

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215665 & CA-215666

DDID 2314 FDS: GA GR Rules Phase 1 Online changes
(Batch 1/2/3), Batch 1 (11 Rules) - Non-Financial
Rules and corresponding NOA Reasons

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	

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06/21/2021	16.0	Added assumption "Aid in kind functionality cannot be tested until phase 2"	Peterson Etienne
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1 OVERVIEW

This SCR will implement the household composition and Non-Financial functionality for the new CalWIN General Relief (GR) solution in CalSAWS.

1.1 Current Design

The General Assistance/General Relief (GA/GR) solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their General Relief Opportunities for Work (GROW) program. Currently CalWIN manages their GR program logic by using a Rule Matrix which can be accessed by the county to allow each county administrator to customize the behavior to their specific county.

1.1 Requests

A new CalWIN GA/GR solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will automate the household composition and Non-Financial functionality for the new solution

1.2 Overview of Recommendations

1. Add all the required Data Collection elements to implement the Household and Non-Financial functionalities for the new solution.
2. Create new Admin Summary and Detail pages that can be accessed in Admin tools by the County Admin staff.
3. Create new Rules Admin Batch Job to update requested changes from the Admin Detail pages.
4. A new set of Admin detail pages, Rules, Batch and NOA triggers will be added for the below Household Composition and Non-Financial.

1. [Fleeing Felon](#)
2. [Liens](#)
3. [QC Audit](#)
4. [Probation](#)
5. [Drug Felon](#)
6. [Fraud Prevention](#)
7. [Striker](#)
8. [Voluntary Quit](#)
9. [Drug and Alcohol Treatment](#)
10. [Employment Status](#)
11. [Job Terminated](#)

1.3 Assumptions

1. The existing Los Angeles county rules will remain unchanged.
2. This SCR CA-215665 & CA-215666 is based on the WCDS approved documents.
3. The design of the rules is for each CalWIN county based on the DXC documents approved by the counties.
4. This SCR CA-215665 & CA-215666 is phase one of three which consists of 11 CalWIN rulesets for Household Composition and Non-Financial. The remaining rulesets will be designed in SCR CA-228982 and SCR CA-215926.
5. The functionality of this CA-215665 & SCR CA-215666 will be disabled until activated by the system property flag established in SCR CA 215669.
6. This SCR CA-215665 & CA-215666 will be an addition to SCR CA-228982 and will not state the additions and modification made in SCR CA-228982. Only new additions and modifications not stated in SCR CA-228982 will be stated in this design.
7. Any logic related to San Francisco explicitly called out in relevant WCDS approved use cases will be included in this design. Any, San Francisco sub program logic independent of the rule will be added in SCR CA-215677 DDID 2374 scheduled for 22.01.
8. Alerts will be handled separately outside the Rules design in a separate SCR CA-220119.
9. The following status reasons will be designed as CalWIN status codes in this SCR but will be translated in future designs:
 - a. XAS853
 - b. CAS306
 - c. CAS668
 - d. XAN005
 - e. XAN766
 - f. XAN791
 - g. X10236
 - h. X10067
 - i. X10224
 - j. X10233
 - k. X10234
 - l. X10235
10. The Compliance reason: 'Client failed to give a fingerprint and photo image' is not currently used in CalWIN but is stated in the WCDS approved document and will not be designed in this SCR.
11. EDBC will result in 0 benefit as resource will be set to PASS and income logic will be bypassed during the first phase. Income logic will be added in phase two (CA-215916, CA-215672, CA-215927). Resource and reporting logic will be added in phase 3 (CA-215917).
12. Leveraged rules are main rules from another use cases whose logic are also used in this use case. Leveraged rules in this SCR whose main use case are not designed in phase 1 cannot be tested using the admin page. Example: Institutional status use case has a leverage rule that is a main rule in Earned income use case. Since Earned income use case is not designed in phase 1, this leverage rule will not be able to be tested from the admin page.

13. EDBC summary page layout will follow current Los Angeles County GA EDBC summary. The following sections will be in the EDBC summary page, others will be added in later phases: EDBC Header, EDBC Information, Program Configuration, Reporting Configuration, Allotment, Page Mappings (PMCR) and Security (STCR). Note: Allotment will have all 0 for values, and Security will follow current Los Angeles county security framework.
14. All Data collection used in EDBC determination is effective for the benefit month.
15. For correspondences that trigger for Change action scenarios, these cannot be tested at this Phase due to the EDBC's not resulting in dollar amount approvals. These scenarios can be tested after implementation of EDBC Rules Phase 2 SCRs.
16. The term 'data selection date' is referencing the first day of the EDBC benefit month.
17. End to End testing of EDBC and Correspondence will not be possible until 22.01 release.
18. GR will use existing CalSAWS functionality that sets first day of the benefit month as data selection date. EDBC SFU and Non-financial evaluation for GR will use the data selection date to determine which data collection records will be used unless otherwise indicated.
19. All calculation for computed values will detailed in the Visio diagram.
20. 'Participation status' will be an internal flag in CalSAWS, when a participation status is set in the rule it will replace the previous set status for each individual.
21. Logic that checks or creates Sanctions cannot be tested until CA-227328 is implemented.
22. The detailed rules flow, requirement calculation, and status reason conditions will be specified in the Visio document.
23. Household composition rules cannot be tested until 21.11 with CA-228982. When testing the non-financial rules without household composition, only single adult program can be tested with positive household composition conditions such as in the home, US citizen, etc.
24. All page updates presented within the document will be available to all 58 counties at the time of implementation. The programs on the case do not affect the ability to view any of the added fields or pages, unless specified.
25. County-specific correspondences will not trigger for counties where the eligibility rule is turned off (see County Admin Matrix for any rule in section 2.30)
26. Any functionality related to Aid-in-kind cannot be tested until phase 2 Financial Functionality income logic which consists of CA-215916, CA-215672 and CA-224578.
27. County reference convicted start date for drug felony does not exist. The condition individual's date convicted for drug felony is after the county reference convicted start date for drug felony will always return true.

2 RECOMMENDATIONS

2.1 County Rule Summary Page

2.1.1 Overview

The County Rule Summary page will provide the user a list of rule functionalities broken down into different categories. The functionalities will lead the user to a detail page in which they can view the individual rules.

2.1.2 County Rule Summary Page Mockup

County Admin Summary

County: Sacramento	
▼ Household Composition	
Adult/Child Determination	Edit
Amount of GA Support	Edit
Citizenship/Non-Citizen Status	Edit
Included Individuals	Edit
Identity Check	Edit
Marital Status	Edit
Pregnancy Check	Edit
Sponsored Non-Citizen Cert Period	Edit
Undocumented Non-Citizen	Edit
▶ Non-Financial	
▶ Property	
▶ Income	

Figure 2.1.2.1 – County Rule Summary Page

2.1.3 Description of Changes

1. County – This field will display the county of the user.

2. Household Composition – This section will be an expandable section with the following functionalities listed beneath it. This section will be collapsed by default.
 - a. Adult/Child Determination
 - b. Amount of GA Support
 - c. Citizenship/Non-Citizen Status
 - d. Included Individuals
 - e. Identity Check
 - f. Marital Status
 - g. Pregnancy Check
 - h. Sponsored Non-Citizen Cert Period
 - i. Undocumented Non-Citizen
3. Non-Financial – This section will be an expandable section with the functionalities listed beneath it. This section will be collapsed by default. Functionalities will be defined in a future SCR.
 - a. Fleeing Felon
 - b. Liens
 - c. QC Audit
 - d. Probation
 - e. Drug Felon
 - f. Fraud Prevention
 - g. Striker
 - h. Voluntary Quit
 - i. Drug and Alcohol Treatment
 - j. Employment Status
 - k. Job Terminated
4. Property – This section will be an expandable section with the functionalities listed beneath it. This section will be collapsed by default. Functionalities will be defined in a future SCR.
5. Income – This section will be an expandable section with the functionalities listed beneath it. This section will be collapsed by default. Functionalities will be defined in a future SCR.

2.1.4 Page Location

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

2.1.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
CountyRuleSummaryView	County Rule Summary	County Rule Summary View

Security Right	Right Description	Right to Group Mapping
CountyRuleDetailView	County Rule Summary	County Rule Detail View, County Rule Detail Edit
CountyRuleDetailEdit	County Rule Summary	County Rule Detail Edit

Security Groups

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

2.1.6 Page Mapping

No page mappings are required.

2.1.7 Page Usage/Data Volume Impacts

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

2.2 County Rules Detail Page

2.2.1 Overview

The County Rules Detail page will provide the user a list of all rules contained within a specific functionality. The rules will display whether they are active or inactive for a given date.

2.2.2 County Rules Detail Mockup

County Rules Detail

[Edit](#) [Close](#)

Included Individuals

County: Sacramento **View Month:** 01/2020

Rules	Activated	Begin Month	End Month
Exclude person under 18 in the SFU.	No	01/2020	04/2020
Include individual in the armed force not on active duty in SFU. (Adult)	Yes	01/2020	
Include individual in High School/GED program in SFU (Adult)	No		
Include person under 18 applying with parent/caretaker.	Yes	01/2020	
Include legally separated or emancipated person under 18.	Yes	01/2020	05/2020
Include married or widowed/divorced person under 18. (Adult)	No	01/2020	
Include married/emancipated/widowed/divorced person or person with domestic partner under 18. (Adult)	Yes	01/2020	
Include married or emancipated individual. (Adult)	No	01/2020	
Include married /emancipated person or person in armed force (active/unactive) under 18.	Yes	01/2020	
Exclude non-married emancipated individual.	Yes	01/2020	03/2020
Include only married individual. (Adult)	Yes	01/2020	
Exclude individual in armed forces in SFU.	Yes	01/2020	

Pending Updates

Rules	Activated	Begin Month	End Month	Updated By
No Data Found				

[Edit](#) [Close](#)

Figure 2.2.2.1 – County Rule Detail (View)

County Rules Detail

Included Individuals				
County: Sacramento	View Month: 01/2020			
Rules	Activated	Begin Month	End Month	
Exclude person under 18 in the SFU.	No	01/2020	04/2020	
Include individual in the armed force not on active duty in SFU. (Adult)	Yes	01/2020		
Include individual in High School/GED program in SFU (Adult)	No	01/2020		
Include person under 18 applying with parent/caretaker.	Yes	01/2020		
Include legally separated or emancipated person under 18.	Yes	01/2020	05/2020	
Include married or widowed/divorced person under 18. (Adult)	No	01/2020		
Include married/emancipated/widowed/divorced person or person with domestic partner under 18. (Adult)	Yes	01/2020		
Include married or emancipated individual. (Adult)	No	01/2020		
Include married /emancipated person or person in armed force (active/unactive) under 18.	Yes	01/2020		
Exclude non-married emancipated individual.	Yes	01/2020	03/2020	
Include only married individual. (Adult)	Yes	01/2020		
Exclude individual in armed forces in SFU.	Yes	01/2020		

Pending Updates				
Rules	Activated	Begin Month	End Month	Updated By
Exclude person under 18 in the SFU.	Yes	04/2020		92
Include individual in the armed force not on active duty in SFU. (Adult)	No	05/2020		92
Include individual in High School/GED program in SFU (Adult)	>Yes	04/2020		92

Figure 2.2.2.2 – County Rule Detail (Edit)

2.2.3 Description of Changes

1. The section title will match the functionality selected to reach the detail page
2. County – The County of the logged in user.
3. View Month – The date the user is viewing the associated rules for. The calendar icon will allow the user to select the date. The date will display in MM/YYYY format. Standard Date validation for the date format will apply. The default date will be the current month.
4. View – This button will refresh the rule display information based on dates provided.
5. Rules – The list of rules associated to this functionality.

6. Activated – The indicator of whether the rule is active or not based on the view date. This field will be a Yes/No dropdown. There will be no blank value.
7. Begin Month – The date the rule was activated/deactivated. This will be a date field in MM/YYYY format. This date will always evaluate to the first day of the month selected. This field will only be editable in Create and Edit mode. The validation message, “Begin Month cannot be prior to the current month.”, will display if the user attempts to Save with a month prior to the current month.
8. End Month – The date the rule stopped being active/inactive. This will be a date field in MM/YYYY format. This date will always evaluate to the last day of the month selected. This field will only be editable in Create and Edit mode. The validation message, “End Month cannot be prior to the Begin Month.”, will display if the user attempts to Save with a month prior to the Begin Month.
9. Pending Updates – This section will display the list of changes made throughout the day that have yet to be applied by users. Changes made by a user will be pending until they are applied via an overnight batch job. The section will display the same information inserted as well as an updated by column. The updated by column will display a staff id as a link to the worker detail page of the user specified.
10. Save - This button will save update the information based on the user's input and return the user to the County Rule Summary page. This button is only visible in Edit mode.
11. Cancel - This button will return the user to the County Rule Summary page without applying any changes. This button is only visible in Edit mode.
12. Edit - This button will take the user to the County Rule Summary Page in Edit mode. This button is only visible in View mode. This button will only display if the user has the “CountyRuleDetailEdit” right
13. Close - This button will return the user to the County Rule Summary. This button is only visible in View mode.
14. Records created will be effective dated so that there is always a high-dated determination for every rule.

2.2.4 Page Location

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

2.2.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
CountyRuleDetailEdit	County Rule Summary	County Rule Detail View

Security Groups

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

2.2.6 Page Mapping

No page mappings are required.

2.2.7 Page Usage/Data Volume Impacts

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

2.3 Individual Demographics

2.3.1 Overview

This section will provide the data collection page changes required for Individual Demographics to store reasons for separation.

2.3.2 Individual Demographics Detail Mockup

Individual Demographics Detail

*- Indicates required fields

Save and Return Cancel

Name

Last Name: * First Name: * Middle Name/Initial:

Maiden Name: Suffix: Verified: * [View](#)

Identity Proof Source:
Imaged Photo ID

SSN Status

Current Social Security Number: No SSN Reason for no SSN: Application Date:

SSN	Verification Status	Begin Date	End Date
	Pending	02/23/2016	

[Edit](#)

Figure 2.3.2.2 – Individual Demographics Detail (SSN Section Mockup)

A Number:

Sufficient Info for CIN: * [View](#)

CIN: 0000000000 [Search](#)

Marital Status: Marital Status Reason: Gender: *

Date of Birth: Verified: * [View](#)

Birth Country: * Verified: * [View](#)

Is this person Hispanic or Latino? *

ID/Driver License Available? ID/Driver License: Verified: * [View](#)

Figure 2.3.2.2 – Individual Demographics Detail (Marital Status Reason Mockup)

2.3.3 Description of Changes

1. Add a new dropdown labeled “Marital Status Reason” This dropdown will only display when the “Marital Status” field has a

value of "Separated". The field will default to blank. This field will have the following options:

- a. Abused
 - b. Battered
 - c. Insanity
 - d. Irreconcilable Differences
 - e. Other
2. Add a new "Verified" dropdown field. This field will default to "Pending". This field will utilize the existing verification framework. The verification type will be "ID/ Driver's License". The dropdown will be editable in Create and Edit Modes. This field will only display when the ID/Driver's License field is displayed. This field will be required.
 - a. Pending
 - b. Refused
 - c. Verified
 - d. Not Applicable
 3. Add a new "View" button next to the "Verified" Dropdown field. The "View" button will take the user to the "Verification Detail" page in View-Edit mode and will be available in all page modes.
 - ~~4. Create a "Verified" verification record with a type of "ID/ Driver's License" for all existing address records.~~
 5. A Date field titled "SSN Application Date" will display when the "Reason for no SSN" field has a value of "I have applied for an SSN". The field will default to blank.
 - ~~6. Add the following Reason for no SSN options:
 - a. I am unable to apply for an SSN
 - b. I am unwilling to apply for an SSN~~

2.3.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Individual Demographics

2.3.5 Security Updates

No Security Updates Required.

2.3.6 Page Mapping

Add page mappings for the new field.

2.3.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.4 Citizenship Detail

2.4.1 Overview

The Citizenship Detail page is used to track the Citizenship status and documentation of the participants. This page will be updated to track the Trujillo case status of the participant.

2.4.2 Citizenship Detail Mockup

The screenshot shows a web form titled "Citizenship Detail" for the "Sponsor Segment". The form is organized into several sections:

- Sponsored? ***: A dropdown menu with "Yes" selected.
- Verified: ***: A dropdown menu with "Verified" selected and a blue "View" button next to it.
- Willing to Comply by Providing Sponsor's Information ***: A dropdown menu with "Yes" selected.
- Period of Indigence**: A section containing five rows of date selection fields:
 - CalWORKs:** Includes a checkbox for "Indigent", "Begin Date:" and "End Date:" fields with calendar icons.
 - CalFresh:** Includes a checkbox for "Indigent", "Begin Date:" and "End Date:" fields with calendar icons.
 - CAPI:** Includes a checkbox for "Indigent", "Begin Date:" and "End Date:" fields with calendar icons.
 - General Assistance/General Relief:** Includes a checkbox for "Indigent", "Begin Date:" and "End Date:" fields with calendar icons.
 - Sponsor abuse with substantial connection between the cruelty and the need for benefits? ***: Includes "Begin Date:" and "End Date:" fields with calendar icons, and a "Verified? *" dropdown menu with "Yes" selected.

Figure 2.4.2.1 – Citizenship Detail (Sponsor Segment)

Does this individual have, has applied for, or plans to apply for a T-Visa, U-Visa, or VAWA Petition? *
 - Select - v

Verified: *
 Pending v View

Has this person lived in the U.S. continuously since 1996?
 v

Is the participant a Trujillo case?
 v

Secondary Save Status:
 v

Figure 2.4.2.2 – Citizenship Detail (Bottom Segment)

2.4.3 Description of Changes

1. Add a new "NACARA" option to the Document field. When this is selected, the User's citizenship type will be "NACARA".
2. Add a new "General Assistance/General Relief" segment with the following fields:
 - a. Indigent – Checkbox field
 - b. Begin Date – Date field
 - c. End Date – Date field
3. Add a new dropdown field labeled, "Abandoned by Sponsor" to the sponsor section.
 - a. This field will be a Yes/No dropdown with a blank default value.
 - b. This field will only be editable in create and edit mode.
 - c. This field will only display when the "Sponsored?" dropdown has a value of "Yes".
4. Add a new section above the section containing the Secondary Save Status field. This section will hold the field, "Is the participant an LPR or a Trujillo case?"
5. The "Is the participant an LPR or a Trujillo case?" will be a Yes/No dropdown field. This field will not be required and will default to a blank option.

2.4.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Financial-> Citizenship

2.4.5 Security Updates

No security updates.

2.4.6 Page Mapping

Page mappings are required for the new fields.

2.4.7 Page Usage/Data Volume Impacts

No additional page usage updates.

2.5 GR Health Assessment Detail

2.5.1 Overview

The GR Health Assessment Detail page is used to track medical conditions to determine if the participant is eligible to work. This page will be modified to provide a diagnosis field to track specific medical conditions.

2.5.2 GR Health Assessment Detail Mockup

GR Health Assessment Detail

*- Indicates required fields



Save and Return Cancel

Name: *
Doe, John 26M

Assessment Type: * Medical **Assessment Result: *** Permanent Disability

Catastrophically Ill/Disabled:
▼

Verified: * Pending [View](#)

Begin Date: * 05/03/2021  **End Date: *** 11/16/2021 

Save and Return Cancel

Figure 2.5.2.1 – GR Health Assessment Detail Page (Create Mode)

GR Health Assessment Detail

*- Indicates required fields

Edit

Close

Name: *

Doe, John 26M

Assessment Type: *

Medical

Assessment Result: *

Permanent Disability

Comment:

Catastrophically Ill/Disabled:

Verified: *

Pending

[View](#)

Begin Date: *

05/03/2021

End Date: *

11/16/2021

Edit

Close

Figure 2.5.2.2 – GR Health Assessment Detail Page (View Mode)

2.5.3 Description of Changes

1. Add a new field labeled, "Catastrophically Ill/Disabled". This field will not be required. This field will be a Yes/No dropdown with a default value of blank. This field will only be editable in Create and Edit modes.
2. Add a new "Verified" dropdown field. This field will default to "Pending". This field will utilize the existing verification framework. The verification type will be "Disability". The dropdown will be editable in Create and Edit Modes.
 - a. Pending
 - b. Refused
 - c. Verified
 - d. Not Applicable
3. Add a new "View" button next to the "Verified" Dropdown field. The "View" button will take the user to the "Verification Detail" page in **View Edit** mode and will be available in all page modes.

2.5.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GR-> GR Health Assessment

2.5.5 Security Updates

No security updates.

2.5.6 Page Mapping

Page mappings are required for the new field.

2.5.7 Page Usage/Data Volume Impacts

No additional page usage updates.

2.6 GA/GR Support List

2.6.1 Overview

The GA/GR Support List page is used to display a list of GA/GR support records tied to individuals.

2.6.2 GA/GR Support List Mockup

GA/GR Support List

*- Indicates required fields Continue

Search Results Summary Results 1 - 1 of 1

Display Name: From: To: View

Name	Begin Date	End Date	
<input type="checkbox"/> Doe, John 26M	01/01/2021		Edit View History

Remove Add

Complete

Continue

Figure 2.6.2.1 – GA/GR Support List Page

2.6.3 Description of Changes

1. The GA/GR Support task navigation option will appear as the last option after the "GR Time Limits" option beneath the GR task navigation sub menu.
2. Name - This dropdown will display all participants on the case that are not hidden or marked as duplicate. The default value will be "All".
3. From - The earliest date that a record of support can begin to appear in search results.

4. To - The latest date that a record of support can end to appear in search results.
5. View - This button will refresh the search results based on the filter criteria provided. The default search results will display all currently active records for eligible participants.
6. Name - The name of the participant associated with the record. The name will display in the <Last, First AgeGender> format. This field will be a hyperlink that will direct the user to the GA/GR Support Detail page in view mode when the user has the "GAGRSupportDetailView" right.
7. Begin Date - The date the support began.
8. End Date - The date the support ended.
9. Edit - This button will take the user to the GA/GR Support Detail page in Edit mode for the associated record. This button will only display when the user has the "GAGRSupportDetailEdit" right.
10. View History - This button will open the Transaction History Detail page for the associated record to view changes made to the record.
11. Remove - This button will delete all records with a checkbox selected. This button will only display when the user has the "GAGRSupportDetailRemove" right.
12. Add - This button will take the user to the GA/GR Support Detail page in Create mode. This button will only display when the user has the "GAGRSupportDetailEdit" right.
13. Continue - This button will direct the user to the Verification List page. If the Support Detail page was marked as a page required based on root questions, then if the complete checkbox has been selected, the page will be marked as complete on the to-do list.

2.6.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GR-> GA/GR Support

2.6.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
GAGRSupportDetailEdit	GA/GR Support Detail	GAGR Support Detail Edit
GAGRSupportDetailView	GA/GR Support Detail	GAGR Support Detail View, GAGR Support Detail Edit

Security Right	Right Description	Right to Group Mapping
GAGRSupportListView	GA/GR Support List	GAGR Support List View, GAGR Support Detail View, GAGR Support Detail Edit

Security Groups:

Security Group	Group Description	Group to Role Mapping
GAGR Support Detail Edit	This group has the capability to access the GA/GR Support Detail page to view, edit, and create information.	See the Security Matrix for the group to role associations
GAGR Support Detail View	This group has the capability to access the GA/GR Support Detail page to view information.	See the Security Matrix for the group to role associations
GAGR Support List View	This group has the capability to access the GA/GR Support List page to view information.	See the Security Matrix for the group to role associations

2.6.6 Page Mapping

Page mappings are required for the new page.

2.6.7 Page Usage/Data Volume Impacts

No additional page usage updates.

2.7 GA/GR Support Detail

2.7.1 Overview

The GA/GR Support Detail page is used to track if a participant is receiving support from a non-sponsor.

2.7.2 GA/GR Support Detail Mockup

GA/GR Support Detail

*- Indicates required fields

Save and Return Cancel

Name: *
Doe, John 26M

Supporter Name:

What types of support do you receive?
 Clothing Food Housing Other

History of Support: **Living With Supporter:** **Non-Support Reason:**

Begin Date: * 07/02/2021 **End Date:**

Save and Return Cancel

Figure 2.7.2.1 – GA/GR Support Detail

2.7.3 Description of Changes

1. Name – This dropdown will display all GA/GR program participants on the case that are not hidden or marked as duplicate. The name will display in the <Last, First AgeGender> format. The default value will be “-Select”. This field will be required.
2. Supporter Name – This dropdown will display all GA/GR program participants on the case that are not hidden or marked as duplicate. The name will display in the <Last, First AgeGender> format. The default value will be blank.
3. What types of support do you receive? – This field will have checkboxes to allow the user to select between the following support types received.
 - a. Clothing
 - b. Food
 - c. Housing
 - d. Other – Other will also have an input field with a 30-character limit to allow the user to specify their own support types.
4. History of Support – This field will be a yes/no dropdown field. The default value will be blank.
5. Living with Supporter – This field will be a yes/no dropdown field. The default value will be blank.
6. Non-Support Reason – This field will be a dropdown with the following options. The default value will be blank.
 - a. Abandonment
 - b. Abuse
 - c. Accepted In Home without Rent
 - d. Addition to Family

- e. Car Accident
- f. Change in Landlord
- g. Change in Living Arrangements
- h. Client Failed to Provide Information
- i. Court Appearance
- j. Death
- k. Disabled
- l. Drug/Alcohol Problem
- m. Establish Paternity
- n. Expenses Increased
- o. Family
- p. Fighting
- q. Homelessness
- r. Hospitalization
- s. Illness
- t. Inappropriate Conduct
- u. Incarceration
- v. Insufficient Income
- w. Institutionalized
- x. Loss of Contact
- y. Loss of Resources
- z. Mandatory Member of Food Stamp Household
- aa. Marriage
- bb. Medical Appointment
- cc. Mental Disability
- dd. Needs Still Being Met
- ee. No Good Cause for Non-Support
- ff. No Longer Able to
- gg. No Longer Able to Support Financially
- hh. No Longer Living with Sponsor
- ii. No Longer Subject to Sponsor Deeming
- jj. No Longer Want to
- kk. Not Legally Responsible
- ll. Other - Good Cause for Non-Support
- mm. Other - No Good Cause for Non-Support
- nn. Other Household Members No Longer Receiving CalWORKs
- oo. Other Household Members Receiving CalWORKs
- pp. Other Obligations
- qq. Out of Jail
- rr. Physical Disability
- ss. Quit Job
- tt. Refusal to Accept Employment
- uu. Refusal to Attend School
- vv. Refusal to Attend Training
- ww. Source is Receiving Cash Aid and Cannot Support
- xx. Sponsor/Responsible Relative Refuses to Provide Info
- yy. Sponsor/Responsible Relative Refuses to Support
- zz. Sponsor/Responsible Relative on Public Assistance

aaa. Sponsor/Responsible Relative will Support Client in Own Home

bbb. Unemployment

ccc. Unsubstantiated

ddd. Whereabouts of Source of Support Unknown

eee. Whereabouts of Sponsor/Responsible Relative Unknown

7. Begin Date – The date the support began. This field will be required. The date will be stored in the MM/DD/YYYY format.
8. End Date – The date the support ended. The date will be stored in the MM/DD/YYYY format.
9. Edit – This button will take the user to the GA/GR Support Detail page in Edit mode for the associated record. This button will only display when the user has the “GAGRSupportDetailEdit” right. This button will only display in View Mode.
10. Close – This button will take the user to the GA/GR Support List page. This button will only display in View mode.
11. Cancel – This button will take the user to the GA/GR Support List page. This button will only display in Edit mode.
12. Save and Continue – This button will take the user to the GA/GR Support List page and commit all modified information into the database. Changes saved to the database will be stored in a history table to be used with the transaction history functionality. This button will only display in Edit mode.

2.7.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GR-> GA/GR Support

2.7.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
GAGRSupportDetailEdit	GA/GR Support Detail	GAGR Support Detail Edit
GAGRSupportDetailView	GA/GR Support Detail	GAGR Support Detail View, GAGR Support Detail Edit

Security Groups:

Security Group	Group Description	Group to Role Mapping
GAGR Support Detail Edit	This group has the capability to access the GA/GR Support Detail page to view, edit, and create information.	See the Security Matrix for the group to role associations
GAGR Support Detail View	This group has the capability to access the GA/GR Support Detail page to view information.	See the Security Matrix for the group to role associations

2.7.6 Page Mapping

Page mappings are required for the new page.

2.7.7 Page Usage/Data Volume Impacts

No additional page usage updates.

2.8 Case Review - Non-Cooperation

2.8.1 Overview

The Case Review Non-Cooperation page is used for QA Auditors to track the status of a participant's cooperation with a Quality Assurance/Quality Control Audit. This page will be updated to allow the users to declare whether good cause was deemed for the participant's non-cooperation.

2.8.2 Case Review - Non-Cooperation Mockup

Case Review - Non-Cooperation

*- Indicates required fields

Save & Reassign Save Cancel

Escalate To:

Participant Cooperating: *

Good Cause:

Discontinuance Date:

Reinstatement Date:

Comments:

Save & Reassign Save Cancel

Figure 2.8.2.1 – Case Review - Non-Cooperation

2.8.3 Description of Changes

1. Add a 'Good Cause' dropdown field. This field will be a Yes/No dropdown field with a default value of blank ~~'Select'~~. This field will be required, when visible.
2. The 'Good Cause' dropdown will only display when the 'Participant Cooperating' field is set to 'No'

2.8.4 Page Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** Case Review

2.8.5 Security Updates

No security updates.

2.8.6 Page Mapping

Add page mappings for the new field.

2.8.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.9 Sponsorship Detail

2.9.1 Overview

The Sponsorship Detail page for Individual sponsors is used to track sponsor information for individuals sponsored on a case. An additional field will be added to track whether the sponsor has signed the lien for sponsorship as well.

2.9.2 Sponsorship Detail Mockup

Sponsorship Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Sponsor: Individual

Sponsored Non-Citizen's Name: *

- Select -
Doe, John 26M

Sponsor's Name: *

- Select -

Sponsor's Household Size: *

Total Number of Sponsored Non-Citizens: *

Did the sponsor sign an I-864? *

Date I-864 Signed:

Sponsor Lien Signed?

Are there any new dependents since the sponsor signed sponsorship documents?

Does the sponsor help with any of the following?

Rent Clothes

Food Other

Begin Date: * **End Date:**

Save and Add Another Save and Return Cancel

Figure 2.9.2.1 – Sponsorship Detail

2.9.3 Description of Changes

1. Add a new 'Sponsor Lien Signed?' dropdown field. This field will be a Yes/No dropdown field with a default value of blank. This field will be editable in Create and Edit Mode.

2. Add a new 'Are there any new dependents since the sponsor signed sponsorship documents?' dropdown field. This field will be a Yes/No dropdown field with a default value of blank. This field will be editable in Create and Edit Mode.

2.9.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Financial-> Sponsorship

2.9.5 Security Updates

No security updates.

2.9.6 Page Mapping

Add page mappings for the new field.

2.9.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.10 Employment Detail

2.10.1 Overview

The Employment Detail page is used to track a user's employment information including their employer, hours, and employment type. This page will be modified to add an additional termination reason to specify if the user refused to start their employment at a job site.

2.10.2 Employment Detail Mockup

Job Information

Job Title: * <input type="text" value="Dev"/>	Date Hired: * <input type="text" value="10/08/2020"/>	
Countable: <input type="text" value="v"/>	Responsible Worker: <input type="text" value="v"/>	
Employment Type: <input type="text" value="v"/>	Health Insurance: <input type="text" value="v"/>	Benefit: <input type="text" value="v"/>
Job Description: <input type="text"/>		
Termination Date: <input type="text" value="10/16/2020"/>	Termination Date Entered: <input type="text" value="10/15/2020"/>	Termination Reason: * <input type="text" value="Job Refused"/>
Date of Last Pay: * <input type="text"/>		
Verified: * <input type="text" value="v"/>	<input type="button" value="View"/>	

Figure 2.10.2.1 – Employment Detail (Job Information Section)

2.10.3 Description of Changes

1. Add the following new options to the 'Termination Reason' dropdown field:
 - a. Business Closure
 - b. Discrimination
 - c. Household Emergency
 - d. Inadequate Wages
 - e. Job Refused
 - f. Labor Dispute
 - g. Language
 - h. Legal Reasons
 - i. Medical Reasons
 - j. Other
 - k. Other Good Cause
 - l. Physical/Mental Safety
 - m. Transportation

2.10.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Financial-> Employment

2.10.5 Security Updates

No security updates.

2.10.6 Page Mapping

No new page mappings required

2.10.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.11 Eligibility Non-Compliance Detail

2.11.1 Overview

The Eligibility Non-Compliance Detail page is used to track non-compliance reasons for the eligibility programs such as CalFresh, Medi-Cal, and General Assistance/General Relief. This page will be modified to enhance the ability to view and track additional non-compliance reasons for GA/GR programs.

2.11.2 Eligibility Non-Compliance Detail Mockup

Eligibility Non-Compliance Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Program: General Assistance/General Relief	Determined By: User Determined
Name: * Real, Person OM	
Type: * Voluntary Quit/Striker	
Reason: * Job Quit	
Instance: 1	
Good Cause:	Non-Compliance Act:
Begin Date: *	End Date:

Save and Add Another Save and Return Cancel

Figure 2.11.2.1 – Eligibility Non-Compliance Detail (User Determined)

Eligibility Non-Compliance Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Program: General Assistance/General Relief	Determined By: System Determined
Name: * Real, Person OM	
Type: * Voluntary Quit/Striker	
Reason: * Job Quit	
Instance: 1	
Good Cause: <input type="text"/>	Non-Compliance Act: <input type="text"/>
Begin Date: * <input type="text"/>	End Date: <input type="text"/>

Save and Add Another Save and Return Cancel

Figure 2.11.2.2 – Eligibility Non-Compliance Detail (System Determined)

2.11.3 Description of Changes

1. Update the instance dropdown to permanently display for the General Assistance/General Relief type. Current positioning and dynamic field logic will apply when determining the location of the field. Only one instance field label will display at any given time. The instance options for the new Reasons will be the following:
 - a. 1
 - b. 2
 - c. 3
 - d. 4
 - e. 5
2. Add a new field, “Determined By”. This field will be un-editable in all page modes and will populate to a value of “User Determined” when a user creates the record or “System Determined” when the record is created by the system through an automated action. When the record is system determined, only the following fields will be editable:
 - a. Good Cause
 - b. Begin Date
 - c. End Date
3. Add a new “Good Cause” dropdown field. This field will be editable in Create and Edit Mode. This field will be located below all dynamic fields. This field will

have the following values with a default value of blank. The values will be ordered alphabetically.

- a. Agency Error
 - b. Circumstances Beyond Control
 - c. Conceived Thru Rape/Incest
 - d. Counseling Regarding Adoption
 - e. County Determined
 - f. Death in the Family
 - g. Emotional Harm
 - h. Employment Obtained
 - i. FC Not Best Interest of Child
 - j. Illness
 - k. Inadequate License
 - l. Incarceration
 - m. Individual has a Disability
 - n. Lack of Available Appointments
 - o. Language
 - p. Legal Adoption Pending
 - q. Legal Difficulties
 - r. Mandatory Court Appearance
 - s. Medical Appt that Cannot be Rescheduled
 - t. Moved Out of County
 - u. Needed to Care for Verifiably Ill Immediate Family Member
 - v. No Care for Child or Incap Family Member
 - w. Other
 - x. Physical Harm
 - y. Remoteness
 - z. Sexual Harassment
 - aa. Sexual Harm
 - bb. Transportation Problems
 - cc. Unable to Read/Write
 - dd. Wage Below Minimum Wage
 - ee. Worksite Unsafe
 - ff. Would Interrupt High School or GED Study
 - gg. Would Interrupt Training Increasing Employability
4. Update the "Good Cause" dropdown to display the following values when the type, "Voluntary Quit/Striker" is selected.
- a. Circumstances Beyond Control
 - b. Commute Time Exceeds 2 Hours per Day
 - c. Discrimination
 - d. Employer Requested Resignation
 - e. Enrolled in School More than Half Time
 - f. Household Emergency
 - g. Illness
 - h. Labor Union Restrictions
 - i. Lack of Adequate Child Care
 - j. Language
 - k. Lost New job

- l. Migrant/Seasonal Employment
 - m. Moved to Support Other Household Member New Job
 - n. Offer Accepted for Employment That Never Started
 - o. Out of County Job/Training for Household Member
 - p. Physical/Mental Incapacity
 - q. Quit Self Employment
 - r. Reduced Working Hours
 - s. Religion
 - t. Required to Care for Family Member
 - u. Retirement Under 60
 - v. Secured Comparable Employment
 - w. Strike/Lockout
 - x. Transportation Problems
 - y. Unreasonable Work Demands
 - z. Unsuitable Work Conditions
 - aa. Wage Below Minimum Wage
 - bb. Working Less than 30 Hours per Week
 - cc. Worksite Unsafe
5. Add a dropdown labeled 'Non-Compliance Act'. This dropdown will default to blank and will have the following values in Alphabetical order.
- a. Negligence
 - b. Willful
6. Add the following Type and Reason options based on the associated type. Note that some types listed below already exist for the corresponding program and only need reasons added. Existing order methods will apply for the Type and Reason dropdowns:
- a. Type: Audit
 - i. Refused to Cooperate
 - b. Type: CAPI
 - i. No CAPI Application
 - c. Type: Employment
 - i. Job Termination or Job Refusal
 - d. Type: Employment Services
 - i. Failure to Meet Requirements
 - ii. GRWP
 - e. Type: Failure to Attend
 - i. Comprehensive Assessment
 - ii. Disability Case Management Appointment
 - iii. Drug Treatment
 - iv. Drug Treatment Outside of County Residence
 - v. Evaluation
 - vi. Medical Consultant Appointment
 - vii. Multilingual Assessment
 - viii. Orientation
 - ix. Substance Abuse Treatment
 - f. Type: Failure to Provide
 - i. Choice of Representation Form
 - ii. Earnings

- iii. False Information Provided
- iv. Interest Income/Property
- v. Lawsuit Information
- vi. Lawyer Release
- vii. Medical Assessment/Questionnaire
- viii. Medical Report
- ix. Notice of Appeal Filed
- x. Real/Personal Property
- xi. Release of Information
- xii. Requested Information
- xiii. SSI/SSP Status
- xiv. Timely Information
- g. Type: Felony/Violation
 - i. Fleeing Felon
 - ii. Fleeing Felon Pending Verification
 - iii. Probation/Parole Violator
 - iv. Unverified Fleeing Felon
- h. Type: Fiscal
 - i. Check Cashed After Replacement Issued
 - ii. Out of County EBT Transaction
- i. Type: IPV/Fraud
 - i. Fraud Conviction
 - ii. Fraud Prevention
 - iii. Non-Cooperation
- j. Type: Living Arrangement
 - i. Housing Claimed while Sheltered
- k. Type: Medical
 - i. Medical Evaluation
- l. Type: Participant
 - i. Participant Requested
- m. Type: Procedural Requirement
 - i. CalWORKs Eligible Minor
 - ii. Failed Reinstatement Appointment
 - iii. Failed to Complete Orientation
 - iv. Failed to Comply with Work Audit
 - v. Failed to Cooperate with Child Support
 - vi. Failed to Maintain DHS Housing
 - vii. Failed to Register EDD
 - viii. Failed to Sign Lien
 - ix. Failure to Comply with SSI
 - x. Failure to Comply with Veteran's Benefit Requirements
 - xi. Failure to Contact TLCS
 - xii. Failure to Cooperate with Disability Management Services Program
 - xiii. Failure to Cooperate with SETA Refugee Program
 - xiv. Failure to File Administrative Appeal for SSI/SSP
 - xv. Failure to Request SSI/SSP Denial Hearing
 - xvi. Found on SFIS
 - xvii. SSN

- n. Quality Control
 - i. Refused to Cooperate
 - o. SSI/SSP
 - i. Failed to Cooperate with IAP Advocate
 - ii. Failed to Cooperate with SSA Office/ Agency
 - iii. Failed to Cooperate with SSI Advocate
 - iv. SSI Process
 - p. Voluntary Quit/Striker
 - i. Job Quit More Than 45 Days Ago
7. Update the Date Convicted field to display when the following conditions are met. All existing field-specific validations will apply:
- a. Type: Felony/Violation
 - b. Reason: Fleeing Felon or Unverified Fleeing Felon
 - c. Program: General Assistance/General Relief

2.11.4 Page Location

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

2.11.5 Security Updates

No security updates.

2.11.6 Page Mapping

Add page mappings for the new fields.

2.11.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.12 Customer Options Detail

2.12.1 Overview

The Customer Options Detail page is used to allow unique options to be related to a participant. This page will be updated to add additional option required for rules.

2.12.2 Customer Options Detail Mockup



Customer Options Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Name: *
Doe, John 26M

Type: *
County Application Assistance Program Participant

Begin Date: * 10/01/2020  **End Date:** 

Save and Add Another Save and Return Cancel

Figure 2.12.2.1 – Customer Options Detail

2.12.3 Description of Changes

1. Add the following options to the Type dropdown. This option will follow the existing sorting method of the dropdown.
 - a. County Application Assistance Program Participant
 - b. SBR Director's Exception

2.12.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Financial-> Customer Options

2.12.5 Security Updates

No security updates.

2.12.6 Page Mapping

Add page mappings for the new fields.

2.12.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.13 GA/GR Document Signature Detail

2.13.1 Overview

The GA/GR Document Signature page is used to track the date that particular document types were signed. This page will be updated to include additional documents.

2.13.2 GA/GR Document Signature Mockup

GA/GR Document Signature Detail

* - Indicates required fields

Save and Return Cancel

Document Signature Details *

Type	Signed	Sign Date	Effective Date	
GA-241	Yes	04/01/2021	04/01/2021	Add

Save and Return Cancel

Figure 2.13.2.1 – GA/GR Document Signature Detail

2.13.3 Description of Changes

1. Add the following options to the Type dropdowns:
 - a. GA-241
 - b. GA-243
 - c. SC-20

2.13.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GR->Document Signature

2.13.5 Security Updates

No security updates.

2.13.6 Page Mapping

No page mapping impacts.

2.13.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.14 SSN Detail

2.14.1 Overview

The “SSN Detail” page is used to add and modify a Social Security Number for an individual. This page will be updated to display a new field labeled “Attempted to Obtain” when the SSN Number field is blank.

2.14.2 SSN Detail Mockup

SSN Detail

*- Indicates required fields

Save and Return Cancel

SSN Number:	Verified: *	Attempted to Obtain:
<input type="text"/>	Verified <input type="button" value="View"/>	Yes <input type="button" value=""/>
Begin Date: *	End Date:	
09/18/2015 <input type="button" value=""/>	<input type="text"/> <input type="button" value=""/>	

Save and Return Cancel

Figure 2.14.2.1 – SSN Detail Mockup

2.14.3 Description of Changes

Add a new Yes/No dropdown labeled “Attempted to Obtain”. This field will only display while the SSN Number field is blank. The field will default to blank.

2.14.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Individual Demographics

2.14.5 Security Updates

No Security Updates.

2.14.6 Page Mapping

Add page mapping for the New Field.

2.14.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.15 Residency Detail

2.15.1 Overview

The Residency Detail page is used to track the participant's residency information within a given county. This page will be updated to allow the users to track the participant's right and ability to reside.

2.15.2 Residency Detail Mockup

Residency Detail

*- Indicates required fields

Save and Return Cancel

Change Reason

New Change Reason: * Reported on PR/RE	New Reported Date: * 04/05/2021
Change Reason:	Reported Date:

Name: *

Doe, John 26M

CA Resident: * Yes	Migrant Seasonal Farm Worker? * No
Begin Date: * 09/18/2015	End Date:
Verified: * Verified View	

General Relief

County Arrival Date: Intent to Reside	County Departure Date:
County of Residence: Los Angeles	Right and Ability to Reside: Yes

Save and Return Cancel

Figure 2.15.2.1 – Residency Detail Mockup

2.15.3 Description of Changes

1. Add a new Yes/No dropdown labelled "Right and Ability to Reside". This field will default to blank. This field will only be editable in Create and Edit modes.

2.15.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Residency

2.15.5 Security Updates

No Security Updates Required.

2.15.6 Page Mapping

Page mapping updates are required.

2.15.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.16 SSIAP Detail

2.16.1 Overview

The SSIAP Detail page is used to track SSI Advocacy and Hearing information and statuses. This page will be updated to accommodate additional fields to support the new GA/GR rulesets.

2.16.2 SSIAP Detail Mockup



SSIAP Detail

*- Indicates required fields

Save


Cancel

Name of SSIAP Client: *

Begin Date: *  End Date: 

General Information


Advocate File No: * SSI Type: *

Referred to Advocate Date: *  Disability Type: *

SSI Level:

Refused SSIAP Services: *

Other/Self Representative:

Screened for Advocacy Services Date: 


SSI Advocate Participation:

IAP Advocate:

SSI Application Initiated:

Disposed:


Disposed Reason: *

Disposal Date: * 

Participant has their Own Lawyer:

Cooperated within the Time Limit:

Follow-Up:


Follow-Up Date: 


Doctor's Recommendation:

Verified: *

Figure 2.16.2.1 – SSIAP Detail (General Information Section)

Application

Application Signed Date: 

Status / Decision: * Decision Date: * 

Title II Decision:

Application Reapplied: SSI Application Result:

Figure 2.16.2.2 – SSIAP Detail (Application Section)

2.16.3 Description of Changes

1. Add a new Yes/No dropdown labeled "Doctor's Recommendation". The field will default to blank. This field will only be editable in Create and Edit modes.
2. Add a new Yes/No dropdown labeled "Follow Up". The field will default to blank. This field will only be editable in Create and Edit modes.
3. Add a new Date field labeled "Follow Up Date". The field will default to blank. The Date will be in the DD/MM/YYYY format. This field will only be editable in Create and Edit modes.
4. Add a new Yes/No dropdown labeled "Application Reapplied". The field will default to blank. This field will only be editable in Create and Edit modes.
5. Add a new Yes/No dropdown labeled "SSI Advocate Participation". The field will default to blank. This field will only be editable in Create and Edit modes.
6. Add a new Yes/No dropdown labeled "IAP Advocate". The field will default to blank. This field will only be editable in Create and Edit modes.
7. Add a new Yes/No dropdown labeled "Participant has their Own Lawyer". The field will default to blank. This field will only be editable in Create and Edit modes.
8. Add a new Yes/No dropdown labeled "Cooperated within the Time Limit". The field will default to blank. This field will only be editable in Create and Edit modes.
9. Add a new dropdown labeled "SSI Application Result" with the following options. The field will default to blank. This field will only be editable in Create and Edit modes.
 - a. Approved
 - b. Rejected
 - c. Pending
10. Add a new "Verified" dropdown field. This field will default to "Pending". This field will utilize the existing verification framework. The verification type will be "SSIAP". The dropdown will be editable in Create and Edit Modes. This field will be required.
 - a. Pending
 - b. Refused
 - c. Verified
 - d. Not Applicable
11. Add a new "View" button next to the "Verified" Dropdown field. The "View" button will take the user to the "Verification Detail" page in **View Edit** mode and will be available in all page modes.

2.16.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information

- **Task:** Non-Financial->SSIAP

2.16.5 Security Updates

No Security Updates Required.

2.16.6 Page Mapping

No new page mappings are required.

2.16.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.17 Address Detail

2.17.1 Overview

The "Address Detail" page is used to track a participant's home and mailing address. This page will be updated to track whether an Address is Long Term.

DRAFT

2.17.2 Address Detail Mockup

Address Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Address Information

Address Applies To: *

- Select -
Doe, John 28M

Use Office Address

Begin Date: * **End Date:**

Address Type(s): *

- Select -
Mailing
Physical

Address Line 1: *

Address Line 2:

City: * **State:** * **ZIP Code:** *

CA

Country: *

United States

Verified: *

Pending

Save and Add Another Save and Return Cancel

Figure 2.17.2.1 – Address Detail Mockup

2.17.3 Description of Changes

1. Add a new "Verified" dropdown field. This field will default to "Pending". This field will utilize the existing verification framework. The verification type will be "Living Address". The dropdown will be editable in Create and Edit Modes. This field will be required.
 - a. Pending
 - b. Refused
 - c. Verified
 - d. Not Applicable
2. Add a new "View" button next to the "Verified" Dropdown field. The "View" button will take the user to the "Verification Detail" page in View mode and will be available in all page modes. This button will not

display when either the parent field does not display or there is no verification record associated in view mode.

2.17.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Contact

2.17.5 Security Updates

No Security Updates.

2.17.6 Page Mapping

Add page mapping for the New Fields.

2.17.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.18 Living Arrangement Detail

2.18.1 Overview

The "Living Arrangement Detail" page is used to track the living situation for people living in facilities outside of standard housing situations. This page will be updated to track additional information related to the user's housing circumstances.

2.18.2 Living Arrangements Detail Mockup

Living Arrangements Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Change Reason

New Change Reason: * Intake
New Reported Date: * 06/01/2021

Name: * Doe, John 26M Retrieve Information Living Arrangement Type: * Commercial Boarding Facility

Name of Location (Institution, Center, Shelter, Facility, etc.):

ASP Needs Met: Food Needs Met: Household Needs Met:

Facility Rate Letter Provided: Facility Sub-Type: Group Home

Verified: * Pending View

Arrival Date: * 06/01/2021 Departure Date: Expected Date of Release:

Save and Add Another Save and Return Cancel

Figure 2.18.2.1 – Living Arrangements Detail Mockup

2.18.3 Description of Changes

1. Add the following Living Arrangement Type options:
 - a. Maternity Home
 - b. Medical Institution
 - c. Mission
 - d. Special Program Housing
2. Add a new Yes/No dropdown labeled "ASP Needs Met". The field will default to blank. This field will only be Editable in Create and Edit modes.
3. Add a new Yes/No dropdown labeled "Food Needs Met". The field will default to blank. This field will only be Editable in Create and Edit modes.
4. Add a new Yes/No dropdown labeled "Household Needs Met". The field will default to blank. This field will only be Editable in Create and Edit modes.
5. Add a new Yes/No dropdown labeled "Facility Rate Letter Provided". The field will default to blank. This field will only be Editable in Create and Edit modes.

6. Add a new field "Facility Sub-Type". This field will be editable in Create and Edit modes. This field will dynamically populate with values based on the Living Arrangement Type value selected. This field will default to blank. Below is the list of values:

- a. Alternative General Assistance Program Drug & Alcohol
- b. College/Univ Dormitory
- c. Correctional Facilities
- d. County Certified Private Home
- e. County Inmate
- f. County Inmate Stipulated Order of Continuance
- g. County Inmate Stipulated Order of Continuance Undocumented
- h. County Inmate Undocumented
- i. Criminal Institution
- j. Department of Rehabilitation
- k. Detention Center
- l. Drug and Alcohol Rehab Public Funding
- m. Drug and Alcohol Treatment Private Funding
- n. Group Home
- o. Half-way House
- p. Homeless Shelter
- q. Jail
- r. Juvenile Detention Facility
- s. Licensed Facility
- t. Maternity Home
- u. Maternity Home
- v. Mission
- w. Other
- x. Pre-Parole-County
- y. Pre-Parole-State
- z. Prison
- aa. Private Medical Institution
- bb. Private Mental Facility
- cc. Public Medical Institution
- dd. Public Mental Facility
- ee. Recovery Homes
- ff. Residential Shelter
- gg. Safe House
- hh. Shelter for Battered Spouse
- ii. Sober Living
- jj. Special Program Housing - Exempt
- kk. Special Program Housing - Non-Exempt
- ll. State Inmate
- mm. State Inmate Stipulated Order of Continuance
- nn. State Inmate Stipulated Order of Continuance Undocumented
- oo. State Inmate undocumented
- pp. Transitional Housing
- qq. Veterans Acute Care Facility

7. Add a new "Verified" dropdown field. This field will default to "Pending". This field will utilize the existing verification framework. The verification type will be "Living Arrangement". The dropdown will be editable in Create and Edit Modes. This field will be required.
 - a. Pending
 - b. Refused
 - c. Verified
 - d. Not Applicable
8. Add a new "View" button next to the "Verified" Dropdown field. The "View" button will take the user to the "Verification Detail" page in **View Edit** mode and will be available in all page modes.

2.18.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Living Arrgmt

2.18.5 Security Updates

No Security Updates.

2.18.6 Page Mapping

Add page mapping for the New Fields.

2.18.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.19 Work Registration Detail

2.19.1 Overview

The "Work Registration Detail" page is used to track the employability status for the GROW program. This page will be enhanced to represent all General Assistance Employment Service programs.

2.19.2 Work Registration Detail Mockup

Work Registration Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Name: * Doe, John 26M **Type: *** GA/GR ES

Status: * Unemployable

Available to work between 8am and 5pm:

Verified: * Pending [View](#)

Begin Date: * 07/02/2021 **End Date:** **Expected End Date:**

Save and Add Another Save and Return Cancel

Figure 2.19.2.1 – Work Registration Detail Mockup (Create Mode)

Work Registration Detail

*- Indicates required fields

Save and Return Cancel

Name: * Doe, John 26M **Type: *** GA/GR ES

Status: * Unemployable

Volunteer: * No

Available to work between 8am and 5pm:

Verified: * Pending [View](#)

Begin Date: * 07/02/2021 **End Date:** **Expected End Date:**

Save and Return Cancel

Figure 2.19.2.2 – Work Registration Detail Mockup (Edit Mode)

2.19.3 Description of Changes

1. Add a new option, "GA/GR ES" under the "Type" dropdown to represent all employment services for General Assistance/General Relief aside from the GROW program. This option will be available to select from the Type dropdown when adding a new Work Registration record.
2. Update the Status Dropdown to display the following options when the "Type" is "GA/GR ES":

- a. Employable
- b. Unemployable
- c. Conditionally Employable

3. The "Status Reason" and "Status Reason Type" fields will not display for the type selection, "GA/GR ES"
4. Add a new Yes/No dropdown labeled "Available to work between 8am and 5pm". The field will default to blank. This field will be editable in Create and Edit modes.
5. Add a new "Verified" dropdown field. This field will default to "Pending". This field will utilize the existing verification framework. The verification type will be "Work Registration". The dropdown will be editable in Create and Edit Modes. This field will be required.
 - a. Pending
 - b. Refused
 - c. Verified
 - d. Not Applicable
6. Add a new "View" button next to the "Verified" Dropdown field. The "View" button will take the user to the "Verification Detail" page in **View Edit** mode and will be available in all page modes.

2.19.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Work Regist.

2.19.5 Security Updates

No Security Updates.

2.19.6 Page Mapping

Add page mapping for the New Fields.

2.19.7 Page Usage/Data Volume Impacts



No page usage impacts.

2.20 School Attendance Detail

2.20.1 Overview

The "School Attendance Detail" page is used to track the Information of a student. This page will be modified to track course information and add additional School types.

2.20.2 School Attendance Detail Mockup

Display
From:  To:  [View](#)

Attendance Status					
<input type="checkbox"/>	Status	Date Reported	Status Begin Date	Status End Date	
<input type="checkbox"/>	Attending_Full Time		11/01/2020		Edit

[Remove](#)

Course Details				
<input type="checkbox"/>	Course	Begin Date	End Date	
<input type="checkbox"/>	Health Science	07/23/2021		Edit

[Remove](#) [Add](#)

[Save and Add Another](#) [Save and Return](#) [Cancel](#)

Figure 2.20.2.1 – School Attendance Detail Mockup (Bottom Section)

2.20.3 Description of Changes

1. Add the following School Attendance Type options:
 - a. ESL
 - b. Health Rehabilitation
 - c. Home School
 - d. Library
 - e. Prescribed by Doctor
2. Add a new “Course Details” Section. This section will have a table to display a list of the courses associated with the school attendance detail record with the following fields:
 - a. Checkbox – This check box will be used to select records for removal. This will only display if the user has the right, “SchoolAttendanceCourseRemove”.
 - b. Course – This field will be a hyperlink to the “School Attendance Course Detail” page. This link will take the user to the detail page in view mode.
 - c. Begin Date- The Begin Date of the Course in MM/DD/YYYY format.
 - d. End Date – The End date of the course in MM/DD/YYYY format.
 - e. Edit – This button will allow the user to navigate to the School Attendance Course Detail page in Edit mode for the given record. This button will only appear if the user has the “School

Attendance Detail Edit" right. This button will display in all page modes.

3. Add the Remove button for the Course Details Section. This button will only display in create and edit mode. This button will remove all selected courses. This button will only display if the user has the right, "SchoolAttendanceCourseRemove".
4. Add the Add button for the Course Details Section. This button will only display in Create and Edit modes. This button will lead the user to the School Attendance Course Detail page in Create mode.

2.20.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** School Attend

2.20.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
SchoolAttendanceCourseRemove	County Admin Summary	Information Remove

2.20.6 Page Mapping

Add page mapping for the New Fields.

2.20.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.21 School Attendance Course Detail

2.21.1 Overview

The "School Attendance Course Detail" page will be used to track the course information of a student.

2.21.2 School Attendance Course Detail Mockup

School Attendance Course Detail

*- Indicates required fields

Save and Return Cancel

Name:
Doe, John 26M

School Name: School **School Attendance Type:** Library

Course Type:* Health Science **Approved/Recommended:** Yes

Begin Date:* 02/01/2021 **End Date:** **Expected End Date:**

Save and Return Cancel

Figure 2.21.2.1 – School Attendance Course Detail Mockup (Create/Edit Mode)

School Attendance Course Detail

*- Indicates required fields

Edit Close

Name:
Doe, John 26M

School Name: School **School Attendance Type:** Library

Course Type:* Health Science **Approved/Recommended:** Yes

Begin Date:* 02/01/2021 **End Date:** **Expected End Date:**

Edit Close

Figure 2.21.2.2 – School Attendance Course Detail Mockup (View Mode)

2.21.3 Description of Changes

1. Name – This field will display the name of the participant selected on the School Attendance Detail page. This field will be uneditable.
2. School – The name of the school selected on the School Attendance Detail page. This field will be uneditable.
3. School Type – The name of the School Attendance Type selected on the School Attendance Detail page. This field will be uneditable.
4. Course Type – This field will be a dropdown in Create and Edit modes. The default value will be “- Select – “. This field will be required. This field will have the following options:
 - a. Accounting
 - b. Anthropology
 - c. Architecture

- d. Art
- e. Astronomy
- f. Automotive Technology
- g. Aviation
- h. Biology
- i. Business
- j. Carpentry
- k. Chemistry
- l. Communications
- m. Computer Information Science
- n. Construction
- o. Cosmetology
- p. Criminal Justice
- q. Dental Assistant
- r. Design Technology
- s. Driver (Truck, Van, Bus, etc)
- t. Early Childhood Education
- u. Economics
- v. Electronics Technology
- w. Engineering
- x. English
- y. Family & Consumer Science
- z. Fashion
- aa. Fire Technology
- bb. Funeral Service Education
- cc. Geography
- dd. Geology
- ee. Gerontology
- ff. Hazardous Materials
- gg. Health Education
- hh. Health Science
- ii. History
- jj. Home Economics
- kk. Horticulture
- ll. Hospitality Management
- mm. Human Career Development
- nn. Human Resources
- oo. Human Services
- pp. Humanities
- qq. Interdisciplinary Studies
- rr. Interior Design
- ss. Janitorial
- tt. Journalism
- uu. Language
- vv. Legal Assisting
- ww. Library
- xx. Management
- yy. Marketing

- zz. Mathematics
- aaa. Medical
- bbb. Music
- ccc. Natural Resources
- ddd. Nursing
- eee. Nutrition and Foods
- fff. Paralegal
- ggg. Paramedic
- hhh. Philosophy
 - iii. Photography
 - jjj. Physical Education
- kkk. Physical Science
- lll. Physics
- mmm. Political Science
- nnn. Psychology
- ooo. Real Estate
- ppp. Recreation
- qqq. Respiratory Care
- rrr. Social Science
- sss. Sociology
- ttt. Speech
- uuu. Statistics
- vvv. Student Government
- www. Theatre Arts
- xxx. Veterinarian
- yyy. Welding Technology

5. Approved/Recommended – This field will be a yes/no dropdown editable in Create and Edit modes only. This field will default to blank.
6. Begin Date – The Date the Course began. This field will be editable in Create and Edit modes only. This field will default to blank. This field will display in MM/DD/YYYY format.
7. End Date – The Date the Course ends. This field will be editable in Create and Edit modes only. This field will default to blank. This field will display in MM/DD/YYYY format.
8. Expected End Date – The Date the Course is expected to end. This field will be editable in Create and Edit modes only. This field will default to blank. This field will display in MM/DD/YYYY format.
9. Edit – This button will take the user to the School Attendance Course Detail page in Edit mode. This button will only display in View mode and only if the user has the “SchoolAttendanceDetailEdit” right.
10. Save And Return - This button will save the record and return the user to the School Attendance Detail page in the page mode it was in previously. This button will only display in Edit mode.
11. Course information saved will display on the Transaction History Detail page in relation to the parent School Attendance record under a section labeled, “School Attendance Course Detail” using the existing Transaction History Framework

2.21.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** School Attend

2.21.5 Security Updates

No Security Updates.

2.21.6 Page Mapping

Add page mapping for the New Fields.

2.21.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.22 School Attendance Status Detail

2.22.1 Overview

The "School Attendance Status Detail" page will be used to track the student's school attendance. An additional status of "Dropped Out" will be added.

2.22.2 School Attendance Status Detail Mockup

School Attendance Status Detail

*- Indicates required fields

Save and Return

Cancel

Change Reason

New Change Reason: *

Intake

New Reported Date: *

04/05/2021

Name:

Doe, John 26M

School Name:

School

School Attendance Type:

High School

Attendance Status: *

Dropped Out

Attendance Status Reason *

Good Cause

Good Cause Reason:

Verified: *

Verified

View

Date Reported:

04/01/2021

Status Begin Date: *

04/01/2021

Status End Date:

Save and Return

Cancel

Figure 2.22.2.1 – School Attendance Status Detail Mockup

2.22.3 Description of Changes

1. Add the "Dropped Out" option to the Attendance Status dropdown.

2.22.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** School Attend

2.22.5 Security Updates

No Security Updates.

2.22.6 Page Mapping

Add page mapping for the New Fields.

2.22.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.23 Third Party Liability Detail

2.23.1 Overview

The "Third Party Liability Detail" page is used to store information regarding the participant's compensation request related to injuries received. This page will be updated to add fields to indicate the appropriate forms have been signed.

2.23.2 Third Party Liability Detail Mockup

Third Party Liability Detail

*- Indicates required fields

Save and Return Cancel

Person Injured: * Real, Person 0M	Date injury occurred: * 04/05/2021	Do you intend to file a lawsuit or claim for your injury? No
Have you received a payment or settlement for your injury? Yes	Have you received or been granted restitution for your injury? Yes	Is this injury work related? * Yes
Settlement Receive Date: [Date Picker]	Restitution Receive Date: [Date Picker]	
Claim Adjuster: [Text Field]	Claim Policy Number: [Text Field]	
Lien Signed: Yes	Lawyer Release Signed: Yes	

Work Related Injuries

Name of Employer at Time of Injury: [Text Field]	Workers Compensation Case Number: [Text Field]		
Accident/Injury Type: [Dropdown]			
Address Line 1: [Text Field]			
Address Line 2: [Text Field]			
City: [Text Field]	State: [Dropdown]	Zip: [Text Field]	Telephone: [Text Field]

Figure 2.24.2.1 – Third Party Liability Detail Mockup

2.23.3 Description of Changes

1. Add a new Yes/No dropdown labeled "Lien Signed". The field will default to blank. This field will only be Editable in Create and Edit modes.

2. Add a new Yes/No dropdown labeled “Lawyer Release Signed”. The field will default to blank. This field will only be Editable in Create and Edit modes.
3. Add the option, “Other Possible Settlement” to the Accident/Injury Type dropdown under the Work Related Injuries section.

2.23.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Financial -> Third Party Liability

2.23.5 Security Updates

No Security Updates.

2.23.6 Page Mapping

Add page mapping for the New Fields.

2.23.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.24 Return to Residence List

2.24.1 Overview

The “Return to Residence List” page is used to display a list of residents returning to out of state locations.

2.24.2 Return to Residence List Mockup

Return to Residence List

Search Results Summary			Results 1 - 1 of 1
Display			
From:		To:	
<input type="text"/>		<input type="text"/>	
<input type="checkbox"/>	Doe, John 26M	09/18/2015	<input type="button" value="View"/> <input type="button" value="Add"/>
			<input type="button" value="Edit"/> <input type="button" value="View History"/>
<input type="button" value="Remove"/>			<input type="button" value="Add"/>

Figure 2.25.2.1 – Return to Residence List Mockup

2.24.3 Description of Changes

1. The Return to Residence Left Hand Task Navigation option Will appear under the GR SupportDisplay From – The earliest effective date for a record.
2. To – The latest end date of a record.
3. View – This button will reload the search results based on the dates provided.
4. Checkbox – The checkboxes will be used to select records for removal.
5. Name – The name of the participant. This field will be a hyperlink to the Return to Residence Detail page in View mode for the associated record when the user has the "ReturnToResidenceDetailView" right.
6. Begin Date – The begin date of the record.
7. End Date – The end date of the record.
8. Edit – This button will navigate to the Return to Residence Detail page in Edit mode for the associated record when the user has the "ReturnToResidenceDetailEdit" right.
9. View History – This button will open the Transaction History popup to display the historical changes for the given record when the user has the "ReturnToResidenceDetailView" right.
10. Add – This button will navigate to the Return to Residence Detail page in Create mode for the associated record when the user has the "ReturnToResidenceDetailEdit" right.
11. Remove – This button will delete all selected records. This button will only display when the user has the "ReturnToResidenceDetailRemove" right.

2.24.4 Page Location

- **Global:** Case Info
- **Local:** Customer Information

- **Task:** GR -> Return to Residence

2.24.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
ReturnToResidenceDetailView	The right to view Return to Residence records	Return to Residence View, Return to Residence Edit
ReturnToResidenceEdit	The right to create and Edit Return to Residence records	Return to Residence Edit
ReturnToResidenceRemove	The right to remove existing Return to Residence records	Return to Residence Remove

Security Groups:

Security Group	Group Description	Group to Role Mapping
Return to Residence View	This group has the capability to view Return to Residence records	See the Security Matrix for the group to role associations
Return to Residence Edit	This group has the capability to create and modify Return to Residence records	See the Security Matrix for the group to role associations
Return to Residence Remove	This group has the capability to remove Return to Residence records	See the Security Matrix for the group to role associations

2.24.6 Page Mapping

Add page mappings for the new field.

2.24.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.25 Return to Residence Detail

2.25.1 Overview

The "Return to Residence Detail" page is used to track residents returning to out of state locations.

2.25.2 Return to Residence Detail Mockup

Return to Residence Detail

*- Indicates required fields

Save and Return Cancel

Name: *
Doe, John 26M

Connection of Place of Residence: Yes

Potentially GA/GR Eligible: No

Signed Return Letter: No

Request Amount:

Pre-Approval: No

Return Reason: Stranded

State: Alabama

Verified Self-Sufficiency: No

Begin Date: * 09/18/2015

End Date:

Save and Return Cancel

Figure 2.26.2.1 – Return to Residence Detail Mockup (Create and Edit Mode)

Return to Residence Detail

*- Indicates required fields

Edit Close

Name: *
Doe, John 26M

Connection of Place of Residence: Yes

Potentially GA/GR Eligible: Yes

Signed Return Letter: No

Request Amount: \$45.00

Pre-Approval: No

Return Reason: Stranded

State: Alabama

Verified Self-Sufficiency: No

Begin Date: * 09/18/2015

End Date:

Edit Close

Figure 2.26.2.2 – Return to Residence Detail Mockup (View Mode)

2.25.3 Description of Changes

1. Name – Displays the name of the case members. This dropdown will only be editable in Create and Edit modes. This dropdown will default to “-Select-“.
2. Connection of Place of Residence – This field will be a Yes/No dropdown. This dropdown will only be editable in Create and Edit modes. This dropdown will default to “blank”.
3. Potentially GA/GR Eligible – This field will be a Yes/No dropdown. This dropdown will only be editable in Create and Edit modes. This dropdown will default to “blank”.
4. Signed Return Letter – This field will be a Yes/No dropdown. This dropdown will only be editable in Create and Edit modes. This dropdown will default to “blank”.
5. Pre-Approval – This field will be a Yes/No dropdown. This dropdown will only be editable in Create and Edit modes. This dropdown will default to “blank”.
6. Return Reason – This dropdown will only be editable in Create and Edit modes. This dropdown will default to “blank”. This will have the following options:
 - a. Absent Parent Returned Home
 - b. Alternative housing
 - c. Better neighborhood
 - d. Better Schools
 - e. Better Services
 - f. Cheaper rent
 - g. Child Returned from Guardian
 - h. Child Returned from Relative Caretaker
 - i. Children
 - j. Closer to schools
 - k. Closer to work
 - l. Completed Counseling
 - m. Completed drug rehab
 - n. Did Not Work Out
 - o. Family
 - p. Finished school
 - q. Foster Child Returned Home
 - r. Homeless Returning to Verified Residence
 - s. Job Available
 - t. Lack of Local Services
 - u. Legal Residence
 - v. Missed home
 - w. Needed help
 - x. Ran out of money
 - y. Released from hospital
 - z. Released from jail
 - aa. Returning to family
 - bb. Shared Housing Available

- cc. Someone Will Take In
- dd. Stranded
- ee. Worked out problems
- 7. State – This field will be a dropdown listing the following states and territories. This dropdown will only be editable in Create and Edit modes. This dropdown will default to “blank”.
 - a. Alabama
 - b. Alaska
 - c. American Samoa
 - d. Arizona
 - e. Arkansas
 - f. California
 - g. Colorado
 - h. Connecticut
 - i. Delaware
 - j. District of Columbia
 - k. Federated States of Micronesia
 - l. Florida
 - m. Georgia
 - n. Guam
 - o. Hawaii
 - p. Idaho
 - q. Illinois
 - r. Indiana
 - s. Iowa
 - t. Kansas
 - u. Kentucky
 - v. Louisiana
 - w. Maine
 - x. Marshall Islands
 - y. Maryland
 - z. Massachusetts
 - aa. Michigan
 - bb. Minnesota
 - cc. Mississippi
 - dd. Missouri
 - ee. Montana
 - ff. Nebraska
 - gg. Nevada
 - hh. New Hampshire
 - ii. New Jersey
 - jj. New Mexico
 - kk. New York
 - ll. North Carolina
 - mm. North Dakota
 - nn. Northern Mariana Islands
 - oo. Ohio
 - pp. Oklahoma

qq. Oregon
rr. Palau
ss. Pennsylvania
tt. Puerto Rico
uu. Rhode Island
vv. South Carolina
ww. South Dakota
xx. Tennessee
yy. Texas
zz. Utah
aaa. Vermont
bbb. Virgin Islands
ccc. Virginia
ddd. Washington
eee. West Virginia
fff. Wisconsin
ggg. Wyoming

8. Verified Self-Sufficiency – This field will be a Yes/No dropdown. This dropdown will only be editable in Create and Edit modes. This dropdown will default to “blank”.
9. Begin Date – This field will only be editable in Create and Edit modes. This field is required. This field will use the date constraints in the MM/DD/YYYY format.
10. End Date – This field will only be editable in Create and Edit modes. This field will use the date constraints in the MM/DD/YYYY format.
11. Edit – This button will be available in View mode. This button will load the Return to Residence Detail page in Edit mode
12. Close – This button will be available in View mode. This button will return the user to the Return to Residence List page.
13. Cancel – This button will be available in Create and Edit mode. This button will return the user to the Return to Residence List page.
14. Save and Return – This button will be available in Create and Edit mode. This button will save the changes made to the record and return the user to the Return to Residence List page. Records saved on this page will be effective dated.

2.25.4 Page Location

- **Global:** Case Info
- **Local:** Customer Information
- **Task:** GR -> Return to Residence

2.25.5 Security Updates

No Security Updates.

2.25.6 Page Mapping

Add page mappings for the new field.

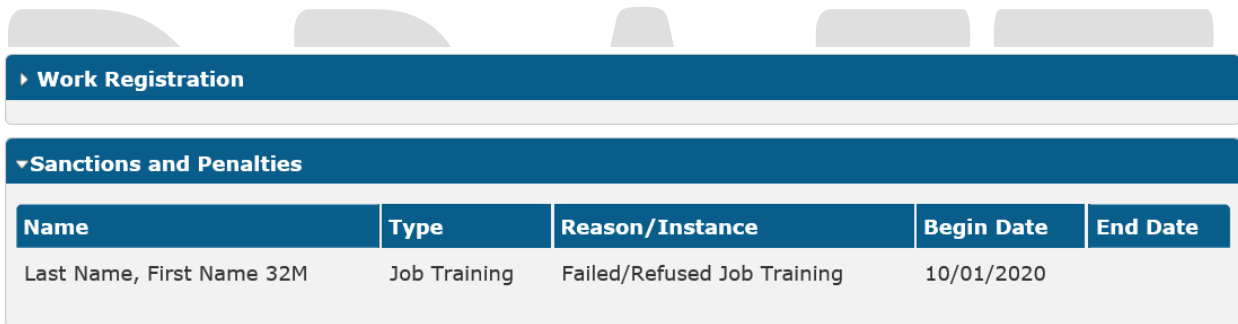
2.25.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.26 EDBC Summary Update

2.26.1 Overview

Update the EDBC Summary to have an additional section showing the sanction individual for that benefit month. This section will reflect the information on the Eligibility Non-Compliance Detail that is valid for the benefit month.



The screenshot shows a web interface with a blue header bar containing a right-pointing arrow and the text "Work Registration". Below this is a section titled "Sanctions and Penalties" with a downward-pointing arrow. Underneath is a table with the following data:

Name	Type	Reason/Instance	Begin Date	End Date
Last Name, First Name 32M	Job Training	Failed/Refused Job Training	10/01/2020	

EDBC Summary page Mockup 2.27.1

2.26.2 Description of Changes

1. Update the EDBC Results page to display the "Sanctions and Penalties" section which will show the sanctions and/or penalties of an applicant or recipient.
 - a. The Sanctions and/or penalties will be displayed in the following form:
 - i. Name – This will display the name of the individual who has the sanction and/or penalties.
 1. The Name will be displayed in rows due to its length
 - ii. Type – This field will display the type based on the Eligibility Non-Compliance Detail
 - iii. Reason/Instance – This field will display the reason and the instance for which the sanction or penalty has been imposed.
 1. The Reasons will be displayed in rows due to its length.

- iv. Begin Date – This date will be determined by the EDBC when the sanction will be applied.
- v. End Date – This field will map to End Date of the sanction on the Eligibility Non-Compliance Detail.
- vi. The section will be displayed below the “Work Registration” section in the EDBC summary page.

2.26.3 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Run EDBC -> [Program] EDBC Summary

2.26.4 Security Updates

No security updates.

2.26.5 Page Mapping

Add page mappings for the new fields.

2.26.6 Page Usage/Data Volume Impacts

No page usage impacts.

2.27 EDBC Verification Logic

2.27.1 Overview

Currently in CalWIN verifications when they are due, and the verification results is managed by each individual CalWIN county administrators through an administration page. Migrating into CalSAWS, CalWIN will inherit CalSAWS existing verification logic.

In CalSAWS, all verification due dates are automatically set to 10 calendar days. If the last day falls on a weekend or holiday, the verification due date will be moved to the next business day. The worker will have access to the Verification Detail Page to update the due date for each verification.

There are three types of verifications in CalSAWS: Mandatory Verifications, Mandatory Verification after due date or Non-Mandatory Verification.

For Mandatory Verifications:

- a. If the verification is pending before the verification due date:
 - i. The following soft validation will be displayed before running the EDBC: 'The following verification(s) have not been received'.
 - ii. The EDBC will have the status of 'Pending Verification'.

- iii. The user will not be able to authorize the EDBC.
- b. If the verification is pending after the verification due date
 - i. A soft validation will be displayed before running the EDBC: 'The following verification(s) have not been received.'
 - ii. The EDBC will be discontinued or denied.
 - iii. The user will be able to authorize the EDBC.

For Mandatory Verification after due date:

- a. If the verification is pending before the verification due date:
 - i. A soft validation will be displayed before running the EDBC: 'The following verification(s) have not been received.'
 - ii. The EDBC will be a regular EDBC.
 - iii. The user can authorize the EDBC.
- b. If the verification is pending after the verification due date:
 - i. A soft validation will be displayed before running the EDBC: 'The following verification(s) have not been received'.
 - ii. The EDBC will be discontinued or denied.
 - iii. The user can authorize the EDBC.

For Non-Mandatory Verification:

- a. If the verification is pending before the verification due date, there will be no soft validation check.
- b. The EDBC will be a regular EDBC.
- c. The user can authorize the EDBC.
- d. The verification type will not impact the person.

2.27.2 Description of Changes

1. Each county current verification for future and current action will be set according to the table below. The table will map the different combinations of current and future actions currently in CalWIN for verification to CalSAWS M – Mandatory Verification, Y- Mandatory Verification after due date and N- Non-Mandatory Verification. The CalWIN verification types will not have an administration page and any change to the verification types will now be managed in the back end.

CalWIN Current Action	CalWIN Future Action	CalSAWS verification Type	CalSAWS Verification Status
Pend	Fail	M – Mandatory Verification	Pending
Pass	Pass	N - Non-Mandatory Verification	Pending / Not Applicable
Pass	Fail	Y – Mandatory Verification after due date	Pending

Fail	Fail	Y – Mandatory Verification after due date & M - Mandatory Verification	Refused
------	------	---	---------

2. Add a new reference column name 'GR' in CT 170 Verification Type Code.
3. For existing verification types being updated for 'GR' set the indicator as 'Y' for the reference column 'GR' in CT 170 Verification Type Code.
4. For existing verification types not being updated for 'GR' set the indicator as 'N' for the reference column 'GR' in CT 170 Verification Type Code.
5. For new verification types being added for 'GR' set the indicator as 'Y' for the reference column 'GR' in CT 170 Verification Type Code and set 'N' for all other program reference columns.

2.28 Correspondence Changes

2.28.1 Overview

Prior to the new architecture implementation, the notice triggers will be created upon Accepting and Saving EDBC. After which, the user will be navigated to the Distributed Documents page where the document name of the correspondence to be generated will be displayed as text instead of a hyperlink (see below image).

Distributed Documents Search

* - Indicates required fields

Images

▸ Refine Your Search

Search Results Summary						Results 1 - 2 of 2
Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal	Details
08/14/2020 9:41 AM	Overissuance Budget Worksheet (ENG)	NA 1263	CalFresh	Printed Locally		Details
08/13/2020 4:05 PM	GA Denial - Not a Legal Alien	119-4 (02/90)	General Assistance/General Relief	Incomplete		

Mockup of Distributed Documents Page after Saving EDBC and a Notice Trigger is Generated prior to CalWIN Correspondence Solution

When the Correspondence Service is implemented, it will become a hyperlink that, upon clicking, will display the notice or trigger the Correspondence Service Window in a new tab (see below image).

Distributed Documents Search

*- Indicates required fields Images

▸ Refine Your Search

Search Results Summary Results 1 - 2 of 2

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal	Details
08/14/2020 9:41 AM	Overissuance Budget Worksheet (ENG)	NA 1263	CalFresh	Printed Locally		Details
08/13/2020 4:05 PM	GA Denial - Not a Legal Alien	119-4 (02/90)	General Assistance/General Relief	Pending Review		Details

Mockup of Distributed Documents Page after Saving EDBC and a Notice is Generated after CalWIN Correspondence Solution is implemented.

CalSAWS has a “Preview NOA” functionality where a worker can preview a NOA through clicking the “Preview NOA” button before Saving and Authorizing EDBC. This functionality will be disabled for CalWIN GA/GR-only EDBC. The worker will still be able to view the NOAs, however, it will be after Saving and Authorizing EDBC.

2.29 Non-Financial Composition

2.29.1 Fleeing Felon Functionality

2.29.1.1 County Admin Matrix – Fleeing Felon

2.29.1.1.1 Overview

A new County Admin Detail page for Fleeing Felon will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Fleeing Felon functionality to their county.

2.29.1.1.2 Description of Changes

- a. The Admin page matrix for Fleeing Felon will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
- b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.

- c. The functionality is effective dated with begin and end date
- d. The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Fail person who is a Fleeing Felon.	N	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N
Fail person who is a fleeing felon convicted after the county defined date.	N	N	N	N	N	N	N	N	Y	N	N	Y	N	N	N	N	N	Y

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX107C001	Fail person who is a Fleeing Felon.
EDX107C002	Fail person who is a fleeing felon convicted after the county defined date.

2.29.1.2 EDBC Changes

2.29.1.2.1 Overview

This section will provide the Eligibility Rules flow for Fleeing Felon Program Person Eligibility that can be filtered for each CalWIN County

2.29.1.2.2 Description of Change

Fleeing Felon Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a

selected County. Reference **Appendix 6.1 Rules Flow Diagram** '[Viewing Visio Document in Internet Explorer](#)' for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
Name	Name	Existing	Eligibility Non-Compliance Detail
Conviction Date	Date Convicted	Existing	Eligibility Non-Compliance Detail
Type of Felony	Type: Felony/Violation	Existing	Eligibility Non-Compliance Detail
Fleeing	Type: Felony/Violation Reason: Fleeing Felon	Existing	Eligibility Non-Compliance Detail
Fleeing felon pending verification	Non-compliance type: Felony/Violation Non-compliance reason: Unverified Fleeing Felon	New	Eligibility Non-Compliance Detail
Fleeing felon failing verification	Non-compliance type: Felony/Violation Non-compliance reason: Fleeing Felon Pending Verification	New	Eligibility Non-Compliance Detail

Existing Program/Person Status:

The following existing program/person status reason will be leveraged by this rule flow when the following conditions are met.

1. The existing program/person status reason 'CT73_C1 Fleeing Felon' will be set as a display status reason when all the following conditions are met.
 - a. The individual has the following non-compliance entry:
 - i. Non-compliance type: Felony/Violation
 - ii. Non-compliance reason: Fleeing Felon
 - b. The rule 'Fail person who is a Fleeing Felon.' is active.

Category	Short Description
73	Fleeing Felon

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Fleeing Felon After County Date' will be set as a display status reason when all the following conditions:
 - a. The individual has the following non-compliance entry:
 - i. Non-compliance type: Felony/Violation
 - ii. Non-compliance reason: 'Fleeing Felon'
 - b. The rule 'Fail person who is a Fleeing Felon.' is not active.
 - c. The rule 'Fail person who is a fleeing felon convicted after the county defined date.' is not active.
 - d. The individual's date convicted for fleeing felon is after the convicted start date for fleeing felon '12/31/1997'.

Category	Short Description
73	Fleeing Felon After County Date

2. The existing program/person status reason CT73 'FTP No Proof Fleeing Felon' will be set as a display status reason when all the following conditions in either A or B are met.
 - A. All the following are met:
 - a. The individual has the following non-compliance entry:
 - i. Non-compliance type: Felony/Violation
 - ii. Non-compliance reason: Unverified Fleeing Felon
 - B. All the following are met:
 - a. The individual has the following non-compliance entry:
 - i. Non-compliance type: Felony/Violation
 - ii. Non-compliance reason: Fleeing Felon Pending Verification

Category	Short Description
73	FTP No Proof Fleeing Felon

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.1.3 Correspondence

2.29.1.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.1.3.2 Description of Change

1. Reason Code: XAN057 - Fleeing Felon

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Fleeing Felon'.
- or
- ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Fleeing Felon' and the program is also Discontinued
- or
- iii. This notice generates for the applicable counties when there is a change in benefit amount and the program was 'Active' in the previous saved EDBC and is still 'Active' on the current EDBC with the reason 'Fleeing Felon'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Discontinuance	GA Discontinuance - Fleeing Felon, Parole/Probation Violation	014 2	11524
Contra Costa	Denial	GA Denial - Fleeing Felon, Parole/Probation Violation	109 2	11512
Fresno	Discontinuance	General Relief Discontinuance - Various Reasons	022-B	11539
Fresno	Denial	General Relief Denial - Various Reasons	241-A	610728

Orange	Discontinuance	GR Disc - Fleeing Felon.	051 B	11600
Orange	Denial	GR Denial - Fleeing Felon	151 C	11608
Placer	Denial	Drug Conviction, Fleeing Felon or Parole/Probation Violator	145-1	608582
Sacramento	Discontinuance	DISCONTINUANC E-Variou s Reasons	CDS 013- 1	12450
Sacramento	Denial	GA-Denial - Various Non-Financial Reason	CDS 112- 1	11787
Santa Barbara	Discontinuance	GR - Disc - Outstanding arrest warrant	076-0	12334
Santa Barbara	Denial	GR- Deny - Outstanding Warrant For Arrest	162-0	12332
Santa Cruz	Discontinuance	GA Disc - Drug Felon, Fleeing Felon or Parole/Probation Violator	021-C (06/02)	12094
Santa Cruz	Denial	Denial - GA Denial Due to Fleeing Felon Status	130-B	610717
San Diego	Change	GR Change - Person Discontinuance - Outstanding Warrant	042-2	12718
San Diego	Denial	GR Person/Case Denied Outstanding Warrant – Marshal	129-1	610681
San Francisco	Discontinuance	CAAP Discontinuance:	047 1	12599

		Fleeing Felon (non-fraud)		
San Francisco	Denial	CAAP Denial - Fleeing Felon	CP 20	12604
Solano	Denial	GA - Denial - Felony Arrest Warrant Issued	173	12131

2. Reason Code: XAN058 - Fleeing felon after county date

a. Trigger Condition

i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Fleeing felon after county date'.

or

ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Fleeing felon after county date'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Yolo	Discontinuance	General Assistance Discontinuance - CalWORKs Exclusions	010-3	12247
Yolo	Denial	General Assistance Denial - CalWORKs Exclusions	125-3	12240

2.29.1.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Indiv is a Fleeing Felon} CalSAWS must fail a fleeing felon for GA/GR.]	The rule 'Fail person who is a Fleeing Felon.' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Individual is Fleeing Felon convicted after county defined date} CalSAWS must fail a fleeing felon if the conviction date is after county defined date for GA/GR.]	The rule 'Fail person who is a fleeing felon convicted after the county defined date.' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

2.29.2 Liens Functionality

2.29.2.1 County Admin Matrix - Liens

2.29.2.1.1 Overview

A new County Admin Detail page for Liens will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Liens functionality to their county.

2.29.2.1.2 Description of Changes

- The Admin page matrix for Liens will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
- The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- The functionality is effective dated with begin and end date.
- The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Approve Lien signed by client.	Y	Y	N	Y	N	N	N	N	Y	Y	N	N	N	Y	Y	Y	N	Y
Sponsor Non-Citizen needs to sign sponsor lien.	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N

Sponsor Non-Citizen needs to sign lien.	N	N	N	N	Y	Y	Y	N	N	N	N	N	Y	N	N	N	Y	N
Determine if Liens needs to be signed.	Y	Y	N	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
Non-Citizen sponsor needs to sign Lien within 3 years of US Entry date.	N	N	N	N	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N
Fail the person if the lien is not signed.	Y	Y	N	N	N	Y	N	N	N	Y	N	N	N	Y	N	N	N	N
Lien is not applicable if it's not signed and there is no good reason.	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	Y	N	N	N
Lien signature is not required on a re-application.	N	N	N	N	N	N	Y	N	N	Y	N	Y	Y	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX100C001	Approve Lien signed by client.
EDX100C003	Sponsor Non-Citizen needs to sign sponsor lien.
EDX100C004	Sponsor Non-Citizen needs to sign lien.
EDX100C005	Determine if Liens needs to be signed.
EDX100C007	Non-Citizen sponsor needs to sign Lien within 3 years of US Entry date.
EDX100C008	Fail the person if the lien is not signed.
EDX100C009	Lien is not applicable if it's not signed and there is no good reason.
EDX100C010	Lien signature is not required on a re-application.

Leverage Rule

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Earned Income – Sacramento.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Earned Income - Contra Costa.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Do not deem the sponsor if the sponsor non-citizen has been in US for more than 3 years.	Y	N	N	Y	N	Y	Y	N	N	Y	N	N	N	N	N	N	Y	N

CalWIN Rule	CalSAWS Rule
EDX309C006	Earned Income – Sacramento.
EDX309C002	Earned Income - Contra Costa.
EDX013C006	Do not deem the sponsor if the sponsor non-citizen has been in US for more than 3 years.

2.29.2.2 EDBC Changes

2.29.2.2.1 Overview

This section will provide the Eligibility Rules flow for Liens/Program Person Eligibility that can be filtered for each CalWIN County

2.29.2.2.2 Description of Change

Liens Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram 'Viewing Visio Document in Internet Explorer'** for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
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Non-Citizen Sponsor Lien Signed	Sponsor Lien Signed	New	Sponsorship Detail
Signed Lien	Signed	New	GA/GR Document Signature Detail
US entry	US Entry Date	Existing	Citizenship Detail
Good Cause	Good Cause	New	Eligibility Non-Compliance Detail
Not complying with Sign GA/GR Lien	Non-compliance type: Procedural Requirement Non-compliance reason: Failed to sign Lien	New	Eligibility Non-Compliance Detail
GA-241 form signed and signed date	Add new type: GA-241	New	GA/GR Document Signature List
GA-243 form signed and signed date	Add new type: GA-243	New	GA/GR Document Signature List
SC-20 form signed and signed date	Add new type: SC-20	New	GA/GR Document Signature List

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason 'CT73 'Non-Citizen Lien Not Signed' will be set as a display status reason when all of the following conditions are met in either A or B.
 - A. All the conditions are met:
 - a. The rule 'Determine if Liens needs to be signed.' is active.
 - b. The individual has a non-compliance entry and no good cause selected.
 - i. Non-compliance type: Procedural Requirement
 - ii. Non-compliance reason: Failed to sign Lien.
 - c. The rule 'Approve Lien signed by client.' is not active.
 - d. The individual has a sponsor. This is checked by having a sponsorship record.
 - e. The rule 'Sponsor Non-Citizen needs to sign sponsor lien.' is active.
 - f. Any non-citizen individual in the household has the 'sponsor lien signed' as 'No'.
 - B. All the conditions are met:
 - a. The rule 'Determine if Liens needs to be signed.' is active.

- b. The rule 'Approve Lien signed by client.' is not active.
- c. The individual has a sponsor. This is checked by having a sponsorship record.
- d. The rule 'Sponsor Non-Citizen needs to sign sponsor lien.' is not active.
- e. The rule 'Sponsor Non-Citizen needs to sign lien.' is active.
- f. The non-citizen individual 'Sponsor lien signed' is 'No'.
- g. The rule 'Non-Citizen sponsor needs to sign Lien within 3 years of US Entry date.' is active.
- h. The rule 'Do not deem the sponsor if the sponsor non-citizen has been the in US for more than 3 years.' is active.
- i. The individual has a valid 'Date of entry' into the United states.
- j. The benefit begin month is after the individual 'Date of Entry + 3 years'.

Category	Short Description
73	Non-Citizen Lien Not Signed

- 2. The new program/person status reason 'CT73 'Did Not Sign Lien' will be set as a display status reason when all of the following conditions are met in either A or B.
 - A. All the conditions are met:
 - a. The rule 'Determine if Liens needs to be signed.' is active.
 - b. The individual has a non-compliance entry and no good cause selected.
 - i. Non-compliance type: Procedural Requirement
 - ii. Non-compliance reason: Failed to sign Lien.
 - c. The rule 'Approve Lien signed by client.' is not active.
 - d. The individual has a sponsor. This is checked by having a sponsorship record.
 - e. The rule 'Sponsor Non-Citizen needs to sign sponsor lien.' is not active.
 - f. The rule 'Sponsor Non-Citizen needs to sign lien.' is active.
 - g. The non-citizen individual 'Sponsor lien signed' is 'No'.
 - h. The rule 'Non-Citizen sponsor needs to sign Lien within 3 years of US Entry date.' is active.
 - B. All the conditions are met:
 - a. The Non-citizen in the household does not have a sponsor (sponsorship record exists) or the Non-Citizen Sponsor Lien Signed is false.
 - b. The signed Lien is 'false', or the 'signed date' is before the application date.
 - c. The rule 'Fail the person if the lien is not signed.' is active.

Category	Short Description
73	Did Not Sign Lien

3. The new program/person status reason CT73 'SC-20 Not Signed' will be set as a display status reason when all the following conditions are met.
 - a. The rule 'Determine if Liens needs to be signed.' is active
 - b. The rule 'Earned Income – Sacramento.' is active.
 - c. The case has an entry in the GA/GA Document signature List with the type: SC-20 and the form is not signed.

	Short Description
73	SC-20 Not Signed

4. The new program/person status reason CT73 'GA-241 Not Signed' will be set as a display status reason when all of the following conditions are met.
 - a. The rule 'Determine if Liens needs to be signed.' is active.
 - b. The rule 'Earned Income – Sacramento.' is active.
 - c. The case has an entry in the GA/GA Document signature List with the type: SC-20 and the form is signed.
 - d. The rule 'Earned Income - Contra Costa.' is active
 - e. The case has an entry in the GA/GA Document signature List with the type: GA-241 and the form is not signed.

Category	Short Description
73	GA-241 Not Signed

5. The new program/person status reason CT73 'Lien Not Signed' will be set as a display status reason when all the following conditions:
 - a. The non-citizen in the household does not have a sponsor (sponsorship record exists).
 - b. The signed Lien is 'No', and the 'signed date' is before the application date
 - c. The rule 'Fail the person if the lien is not signed.' or 'Lien signature is not required on a re-application.' is not active.
 - d. The rule 'Lien is not applicable if it's not signed and there is no good reason.' is not active

Category	Short Description
73	Lien Not Signed

6. The new program/person status reason CT73 'GA-243 Not Signed' will be set as a display status reason when all of the following conditions are met.
 - a. The rule 'Determine if Liens needs to be signed.' is active.
 - b. The rule 'Earned Income - Contra Costa.' is active.
 - c. The case has an entry in the GA/GA Document signature List with the type: GA-241 and the form is signed
 - d. The case has an entry in the GA/GA Document signature List with the type: GA-243 and the form is not signed.

Category	Short Description
73	GA-243 Not Signed

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.2.3 Correspondence

2.29.2.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.2.3.2 Description of Change

1. Reason Code: XAN062 - Non-Citizen lien not signed
 - a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Non-Citizen lien not signed'.
 - b. Person Level Reason
 - c. County-specific information:

County	Action	Document Description	Number	Template
Santa Clara	Denial	GA Denial - Needs Being Met by Sponsor	GA 129	12043

2. Reason Code: XAN064 – Did not sign lien
 - a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Did not sign lien'.
 - b. Person Level Reason
 - c. County-specific information:

County	Action	Document Description	Number	Template
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Alameda	Denial	GA Denial - Reimbursement Agreement	136 0 (10/10)	11462
Sacramento	Denial	GA-Denial-Various Non-Financial Reason	CDS 112-1	11787

3. Reason Code: XAN065 – Lien not signed

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Lien not signed'.
- ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Lien not signed'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Orange	Discontinuance	GR Disc - Lien on Real Property	072 A	11611
Orange	Denial	GR Denial - Reimbursement Agreement Not Signed	136 A	11608
Santa Clara	Discontinuance	GA Discontinuance - Refused to Sign Reimbursement Agreement	GA 065	12013
Santa Clara	Denial	GA Denial - refused to sign the Reimbursement Agreement	GA 136	12038
Santa Cruz	Denial	Denial - GA Denial for Failure to Sign Reimbursement Form	123-A	610712

4. Reason Code: XAN026 – SC-20 not signed

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'SC-20 not signed'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Denial	GA-Denial-Various Non-Financial Reason	CDS 112-1	11787

5. Reason Code: XAN124 – GA-241 not signed

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'GA-241 not signed'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Denial	GA Denial - Failure to Comply with Sponsor Requirements	110 4	12552

6. Reason Code: XAN131 – GA-243 not signed

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'GA-243 not signed'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Denial	GA Denial - Failure to Comply with Sponsor Requirements	110 4	12552

2.29.2.4 **Project Requirements**

DDID 2314	DDID Description	How Requirement Met	DDID	Rule Flow Diagram
	[Business Rule: {Client signed lien alone is enough} CalSAWS must check for Client signed lien and date. for GA/GR.]	The rule 'Approve Lien signed by client.' will meet this requirement		The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How Requirement Met	DDID Rule Flow Diagram
	[Business Rule: {Alien Sponsor needs to sign the sponsor lien} CalSAWS must verify that Alien Sponsor needs to sign the sponsor lien for GA/GR.]	The rule 'Sponsor Non-Citizen needs to sign sponsor lien.' will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Alien sponsor needs to sign lien} CalSAWS must assure that Alien sponsor needs to sign lien for GA/GR.]	The rule 'Sponsor Non-Citizen needs to sign lien.' will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Liens apply to these counties} CalSAWS must determine whether sponsor liens are applicable to an individual applying for GA/GR.]	The rule 'Determine if Liens needs to be signed.' will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Alien Sponsor Signed Lien} CalSAWS must determine whether there is good cause for not signing the GA/GR sponsor lien.]	The rule 'Non-Citizen sponsor needs to sign Lien within 3 years of US Entry date.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Client did not sign lien} CalSAWS must fail a GA/GR applicant who has not signed the sponsor lien.]	The rule 'Fail the person if the lien is not signed.' will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Generic lien not applicable} CalSAWS must verify that generic lien is not applicable for GA/GR.]	The rule 'Lien is not applicable if it's not signed and there is no good reason.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How Requirement Met	DDID	Rule Flow Diagram
	[Business Rule: {GA Generic Lien Signature is not required on re-application} CalSAWS must not require a GA Generic lien signature when the client reapplies.]	The requirement 'Lien signature is not required on a re-application.' will meet this requirement.		The following rule is stated in the business flow diagram and admin matrix

2.29.3 QC Audit Functionality

2.29.3.1 County Admin Matrix – QC Audit

2.29.3.1.1 Overview

A new County Admin Detail page for QC Audit will be created. This page is viewed by the County Administrator to view the list of rules applicable for the QC Audit functionality to their county.

2.29.3.1.2 Description of Changes

- The Admin page matrix for QC Audit will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
- The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- The functionality is effective dated with begin and end date
- The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Determine if a person should be sanctioned based on QC/Audit cooperation.	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Sanction the person if they are not cooperating with Audit and have no good cause.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Sanction the person if they are not cooperating with QC and have not good cause.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX105C001	Determine if a person should be sanctioned based on QC/Audit cooperation.
EDX105C002	Sanction the person if they are not cooperating with Audit and have no good cause.
EDX105C003	Sanction the person if they are not cooperating with QC and have not good cause.

2.29.3.2 EDBC Changes

2.29.3.2.1 Overview

This section will provide the Eligibility Rules flow for QC Audit/Program Person Eligibility that can be filtered for each CalWIN County

2.29.3.2.2 Description of Change

QC Audit Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram** '[Viewing Visio Document in Internet Explorer](#)' for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
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Did not cooperate with Quality control	Non-compliance type: Quality control Non-compliance reason: Refused to cooperate	New	Eligibility Non-compliance
Did not cooperate with Audit	Non-compliance type: Audit Non-compliance reason: Refused to cooperate	New	Eligibility Non-compliance
Good Cause	Good Cause	New	Eligibility Non-Compliance Detail

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Failed to Comply: QC' will be set as a display status reason when all the following conditions in either A or B:
 - A. All the following:
 - a. The rule 'Determine if a person should be sanctioned based on QC/Audit cooperation.' is active.
 - b. The person is not cooperating with QC. This will be indicated by having the following non-compliance entry:
 - i. Non-compliance Type: Quality Control
 - ii. Non-compliance Reason: Refused to cooperate
 - c. The rule 'Sanction the person if they are not cooperating with QC and have not good cause.' is active.
 - d. There is no good cause reason for not cooperating with QC for the payment month or the good cause reason is not valid for that county.
 - e. The individual is receiving GR aid.
 - B. All the following:
 - a. The rule 'Determine if a person should be sanctioned based on QC/Audit cooperation.' is active.
 - b. The person is not cooperating with QC. This will be indicated by having the following non-compliance entry:
 - i. Non-compliance Type: Quality Control

- ii. Non-compliance Reason: Refused to cooperate
- c. The rule 'Sanction the person if they are not cooperating with QC and have not good cause.' is no active.

Category	Short Description
73	Failed to Comply: QC

7. The new program/person status reason CT73 'Failed to Comply: Audit' will be set as a display status reason when all the following conditions:
- A. The rule 'Determine if a person should be sanctioned based on QC/Audit cooperation.' is active.
 - ~~B. The person is not cooperating with QC. This will be indicated by having the following non-compliance entry:

 - a. Non-compliance Type: Quality Control
 - b. Non-compliance Reason: Refused to cooperate~~
 - C. The person is cooperating with QC. This will be indicated by not having the following non-compliance entry:
 - a. Non-compliance Type: Quality Control
 - b. Non-compliance Reason: Refused to cooperate
 - ~~D. The rule 'Sanction the person if they are not cooperating with Audit and have no good cause.' is active.~~
 - E. The person is receiving GR aid.
 - F. The person is not cooperating with audit. This will be indicated by having the following non-compliance entry:
 - a. Non-compliance Type: Audit
 - b. Non-compliance Reason: Refused to cooperate
 - G. There is no good cause reason selected for not cooperating with audit for the payment month or the good cause reason selected is not valid for that county.

Category	Short Description
73	Failed to Comply: Audit

3. The new program/person status reason CT73 'Not Cooperating' will be set as a display status reason when all the following conditions:
- a. The rule 'Determine if a person should be sanctioned based on QC/Audit cooperation.' is active.
 - b. The person is not cooperating with QC. This will be indicated by having the following non-compliance entry:
 - a. Non-compliance Type: Quality Control
 - b. Non-compliance Reason: Refused to cooperate
 - c. The rule 'Sanction the person if they are not cooperating with QC and have not good cause.' is active.
 - d. There is no good cause for not cooperating with QC for the payment month.
 - e. The person is not currently receiving GR aid.

Category	Short Description
73	Not Cooperating

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.3.3 Correspondence

2.29.3.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.3.3.2 Description of Change

1. Reason Code: XAN087 - Failed to Comply: Audit
 - a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Failed to comply: Audit'.
 - b. County-specific information:

County	Action	Document Description	Number	Template
Alameda	Discontinuance	GA Disc - Audit Requirement - 180 Day Sanction	043 1 (10/10)	12652

2.29.3.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {QC/AUDIT applies} CalSAWS must determine whether the individual cooperating with QC is applicable or not.]	The rule 'Determine if a person should be sanctioned based on QC/Audit cooperation.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Client cooperating with QC and Audit} CalSAWS must determine whether the individual cooperating with QC/Audit is applicable or not for an ongoing case.]	The rule 'Sanction the person if they are not cooperating with Audit and have no good cause.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Client not cooperating with QC, then sanction} CalSAWS must determine whether the individual not cooperating with QC has a good cause or not.]	The rule 'Sanction the person if they are not cooperating with QC and have not good cause.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix

2.29.4 Probation Functionality

2.29.4.1 County Admin Matrix - Probation

2.29.4.1.1 Overview

A new County Admin Detail page for Probation will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Probation functionality to their county.

2.29.4.1.2 Description of Changes

- The Admin page matrix for Probation will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
- The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- The functionality is effective dated with begin and end date
- The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Fail the person if they violated their probation/parole.	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	Y	Y	Y	Y	Y	Y	Y

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX104C001	Fail the person if they violated their probation/parole.

2.29.4.2 EDBC Changes

2.29.4.2.1 Overview

This section will provide the Eligibility Rules flow for Probation /Program Person Eligibility that can be filtered for each CalWIN County

2.29.4.2.2 Description of Change

Probation Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram 'Viewing Visio Document in Internet Explorer'** for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
Probation for Parole Violator	Type: Felony/Violation Reason: Probation/ Parole Violator	Existing	Non-Compliance List
Type of felony	Type: Felony/Violation Reason: All reasons	Existing	Non-Compliance List

Existing Program/Person Status:

The following existing program/person status reason will be leveraged by this rule flow when the following conditions are met.

1. The existing program/person status reason CT73_C3 'Probation/Parole Violator' will be set as a display status reason when all of the following conditions are met.
 - a. The individual has a non-compliance:
 - i. Non-compliance type: Felony/Violation entry
 - ii. Non-compliance reason: 'Probation/Parole Violator'.
 - b. The Rule 'Fail the person if they violated their probation/parole' is active.

Category	Short Description
73	Probation/Parole Violator

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.4.3 Correspondence

2.29.4.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.4.3.2 Description of Change

1. Reason Code: XAN044 - Probation/Parole Violator
 - a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Probation/Parole Violator'.
 - or
 - ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Probation/Parole Violator'.
 - b. Person Level Reason
 - c. County-specific information:

County	Action	Document Description	Number	Template
Alameda	Discontinuance	GA Disc - Individuals With Felony Warrant/Parole Violation	027 2 (10/10)	12652
Alameda	Denial	GA Denial - Felony Warrant or Parole/Probation	111 2 (11/08)	11462
Contra Costa	Discontinuance	GA Discontinuance - Fleeing Felon, Parole/Probation Violation	014 2	11524
Contra Costa	Denial	GA Denial - Fleeing Felon, Parole/Probation Violation	109 2	11512
Orange	Discontinuance	GR Disc - Probation/Parole Violation.	052 B	11600
Orange	Denial	GR Denial - Probation/Parole Violation	152 C	11608
Placer	Denial	Drug Conviction, Fleeing Felon or Parole/Probation Violator	145-1	608582
Sacramento	Discontinuance	DISCONTINUANCE-Variou Reasons	CDS 013-1	12450
Sacramento	Denial	GA-Denial-Variou Non- Financial Reason	CDS 112-1	11787
Santa Cruz	Discontinuance	GA Disc - Drug Felon, Fleeing Felon or Parole/Probation Violator	021-C (06/02)	12094
Santa Cruz	Denial	Denial - GA Denial Due to Fleeing Felon Status	130-B	610717
Yolo	Discontinuance	General Assistance Discontinuance - CalWORKs Exclusions	010-3	12247
Yolo	Denial	General Assistance Denial - CalWORKs Exclusions	125-3	12240

2.29.4.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Indiv is a Probation/Parole Violator} CalSAWS must fail an individual who is a probation or parole violator for GA/GR.]	The rule 'Fail the person if they violated their probation/parole.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix

2.29.5 Drug Felon Functionality

2.29.5.1 County Admin Matrix - Drug Felon

2.29.5.1.1 Overview

A new County Admin Detail page for Drug Felon will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Drug Felon functionality to their county.

2.29.5.1.2 Description of Changes

- The Admin page matrix for Drug Felon will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
- The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- The functionality is effective dated with begin and end date.
- The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Aid Drug Felon.	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	N	Y	N	N	Y	N
Consider person as a drug felon if convicted after the county defined date.	N	Y	N	N	N	N	Y	N	N	Y	N	Y	Y	N	Y	Y	N	Y
Fail person convicted of drug felony after the county defined date.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Fail person with drug felony after county defined date.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
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EDX108C001	Aid Drug Felon.
EDX108C002	Consider person as a drug felon if convicted after the county defined date.
EDX108C003	Fail person convicted of drug felony after the county defined date.
EDX108C005	fail person with drug felony after county defined date.

2.29.5.2 EDBC Changes

2.29.5.2.1 Overview

This section will provide the Eligibility Rules flow for Drug Felon /Program Person Eligibility that can be filtered for each CalWIN County

2.29.5.2.2 Description of Change

Drug Felon Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram** '[Viewing Visio Document in Internet Explorer](#)' for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
Drug Felon	Type: IPV/Fraud Reason: Drug	Existing	Eligibility Non-Compliance Detail
Date of Conviction	Date Convicted	Existing	Eligibility Non-Compliance Detail

Existing Program/Person Status:

The following existing program/person status reason will be leveraged by this rule flow when the following conditions are met.

1. The existing program/person status reason CT73 QC 'Drug Felon' will be set as a display status reason when all of the following conditions are met.
 - a. The individual has a non-compliance entry:
 - i. Non-compliance Type: IPV/Fraud.
 - ii. Non-compliance Reason: Drug.
 - b. The following is not true:
 - i. The rule 'Aid Drug Felon.' is active.

- ii. The county is San Francisco (SFO) and GR sub program is Age Exempt.
- c. The rule 'Consider person as a drug felon if convicted after the county defined date.' is active.
- d. The rule 'fail person with drug felony after county defined date.' is active.
- e. ~~The individual's date convicted for drug felony is after the county reference convicted start date for drug felony.~~

Category	Short Description
73	Drug Felon

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Drug Felon (GA)' will be set as a display status reason when all the following conditions:
 - a. The individual has a non-compliance entry:
 - i. Non-compliance Type: IPV/Fraud
 - ii. Non-compliance Reason: Drug
 - b. All of the following is not true:
 - i. The rule 'Aid Drug Felon.' is active.
 - ii. The county is San Francisco (SFO) and GR sub program is Age Exempt.
 - c. The rule 'Consider person as a drug felon if convicted after the county defined date.' is not active.
 - d. The rule 'Fail person convicted of drug felony after the county defined date.' is not active.

Category	Short Description
73	Drug Felon (GA)

2. The new program/person status reason CT73 'Drug Felon Committed After County Date' will be set as a display status reason when all the following conditions:
 - a. The individual has a non-compliance entry:
 - i. Non-compliance Type: IPV/Fraud
 - ii. Non-compliance Reason: Drug
 - b. All of the following is not true:
 - i. The rule 'Aid Drug Felon.' is active.
 - ii. The county is San Francisco (SFO) and GR sub program is Age Exempt.
 - c. The rule 'Consider person as a drug felon if convicted after the county defined date.' is not active.

- d. The rule 'Fail person convicted of drug felony after the county defined date.' is active.
- e. The individual's Date Crime Committed, and Date convicted for drug felony is after the county reference committed effective start date and the convicted effective start date for drug felony respectively.

Category	Short Description
73	Drug Felon Committed After County Date

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.5.3 Correspondence

2.29.5.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.5.3.2 Description of Change

1. Reason Code: XAN061 - Drug Felon (GA)
 - a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Drug Felon (GA)'.
 - b. Person Level Reason
 - c. County-specific information:

County	Action	Document Description	Number	Template
Placer	Denial	Drug Conviction, Fleeing Felon or Parole/Probation Violator	145-1	608582
Yolo	Denial	General Assistance Denial - CalWORKs Exclusions	125-3	12240

2. Reason Code: XAN031 – Drug Felon

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Drug Felon'.
- or
- ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Drug Felon'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Santa Cruz	Discontinuance	GA Disc - Drug Felon, Fleeing Felon or Parole/Probation Violator	021-C (06/02)	12094
Santa Cruz	Denial	Denial - GA Denial Due To Felony Drug Conviction	124-C	610713

3. Reason Code: XAN069 - Drug Felon committed after county date

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Drug felon committed after county date'.
- or
- ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Drug felon committed after county date'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Discontinuance	GA Discontinuance - Drug Felon	012 2	11524
Contra Costa	Denial	GA Denial - Felony Drug/Connected to CalWORKs	111 3	607363

2.29.5.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {County aids Drug Felon} CalSAWS must determine if a drug felon is eligible for GA/GR.]	The rule 'Aid Drug Felon.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Indv is a drug felon convicted after a county defined date} CalSAWS must determine GA/GR eligibility for a client with a drug felony conviction after a county defined felony date.]	The rule 'Consider person as a drug felon if convicted after the county defined date.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Indv is a drug felon convicted after a county defined date and is Contra Costa or San Diego} CalSAWS must fail a GA/GR client convicted of a drug felony.]	The rule 'Fail person convicted of drug felony after the county defined date.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Convicted of a drug felony} CalSAWS must pass or fail a GA/GR client based on the county defined felony date.]	The rule 'fail person with drug felony after county defined date.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix

2.29.6 Fraud Prevention Functionality

2.29.6.1 County Admin Matrix - Fraud Prevention

2.29.6.1.1 Overview

A new County Admin Detail page for Fraud Prevention will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Fraud Prevention functionality to their county.

2.29.6.1.2 Description of Changes

- a. The Admin page matrix for Fraud Prevention will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
- b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- c. The functionality is effective dated with begin and end date
- d. The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Allow Fraud Prevention as a determination factor in eligibility.	Y	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y	N	Y	N	Y	Y	Y
Fail person who is not cooperating with fraud prevention.	N	Y	N	N	Y	N	N	N	Y	N	Y	Y	N	Y	N	Y	N	Y
Fail applicants for non-cooperation with Fraud Prevention.	Y	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Allow good cause for not cooperating with fraud prevention.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX106C001	Allow Fraud Prevention as a determination factor in eligibility.
EDX106C003	Fail person who is not cooperating with fraud prevention.
EDX106C004	Fail applicants for non-cooperation with Fraud Prevention.
EDX106C005	Allow good cause for not cooperating with fraud prevention.

2.29.6.2 EDBC Changes

2.29.6.2.1 Overview

This section will provide the Eligibility Rules flow for Fraud Prevention /Program Person Eligibility that can be filtered for each CalWIN County.

2.29.6.2.2 Description of Change

Fraud Prevention Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram** '[Viewing Visio Document in Internet Explorer](#)' for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
Non-cooperation with Fraud Prevention	Non-compliance Type: IPV/Fraud Non-compliance Reason: Non-cooperation	New	Eligibility Non-Compliance Detail
Type	Type	Existing	Eligibility Non-Compliance Detail
Good Cause	Good Cause	New	Eligibility Non-Compliance Detail

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Non-Comply with Fraud Prevention' will be set as a display status reason when all the following conditions in either A or B are met:
 - A. All the conditions are met:
 - a. The rule 'Allow Fraud Prevention as a determination factor in eligibility.' is active and the individual has a non-compliance entry.
 - b. The individual has the non-compliance entry :
 - i. Non-compliance Type: IPV/Fraud
 - ii. Non-compliance Reason: Non-cooperation
 - c. The rule 'Fail person who is not cooperating with fraud prevention.' is not active.
 - d. The rule 'Fail applicants for non-cooperation with Fraud Prevention.' is not active.
 - e. The rule 'Allow good cause for not cooperating with fraud prevention.' is active.
 - f. The individual has a good cause for Non-compliance:
 - i. Non-compliance Type: IPV/Fraud
 - ii. Non-compliance Reason: Non-cooperation
 - g. The good cause reason selected is not applicable for that county.
 - B. All the conditions are met:

- a. The rule 'Allow Fraud Prevention as a determination factor in eligibility.' is active and the individual has a non-compliance entry.
 - b. The individual has the non-compliance entry:
 - i. Non-compliance Type: IPV/Fraud
 - ii. Non-compliance Reason: Non-cooperation
 - c. The rule 'Fail person who is not cooperating with fraud prevention.' is not active.
 - d. The rule 'Fail applicants for non-cooperation with Fraud Prevention.' is active.
 - e. The program is ongoing.
 - f. The individual is receiving Aid-in-kind.
- C. All the conditions are met:
- a. The rule 'Allow Fraud Prevention as a determination factor in eligibility.' is active and the individual has a non-compliance entry.
 - b. The individual Non-compliance entry:
 - i. Non-compliance Type: IPV/Fraud
 - ii. Non-compliance Reason: Non-cooperation
 - c. The rule 'Fail person who is not cooperating with fraud prevention.' is active.

Category	Short Description
73	Non-Comply with Fraud Prevention

2. The new program/person status reason CT73 'Non-Compliant' will be set as a display status reason when all the following conditions in either A or B are met:
- A. All the conditions are met:
 - a. The rule 'Allow Fraud Prevention as a determination factor in eligibility.' is active and the individual has a non-compliance entry.
 - b. The individual has the non-compliance entry:
 - i. Non-compliance Type: IPV/Fraud
 - ii. Non-compliance Reason: Non-cooperation
 - c. The rule 'Fail person who is not cooperating with fraud prevention.' is not active.
 - d. The rule 'Fail applicants for non-cooperation with Fraud Prevention.' is active.
 - e. The program is intake.
 - B. All the conditions are met:
 - a. The rule 'Allow Fraud Prevention as a determination factor in eligibility.' is active and the individual has a non-compliance entry.
 - b. The individual has the non-compliance entry:
 - i. Non-compliance Type: IPV/Fraud

- ii. Non-compliance Reason: Non-cooperation
- c. The rule 'Fail person who is not cooperating with fraud prevention.' is not active.
- d. The rule 'Fail applicants for non-cooperation with Fraud Prevention.' is active.
- e. The program is ongoing.
- f. The individual is not receiving Aid-in-kind.

Category	Short Description
73	Non-Compliant

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.6.3 Correspondence

2.29.6.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.6.3.2 Description of Change

1. Reason Code: XAN029 – Non-Comply with fraud prevention

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Non Comply with fraud prevention'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Discontinuance	GA - Provided Fraudulent Information - 6 Month POI	004 0 (12/97)	610772
Sacramento	Discontinuance	Disc - Fraud Sanction - Civil or Criminal Court Order	CDS 478-0 (08/97)	608042

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2.29.6.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	<p>[Business Rule: {Fraud Prevention applies} CalSAWS must determine if the GA/GR individual is cooperating with fraud prevention.]</p>	<p>The rule 'Allow Fraud Prevention as a determination factor in eligibility' Will meet this requirement.</p>	<p>The following rule is stated in the business flow diagram and admin matrix</p>
	<p>[Business Rule: {Fail for non-cooperation with Fraud Prevention} CalSAWS must fail the non-complaint GA/GR individual for non-cooperation with fraud prevention.]</p>	<p>The rule 'Fail person who is not cooperating with fraud prevention 'Will meet this requirement.</p>	<p>The following rule is stated in the business flow diagram and admin matrix</p>
	<p>[Business Rule: {Fail applicants for non-cooperation with Fraud Prevention} CalSAWS must determine fail or pass the GA/GR individual receiving Aid Inkind on an intake case.]</p>	<p>The rule 'Fail applicants for non- non-cooperation with Fraud Prevention ' Will meet this requirement.</p>	<p>The following rule is stated in the business flow diagram and admin matrix</p>
	<p>[Business Rule: {Good Cause allowed for non-cooperation with Fraud Prevention} CalSAWS must allow good cause for an individual on a GA/GR case who does not comply with fraud prevention.]</p>	<p>The rule 'Allow good cause for not cooperating with fraud prevention' Will meet this requirement</p>	<p>The following rule is stated in the business flow diagram and admin matrix</p>

2.29.7 Striker Functionality

2.29.7.1 County Admin Matrix - Striker

2.29.7.1.1 Overview

A new County Admin Detail page for Striker will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Striker functionality to their county.

2.29.7.1.2 Description of Changes

- The Admin page matrix for Striker will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
- The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- The functionality is effective dated with begin and end date
- The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
County does not aid Strikers.	N	N	Y	N	Y	Y	N	N	Y	Y	Y	Y	Y	N	N	Y	Y	Y
Fail active striker without good cause.	Y	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Fail strikers without a good cause.	N	Y	N	N	N	N	N	N	N	N	N	N	N	Y	Y	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX113C001	Fail active striker without good cause.
EDX113C002	County does not aid Strikers.
EDX113C003	Fail strikers without a good cause.

* Please note the following rule will not be migrated over. For the corresponding reason.

CalWIN Rule	CalWIN Description	Reason
EDX113C004	Striker-Orange	Not Used

2.29.7.2 EDBC Changes

2.29.7.2.1 Overview

This section will provide the Eligibility Rules flow for Striker /Program Person Eligibility that can be filtered for each CalWIN County

2.29.7.2.2 Description of Change

Striker Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram** '[Viewing Visio Document in Internet Explorer](#)' for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
Striker Status	Striker	Existing	Striker Detail
Begin Date	Begin Date	Existing	Striker Detail
Good Cause	Good Cause	New	Eligibility Non-Compliance Detail

Striker Sanction:

To create a Striker, sanction a Non-Compliance entry will need to be created in the Eligibility Non-Compliance Detail page with the following type and reason:

- a. Non-Compliance Type: Volunteer Quit/Striker
- b. Non-Compliance Reason: Striker

Existing Program/Person Status:

The following existing program/person status reason will be leveraged by this rule flow when the following conditions are met.

1. The existing program/person status reason CT73 20 'Striker' will be set as a display status reason when all of the following conditions are met in either A, B or C are met.
 - A. All the conditions are met:
 - a. There is at least one entry in Striker Detail.

- b. The individual has a striker entry and its effective for the benefit month.
- c. The rule 'Fail active striker without good cause.' Is active.
- d. There is no good cause for the strike.
- B. All the conditions are met:
 - a. There is at least one entry in Striker Detail.
 - b. The individual entry is not effective for the benefit month or the rule 'Fail active striker without good cause.' is not active.
 - c. The rule 'County does not aid Strikers' is active.
- C. All the conditions are met:
 - a. There is at least one entry in Striker Detail.
 - b. The individual entry is not effective for the benefit month or the rule 'Fail active striker without good cause.' is not active.
 - c. The rule 'County does not aid Strikers' is not active.
 - d. There is no good cause for strike.
 - e. The rule 'Fail strikers without a good cause.' is not active
 - f. The program is intake.

Category	Short Description
73	Striker

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Striker No Good Cause' will be set as a display status reason when all the following conditions:
 - a. There is at least one entry in Striker Detail.
 - b. The individual entry is not effective for the benefit month or the rule 'Fail active striker without good cause.' is not active.
 - c. The rule 'County does not aid Strikers' is not active.
 - d. There is no good cause for strike.
 - e. The rule 'Fail strikers without a good cause.' is active.

Category	Short Description
73	Striker No Good Cause

2. The new program/person status reason CT73 'Sanction - Striker' will be set as a display status reason when all the following conditions:
 - a. There is at least one entry in Striker Detail.
 - b. The individual entry is not effective for the benefit month or the rule 'Fail active striker without good cause.' is not active.
 - c. The rule 'County does not aid Strikers' is not active.
 - d. There is no good cause for strike.
 - e. The rule 'Fail strikers without a good cause.' is not active
 - f. The program is not intake.

Category	Short Description
73	Sanction - Striker

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.7.3 Correspondence

2.29.7.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.7.3.2 Description of Change

1. Reason Code: XAN047 - Striker
 - a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Striker'.
 - b. Person Level Reason
 - c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Denial	GA-Denial-Variou Non-Financial Reason	CDS 112-1	11787

2.29.7.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule:{ County does not aid Strikers} CalSAWS must not aid Strikers for GA/GR.]	The rule 'County does not aid Strikers ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule:{ Striker without good cause} CalSAWS must allow good cause for an individual who is a striker who has applied for GA/GR.]	The rule 'Fail strikers without a good cause. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

2.29.8 Voluntary Quit Functionality

2.29.8.1 County Admin Matrix - Voluntary Quit

2.29.8.1.1 Overview

A new County Admin Detail page for Voluntary Quit will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Voluntary Quit functionality to their county.

2.29.8.1.2 Description of Changes

- The Admin page matrix for Voluntary Quit will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
- The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- The functionality is effective dated with begin and end date
- The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Determine if Volunteer Job Quit should be considered	Y	Y	N	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y

Allow good cause for applicant	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Sanction individual for volunteer quit trigger Notice of Action.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N
Sanction voluntary quit no good cause.	N	N	N	N	N	N	N	Y	N	N	Y	N	N	N	N	N	N	N	N
Sanctioned individual cured of volunteer quit.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Sanction individual for volunteer quit do not trigger Notice of Action	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Fail individual who re-applies within 12 months after ending sanction.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Sanction the individual if they are not cured of voluntary quit.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y
Sanction individual voluntary quit their job.	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Allow good cause for Volunteer Quit	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N
Voluntary Job Quit – Santa Cruz, Solano.	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX118C001	Determine if Volunteer Job Quit should be considered
EDX118C002	Allow good cause for applicant
EDX118C003	Sanction voluntary quit no good cause.
EDX118C005	Sanction individual for volunteer quit trigger Notice of Action.
EDX118C009	Sanctioned individual cured of volunteer quit.
EDX118C004	Voluntary Job Quit – Santa Cruz, Solano.
EDX118C010 & EDX118C012	Sanction individual for volunteer quit do not trigger Notice of Action.
EDX118C006	Fail individual who re-applies within 12 months after ending sanction.
EDX118C007	Sanction the individual if they are not cured of voluntary quit.

EDX118C008	Sanction individual voluntary quit their job.
EDX118C011	Allow good cause for Volunteer Quit.

The tables below show the combined rules and the combined indicators in the admin matrix format:

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Sanction individual for volunteer quit do not trigger Notice of Action	N	N	N	Y	N	N	N	N	N	N	N	N	Y	Y	N	N	N	N
CalWIN Rule																		
EDX118C010	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
EDX118C012	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Leverage Rule

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Earned income method 3 - Fresno Only	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Mandatory Program Requirements - Fail individual who previously was an Aid-In-Kind recipient	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Determine GR grant amount based on program, number of persons and BDA.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N

CalWIN Rule	CalSAWS Rule
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EDX309C003	Earned income method 3 - Fresno Only
EDX111C005	Mandatory Program Requirements - Fail individual who previously was an Aid-In-Kind recipient
EDX321C005	Determine GR grant amount based on program, number of persons and BDA.

* Please note the following rule will not be migrated over. For the corresponding reason.

CalWIN Rule	CalWIN Description	Reason
EDX118C013	Apply 30 day penalty from date of application	Not Used

2.29.8.2 EDBC Changes

2.29.8.2.1 Overview

This section will provide the Eligibility Rules flow for Voluntary Quit /Program Person Eligibility that can be filtered for each CalWIN County

2.29.8.2.2 Description of Change

Voluntary Quit Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram** '[Viewing Visio Document in Internet Explorer](#)' for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
Volunteer Quit	Type: Voluntary Quit/Striker Reason: Job Quit	Existing	Eligibility Non-Compliance Detail
Good Cause	Good Cause	Existing	Eligibility Non-Compliance Detail
Reapplied within 12 months of sanction	n/a	Calculated Value	n/a
Sanction cured by getting a new job at the same pay	n/a	Calculated Value	n/a
Another County's Penalty	n/a	Calculated Value	n/a

Existing Program/Person Status:

The following existing program/person status reason will be leveraged by this rule flow when the following conditions are met.

1. The existing program/person status reason 'CT73_J1 'Refused Job Offer/Volunteer Quit Job' will be set as a display status reason when all of the following conditions are met.
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit' is not active.
 - f. The rule 'Allow good cause for applicant' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The rule 'sanction voluntary quit no good cause' is not active.
 - i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action' is active.
 - j. The rule 'Sanction individual for volunteer quit trigger Notice of Action' is active.

Category	Short Description
73	Refused Job Offer/Volunteer Quit Job

2. The existing program/person status reason 'CT73_GGY 'Refused Job Offer/Volunteer Quit Job No Show' will be set as a display status reason when all of the following conditions in either A or B are met.
 - A. All the conditions are met:
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:

- i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - f. The rule 'Allow good cause for applicant.' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The rule 'sanction voluntary quit no good cause.' is not active.
 - i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action.' is not active.
 - j. The rule 'Fail individual who re-applies within 12 months after ending sanction.' is not active.
 - k. The rule 'Earned income method 3 - Fresno Only.' is not active.
 - l. The rule 'Sanction the individual if they are not cured of voluntary quit.' Is not active.
 - m. The rule 'Sanction individual voluntary quit their job.' is active.
- B. All the conditions are met:
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered.' is active.
 - d. The rule 'Allow good cause for Volunteer Quit.' is active.
 - e. There is a good cause for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit

Category	Short Description
73	Refused Job Offer/Volunteer Quit Job No Show

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'No Good Cause - Volunteer Quit' will be set as a display status reason when all the following conditions in either A, B, or C are met:
 - A. All the conditions are met:
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered.' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - f. The rule 'Allow good cause for applicant.' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The rule 'sanction voluntary quit no good cause. 'is not active.
 - i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action.' is not active.
 - j. The rule 'Fail individual who re-applies within 12 months after ending sanction.' is not active.
 - k. The rule 'Earned income method 3 - Fresno Only.' is not active.
 - l. The rule 'Sanction individual voluntary quit their job.' Is not active.
 - m. The rule 'Sanction the individual if they are not cured of voluntary quit.' is not active.
 - n. The rule 'Sanction individual voluntary quit their job.' Is not active.

- o. The rule 'Sanctioned individual cured of volunteer quit.' is not active.
- p. The program is intake.
- B. All the conditions are met:
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered.' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - f. The rule 'Allow good cause for applicant.' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The rule 'sanction voluntary quit no good cause.' is not active.
 - i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action' is not active.
 - j. The rule 'Fail individual who re-applies within 12 months after ending sanction.' is active.
 - k. The program is intake.
 - l. The individual has the status reason 'Within sanction time limit' in any authorized and regular EDBC between (application date minus county defined time limit) to application date.
- C. All the conditions are met:
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.

- c. The rule 'Determine if Volunteer Job Quit should be considered' is active.
- d. The individual applied for GR.
- e. The rule 'Allow good cause for Volunteer Quit.' is not active.
- f. The rule 'Allow good cause for applicant.' is not active.
- g. There is no good cause for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
- h. The rule 'sanction voluntary quit no good cause.' is active.

Category	Short Description
73	No Good Cause - Volunteer Quit

2. The new program/person status reason 'CT73 'Sanction > 30 w/ Aid Inkind' will be set as a display status reason when all of the following conditions are met.
- a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered.' is not active.
 - d. The rule 'Mandatory Program Requirements - Fail individual who previously was an Aid-In-Kind recipient.' is active.
 - e. Any individual on the case has a sanction for volunteer quit and the program is ongoing, and the individual sanction is more than 30 days and they are receiving Aid-in-kind.

Category	Short Description
73	Sanction > 30 w/ Aid Inkind

3. The new program/person status reason 'CT73 'Sanction <30 w/ Aid Inkind' will be set as a display status reason when all of the following conditions are met.
- a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from

- the program application date is greater or equal to the non-compliance begin date.
- ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
- c. The rule 'Determine if Volunteer Job Quit should be considered.' is not active.
- d. The rule 'Mandatory Program Requirements - Fail individual who previously was an Aid-In-Kind recipient.' is active.
- e. Any individual on the case does not have a sanction for volunteer quit or the program is not active, or the individual sanction is less than 30 days, and they are receiving Aid-in-kind.

Category	Short Description
73	Sanction <30 w/ Aid Inkind

4. The new program/person status reason CT73 'Volunteer Quit (Self-Imposed)' will be set as a display status reason when all the following conditions:
- a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - f. The rule 'Allow good cause for applicant.' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The 'sanction voluntary quit no good cause.' is not active.
 - i. The rule 'Voluntary Job Quit – Santa Cruz, Solano.' is active.
 - j. The rule 'Sanction individual for volunteer quit trigger Notice of Action' is not active.
 - k. The program is intake.

Category	Short Description
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73	Volunteer Quit (Self-Imposed)
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5. The new program/person status reason CT73 'Volunteer Quit (Not Cured)' will be set as a display status reason when all the following conditions:
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered.' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - f. The rule 'Allow good cause for applicant.' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The rule 'sanction voluntary quit no good cause.' is not active.
 - i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action.' is not active.
 - j. The rule 'Fail individual who re-applies within 12 months after ending sanction.' is not active.
 - k. The rule 'Earned income method 3 - Fresno Only.' is not active.
 - l. The rule 'Sanction individual voluntary quit their job.' is not active.
 - m. The rule 'Sanction the individual if they are not cured of voluntary quit.' is active.

Category	Short Description
73	Volunteer Quit (Not Cured)

6. The new program/person status reason CT73 'Volunteer Quit (County Decision)' will be set as a display status reason when all the following conditions:
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from

- the program application date is greater or equal to the non-compliance begin date.
- ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
- c. The rule 'Determine if Volunteer Job Quit should be considered' is active.
- d. The individual applied for GR.
- e. The rule 'Allow good cause for Volunteer Quit.' is not active.
- f. The rule 'Allow good cause for applicant.' is not active.
- g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
- h. The rule 'sanction voluntary quit no good cause.' is not active.
- i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action.' is not active.
- j. The rule 'Fail individual who re-applies within 12 months after ending sanction.' is not active.
- k. The rule 'Earned income method 3 - Fresno Only' is not active.
- l. The rule 'Sanction individual voluntary quit their job.' Is not active.
- m. The rule 'Sanction the individual if they are not cured of voluntary quit.' is not active.
- n. The rule 'Sanctioned individual cured of volunteer quit.' is active.
- o. The program is intake.

Category	Short Description
73	Volunteer Quit (County Decision)

- 7. The new program/person status reason CT73 'Volunteer Quit Job No Show(Recipient)' will be set as a display status reason when all the following conditions:
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered.' is active.

- d. The individual applied for GR.
- e. The rule 'Allow good cause for Volunteer Quit.' is not active.
- f. The rule 'Allow good cause for applicant.' is not active.
- g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
- h. The rule 'sanction voluntary quit no good cause.' is not active.
- i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action.' is not active.
- j. The rule 'Fail individual who re-applies within 12 months after ending sanction.' is active.
- k. The program is ongoing.

Category	Short Description
73	Volunteer Quit Job No Show(Recipient)

- 8. The new program/person status reason CT73 'Quit Job' will be set as a display status reason when all the following conditions in either A, B, C or D are met:
 - A. All the conditions are met:
 - a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered.' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - f. The rule 'Allow good cause for applicant.' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The rule 'sanction voluntary quit no good cause' is not active.
 - i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action' is not active.

- j. The rule 'Fail individual who re-applies within 12 months after ending sanction.' is not active.
 - k. The rule 'Earned income method 3 - Fresno Only.' is not active.
 - l. The rule 'Sanction individual voluntary quit their job.' Is not active.
 - m. The rule 'Sanction the individual if they are not cured of voluntary quit.' is not active.
 - n. The rule 'Sanctioned individual cured of volunteer quit.' is active.
 - o. The program is ongoing.
- B. All the conditions are met:
- a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - f. The rule 'Allow good cause for applicant.' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The rule 'sanction voluntary quit no good cause.' is not active.
 - i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action' is not active.
 - j. The rule 'Fail individual who re-applies within 12 months after ending sanction.' is not active.
 - k. The rule 'Earned income method 3 - Fresno Only' is not active.
 - l. The rule 'Sanction the individual if they are not cured of voluntary quit.' is not active.
 - m. The rule 'Sanction individual voluntary quit their job.' Is not active.
 - n. The rule 'Sanctioned individual cured of volunteer quit.' is not active.
 - o. The program is ongoing.
- C. All the conditions are met:

- a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered.' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - f. The rule 'Allow good cause for applicant.' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The rule 'sanction voluntary quit no good cause.' is not active.
 - i. The rule 'Voluntary Job Quit – Santa Cruz, Solano.' is active.
 - j. The rule 'Sanction individual for volunteer quit trigger Notice of Action.' is not active.
 - k. The program is ongoing.
- D. All the conditions are met:
- a. The individual has a non-compliance record:
 - b. Non-compliance Type: Volunteer Quit/Strike
 - c. Non-compliance Reason: Job Quit
 - d. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - e. The rule 'Determine if Volunteer Job Quit should be considered.' is active.
 - f. The individual applied for GR.
 - g. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - h. The rule 'Allow good cause for applicant.' is active.
 - i. the program is intake.
 - j. There is no good cause reason selected or the good cause was not valid for the that county.

Category	Short Description
73	Quit Job

8. The new program/person status reason CT73 'Within Sanction time Limit' will be set as a display status reason when all the following conditions are met:
- a. The individual has a non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Strike
 - ii. Non-compliance Reason: Job Quit
 - b. Either of the conditions is true:
 - i. The program is intake and the county defined time limit for voluntary quit effective for the benefit month subtracted from the program application date is greater or equal to the non-compliance begin date.
 - ii. The individual non-compliance record begin date is before program application date and application date is in the benefit month.
 - c. The rule 'Determine if Volunteer Job Quit should be considered.' is active.
 - d. The individual applied for GR.
 - e. The rule 'Allow good cause for Volunteer Quit.' is not active.
 - f. The rule 'Allow good cause for applicant.' is not active.
 - g. There is no good cause reason selected for the non-compliance record:
 - i. Non-compliance Type: Volunteer Quit/Striker
 - ii. Non-compliance Reason: Job Quit
 - h. The rule 'sanction voluntary quit no good cause.' is not active.
 - i. The rule 'Sanction individual for volunteer quit do not trigger Notice of Action.' is not active.
 - j. The rule 'Fail individual who re-applies within 12 months after ending sanction.' is active.
 - k. The program is intake.
 - l. The individual does have the reason code XAN509 in any authorized and regular EDBC between (application date minus county defined time limit) to application date.

Category	Short Description
73	Within sanction Time Limit

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.8.3 Correspondence

2.29.8.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.8.3.2 Description of Change

1. Reason Code: XAN370 - Sanction > 30 w/ Aid inkind

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Sanction > 30 w/ Aid inkind'.

b. Person Level Status

c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Discontinuance	GA-Disc &Mult Months Sanction-Failure to Coop-Various reasons	CDS 233-0 (04/97)	611003

2. Reason Code: XAN369 - Sanction < 30 w/ Aid Inkind

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Sanction < 30 w/ Aid inkind'.
- Or
- ii. This notice generates for the applicable counties when there is a change in benefit amount and the program was 'Active' in the previous saved EDBC and is still 'Active' on the current EDBC with the reason 'Sanction < 30 w/ Aid inkind'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Change	GA MULTI-MONTH SANCTION - FAMILY	CDS 232-0 (01/01)	610979

Sacramento	Discontinuance	GA-Disc &Mult Months Sanction-Failure to Coop-Various reasons	CDS 233-0 (04/97)	611003
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3. Reason Code: XAN156 - Refused Job Offer/Volunteer Quit Job no show

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Refused Job Offer/Volunteer Quit Job no show'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Yolo	Denial	General Assistance Denial - Job Quit Sanction	112-3	12214

4. Reason Code: XAN085 - No good cause - Volunteer quit

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'No good cause - Volunteer quit'.
- or
- ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'No good cause - Volunteer quit'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Denial	GA Denial - Failure to Continue Employment - 60 Day Penalty	137 0	11519
Fresno	Denial	General Relief Denial - Employable Requirements	138-A	11550
Santa Barbara	Discontinuance	GR - Disc - Job Responsibility	061-0 (08/97)	12375
Santa Barbara	Denial	GR - Deny - Job Responsibility	161-0	12701
San Francisco	Denial	CAAP Denial - 45-day Job Quit	CP 16	12604
Sonoma	Denial	GA Denial - Job Quit	124-1 (02/90)	12539

5. Reason Code: XAN076 - Refused Job offer/Volunteer quit job

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Refused job offer/Volunteer quit job'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Solano	Denial	GA - Denial - Job Responsibility	161	12112

6. Reason Code: XAN152 - Volunteer quit (self-imposed)

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Volunteer quit (self-imposed)'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Santa Cruz	Denial	Denial – GA Denial for Termination of Employment in Past 30 Days	126-B	610714
Yolo	Denial	General Assistance Denial - Job Quit Sanction	112-3	12214

7. Reason Code: XAN508 - Volunteer Quit Job no show(Recipient)

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Volunteer Quit Job no show(Recipient)'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Fresno	Discontinuance	General Relief Discontinuance - Employable Requirements	017-C	12624

8. Reason Code: XAN157 - Volunteer Quit (Not Cured)

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Volunteer Quit (Not Cured)'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Placer	Denial	Quit Job without Good Cause - 180 day penalty	137-0	608582

9. Reason Code: XAN023 - Volunteer Quit (County decision)

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Volunteer Quit (County decision)'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Denial	DENIAL/VOLUNTARY TERM OF EMPLOYMENT 90DAY DISQUALIF.	CDS 141-0 (12/97)	11746

2.29.8.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Vol.JobQuit applies} CalSAWS must apply Voluntary Job Quit verification for GA/GR.]	The rule 'Determine if Volunteer Job Quit should be considered ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Allow good cause for applicant} CalSAWS must allow good cause for voluntary quit applicant for GA/GR.]	The rule 'Allow good cause for applicant ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Apply County-defined penalty period from date of quit without good cause} CalSAWS must apply County-defined penalty period from date of quit without good cause for GA/GR.]	The rule 'Sanction individual for volunteer quit trigger Notice of Action ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {VolJobQuit-Santacruz, Solano} CalSAWS must determine Voluntary Job Quit applicability for GA/GR.]	The rule 'Sanction individual for volunteer quit do not trigger Notice of Action ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Compare county penalty with other county's penalty} CalSAWS must compare county penalty with other county's penalty for GA/GR.]	The rule 'Sanction individual for volunteer quit trigger Notice of Action ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Apply penalty for applicant at end of 30 day wait period} CalSAWS must apply penalty for applicant at end of 30 day voluntary job quit wait period for GA/GR.]	The rule 'Fail individual who re-applies within 12 months after ending sanction. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Sanction if not cured by getting a job at the same pay} CalSAWS must apply sanction if not cured by getting a job at the same pay for GA/GR.]	The rule 'Sanction the individual if they are not cured of voluntary quit. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Apply sanction for 6 months from date of quit} CalSAWS must apply sanction for 6 months from date of voluntary job quit for GA/GR.]	The rule 'Sanction the individual if they are not cured of voluntary quit. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Apply sanction from first day of the month that timely notice can be given following the month of job quit} CalSAWS must apply sanction from first day of the month that timely notice can be given following the month of job quit for GA/GR.]	The rule 'Sanctioned individual cured of volunteer quit. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Vol.JobQuit-Orange(Applicant)} CalSAWS must apply program check for voluntary job quit applicant for GA/GR.]	The rule 'Sanction individual for volunteer quit do not trigger Notice of Action ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Apply penalty, if no good cause-SantaClara} CalSAWS must apply penalty if no good cause exists for GA/GR.]	The rule 'Allow good cause for Volunteer Quit ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Vol.JobQuit-Orange(Recipient)} CalSAWS must apply program check for voluntary job quit recipient for GA/GR.]	The rule 'Sanction individual for volunteer quit do not trigger Notice of Action. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

2.29.9 Drug and Alcohol Functionality

2.29.9.1 County Admin Matrix - Drug and Alcohol

2.29.9.1.1 Overview

A new County Admin Detail page for Drug and Alcohol will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Drug and Alcohol functionality to their county.

2.29.9.1.2 Description of Changes

- a. The Admin page matrix for Drug and Alcohol will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
- b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- c. The functionality is effective dated with begin and end date
- d. The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Fail person if not cooperating with drug and alcohol treatment program.	N	N	Y	N	N	N	N	N	N	N	N	Y	N	N	Y	N	N	Y
Sanction for not cooperating with drug and alcohol treatment program.	N	Y	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Don't Sanction individual receiving aid GA SSIP.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Sanction person with at least one non-compliance entry.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Fail the person if they did not attend and pass the orientation.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Sanction the person with two or more non-compliance entries.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Determine Sanction based on Drug & Alcohol.	Y	Y	Y	N	N	Y	Y	N	Y	N	Y	Y	N	Y	Y	Y	N	Y

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX112C001	Fail person if not cooperating with drug and alcohol treatment program.
EDX112C002	Sanction for not cooperating with drug and alcohol treatment program.
EDX112C003	Don't Sanction individual receiving aid GA SSIP.

EDX112C004	Sanction person with at least one non-compliance entry.
EDX112C005	Fail the person if they did not attend and pass the orientation.
EDX112C006	Sanction the person with two or more non-compliance entries.
EDX112C007	Determine Sanction based on Drug & Alcohol.

Leverage Rule

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Exempt burial, funeral reserves, or trusts \$500 or less.	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N

CalWIN Rule	CalSAWS Rule
EDX200C025	Exempt burial, funeral reserves, or trusts \$500 or less.

2.29.9.2 EDBC Changes

2.29.9.2.1 Overview

This section will provide the Eligibility Rules flow for Drug and Alcohol /Program Person Eligibility that can be filtered for each CalWIN County

2.29.9.2.2 Description of Change

Drug and Alcohol Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram** '[Viewing Visio Document in Internet Explorer](#)' for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
Choice of CAAP Program	Sub-Program Type	Existing	General Assistance/General Relief Detail
Good Cause	Good Cause	New	Eligibility Non-Compliance Detail
Admission Date	Arrival Date	Existing	Living Arrangement Detail
Not complying with Compliance type: Failure to Attend	Non-compliance Type: Failure to Attend Non-compliance Reason: Orientation	New	Eligibility Non-compliance Detail
Not complying with Compliance type: Passed Orientation	Non-compliance Type: Procedural Requirement Non-compliance Reason: Failure to Complete Orientation	New	Eligibility Non-Compliance Detail
Not complying with Compliance type: Dug Treatment as county resident	Non-compliance Type: Failure to Attend Non-compliance Reason: Drug Treatment	New	Eligibility Non-Compliance Detail
Not complying with Compliance type: Drug Treatment	Non-compliance Type: Failure to Attend Non-Compliance Reason: Drug Treatment Outside County Residence	New	Eligibility Non-Compliance Detail

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Failed to Comply: Drug/Alcohol' will be set as a display status reason when all the following conditions I either are met in A, B, C or D:
 - A. When all the conditions are met:
 - a. The rule 'Determine Sanction based on Drug & Alcohol.' is active.

- b. The rule 'Exempt burial, funeral reserves, or trusts \$500 or less' is not active.
 - c. the individual has the individual does has the non-compliance entry:
 - i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Drug Treatment Outside County of Residence
 - d. The rule 'Fail person if not cooperating with drug and alcohol treatment program.' is not active.
 - e. The rule 'Sanction for not cooperating with drug and alcohol treatment program.' is not active.
 - f. The rule 'Don't Sanction individual receiving aid GA SSIP.' is not active.
 - g. The rule 'Sanction person with at least one non-compliance entry.' is not active.
 - h. The rule 'Fail the person if they did not attend and pass the orientation.' is not active.
 - i. There is no good cause reason selected or the good cause is not accept by county as a good cause for the non-compliance entry.
- B. When all the conditions are met:
- a. The rule 'Determine Sanction based on Drug & Alcohol.' is active.
 - b. The rule 'Exempt burial, funeral reserves, or trusts \$500 or less' is not active.
 - c. the individual has the individual does has the non-compliance entry:
 - i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Drug Treatment Outside County of Residence
 - d. The rule 'Fail person if not cooperating with drug and alcohol treatment program.' is not active.
 - e. The rule 'Sanction for not cooperating with drug and alcohol treatment program.' is not active.
 - f. The rule 'Don't Sanction individual receiving aid GA SSIP.' is not active.
 - g. The rule 'Sanction person with at least one non-compliance entry.' is active.
- C. When all the conditions are met:
- a. The rule 'Determine Sanction based on Drug & Alcohol.' is active.
 - b. The rule 'Exempt burial, funeral reserves, or trusts \$500 or less' is not active.
 - c. the individual has the individual does has the non-compliance entry:
 - i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Drug Treatment Outside County of Residence

- d. The rule 'Fail person if not cooperating with drug and alcohol treatment program.' is not active.
 - e. The rule 'Sanction for not cooperating with drug and alcohol treatment program.' is active.
- D. When all the conditions are met:
- a. The rule 'Determine Sanction based on Drug & Alcohol.' is active.
 - b. The rule 'Exempt burial, funeral reserves, or trusts \$500 or less' is not active.
 - c. the individual has the individual does has the non-compliance entry:
 - i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Drug Treatment Outside County of Residence
 - d. The rule 'Fail person if not cooperating with drug and alcohol treatment program.' is active.

Category	Short Description
73	Failed to Comply: Drug/Alcohol

2. The new program/person status reason CT73 'Failed to Comply: Drug/ Alchl. ' will be set as a display status reason when all the following conditions are met in either A or B:
- A. When all the conditions are met:
- a. The rule 'Determine Sanction based on Drug & Alcohol.' is active.
 - b. The rule 'Exempt burial, funeral reserves, or trusts \$500 or less' is not active.
 - c. the individual has the individual does has the non-compliance entry:
 - i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Drug Treatment Outside County of Residence
 - d. The rule 'Fail person if not cooperating with drug and alcohol treatment program.' is not active.
 - e. The rule 'Sanction for not cooperating with drug and alcohol treatment program.' is not active.
 - f. The rule 'Don't Sanction individual receiving aid GA SSIP.' is not active.
 - g. The rule 'Sanction person with at least one non-compliance entry.' is not active.
 - h. The rule 'Fail the person if they did not attend and pass the orientation.' is active.
 - i. The individual has not attended orientation. This is determined by the individual having the non-compliance entry:

- i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Orientation
- B. When all the conditions are met:
 - a. The rule 'Determine Sanction based on Drug & Alcohol.' is active.
 - b. The rule 'Exempt burial, funeral reserves, or trusts \$500 or less' is not active.
 - c. the individual has the individual does has the non-compliance entry:
 - i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Drug Treatment Outside County of Residence
 - d. The rule 'Fail person if not cooperating with drug and alcohol treatment program.' is not active.
 - e. The rule 'Sanction for not cooperating with drug and alcohol treatment program.' is not active.
 - f. The rule 'Don't Sanction individual receiving aid GA SSIP.' is active.
 - g. The individual is not currently aided in GR with aid code as '9H' or aid end date is before the data selection date.
 - h. The county is SFO and GA/GR sub program is 'Personal Assisted Employment Services'.
 - i. The individual is currently aided in GA/GR.

Category	Short Description
73	Failed to Comply: Drug/Alchl.

- 3. The new program/person status reason CT73 'Failed Orientation' will be set as a display status reason when all the following conditions:
 - a. The rule 'Determine Sanction based on Drug & Alcohol.' is active.
 - b. The rule 'Exempt burial, funeral reserves, or trusts \$500 or less' is not active.
 - c. the individual has the individual does has the non-compliance entry:
 - i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Drug Treatment Outside County of Residence
 - d. The rule 'Fail person if not cooperating with drug and alcohol treatment program.' is not active.
 - e. The rule 'Sanction for not cooperating with drug and alcohol treatment program.' is not active.
 - f. The rule 'Don't Sanction individual receiving aid GA SSIP.' is not active.
 - g. The rule 'Sanction person with at least one non-compliance entry.' is not active.

- h. The rule 'Fail the person if they did not attend and pass the orientation.' is active.
- i. The individual has attended orientation. This is determined by the individual not having the non-compliance entry:
 - i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Orientation.
- j. The individual did not complete the orientation. This is determined by the individual having the non-compliance entry:
 - i. Non-compliance Type: Procedural Requirement
 - ii. Non-compliance Reason: Failure to Complete Orientation

Category	Short Description
73	Failed Orientation

- 4. The new program/person status reason CT73 'Drug Treatment' will be set as a display status reason when all the following conditions:
 - a. The rule 'Determine Sanction based on Drug & Alcohol.' is active.
 - b. If any of the following is not true:
 - i. The rule 'Exempt burial, funeral reserves, or trusts \$500 or less' is active.
 - ii. The individual has the non-compliance entry:
 - 1. Non-compliance Type: Failure to Attend
 - 2. Non-compliance Reason: Drug Treatment Outside County of Residence
 - c. The individual has the individual does has the non-compliance entry:
 - i. Non-compliance Type: Failure to Attend
 - ii. Non-compliance Reason: Drug Treatment

Category	Short Description
73	Drug Treatment

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.9.3 Correspondence

2.29.9.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.9.3.2 Description of Change

1. Reason Code: XAN022 – Failed to Comply: Drug/alcohol

a. Trigger Condition

i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Failed to comply: Drug/alcohol'.

or

ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Failed to comply: Drug/alcohol'.

b. Program Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Yolo	Discontinuance	GA DISC.-Noncooperation with D&A Treatment/Assessment	071-3	12247
Yolo	Denial	General Assistance Denial - Noncooperation with D&A Treatment/Assessment	130-3	12240

2. Reason Code: XAN162 – Failed to Comply: Drug/Alchl

a. Trigger Condition

i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Failed to comply: Drug/Alchl'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
San Diego	Discontinuance	GR Disc and Sanction - Non-cooperation GRADS Program Requirements	015-0	12726

3. Reason Code: XAN163 - Failed Orientation

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Failed orientation'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Discontinuance	GA Disc - Failure to Accept Employment - 2, 4, 6 Month Sanction	031 1	12270
Santa Barbara	Discontinuance	GR - Disc - Job Responsibility	061-0 (08/97)	12375

2.29.9.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Fail individual if failed to cooperate with drug and alcohol treatment program} CalSAWS must fail individual if failed to cooperate with drug and alcohol treatment program for GA/GR.]	The rule 'Fail person if not cooperating with drug and alcohol treatment program.' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Sanction if failed to cooperate with drug and alcohol treatment program} CalSAWS must apply sanction individual if failed to cooperate with drug and alcohol treatment program for GA/GR.]	The rule 'Sanction for not cooperating with drug and alcohol treatment program.' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Drug & Alcohol-San Francisco} CalSAWS must apply drug and alcohol treatment program – San Francisco for GA/GR.]	The rule 'Don't Sanction individual receiving aid GA SSIP.' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Sanction if >1 offense or 1st offense not cured} CalSAWS must apply sanction if greater than 1 offense or 1st offense not cured for GA/GR.]	The rule 'Sanction person with at least one non-compliance entry. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Fail, if individual has not attended orientation} CalSAWS must fail individual if individual has not attended orientation for GA/GR.]	The rule 'Fail the person if they did not attend and pass the orientation. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Sanction if more than 2 occurrences of negligence in 24 months} CalSAWS must apply sanction if more than 2 occurrences of negligence in 24 months for GA/GR.]	The rule 'Sanction the person with two or more non-compliance entries. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Drug & Alcohol applies} CalSAWS must apply drug and alcohol treatment program for GA/GR.]	The rule 'Determine Sanction based on Drug & Alcohol. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

2.29.10 Employment Status Functionality

2.29.10.1 County Admin Matrix – Employment Status

2.29.10.1.1 Overview

A new County Admin Detail page for Employment will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Employment functionality to their county.

2.29.10.1.2 Description of Changes

- a. The Admin page matrix for Employment will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
- b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- c. The functionality is effective dated with begin and end date
- d. The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Determine if Employee status can fail individual.	N	N	N	Y	N	Y	Y	N	Y	N	N	Y	Y	N	N	N	N	N
Fail person with working hours > county defined hours above minimum wage.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Fail applicant if self-employed.	N	N	N	N	N	Y	Y	N	Y	N	N	Y	N	N	N	N	N	N
Fail applicant if employed.	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N
Fail applicant with working hours > county defined hours.	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N
Fail person with working hours > county defined hours.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX115C001	Determine if Employee status can fail individual.
EDX115C002	Fail person with working hours > county defined hours above minimum wage.
EDX115C003	Fail applicant if self-employed.
EDX115C004	Fail applicant if employed.
EDX115C005	Fail applicant with working hours > county defined hours.
EDX115C006	Fail person with working hours > county defined hours.

2.29.10.2 EDBC Changes

2.29.10.2.1 Overview

This section will provide the Eligibility Rules flow for Employment /Program Person Eligibility that can be filtered for each CalWIN County

2.29.10.2.2 Description of Change

Employment Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram** '[Viewing Visio Document in Internet Explorer](#)' for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
Currently Employed	N/A	Calculated	Employment Detail
Income Amount	Amount	Existing	Income Amount Detail
Number of Working Hours	Total Monthly hours	Existing	Employment Hours Detail
Self-Employment	Category: Unsubsidized Type: Self-employment	Existing	Employment Detail
Monthly Amount Earned	Hourly wage * Total Hours (If Total hours not exist then Hours/Week *4.33)	Existing	Employment Detail

Verifications

Verifications will be applied before the non-financial rules.

1. Update the existing non-mandatory verification for employment detail that will set a new status reason of CT73 'FTP Employment' for GA/GR as per current CalSAWS verification framework. In addition, check the following conditions:

- a. The Rule 'Determine if Employee status can fail individual.' is active.
- b. The individual is currently employed.
- c. The Rule 'Fail person with working hours > county defined hours above minimum wage.' is active.
- d. The individual is currently intake.

Please Note:

1. This status reason will not be displayed on the EDBC summary page, it will be used by correspondence to trigger Form E10020.

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Employed More Than County Hours' will be set as a display status reason when all the following conditions:
 - a. The rule 'Determine if Employee status can fail individual.' is active.
 - b. The individual is currently employed this is indicated by having an employment record effective for the benefit month.
 - c. The rule 'Fail person with working hours > county defined hours above minimum wage.' is active.
 - d. The program is intake.
 - e. The individual's total number of working hours in the benefit month is greater than the county defined time limit for number of working hours in a month.
 - f. The individual's total income amount is greater than county defined minimum wage amount.

Category	Short Description
73	Employed More Than County Hours

2. The new program/person status reason CT73 'Employed' will be set as a display status reason when all the following conditions:
 - a. The rule 'Determine if Employee status can fail individual.' is active.
 - b. The individual is currently employed this is indicated by having an employment record effective for the benefit month.
 - c. The rule 'Fail person with working hours > county defined hours above minimum wage.' is not active.
 - d. The rule 'Fail applicant if employed.' is active.

Category	Short Description
73	Employed

3. The new program/person status reason CT73 'Over County Working Hours' will be set as a display status reason when all the following conditions in A or B are met:
 - A. When all the conditions are met:
 - a. The rule 'Determine if Employee status can fail individual.' is active.
 - b. The individual is currently employed, and the employment record type is not Self-employment from employment detail page.
 - c. The rule 'Fail person with working hours > county defined hours.' is active.

- d The individual's total number of working hours in the benefit month and check if it is greater than the county defined time limit for number of working hours in a month.
- B. When all the conditions are met:
 - a The rule 'Determine if Employee status can fail individual.' is active.
 - b The individual is currently employed, and the employment record type is not Self-employment from employment detail page.
 - c The rule 'Fail person with working hours > county defined hours above minimum wage.' is not active.
 - d The rule 'Fail applicant if employed.' is not active.
 - e The rule 'Fail applicant with working hours > county defined hours.' is active.
 - f The individual's total number of working hours in the benefit month (computed input) and check if it is greater than the county defined time limit for number of working hours in a month.

Category	Short Description
73	Over County Working Hours

- 4. The new program/person status reason CT73 'Self Employed' will be set as a display status reason when all the following conditions:
 - a. The rule 'Determine if Employee status can fail individual.' is active.
 - b. The individual is currently employed.
 - c. The rule 'Fail applicant with working hours > county defined hours.' is active.
 - d. The individual employment record type is 'Self-Employment' from employment detail page.
 - e. The rule 'Fail applicant if self-employed.' is active.

Category	Short Description
73	Self Employed

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.10.3 Correspondence

2.29.10.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will

generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.10.3.2 Description of Change

1. Reason Code: E10020 – FTP Employment

- a. Trigger Condition
- b. Person
- c. County-specific information:

County	Action	Document Description	Number	Template
Orange	N/A	Employee's Earnings Record	F0912-26-309 (09/15)	610121

2. Reason Code: XAN060 – Employed more than County hours

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Employed more than County hours'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Orange	Denial	GR Denial - Employed Full Time	134 A	11608

3) Reason Code: XAN082 – Over county working hours

- a) Trigger Condition
 - i) This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'over county working hours'.
- b) Program Level Reason
- c) County-specific information:

County	Action	Document Description	Number	Template
Fresno	Denial	General Relief Denial - Income Exceeds Needs	117	12616
Sacramento	Denial	GA-Denial-Various Non-Financial Reason	CDS 112-1	11787

2.29.10.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {EmpStatus applies } CalSAWS must determine whether to fail an individual applying for GA/GR based on employment status]	The rule 'Determine if Employee status can fail individual. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Working > 64 hours a month at minimum wage } CalSAWS must determine whether to fail an individual applying for GA/GR who is working more than county defined working hours and earning more than minimum wage]	The rule 'Fail person with working hours > county defined hours above minimum wage. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: { Fail if self employed } CalSAWS must determine whether to fail an individual applying for GA/GR who is self employed]	The rule 'Fail applicant if self-employed. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Fail if employed } CalSAWS must determine whether to fail an individual applying for GA/GR who is employed]	The rule 'Fail applicant if employed. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: { Working > 100 hours a month } CalSAWS must determine whether to fail an individual applying for GA/GR who is working more than county defined working hours]	The rule 'Fail applicant with working hours > county defined hours. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: { Working more than county defined number of hours } CalSAWS must determine whether to fail an individual applying for GA/GR who is not self employed]	The rule 'Fail person with working hours > county defined hours. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

2.29.11 Job Terminated Functionality

2.29.11.1 County Admin Matrix - Job Terminated

2.29.11.1.1 Overview

A new County Admin Detail page for Job Terminated will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Job Terminated functionality to their county.

2.29.11.1.2 Description of Changes

- The Admin page matrix for Job Terminated will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
- The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
- The functionality is effective dated with begin and end date
- The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Determine sanction for individual with job termination.	Y	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	N	Y	Y	Y	N	N
Determine sanction for job termination based on good cause.	N	N	Y	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N

Do not allow good cause for job termination for recipients.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Sanction self-imposed job termination reason.	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N
Apply Sanction to recipient with no good cause for job termination.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Apply Sanction to individual with no good cause for job termination.	N	N	N	N	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Determine sanction based on Job Termination Reason.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Sanction recipient who refused job or training.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Do not allow good cause for job refusal.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y
Penalize individual for job refusal. (Most Counties)	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	Y	Y	Y	N	N	
Penalize individual for job refusal or training without good cause. (San Mateo, Santa Cruz)	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	N	N	N	N	N
Do not penalize applicants for refusing job offer.	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N
Do not allow good cause for any job termination reasons.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y
Sanction applicants for refusing job or training.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Do not penalize refused job offers without good cause.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Sanction applicant for refusing job or training trigger Notice of Action.	N	N	N	Y	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Sanction recipient for refusing job offer or training.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Do not penalize Good cause for job refusal.	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N
Sanction individual for job termination without good cause.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Sanction individual for job termination without good cause. (San Diego)	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Sanction recipient who refused job offer or training trigger Notice of Action.	N	N	N	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX109C001	Determine sanction for individual with job termination.
EDX109C002	Determine sanction for job termination based on good cause.
EDX109C003	Do not allow good cause for job termination for recipients.
EDX109C004	Sanction self-imposed job termination reason.
EDX109C005	Apply Sanction to recipient with no good cause for job termination.
EDX109C006	Apply Sanction to individual with no good cause for job termination.
EDX109C007	Determine sanction based on Job Termination Reason.
EDX109C008	Sanction recipient who refused job or training.
EDX109C009	Do not allow good cause for job refusal.
EDX109C010	Penalize individual for job refusal. (Most Counties)
EDX109C012	Penalize individual for job refusal or training without good cause. (San Mateo, Santa Cruz)
EDX109C013	Do not penalize applicants for refusing job offer.
EDX109C014	Do not allow good cause for any job termination reasons.
EDX109C015	Sanction applicants for refusing job or training.
EDX109C016	Do not penalize refused job offers without good cause.
EDX109C017 & EDX109C021	Sanction applicant for refusing job or training trigger Notice of Action.
EDX109C018	Sanction recipient for refusing job offer or training.
EDX109C020	Do not penalize Good cause for job refusal.
EDX109C022	Sanction individual for job termination without good cause.
EDX109C023	Sanction individual for job termination without good cause. (San Diego)
EDX109C024 & EDX109C025	Sanction recipient who refused job offer or training trigger Notice of Action.

The tables below show the combined rules and the combined indicators in the admin matrix format:

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Sanction applicant for refusing job or training trigger Notice of Action.	N	N	N	Y	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
CalWIN Rule																		
EDX109C017	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
EDX109C021	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Sanction recipient who refused job offer or training trigger Notice of Action.	N	N	N	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N
CalWIN Rule																		
EDX109C024	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
EDX109C025	N	N	N	N	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N

* Please note the following rule will not be migrated over. For the corresponding reason.

CalWIN Rule	CalWIN Description	Reason
EDX109C019	Recipient refused job offer in the last 30 days without good cause.	Not Used.

2.29.11.2 EDBC Changes

2.29.11.2.1 Overview

This section will provide the Eligibility Rules flow for Job Terminated /Program Person Eligibility that can be filtered for each CalWIN County

2.29.11.2.2 Description of Change

Job Terminated Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a

selected County. Reference **Appendix 6.1 Rules Flow Diagram** '[Viewing Visio Document in Internet Explorer](#)' for instruction on how to access Visio.

The following Data Collection elements will be used by this Rule Flow.

CalWIN Field	CalSAWS Field	Type	Location Details
Employment Termination	Termination Date	Existing	Employment Detail
End Date	Termination Date	Existing	Employment Detail
Good Cause	Termination Reason	Existing	Employment Detail
Job refusal Termination date	Termination Date with a Termination Reason of "Job Refused"	New	Employment Detail
Training	Type: Job Training Reason: Failed/Refused Job Training	Existing	Eligibility Non-Compliance Detail

Job Terminated Sanction:

To create a Job Termination or Job Refusal sanction a Non Compliance entry will need to be created in the Eligibility Non Compliance Detail page with the following type and reason:

- a. Non Compliance Type: Employment
- b. Non Compliance Reason: Job Termination or Job Refusal

Existing Program/Person Status:

The following existing program/person status reason will be leveraged by this rule flow when the following conditions are met.

1. The program/person status reason CT73 B6 'Refused Job' will be set as a display status reason when all the following conditions in either A or B are met:
 - A. All the conditions are met:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date. (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.

- b The rule 'Determine sanction for individual with job termination.' is active.
 - c The rule 'Determine sanction for job termination based on good cause' is not active.
 - d The rule 'Do not allow good cause for job termination for recipients' is active.
 - e The program is intake.
 - f The individual has a Termination Reason on employment detail and it is not a county defined good cause reason.
 - g Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
 - h Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date.
 - i The rule 'Do not allow good cause for job refusal.' is not active.
 - j The rule 'Penalize individual for job refusal (Most Counties)' is active.
 - k The rule 'Sanction recipient who refused job or training' is not active.
 - l The individual is intake.
 - m The rule 'Sanction applicants for refusing job or training.' is not active.
 - n The rule 'Do not penalize refused job offers without good cause.' is not active.
 - o The rule 'Sanction applicant for refusing job or training trigger Notice of Action' is not active.
- B. All the conditions are met:
- a Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.

- b The rule 'Determine sanction for individual with job termination.' is active.
- c The rule 'Determine sanction for job termination based on good cause' is not active.
- d The rule 'Do not allow good cause for job termination for recipients' is not active.
- e Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
- f Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date.
- g The rule 'Do not allow good cause for job refusal.' is not active.
- h The rule 'Penalize individual for job refusal (Most Counties)' is active.
- i The rule 'Sanction recipient who refused job or training' is not active.
- j The individual is intake.
- k The rule 'Sanction applicants for refusing job or training.' is not active.
- l The rule 'Do not penalize refused job offers without good cause.' is not active.
- m The rule 'Sanction applicant for refusing job or training trigger Notice of Action' is not active.

DRAFT

Category	Short Description
73	Refused Job

- 2. The program/person status reason CT73 B9 'Quit Job' will be set as a display status reason when all the following conditions in either A or B are met:
 - A. All the conditions are met:
 - a Either of the following true:

- i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is not active.
 - c. The rule 'Determine sanction based on Job Termination Reason.' is not active.
 - d. The rule 'Sanction self-imposed job termination reason.' is not active.
 - e. The rule 'Do not allow good cause for any job termination reasons.' is active.
 - f. The program is intake.
- B. All the conditions are met:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is not active.
 - c. The rule 'Determine sanction based on Job Termination Reason.' is not active.
 - d. The rule 'Sanction self-imposed job termination reason.' is active.
 - e. The job termination has a reason selected.
 - f. The program is intake.

Category	Short Description
73	Quit Job

- 3. The program/person status reason CT73 QR 'Refused Job Offer/Voluntarily QuitJob' will be set as a display status reason when all the following conditions in either A or B are met:
 - A. All the conditions are met:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program

- application date – county defined Time limit duration.
- ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause' is not active.
 - d. The rule 'Do not allow good cause for job termination for recipients' is not active.
 - e. Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
 - f. Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date.
 - g. The rule 'Do not allow good cause for job refusal.' is not active.
 - h. The rule 'Penalize individual for job refusal (Most Counties)' is active.
 - i. The rule 'Sanction recipient who refused job or training' is not active.
 - j. The program is intake.
 - k. The rule 'Sanction applicants for refusing job or training.' is active.
- B. All the conditions are met:
- a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.

- c. The rule 'Determine sanction for job termination based on good cause' is not active.
- d. The rule 'Do not allow good cause for job termination for recipients' is not active.
- e. Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
- f. Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date
- g. The rule 'Do not allow good cause for job refusal.' is not active.
- h. The rule 'Penalize individual for job refusal (Most Counties)' is active.
- i. The rule 'Sanction recipient who refused job or training' is not active.
- j. The program is intake.

Category	Short Description
73	Refused Job Offer/Voluntarily Quit Job

New Program/Person Status:

The following new program/person status reason will be used by this rule flow when the following conditions are met.

1. The new program/person status reason CT73 'Job Term No Good Cause' will be set as a display status reason when all the following conditions are met:
 - A. All of the following conditions:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.

- ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause.' is not active.
 - d. The rule 'Do not allow good cause for job termination for recipients.' is active.
 - e. The program is intake.
 - ~~f. The individual has a Termination Reason on employment detail and it is a county defined good cause reason.~~
 - g. Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
 - h. Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date.
 - i. The rule 'Do not allow good cause for job refusal.' is not active.
 - j. The rule 'Penalize individual for job refusal. (Most Counties)' is not active.
 - k. The rule 'Penalize individual for job refusal or training without good cause(San Mateo, Santa Cruz)' is active.
 - l. The rule 'Do not penalize applicants for refusing job offer.' is active.
 - m. The individual is active.
 - n. There is no good cause reason selected for the non-compliance or the good cause reason is not accepted by the county.
- B. All the conditions are met:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause' is active.
 - d. The rule 'Sanction individual for job termination without good cause (San Diego)' is active.

- e. The individual does have a Termination Reason on employment detail or it is not a county defined good cause reason.
- C. All of the following conditions:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause' is not active.
 - d. The rule 'Do not allow good cause for job termination for recipients' is not active.
 - e. The individual has a Termination Reason on employment detail and it is not a county defined good cause reason.
 - f. The individual is active.
 - g. The rule 'Apply Sanction to recipient with no good cause for job termination.' is active.
- D. All of the following conditions:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause' is not active.
 - d. The rule 'Do not allow good cause for job termination for recipients' is not active.
 - e. The individual has a Termination Reason on employment detail and it is not a county defined good cause reason.
 - f. The individual is active.
 - g. The rule 'Apply Sanction to recipient with no good cause for job termination.' is not active.
- E. All the conditions are met:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.

- b. The rule 'Determine sanction for individual with job termination.' is not active.
 - c. The rule 'Determine sanction based on Job Termination Reason.' is not active.
 - d. The rule 'Sanction self-imposed job termination reason.' is active.
 - e. The job termination has a reason selected.
 - f. The individual is active.
- F. All the conditions are met:
- a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration).
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is not active.
 - c. The rule 'Determine sanction based on Job Termination Reason.' is not active.
 - d. The rule 'Sanction self-imposed job termination reason.' is not active.
 - e. The rule 'Do not allow good cause for any job termination reasons.' is active.
 - f. The individual is active.

Category	Short Description
73	Job Term No Good Cause

2. The program/person status reason CT73 'Job Terminated No Good Cause (Recipient)' will be set as a display status reason when all the following conditions in either A, B, C or D are met:
- A. All the conditions are met:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration).
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause' is not active.
 - d. The rule 'Do not allow good cause for job termination for recipients' is active.

- e. The program is intake.
 - f. ~~The individual has a Termination Reason on employment detail and it is a county defined good cause reason.~~
 - g. Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
 - h. Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date
 - i. The rule 'Do not allow good cause for job refusal.' is not active.
 - j. The rule 'Penalize individual for job refusal (Most Counties)' is active.
 - k. The rule 'Sanction recipient who refused job or training' is not active.
 - l. The individual is active.
 - m. The rule 'Sanction recipient for refusing job offer or training.' is not active.
 - n. The rule Do not penalize refused job offers without good cause.' is not active.
 - o. The rule 'Sanction recipient who refused job offer or training trigger Notice of Action' is active.
- B. All the conditions are met:
- a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause' is not active.
 - d. The rule 'Do not allow good cause for job termination for recipients' is active.

- e. The program is intake.
- f. ~~The individual has a Termination Reason on employment detail and it is a county defined good cause reason.~~
- g. Either of the following conditions are true:
- i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
- h. Either of the following conditions is not true:
- i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date
- i. The rule 'Do not allow good cause for job refusal.' is not active.
 - j. The rule 'Penalize individual for job refusal. (Most Counties)' is active.
 - k. The rule 'Sanction recipient who refused job or training' is active.
 - l. The individual is active.
- C. All the conditions are met:
- a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause' is not active.
 - d. The rule 'Do not allow good cause for job termination for recipients' is active.
 - e. The program is intake.
 - f. ~~The individual has a Termination Reason on employment detail and it is a county defined good cause reason.~~
 - g. Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.

- ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
- h. Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date.
- i. The rule 'Do not allow good cause for job refusal.' is not active.
- j. The rule 'Penalize individual for job refusal. (Most Counties)' is active.
- k. The rule 'Sanction recipient who refused job or training.' is not active.
- l. The individual is active.
- m. The rule 'Sanction recipient for refusing job offer or training.' is not active.
- n. The rule Do not penalize refused job offers without good cause.' is not active.
- o. The rule 'Sanction recipient who refused job offer or training trigger Notice of Action' is not active.
- D. All the conditions are met:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration.
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is not active.
 - c. The rule 'Determine sanction based on Job Termination Reason.' is not active.
 - d. The rule 'Sanction self-imposed job termination reason.' is not active.
 - e. The rule 'Do not allow good cause for any job termination reasons.' is active.
 - f. The program is intake.

Category	Short Description
73	Job Terminated No Good Cause (Recipient)

3. The new program/person status reason CT73 'Job Terminated' will be set as a display status reason when all the following conditions:
- Either of the following true:
 - The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration).
 - The Individual is active and Employment termination date is within payment month.
 - The rule 'Determine sanction for individual with job termination.' is active.
 - The rule 'Determine sanction for job termination based on good cause' is active.
 - The rule 'Sanction individual for job termination without good cause. (San Diego)' is not active.
 - The rule 'Sanction individual for job termination without good cause.' is active.

Category	Short Description
73	Job Terminated

4. The new program/person status reason CT73 'Job Termination No Good Cause' will be set as a display status reason when all the following conditions are met:
- Either of the following true:
 - The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration).
 - The Individual is active and Employment termination date is within payment month.
 - The rule 'Determine sanction for individual with job termination.' is active.
 - The rule 'Determine sanction for job termination based on good cause' is not active.
 - The rule 'Do not allow good cause for job termination for recipients' is not active.
 - The individual has a Termination Reason on employment detail and it is not a county defined good cause reason.
 - The program is intake.

Category	Short Description
73	Job Termination No Good Cause

5. The new program/person status reason CT73' County Decision No Good Cause' will be set as a display status reason when all the following conditions are met:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration).
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause.' is not active.
 - d. The rule 'Do not allow good cause for job termination for recipients' is active.
 - e. The program is intake.
 - ~~f. The individual has a Termination Reason on employment detail and it is a county defined good cause reason.~~
 - g. Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
 - h. Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date.
 - i. The rule 'Do not allow good cause for job refusal.' is active.

Category	Short Description
73	County Decision No Good Cause

6. The new program/person status reason CT73 ' Refused Job (Applicant)' will be set as a display status reason when all the following conditions are met:
 - a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration).
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.

- c. The rule 'Determine sanction for job termination based on good cause' is not active.
- d. The rule 'Do not allow good cause for job termination for recipients' is active.
- e. The program is intake.
- ~~f. The individual has a Termination Reason on employment detail and it is a county defined good cause reason.~~
- g. Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
- h. Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date.
- i. The rule 'Do not allow good cause for job refusal.' is not active.
- j. The rule 'Penalize individual for job refusal (Most Counties)' is active.
- k. The rule 'Sanction recipient who refused job or training' is not active.
- l. The individual is the intake.
- m. The rule 'Sanction applicants for refusing job or training.' is not active.
- n. The rule 'Do not penalize refused job offers without good cause.' is not active.
- o. The rule 'Sanction applicant for refusing job or training trigger Notice of Action' is active.

Category	Short Description
73	Refused Job (Applicant)

- 7. The new program/person status reason CT73' Refused Job (recipient)' will be set as a display status reason when all the following conditions in either A or B are met:
 - ~~a. Either of the following true:

 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date - county defined Time limit duration.~~
 - A. All the conditions:

- b. The Individual is active and Employment termination date is within payment month.
 - c. The rule 'Determine sanction for individual with job termination.' is active.
 - d. The rule 'Determine sanction for job termination based on good cause.' is not active.
 - e. The rule 'Do not allow good cause for job termination for recipients' is active.
 - f. The program is intake ongoing.
 - ~~g. The individual has a Termination Reason on employment detail and it is a county defined good cause reason.~~
 - h. Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
 - i. Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date.
 - j. The rule 'Do not allow good cause for job refusal.' is not active.
 - k. The rule 'Penalize individual for job refusal. (Most Counties)' is active.
 - l. The rule 'Sanction recipient who refused job or training' is not active.
 - m. The individual is active.
 - n. The rule 'Sanction recipient for refusing job offer or training.' is not active.
 - o. The rule Do not penalize refused job offers without good cause.' is not active.
 - p. The rule 'Sanction recipient who refused job offer or training trigger Notice of Action' is not active.
8. ~~All the conditions:~~
- ~~a. The individual's job is terminated.~~
 - ~~b. The individual refused working or training.~~
 - ~~c. The program is ongoing.~~
 - ~~d. The rule 'Do not allow good cause for job refusal.' is not active.~~
 - ~~e. The rule 'Penalize individual for job refusal. (Most Counties)' is active.~~
 - ~~f. The individual refused to work or training.~~
 - ~~g. The rule 'Sanction recipient who refused job or training.' is not active.~~
 - ~~h. The rule 'Sanction recipient for refusing job offer or training.' is not active.~~
 - ~~i. The rule 'Do not penalize refused job offers without good cause.' is not active.~~
 - ~~j. The rule 'Sanction recipient who refused job offer or training trigger Notice of Action.' is not active.~~

Category	Short Description
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73	Refused Job (Recipient)
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8. The new program/person status reason CT73' Refused Job No good cause (County Decision)' will be set as a display status reason when all the following conditions are met:
- a. Either of the following true:
 - i. The program is intake and employment termination date is after or the same as Job Termination time limit date (Individual program application date – county defined Time limit duration).
 - ii. The Individual is active and Employment termination date is within payment month.
 - b. The rule 'Determine sanction for individual with job termination.' is active.
 - c. The rule 'Determine sanction for job termination based on good cause' is not active.
 - d. The rule 'Do not allow good cause for job termination for recipients' is active.
 - e. The program is intake.
 - f. The individual has a Termination Reason on employment detail and it is a county defined good cause reason.
 - g. Either of the following conditions are true:
 - i. The individual's employment termination reason is 'job refused'.
 - ii. The individual has a Non-compliance record Type:
 - Non-compliance Type: Job Training
 - Non-compliance Reason: Failed/Refused Job Training
 - h. Either of the following conditions is not true:
 - i. The individual has an employment termination reason is 'job refused' and the program is intake and the individual's application date is after the job refusal time limit = employment termination date + county defined time limit.
 - ii. The individual has an employment termination reason is 'job refused' and the individual application Date is before the Job Refusal termination date.
 - i. The rule 'Do not allow good cause for job refusal.' is not active.
 - j. The rule 'Penalize individual for job refusal. (Most Counties)' is not active.
 - k. The rule 'Penalize individual for job refusal or training without good cause. (San Mateo, Santa Cruz)' is active.
 - l. The rule 'Do not penalize applicants for refusing job offer.' is not active.
 - m. The rule 'Do not penalize Good cause for job refusal.' is active.
 - n. The individual does not have a valid good cause for job refusal.

Category	Short Description
73	Refused Job No Good Cause (County Decision)

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram

2.29.11.3 Correspondence

2.29.11.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.29.11.3.2 Description of Change

1. Reason Code: XAN028 - Refused Job
 - a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Refused Job'.
 - b. Person Level Reason
 - c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Denial	GA Denial - Refused Employment - 60 Day Penalty	134 0	11519
Santa Barbara	Denial	GR - Deny - Job Responsibility	161-0	12701

2. Reason Code: XAN074 – Job Terminated no good cause (recipient)
 - a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Job Terminated no good cause (recipient)'.
 - b. Person Level Reason
 - c. County-specific information:

County	Action	Document Description	Number	Template
San Francisco	Discontinuance	CAAP Discontinuance: Refused Employment	031 1	12599

3. Reason Code: XAN075 - Job Terminated no good cause (recipient)

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Job Terminated no good cause (recipient)'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Placer	Discontinuance	Discontinuance - failure to accept employment/referral	074-0	608577

4. Reason Code: XAN147 – Job Terminated

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Job Terminated'.
 - or
 - ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Job Terminated'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Fresno	Discontinuance	General Relief Discontinuance - Employable Requirements	017-C	12624
Fresno	Denial	General Relief Denial - Employable Requirements	138-A	11550
Santa Clara	Discontinuance	GA Discontinuance - Voluntary Quit	GA 082	610074

5. Reason Code: XAN151 – Job Termination No Good Cause

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Job Termination No Good Cause'.
 - or
 - ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Job Termination No Good Cause'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Santa Barbara	Discontinuance	GR - Disc - Job Responsibility	061-0 (08/97)	12375
Santa Barbara	Denial	GR - Deny - Job Responsibility	161-0	12701
Santa Clara	Denial	GA Denial - Quit Job Without Good Cause	GA 137	12038
Solano	Denial	GA - Denial - Job Responsibility	161	12112

6. Reason Code: XAN152 - Quit Job

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Quit Job'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Santa Cruz	Denial	Denial - GA Denial for Termination of Employment in Past 30 Days	126-B	610714
Yolo	Denial	General Assistance Denial - Job Quit Sanction	112-3	12214

7. Reason Code: XAN154 - County Decision No good cause

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'County Decision No good cause'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Yolo	Discontinuance	GA Discontinuance - Sanction - Failure to Accept or Appear for a Job	074-8	12217

8. Reason Code: XAN158 – Refused Job (applicant)

a. Trigger Condition

- i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Refused Job (applicant)'.

- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Orange	Discontinuance	GR Disc - GRWP Non-Cooperation	070/071 A	609248

9. Reason Code: XAN159 - Refused Job (applicant)

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Refused Job (applicant)'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Solano	Denial	GA - Denial - Job Responsibility	161	12112

10. Reason Code: XAN163 - Refused Job (recipient)

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Refused Job (recipient)'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Discontinuance	GA Disc - Failure to Accept Employment - 2, 4, 6 Month Sanction	031 1	12270
Santa Barbara	Discontinuance	GR - Disc - Job Responsibility	061-0 (08/97)	12375

11. Reason Code: XAN165 - Refused Job No good cause (County Decision)

- a. Trigger Condition
 - i. This notice generates for the applicable counties when an individual was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Refused Job No good cause (County Decision)'.
or
 - ii. An individual was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Refused Job No good cause (County Decision)'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Santa Cruz	Discontinuance	Sanction for GA - Failed to Fulfill Employable Requirements	006-A	12094
Santa Cruz	Denial	Denial - GA Denial for Failure to Comply w/Employable Person Agreement	128-B	610716

2.29.11.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Job Termination –Most of the Counties } CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was terminated.]	The rule 'Determine sanction for individual with job termination. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Job terminated within last 30 days} CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was terminated within last 30 days based on Good cause and Program mode.]	The rule 'Determine sanction for job termination based on good cause ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {County does not allow good cause for job termination of recipients} CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was terminated based on Good cause and program mode]	The rule 'Do not allow good cause for job termination for recipients ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Self imposed job termination} CalSAWS must determine whether to apply sanction on an individual applying for GA/GR whose self imposed job was terminated based on program mode]	The rule 'Sanction self-imposed job termination reason. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Apply sanction from day following the day last aided} CalSAWS must determine whether to apply Sanction from day following the day last aided on an individual applying for GA/GR whose job was terminated]	The rule 'Apply Sanction to recipient with no good cause for job termination. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Apply sanction from first month timely notice can be given} CalSAWS must determine whether to apply Sanction from first month timely notice can be given on an individual applying for GA/GR whose job was terminated]	The rule 'Apply Sanction to individual with no good cause for job termination. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Must apply for UIB} CalSAWS must determine whether to apply UIB on an individual applying for GA/GR whose job was terminated]	The rule 'Fail applicant if employed ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Recipient of GA refusing job offer without good cause} CalSAWS must determine whether to apply a Sanction from date of refusal on an individual applying for GA/GR whose job was refused based on program mode]	The rule 'Determine sanction based on Job Termination Reason.' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Do not allow good cause for job refusal} CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was refused based on program mode]	The rule 'Sanction recipient who refused job or training' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Job refusal most of the counties} CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was refused based on program mode and good cause]	The rule 'Do not allow good cause for job refusal.' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Job Refusal-Senate, Santacruz} CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was refused based on Good Cause AND Program mode]	The rule 'Penalize individual for job refusal (Most Counties)' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {County does not penalize applicants for refusing job offer} CalSAWS must determine whether to penalize an individual applying for GA/GR whose job was refused based on Program mode]	The rule 'Penalize individual for job refusal or training without good cause(San Mateo, Santa Cruz) ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Do not allow good cause for job termination} CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was terminated based on program mode]	The rule 'Do not penalize applicants for refusing job offer. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Apply penalty from date of refusal for applicants} CalSAWS must determine whether to apply penalty from date of refusal on an individual applying for GA/GR whose job was refused]	The rule 'Do not allow good cause for any job termination reasons. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {County does not penalize refused job offers without good cause beyond the last 30 days} CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was refused without good cause beyond last 30 days]	The rule 'Sanction applicants for refusing job or training. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Apply POI from date of refusal for applicants for job refusal without good cause} CalSAWS must determine whether to apply POI from date of refusal on an individual applying for GA/GR whose job was refused without a good cause]	The rule 'Do not penalize refused job offers without good cause.' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Apply POI from date of refusal for applicants for job refusal without good cause} CalSAWS must determine whether to apply POI from date of refusal on an individual applying for GA/GR whose job was refused without a good cause]	The rule 'Sanction applicant for refusing job or training trigger Notice of Action' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Recipient refused job offer without good cause} CalSAWS must determine whether to apply sanction on an individual applying for GA/GR whose job was refused without a good cause]	The rule 'Sanction recipient for refusing job offer or training.' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Good cause for job refusal in last 30 days and reported within 3 days} CalSAWS must determine whether to apply sanction on an individual whose job was refused within last 30 days with good cause and reported within 3days]	The rule 'Do not penalize Good cause for job refusal.' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Sanction from date of refusal} CalSAWS must determine whether to apply Sanction from date of refusal on an individual applying for GA/GR whose job was refused]	The rule 'Sanction applicant for refusing job or training trigger Notice of Action ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Individual job terminated in the last 12 months} CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was terminated within last 12 months]	The rule 'Sanction individual for job termination without good cause. ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Individual job terminated 30 days ago} CalSAWS must determine whether to apply a Sanction, Penalty or POI on an individual applying for GA/GR whose job was terminated 30 days ago based on Good cause and Program mode]	The rule 'Sanction individual for job termination without good cause(San Diego) ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Job Refusal–Sanction from day following the day last aided} CalSAWS must determine whether to apply a Sanction, Penalty or POI from day following the day last aided on an individual applying for GA/GR whose job was refused]	The rule 'Sanction recipient who refused job offer or training trigger Notice of Action ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow Diagram
	[Business Rule: {Job Refusal–Sanction from first month that timely notice can be given} CalSAWS must determine whether to apply a Sanction, Penalty or POI from first month that timely notice can be given on an individual applying for GA/GR whose job was refused]	The rule 'Sanction recipient who refused job offer or training trigger Notice of Action ' Will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

2.30 Data Change Request to add Issuance Threshold values

2.30.1 Overview

Issuance Thresholds are established to determine the amount of benefits or services payments for each Program that can be approved by an Eligibility Worker without requiring a supervisor override. These issuance thresholds are maintained in the System, and can be updated by the county on the County Benefit Threshold page.

2.30.2 Description of Change

Perform a data change to add a default value of 1000 for the General Assistance/General Relief (GA/GR) program issuance thresholds for the CalWIN counties. The GA/GR issuance threshold values for the CalWIN counties will be updated with county provided values with SCR CA-215927 in 21.11.

2.30.3 Estimated Number of Records Impacted/Performance

Approximately 54 records.

2.31 Batch/Interfaces - Create Rules Admin Batch

2.31.1 Overview

The county rules admin batch will process each requested rules admin change that are listed on the pending updates section of the County Rules Detail page as displayed in sections 2.1 and 2.2.

2.31.2 Description of Change

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

1. Retrieve the pending rule admin changes from the transact table that were requested by the Online users for processing.
2. End date the current rules admin record using the begin date of the transaction record if it currently exists.
3. Insert a new rules admin record with the details of the rules admin transact table.
4. Update the transact record from the table once successfully processed with a Complete status or an Error status if there was an issue processing.

2.31.3 Execution Frequency

Daily (Mon-Sat).

2.31.4 Key Scheduling Dependencies

This batch job should run before Batch EDBC.

2.31.5 Counties Impacted

All Counties.

2.31.6 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.			
2.			

4 MIGRATION IMPACTS

This SCR is LA county specific. There are no migration impacts.

General Assistance/General Relief functionality will be implemented as a new program for the 57 counties excluding Los Angeles county. Los Angeles GA/GR functionality will not be modified.

5 OUTREACH


NONE

6 APPENDIX

6.1 Rules Flow Diagram

Viewing Visio Document in Internet Explorer

1. This is applicable for Laptops/Desktops that do not have Microsoft Visio software installed
2. Once you double click the attachment or right click and open with Internet Explorer the Visio will open in internet explorer.
3. The internet Explorer will open with the below pop up in the bottom of the page



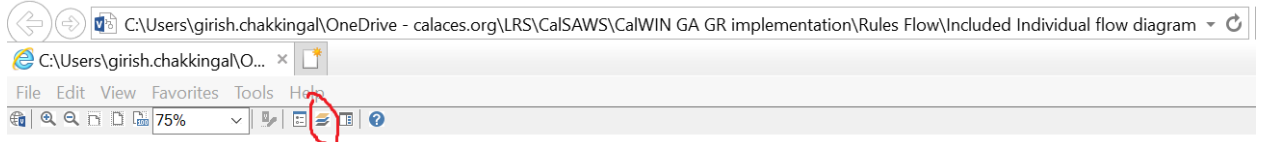
Internet Explorer restricted this webpage from running scripts or ActiveX controls.

Allow blocked content

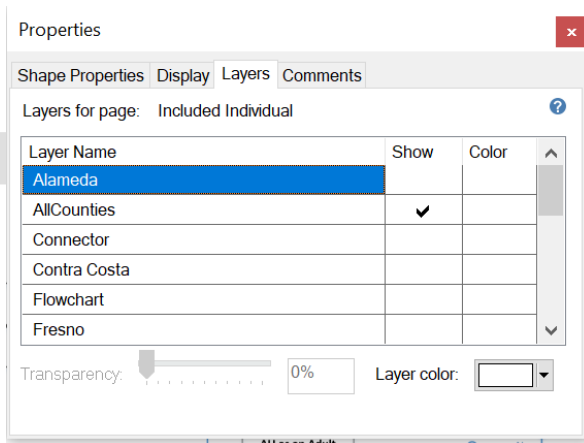


4. Click Allow Blocked Content.
5. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)

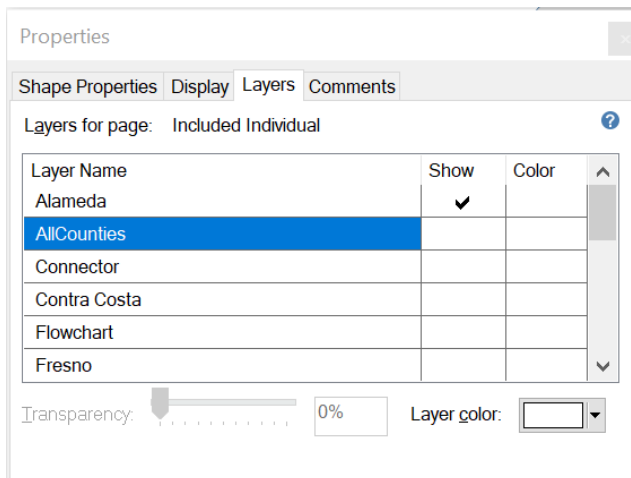
6. Click the layer icon circled in red color below



7. Once the layers button is clicked the Properties box will pop up.



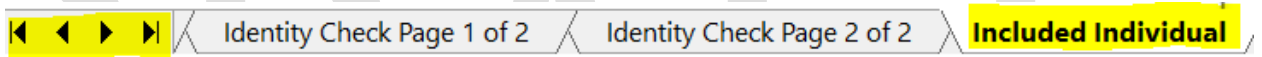
8. Then click the county name that is applicable to you, in this case Alameda



9. Once you select Alameda and close the properties pop up (by clicking the x button at top right corner like closing a tab or window) the flow diagram will show only the rules /functionalities applicable to Alameda.

Viewing Visio Document in Microsoft Visio

1. This is applicable for Laptops/Desktops that do have Microsoft Visio software installed
2. Once you double click the attachment or right click and open with Visio then it will open in Microsoft Visio
3. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



4. On the right side of the flow diagram the counties names will be displayed as shown below

All Counties

- Alameda
- Contra Costa
- Fresno
- Orange
- Placer
- Sacramento
- San Diego
- San Francisco
- San Luis Obispo
- SanMateo
- Santa Barbara
- Santa Clara
- Santa Cruz
- Solano
- Sonoma
- Tulare
- Ventura

5. Then click the county name that is applicable to you, in this case Alameda as shown below

Alameda

- Alameda
- Contra Costa
- Fresno
- Orange
- Placer
- Sacramento
- San Diego
- San Francisco
- San Luis Obispo
- SanMateo
- Santa Barbara
- Santa Clara
- Santa Cruz
- Solano
- Sonoma
- Tulare
- Ventura

6. Once you select Alameda the flow diagram will show only the rules /functionalities applicable to Alameda.

6.2 Status Reason (CT73)

A. Reference table for CT73 (Program status reason) and corresponding status reason in this design document. This table shows the values for the new columns added.

i. Key:

1. GA/GR Priority
 - a. The lower the number the higher the priority
2. GA/GR Program Role
 - a. FE – This indicator means the status reason will change the person role to FRE - 'Financially Responsible – Excluded'
 - b. FI – This indicator means this status reason will change the person role to FRI 'Financially Responsible – Included'
 - c. MM – This indicator means this status reason will change the person role to MMO 'Medi-Cal Member Only'
 - d. UP – This indicator means this status reason will change the person role to UP 'Unaided Person'
3. GA/GR Close Person
 - a. CanCloseBoth – Indicator means this status reason can close both person and program level.
 - b. Y – indicator means this status reason can close the person.
4. GA/GR Close Program
 - a. CanCloseBoth – Indicator means this status reason can close both person and program level.
 - b. Y – Indicator means this status reason can close the program.
5. General Relief
 - a. Y -Indicator means this status reason will be applicable for CalWINs General Relief Program

CalWIN Status	GR Priority	CalSAWs Status (Status Reason)	GA/GR Program Role	GA/GR Close Person	GA/GR Close Program
XAN154	5660	County Decision No Good Cause		Y	
XAN064	1300	Did Not Sign Lien			Y
XAN031	5600	Drug Felon		Y	
XAN061	5620	Drug Felon (GA)		Y	
XAN069	5640	Drug Felon Committed After County Date		Y	
XAN984	1380	Drug Treatment			Y
XAN081	5980	Employed		Y	
XAN060	1400	Employed More Than County Hours			Y

XAN163*	5820	Failed Orientation		Y	
XAN162	5900	Failed to Comply: Drug/Alchl.		Y	
XAN087	5440	Failed to Comply: Audit		Y	
XAN022	5920	Failed to Comply: Drug/Alcohol		Y	
XAN079	5460	Failed to Comply: QC		Y	
XAN057	5540	Fleeing Felon		Y	
XAN058	5560	Fleeing Felon After County Date		Y	
E10020	not displayed on EDBC	FTP Employment			
XAN470	5580	FTP No Proof Fleeing Felon		Y	
XAN124	1340	GA-241 Not Signed			Y
XAN131	1360	GA-243 Not Signed			Y
XAN043	5680	Job Term No Good Cause		Y	
XAN145	5680	Job Term No Good Cause		Y	
XAN149	5680	Job Term No Good Cause		Y	
XAN150	5680	Job Term No Good Cause		Y	
XAN153	5680	Job Term No Good Cause		Y	
XAN155	5680	Job Term No Good Cause		Y	
XAN164	5680	Job Term No Good Cause		Y	
XAN147	5700	Job Terminated		Y	
XAN074	5720	Job Terminated No Good Cause (Recipient)		Y	
XAN075	5720	Job Terminated No Good Cause (Recipient)		Y	
XAN151	5740	Job Termination No Good Cause		Y	
XAN065	1320	Lien Not Signed			Y
XAN085	6120	No Good Cause - Volunteer Quit		Y	
XAN062	1280	Non-Citizen Lien Not Signed			Y
XAN030	5480	Non-Compliant		Y	
XAN412	5480	Non-Compliant		Y	
XAN029	5500	Non-Comply with Fraud Prevention		Y	
XAN007	5520	Not Cooperating		Y	
XAN082	1420	Over County Working Hours			Y
XAN044	5420	Probation/Parole Violator		Y	
XAN152*	6140	Quit Job		Y	
XAN025	6140	Quit Job		Y	
XAN073	6140	Quit Job		Y	
XAN148	6140	Quit Job		Y	
XAN161	6140	Quit Job		Y	
XAN028	5780	Refused Job		Y	
XAN159	5800	Refused Job (Applicant)		Y	

XAN158	5800	Refused Job (Applicant)		Y	
XAN163*	5880	Refused Job (Recipient)		Y	
XAN165	5840	Refused Job No Good Cause (County Decision)		Y	
XAN070	5860	Refused Job Offer/Voluntarily Quit Job		Y	
XAN071	5860	Refused Job Offer/Voluntarily Quit Job		Y	
XAN076	6160	Refused Job Offer/Volunteer Quit Job		Y	
XAN156	6180	Refused Job Offer/Volunteer Quit Job No Show		Y	
XAN808	5940	Sanction - Striker		Y	
XAN369	6200	Sanction <30 w/ Aid Inkind		Y	
XAN370	6220	Sanction > 30 w/ Aid Inkind		Y	
XAN026	1260	SC-20 Not Signed			Y
XAN013	6000	Self Employed		Y	
XAN047	3060	Striker		CanCloseBoth	CanClose
XAN068	5960	Striker No Good Cause		Y	
XAN023	6240	Volunteer Quit (County Decision)		Y	
XAN157	6260	Volunteer Quit (Not Cured)		Y	
XAN152*	6280	Volunteer Quit (Self-Imposed)		Y	
XAN508	6300	Volunteer Quit Job No Show(Recipient)		Y	
XAN509	6320	Within Sanction Time Limit		Y	

6.3 Reference table search (used by developers and testers)

This table lists information on what database table, category, and values to search and retrieve when use case conditions requires retrieving county defined values. Developers and testers will use this information to search the database for the required values.

Use Case	CalSAWs Table	Description (summary of what we are doing in this table)	Example	Category ID	Reference Columns used	Column and value retrieved
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					ed to se ar ch	
Volunteer Quit	County Defined Time Limit	<p>The table 'County Defined Time Limit' (CT 10634) will provide the time limit duration for the CaLWIN GAGR CalWIN County.</p> <p>Search based on the Code number identif 'VQ' .</p> <p>Retrieve the following reference columns:</p> <p>Reference column '[County Name] TIME LIMIT' which will give a numeric value (1,2,3.....).</p> <p>Reference column "[County Name] UNIT OF MEASUREMENT" will give a String Value (D,H,M or Y) with (D = Days, H=Hours, M = Months, Y = Years).</p> <p>These two values will give the duration of 'County Defined Specific Period'.</p> <p>Note - [County Name] is a placeholder for whatever county being searched for.</p>	<p>Example for Searching the time limit table for Voluntary Quit for the county of Alameda :</p> <p>Seach: Reference Column: Alameda Time Limit Reference Column: Alameda Unit of measurement</p> <p>From: Code Detail Table</p> <p>Where: Code number identif = VQ Category Id = 10634</p> <p>Result: "Alameda Time Limit" = 24 "Alameda Unit of measurement" = D</p> <p>Meaning:Alameda time limit duration for 'Voluntary Quit' is 24 Days</p>	10634	C o d e n u m b e r I d = V Q	<p>Column: [County] LIMIT Value: Numeric Value (1,2,3.....)</p> <p>Column: 'County' MEASUREMENT Value: String Value (D,M,H,Y)</p>

Employment status	County Defined Time Limit	<p>The table 'County Defined Time Limit' (CT 10634) will provide the time limit duration for the CaLWIN GAGR CalWIN County.</p> <p>Search based on the Code number identifier 'ES' .</p> <p>Retrieve the following reference columns:</p> <p>Reference column '[County Name] TIME LIMIT' which will give a numeric value (1,2,3.....).</p> <p>Reference column "[County Name] UNIT OF MEASUREMENT" will give a String Value (D,H,M or Y) with (D = Days, H=Hours, M = Months, Y = Years).</p> <p>These two values will give the duration of 'County Defined Specific Period'.</p> <p>Note - [County Name] is a placeholder for whatever county being searched for.</p>	<p>Example for Searching the time limit table for Number of working hours in a month for the county of Alameda :</p> <p>Search: Reference Column: Alameda Time Limit Reference Column: Alameda Unit of measurement</p> <p>From: Code Detail table</p> <p>Where: Code number identifier = ES Category Id = 10634</p> <p>Result: "Alameda Time Limit" = 100 "Alameda Unit of measurement" = H</p> <p>Meaning: Alameda time limit duration for 'Number of working hours in a month' is 100 Hours</p>	10634	C o d e n u m b e r I d = ES	<p>Column: [County] LIMIT Value: Numeric Value (1,2,3.....)</p> <p>Column: 'County' MEASUREMENT Value: String Value (D,M,H,Y)</p>
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Job Terminated	County Defined Time Limit	<p>The table 'County Defined Time Limit' (CT 10634) will provide the time limit duration for the CalWIN GAGR County.</p> <p>Search based on the Code number identif 'JR' .</p> <p>Retrieve the following reference columns:</p> <p>Reference column '[County Name] TIME LIMIT' which will give a numeric value (1,2,3.....).</p> <p>Reference column "[County Name] UNIT OF MEASUREMENT" will give a String Value (D,H,M or Y) with (D = Days, H=Hours, M = Months, Y = Years).</p> <p>These two values will give the duration of 'County Defined Specific Period'.</p> <p>Note - [County Name] is a placeholder for whatever county being searched for.</p>	<p>Example for Searching the time limit table for Job Refusal for the county of Alameda :</p> <p>Seach: Reference Column: Alameda Time Limit Reference Column: Alameda Unit of measurement</p> <p>From: Code Detail Table</p> <p>Where: Code number identif = JR Category Id = 10634</p> <p>Result: "Alameda Time Limit" = 14 "Alameda Unit of measurement" = D</p> <p>Meaning: *Alameda time limit duration for 'Job Refusal' is 14 Days</p>	10634	C o d e n u m b e r I d = J R	<p>Column: [County] LIMIT Value: Numeric V (1,2,3.....)</p> <p>Column: 'County' MEASUREMENT Value: String Value (D,M,H,Y)</p>
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QC Audit	GAGR Good Cause Reason County Reference Table	<p>The table 'GAGR Good Cause Reason County Reference Table' (CT10650) will provide if the good cause reason for Non-cooperation is accepted by the CalWIN GAGR County.</p> <p>Using the reference column 'County code' (which reference CT15 County Code) and 'Good Cause' (which reference CT10346 County Hearing Good Cause Reason') to search in the Reference table 'GAGR Good Cause Reason County Reference Table' (CT 10650) to get the value in the reference column 'Applicable' .</p> <p>If the reference column 'Applicable' is Y - The county specified in Reference column 'County Code' accepts the good cause reason. If the reference column 'Applicable' is N or the entry cannot be found in CT 10650 - Then that county does not accept the good cause reason.</p>	<p>Example: Search: Reference Column: Applicable</p> <p>From: Code Detail Table</p> <p>Where: Reference Column: County Code = 01 Reference Column: Good Cause Reason Code = 'AE' Category Id = 10650</p> <p>Result Applicable = Y</p> <p>The county Alameda (01) accepts the Good Cause Reason Agency Error (AE).</p>	10650	County Code Good Cause Reason	Column: Applicable Values: Y,N or null
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<p>Fraud Prevention</p>	<p>GAGR Good Cause Reason County Reference Table</p>	<p>The table 'GAGR Good Cause Reason County Reference Table' (CT10650) will provide if the good cause reason for Non-cooperation is accepted by the CalWIN GAGR County.</p> <p>Using the reference column 'County code' (which reference CT15 County Code) and 'Good Cause' (which reference CT10346 County Hearing Good Cause Reason') to search in the Reference table 'GAGR Good Cause Reason County Reference Table' (CT 10650) to get the value in the reference column 'Applicable' .</p> <p>If the reference column 'Applicable' is Y - The county specified in Reference column 'County Code' accepts the good cause reason. If the reference column 'Applicable' is N or the entry cannot be found in CT 10650 - Then that county does not accept the good cause reason.</p>	<p>Example: Search: Reference Column: Applicable</p> <p>From: Code Detail Table</p> <p>Where: Reference Column: County Code = 01 Reference Column: Good Cause Reason Code = 'AE' Category Id = 10650</p> <p>Result Applicable = Y</p> <p>The county Alameda (01) accepts the Good Cause Reason Agency Error (AE).</p>	<p>10650</p>	<p>C o u n t y C o d e G o o d C a u s e R e a s o n</p>	<p>Column: Applicable Values: Y,N or null</p>
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Drug and Alcohol Treatment	GAGR Good Cause Reason County Reference Table	<p>The table 'GAGR Good Cause Reason County Reference Table' (CT10650) will provide if the good cause reason for Non-cooperation is accepted by the CalWIN GAGR County.</p> <p>Using the reference column 'County code' (which reference CT15 County Code) and 'Good Cause' (which reference CT10346 County Hearing Good Cause Reason') to search in the Reference table 'GAGR Good Cause Reason County Reference Table' (CT 10650) to get the value in the reference column 'Applicable' .</p> <p>If the reference column 'Applicable' is Y - The county specified in Reference column 'County Code' accepts the good cause reason. If the reference column 'Applicable' is N or the entry cannot be found in CT 10650 - Then that county does not accept the good cause reason.</p>	<p>Example: Search: Reference Column: Applicable</p> <p>From: Code Detail Table</p> <p>Where: Reference Column: County Code = 01 Reference Column: Good Cause Reason Code = 'AE' Category Id = 10650</p> <p>Result Applicable = Y</p> <p>The county Alameda (01) accepts the Hearing Good Cause Reason Agency Error (AE).</p>	10650	County Code Good Cause Reason	Column: Applicable Values: Y,N or null
Job Terminated	GAGR Termination Reason County	<p>Use case condition: Determine if individual has a Termination Reason on employment detail and it is a county</p>	<p>Search: Reference Column: Applicable</p> <p>From: Code Detail Table</p>	10649	County Code	Column: Applicable Values: Y,N or null

	<p>Reference Table</p>	<p>defined good cause reason.</p> <p>The table 'GAGR Termination Reason County Reference Table' (CT10649) will provide if the termination reason for end of employment is accepted by the CalWIN GAGR County.</p> <p>Using the reference column 'County code' (Which reference CT15 County Code) and column 'Termination Reason' (Which reference CT 1792 Termination Reason) to search in the Reference table 'GAGR Termination Reason County Reference Table' (CT 10649) to get the value in the reference column 'Applicable' .</p> <p>If the reference column 'Applicable' is Y - The county specified in Reference column 'County Code' accepts the termination Reason is a good cause. If the reference column 'Applicable' is N or the entry cannot be found in CT 10649 - Then that county does not accept the termination reason is a good cause.</p>	<p>Where: Reference Column: County Code = 01 Reference Column: Termination Reason = 'LO' Category Id = 10649</p> <p>Result Applicable = Y</p> <p>The county Alameda (01) accepts the Termination Reason 'Laid Off' (LO).</p>	<p>de Termination Reason</p>
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217869

Modify LRS CalSAWS Self Service Kiosk Check-In
Application to work with the new CalSAWS Self
Service Kiosk Portal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Michael Wu, Balakumar Murthy, Shilpa Suddavanda, Himanshu Jain, Sumet Patil, Abel Lopez, Kenneth Lerch, Christopher Vasquez

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/3/2021	1.0	Initial	Erika.Kusnadi-Cerezo
7/15/2021	2.0	Content Revision 1: <ul style="list-style-type: none"> • 2 additional assumptions are added. • Added to Section 2.1.3 for the CalSAWS Self Service Kiosk to be integrated with ForgeRock SDK. <ul style="list-style-type: none"> ○ Section 2.1.3 #10 is updated to match the connection to ForgeRock using SDK instead of a new webservice. • Added to Section 2.3.2 to create a new Web service to pull Case Number information using GUID/County Code. • Added/Updates to Section 2.4.2 <ul style="list-style-type: none"> ○ Added to port over the 'login' webservice to springboot. ○ Added additional response for the 'caseauth' web service ○ Remove the 2 new web service that will need to be created since its no longer needed. ○ Removed the requirement to port over the verificationUploadService ○ Update the request/response parameter for the following webservice: caseIndividuals, caseProgramParticipants, appointments and isVerificationUploadAllowedService. 	Erika Kusnadi-Cerezo
7/21/2021	1.1	Content Revision 1: <ul style="list-style-type: none"> • Updated the mock up Figure 2.1.5 to display the format for the Medical Card 	Erika Kusnadi-Cerezo

		BIC to just 01234567A <ul style="list-style-type: none">Remove '12345' from the new format to be display for the Medi-Cal BIC Card option (format will just be 01234567A).	

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1 OVERVIEW

Los Angeles County have two different Lobby Solution that they use at their county offices to assists customers. The first being the CalSAWS Self Service Kiosk application that customers directly use on their own and the other is the CalSAWS Lobby Check-In application that are used by county workers. Both applications have the ability to check-in customers when they visit the county offices, submit documents and provide information in regard to the customer case. As part of CA-207252 (DDID 1778) the CalSAWS Lobby Check-In application was expanded to support all 58 counties and to remove majority of the application dependency from the Your Benefits Now (YBN) application, however the change to the CalSAWS Self Service Kiosk application was limited due to the application being closely dependent on YBN. This SCR will remove all dependency on YBN for both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application and to work with the new Hyland Imaging Solution.

1.1 Current Design

The CalSAWS Self Service Kiosk application is currently only available to Los Angeles County and the application is incorporated with Los Angeles County specific graphics and logos. Secondly, customers who are using the CalSAWS Self Service Kiosk application will first need to Log-in and this process is dependent on the YBN application. Lastly, when customers are submitting documents through the CalSAWS Self Service Kiosk application, documents are being sent to EDMS (Electronic Document Management System).

As part of CA-207252 the Lobby Check-In application was updated to support all 58 counties and majority of the application dependency to YBN was removed. However, the ability to search for an individual using the customer YBN User Name (LA offices only) and IVR/Customer ID remained along with the ability to Check-In a customer by searching for the customer YBN Appt Number.

1.2 Requests

Remove all dependency from YBN application for both the CalSAWS Self Service Kiosk and the CalSAWS Lobby Check-In application. Update the CalSAWS Self Service Kiosk application to with the ability to upload documents to the new CalSAWS Imaging System (Hyland).

1.3 Overview of Recommendations

1. Update the CalSAWS Self Service Kiosk application's look and feel to no longer be county specific.
2. Upgrade the CalSAWS Self Service Kiosk application with new webservice that will communicate to CalSAWS without going through YBN.
3. Upgrade the CalSAWS Self Service Kiosk application with new webservice to communicate to Hyland Imaging system.
4. Update both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application to use customer's BenefitsCal credential instead of the customers YBN credential in order to pull up customers information.

5. Remove from both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application the option to pull up customers information using YBN specific credentials (Customer ID/IVR and YBN Username Customer).
6. Remove the option to Check-In a customer by using the YBN Appt Number from the CalSAWS Lobby Check-In application.
7. Update the Purpose of Visit options on the CalSAWS Lobby Check-In application.
8. Port over the existing web services that are used for the CalSAWS Self Service Kiosk Application to the Lobby Springboot App.
9. Create new web services for the CalSAWS Lobby Check-In and CalSAWS Self Service Kiosk application in order to pull Case information by using participants BenefitsCal User Name.

1.4 Assumptions

1. Updates to the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application are done at the same time Los Angeles County goes live with BenefitsCal and Hyland Imaging Solution.
2. The San Fernando Valley version of the CalSAWS Lobby Check-In Application and CalSAWS Self Service Kiosk Application will not be updated as part of this effort. Any changes needed to the San Fernando Valley version of the CalSAWS Lobby Check-In Application and CalSAWS Self Service Kiosk Application will need to be done by the Los Angeles ISD (Internal Services Department) team.
3. The BenefitsCal website is: <http://benefitscal.org/> and user will need to use an E-Mail address in order to log in.
4. The CalSAWS Self Service Kiosk will use existing webservice that was implemented under CA-214026 to allow documents/images to be upload to Hyland Imaging System.
5. CA-229814 will expand the CalSAWS Self Service Kiosk application to support all 58 Counties.
6. The San Fernando Valley version of the CalSAWS Lobby Check-In application and the CalSAWS Self Service Kiosk are not enabled with the functionality to upload documents. ISD will need to make the appropriate changes for both applications to connect to the Hyland Imaging system in the future if the functionality to upload documents is enabled in the future.
7. Device used for both the CalSAWS Lobby Check-In application and the CalSAWS Self Service Kiosk will need an iOS of 10.x or higher in order to support the functionality of using BenefitsCal E-mail to pull Case Number information.

2 RECOMMENDATIONS

Update the CalSAWS Self Service Kiosk applications look and feel to support all 58 counties and remove the ability to use YBN specific credentials from both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application will be removed. Both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application will be updated with the ability to use the customers BenefitsCal credentials in order to pull their case information. The CalSAWS Self Service Kiosk application will be upgraded with new webservices to communicate to CalSAWS without going through YBN and to also communicate to the Hyland Imaging System.

2.1 CalSAWS Self Service Kiosk Application

2.1.1 Overview

The CalSAWS Self Service Kiosk application was designed to work specifically for Los Angeles County. It is currently integrated into the Your Benefits Now (YBN) Application and have Los Angeles County specific graphics and logos. This SCR will update the CalSAWS Self Service Kiosk Application look and feel to no longer be county specific. Secondly, the CalSAWS Self Service Kiosk Application will be updated to communicate directly to CalSAWS without having to go through YBN and also be updated to communicate to the new Hyland Imaging System.

2.1.2 CalSAWS Self Service Kiosk Application Mockup



Figure 2.1.1 – CalSAWS Self Service Kiosk App Main Screen



Figure 2.1.2 – CalSAWS Self Service Kiosk App My Case Info Screen

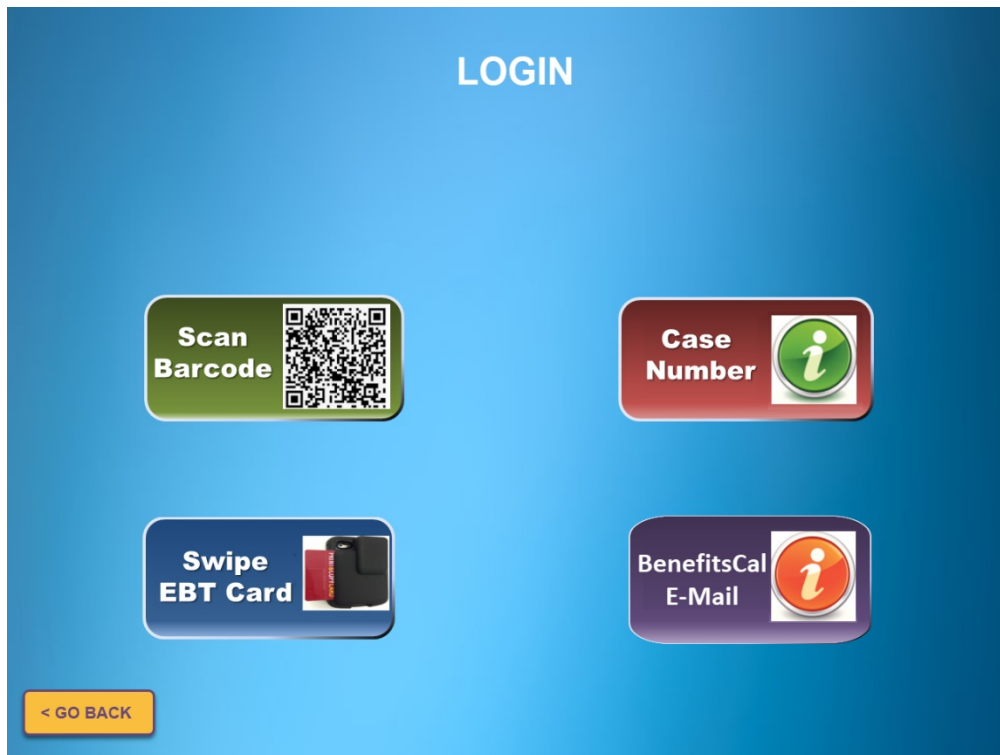


Figure 2.1.3 – CalSAWS Self Service Kiosk App Login Screen

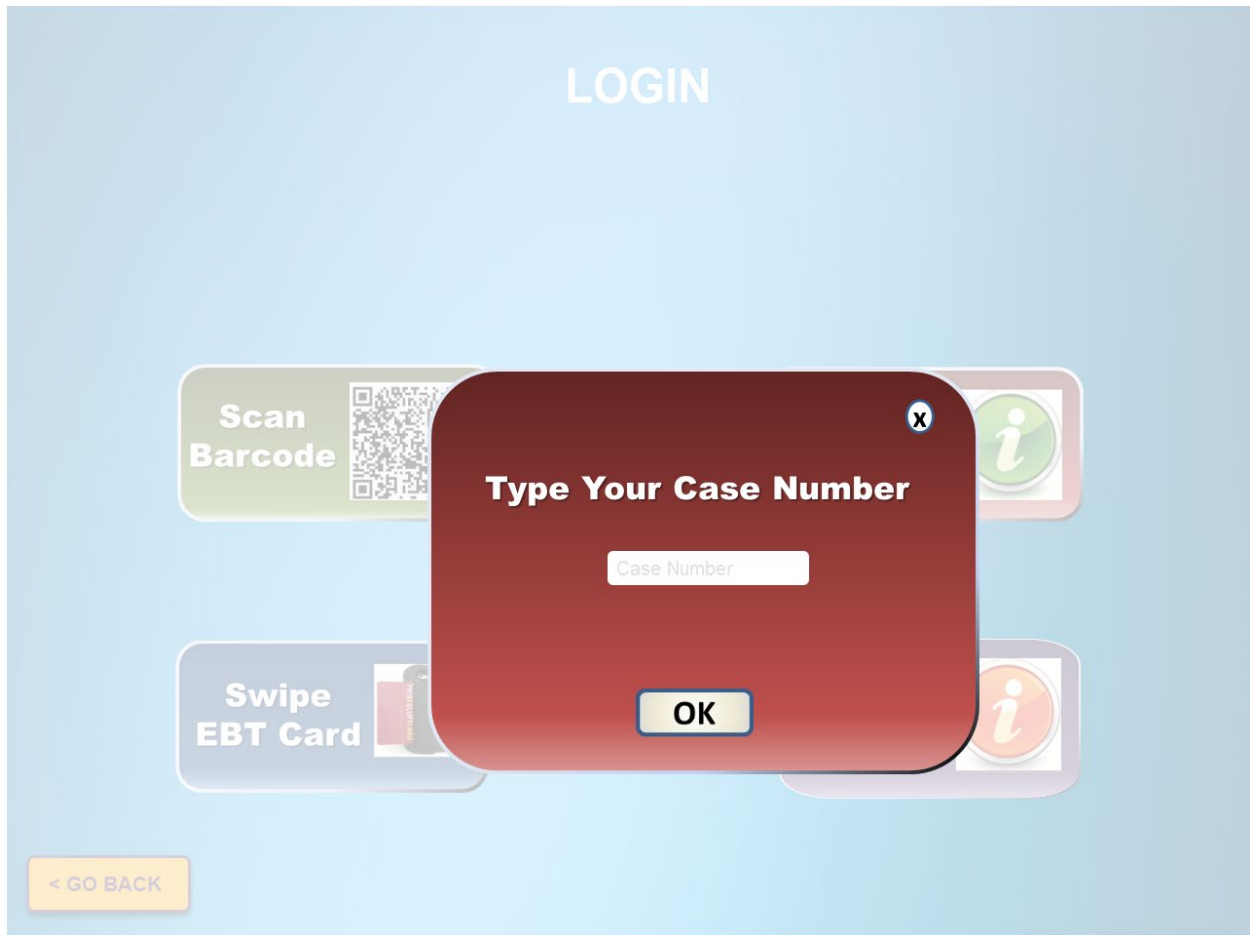


Figure 2.1.4 – CalSAWS Self Service Kiosk App Login_Case Number Screen

LOGIN

Please answer 2 of 4 questions:

Case# : B0KING20

DATE OF BIRTH

YYYY-MM-DD

ZIP CODE

12345

Medi-Cal BIC Card Number

01234567A

LAST 4 DIGIT OF SSN

1234

< GO BACK

OK

Figure 2.1.5 – CalSAWS Self Service Kiosk App Login_Case Number Screen

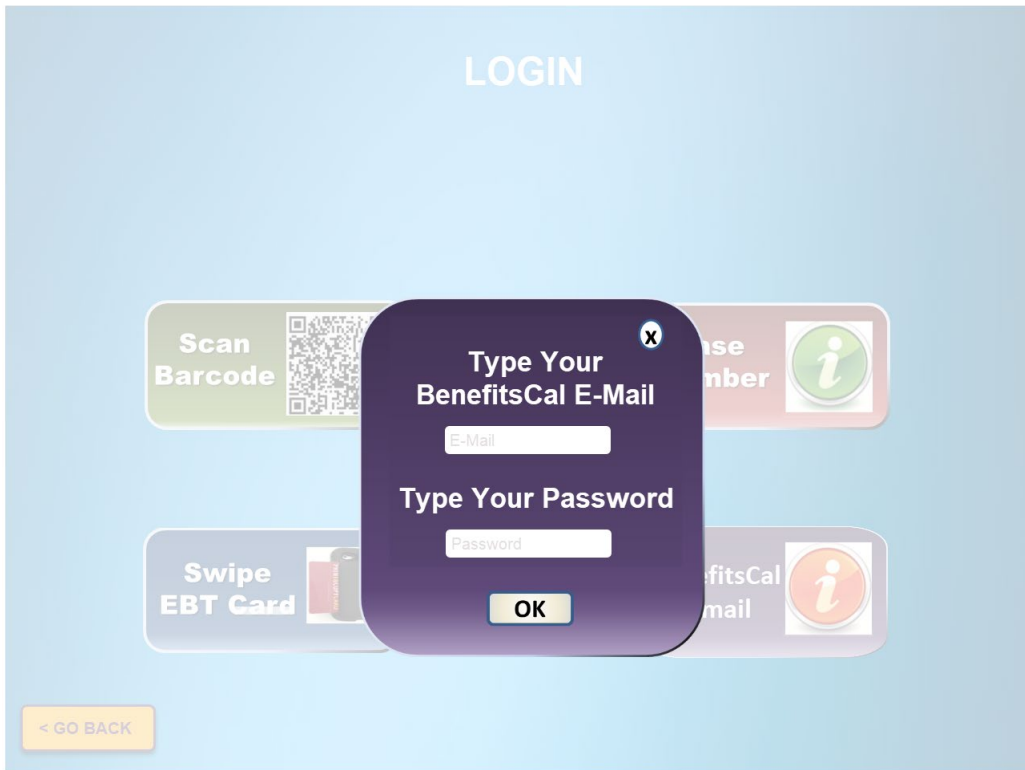


Figure 2.1.6 – CalSAWS Self Service Kiosk App Login_BenefitsCal Screen

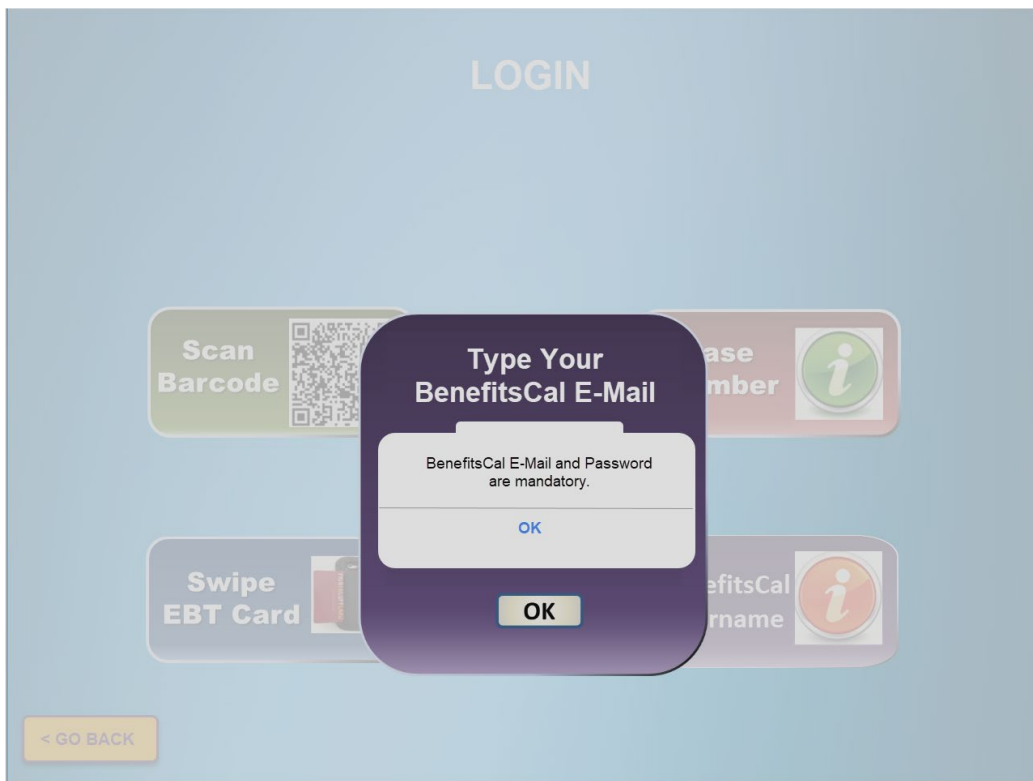


Figure 2.1.7 – CalSAWS Self Service Kiosk Error message for BenefitsCal E-Mail

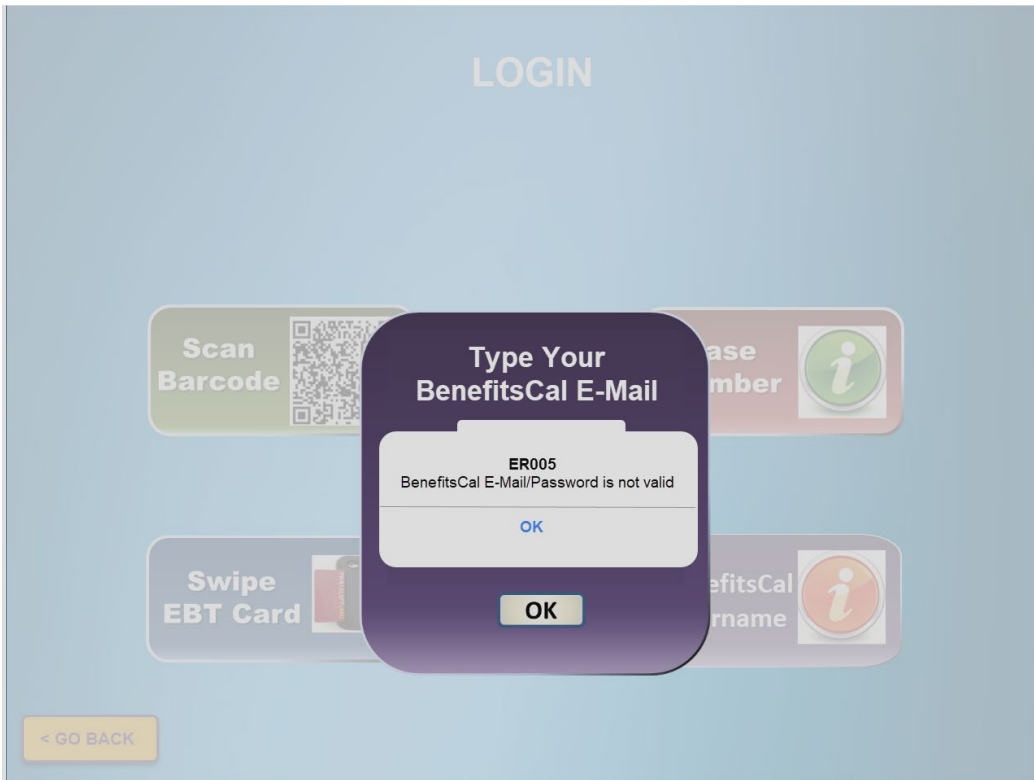


Figure 2.1.8 – CalSAWS Self Service Kiosk Error message for BenefitsCal E-Mail

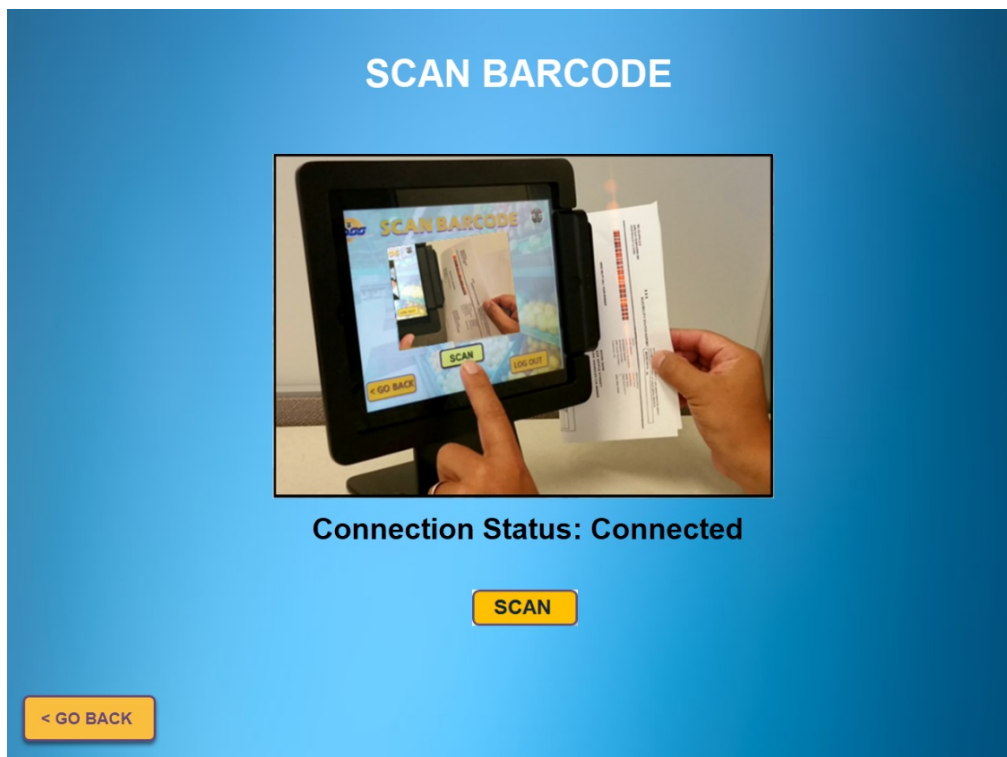


Figure 2.1.9 – CalSAWS Self Service Kiosk App Scan Barcode Screen

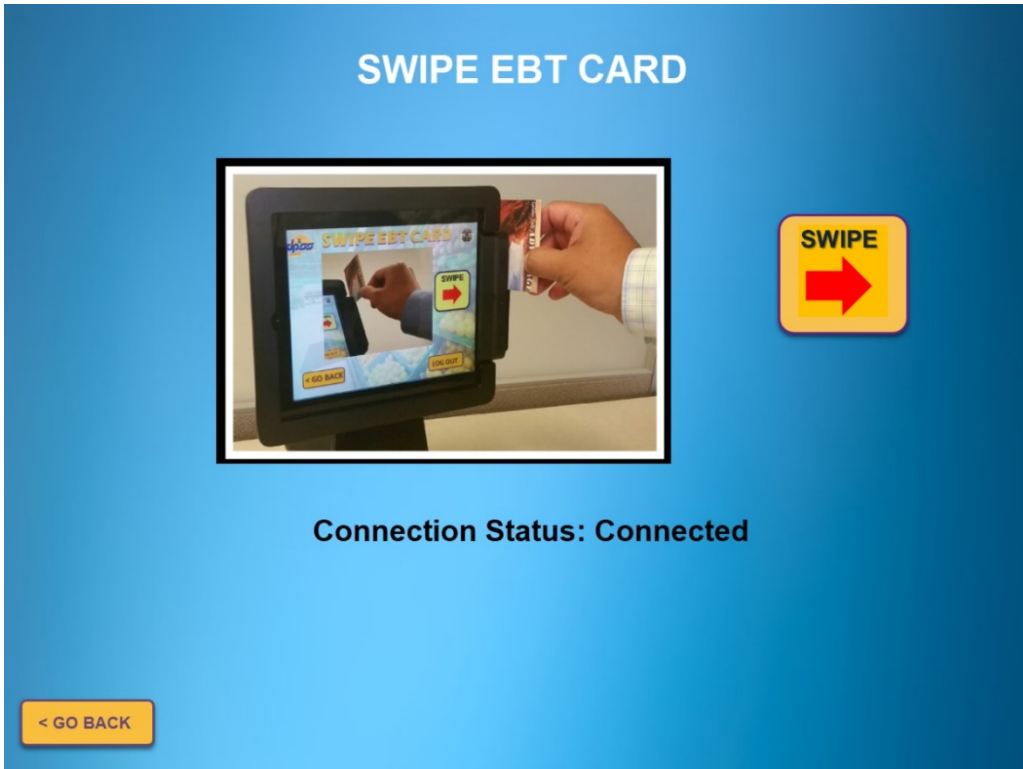


Figure 2.1.10 – CalSAWS Self Service Kiosk App Swipe EBT Card Screen



Figure 2.1.11 – CalSAWS Self Service Kiosk App Self Check In Screen

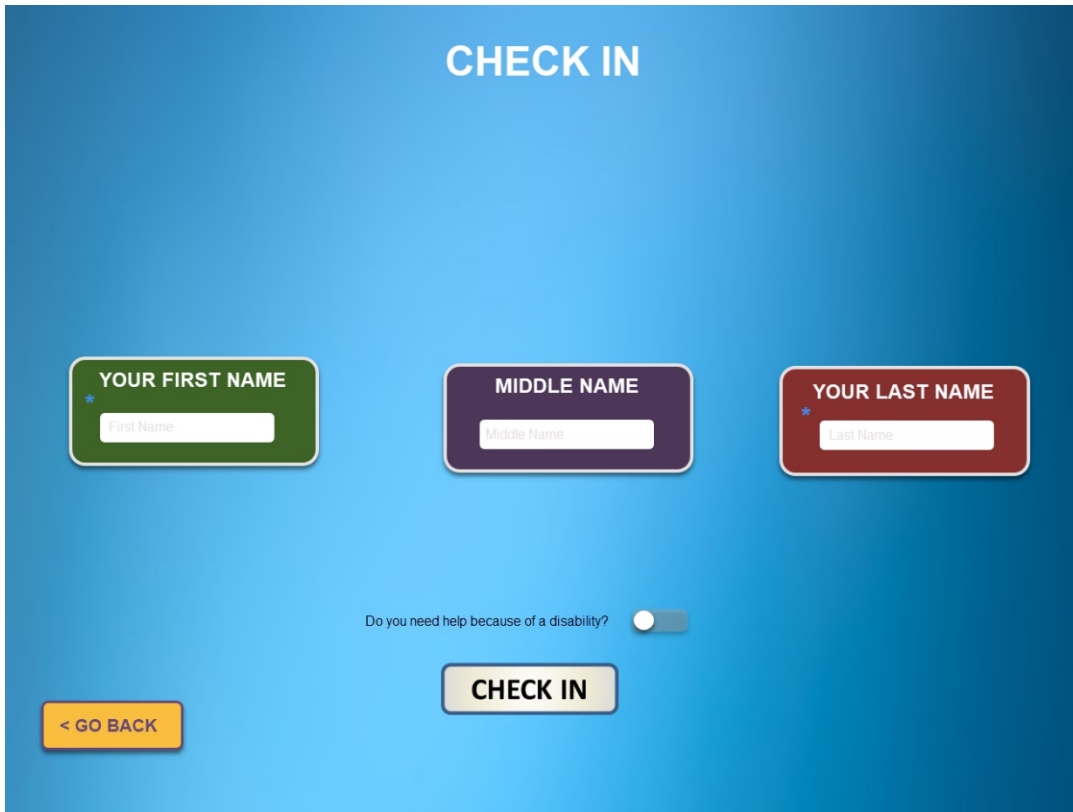


Figure 2.1.12 – CalSAWS Self Service Kiosk App Check In Screen

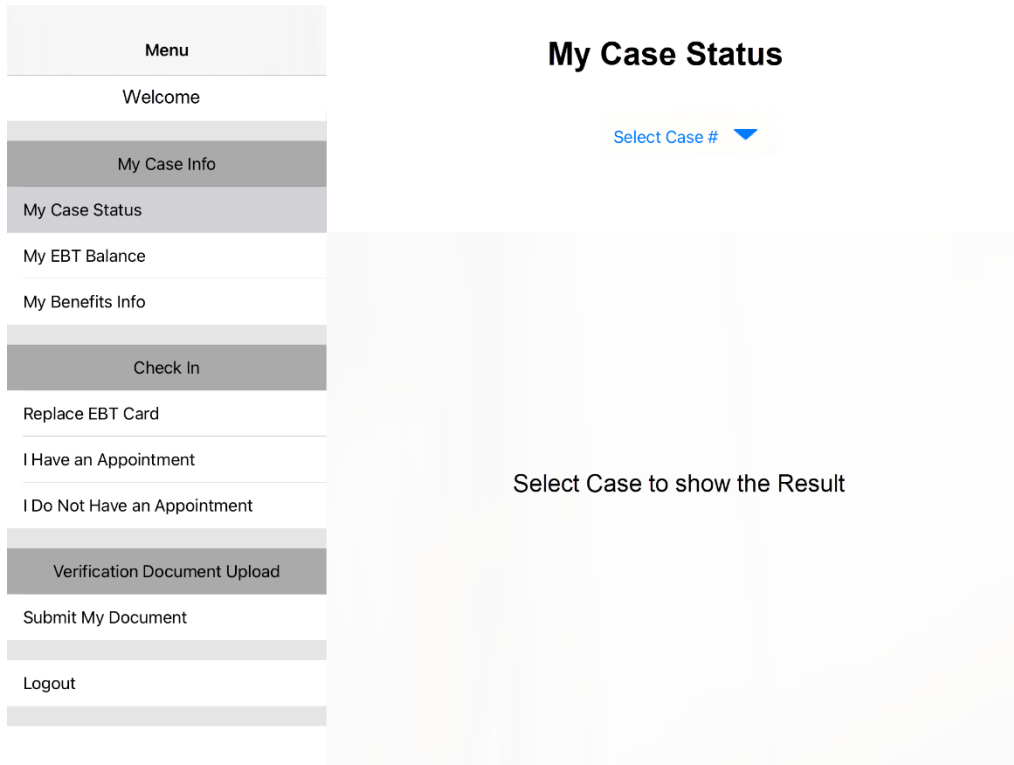


Figure 2.1.13 – CalSAWS Self Service Kiosk App Menu_My Case Info Screen

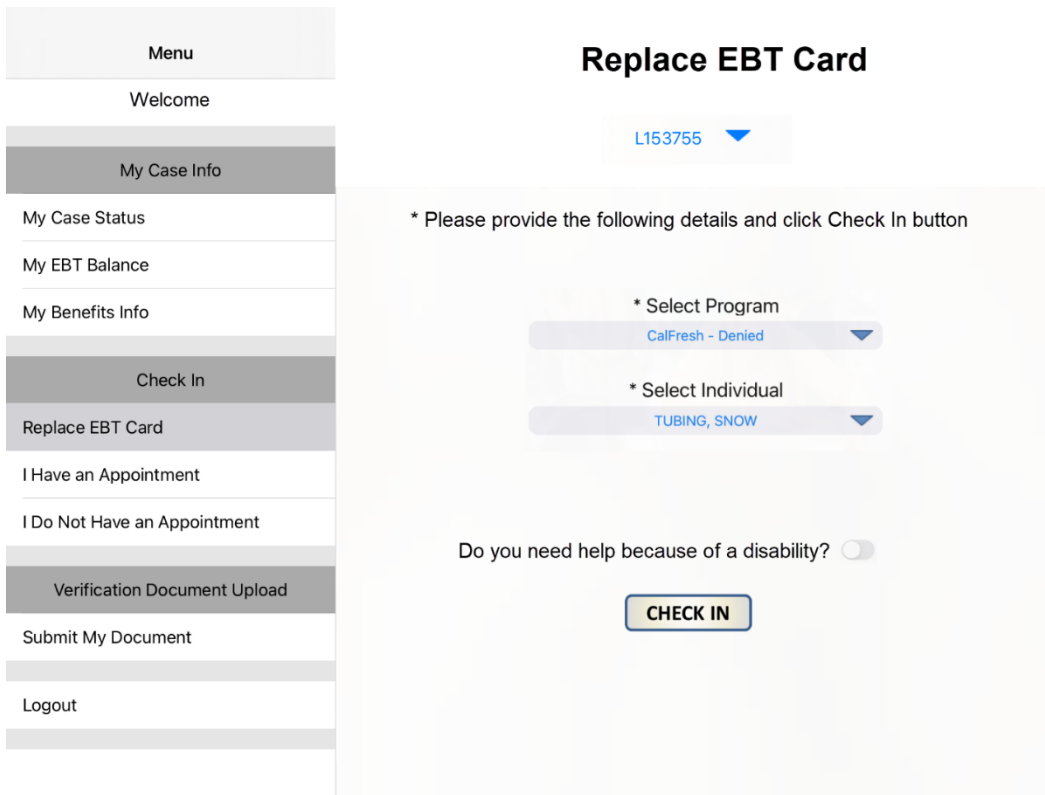


Figure 2.1.14 – CalSAWS Self Service Kiosk App Menu_Check-In_ Replace EBT Card

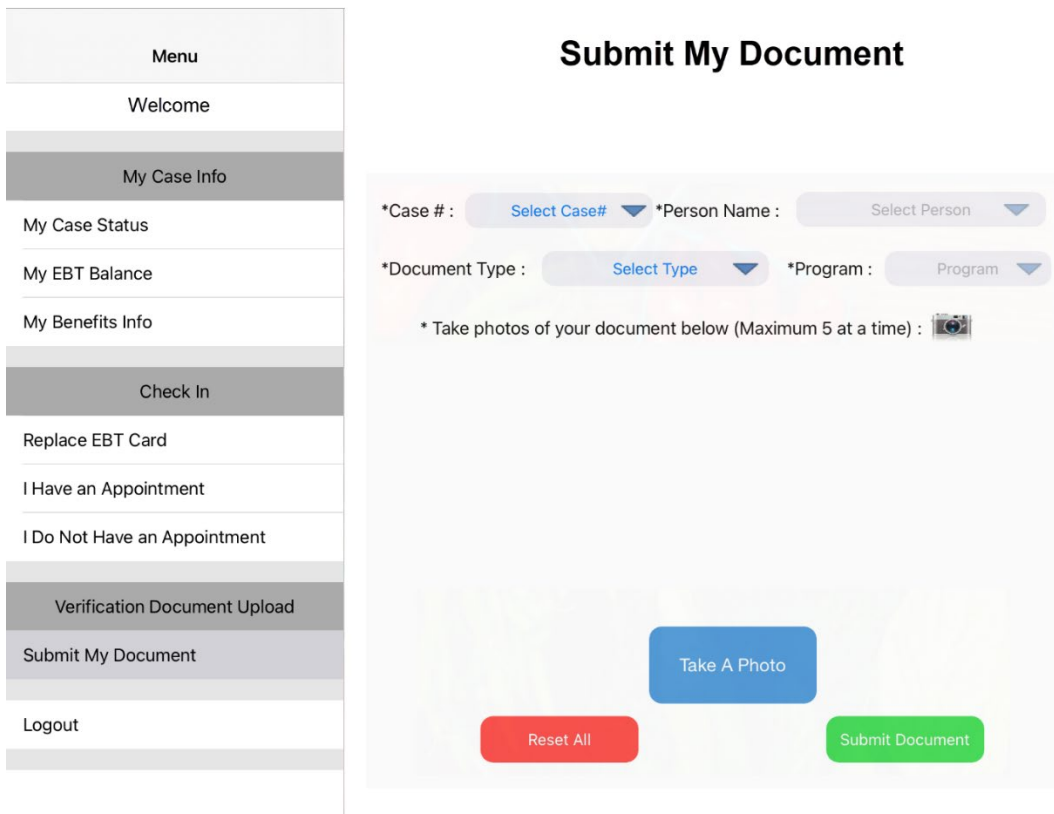


Figure 2.1.15 – CalSAWS Self Service Kiosk App Menu_Submit My Document Screen



Figure 2.1.16 – CaSAWS Self Service Kiosk Icon for Apple device

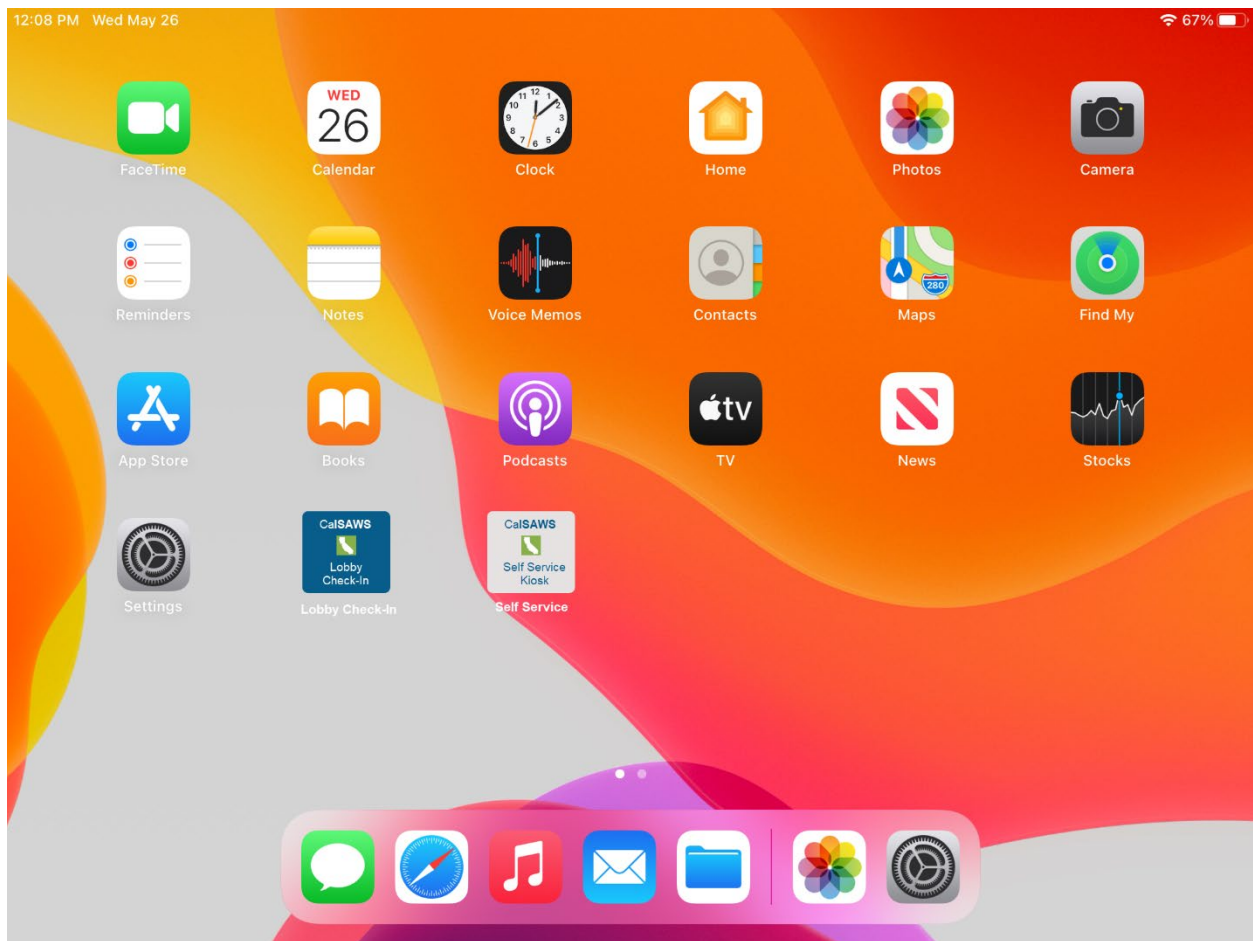


Figure 2.1.17 – CaSAWS Self Service Kiosk Icon for Apple device

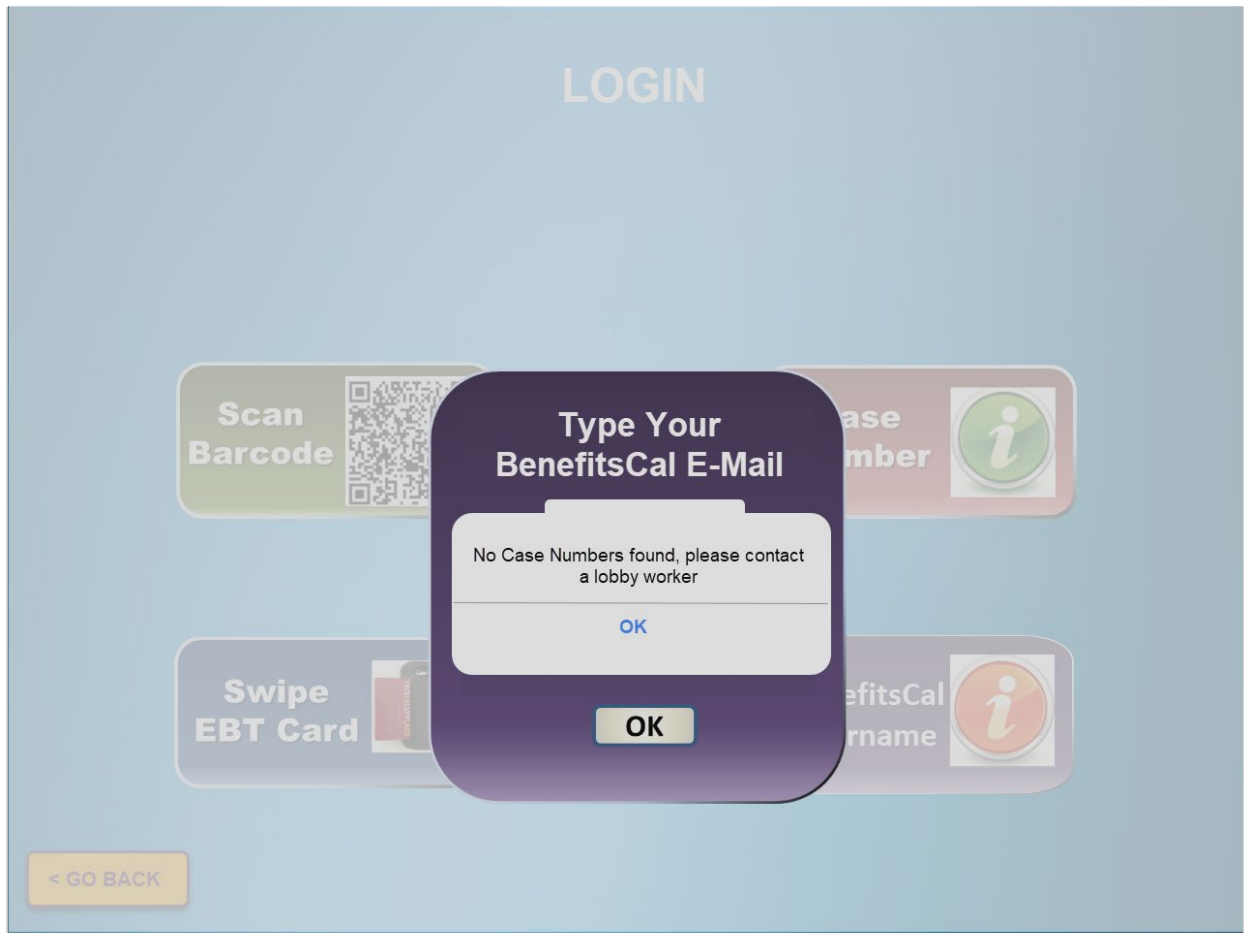


Figure 2.1.18 – CalSAWS Self Service Kiosk Error message for BenefitsCal E-Mail

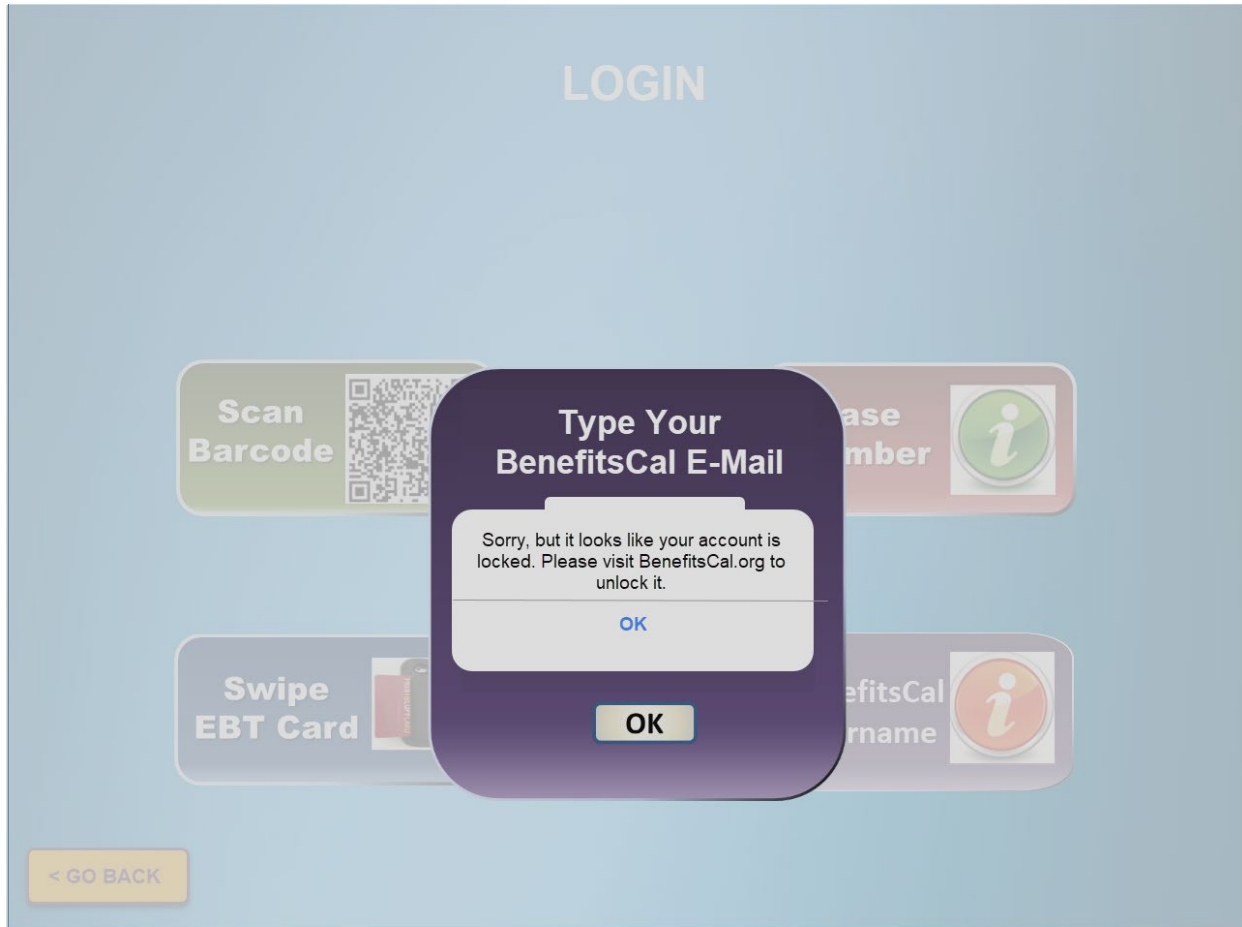


Figure 2.1.19 – CalSAWS Self Service Kiosk Error message for BenefitsCal account locked

2.1.3 Description of Changes

1. Update the background of the CalSAWS Self Service Kiosk application to a gradient blue screen for the following screens:
 - a. Main Screen (Figure 2.1.1)
 - b. My Case Info Screen (Figure 2.1.2)
 - c. Login Screen (Figure 2.1.3)
 - d. Login Screen_Case Number_2 out of 4 questions screen (Figure 2.1.5)
 - e. Scan Barcode Screen (Figure 2.1.9)
 - f. Swipe EBT Card Screen (Figure 2.1.10)
 - g. Self Check In Screen (Figure 2.1.11)
 - h. Check In Screen (Figure 2.1.12)
2. Update the background of the CalSAWS Self Service Kiosk application to gradient blue screen with a white overlay for the following screens:
 - a. Login_Type Your Case Number Screen (Figure 2.1.4)
 - b. Login_Type Your BenefitsCal E-Mail and Password Screen (Figure 2.1.6 through Figure 2.1.8)

3. Update the Menu Screen of the CalSAWS Self Service Kiosk application as below:
 - a. Update the background of the main Menu screen to a white and gray background along with the color of the header from white to black for each screen that is accessible through the Menu screen as shown on Figure 2.1.13 through 2.1.15.
 - i. Changes to the background and the font color of the header will apply to all the screens that are accessed by choosing one of the option from the Menu options located on the left hand side of the screen.
 1. My Case Status
 2. My EBT Balance
 3. My Benefits Info
 4. Replace EBT Card
 5. I have an Appointment
 6. I Do Not Have an Appointment
 7. Submit My Document

Note: The background color for the Menu option located on the left hand side of the screen will be unchanged.
 - b. Update the message that display below 'Menu' on the Menu option located on the left hand side from 'Welcome XXXX' to just 'Welcome'.
 - i. XXXX referenced either the YBN Username (if participants logged in using their YBN Username) or the participants Customer ID.
 - c. Update the value that translate to the Reception Log Visit Purpose field to 'Other/Information' for participants that are checking in through the 'I Do Not have an Appointment'.
4. Update the Header on the Main screen from 'DPSS SELF SERVICE' to 'CalSAWS Self Service Kiosk' as shown on Figure 2.1.1.
5. Update both the 'SUBMIT MY REPORT' and 'VIEW MY MAIL (E-NOTICE)' options from the Main Screen to point to the BenefitsCal website instead of the Your Benefits website.
 - a. Users who choose one of these options will be redirected to the BenefitsCal website automatically.
 - i. BenefitsCal website: <http://benefitscal.org/>
6. Remove the options 'YOUR PHONE NUMBER' and 'YOUR ZIP CODE' from the CHECK IN screen as shown on Figure 2.1.12.
 - a. CHECK IN screen will only have the options of 'YOUR FIRST NAME', 'MIDDLE NAME', and 'YOUR LAST NAME'.
7. Update the barcode icon on the 'Scan Barcode' option on the LOGIN screen to a QR code icon as shown on Figure 2.1.3
8. Remove the option titled 'Username or Customer ID" from the LOGIN screen of the CalSAWS Self Service Kiosk application.
9. Update the background text that display on the text field for the option 'Medi-Cal BIC Card Number' found on the 'Login Screen_Case Number_2 out of 4 questions' screen from 'Medi Cal BIC Card Number' to '01234567A-12345' as reference on Figure 2.1.5)

10. Add a new option titled 'BenefitsCal E-Mail' to the LOGIN screen of the CalSAWS Self Service Kiosk Application as shown on Figure 2.1.3.
 - a. New option titled 'BenefitsCal E-Mail' will be located below the 'Case Number' option and to the right of the 'Swipe EBT Card' option.
 - b. Choosing the 'BenefitsCal E-Mail' option will update the screen and an overlay will display with the following (reference Figure 2.1.6):
 - i. Overlay will have two editable text fields:
 1. First editable text field will be titled 'Type Your BenefitsCal E-Mail'.
 - a. First editable text field will be located at the top of the overlay.
 - b. Editable text field will have the text 'E-Mail' in the background.
 - i. Text will be in Gray color.
 2. Second editable text field will be titled 'Type your Password'.
 - a. Second editable text field will be located right below the 'Type Your BenefitsCal E-mail' editable text field.
 - b. Editable text field will have the text 'Password' in the background.
 - i. Text will be in Gray color.
 - ii. Clicking on the editable text field will bring up the keyboard.
 - iii. An 'X' icon will display on the top right hand side of the overlay.
 1. Clicking on the 'X' icon will close the overlay and users will be redirected back to the Login Page (Figure 2.1.3)
 - iv. An 'OK' button will display at the bottom of the overlay.
 1. Clicking the 'OK' button will initiate the SDK flow (see point #13 for the SDK integration) invoke the newly created webservises (reference Section 2.4 for more detail on the webservises) that will be used to authenticate the BenefitsCal E-Mail and Password against ForgeRock.

Note: For BenefitsCal E-mail and Password that was able to be authenticated successfully by ForgeRock, the corresponding GUID will be provided. The GUID will then be used to search in CalSAWS for all the Case Number that belongs to LA County.

- a. For a BenefitsCal E-mail and Password that was able to be authenticated successfully by Forgerock and returns Case Numbers

that belong to LA County (the BenefitsCal E-mail are link to Case Numbers through a GUID), participants will be redirected to one of the following screens within the main menu screen.

- i. The screen that the User will be redirected to from the Menu option will be dependent on the option that the user selected prior to Logging in.
 1. Example: When user select the 'Submit My Document' option from the Main Screen and then Log In, the user will be redirected to the Submit My Document screen within the main Menu screen.
 2. Lists of screens within the main Menu screen:
 - a. My Case Status
 - b. My EBT Balance
 - c. My Benefits Info
 - d. Replace EBT Card
 - e. I have an Appointment
 - f. I Do Not Have an Appointment
 - g. Submit My Document

Note: The screen that the user will be redirected to after they log in is based on the option that the user selected prior to logging in is an existing functionality.

- b. Display the following error message for BenefitsCal E-mail and Password that was able to be authenticated successfully by ForgeRock but does not return any Case Numbers that belong to LA County (the BenefitsCal E-mail are link to Case Numbers through a GUID) as shown on Figure 2.1.18.
 - i. 'No Case Numbers found, please contact a lobby worker'.
- c. For BenefitsCal E-Mail and Password that was not able to be authenticated successfully by ForgeRock, display the following error message:
 - i. 'ER005 BenefitsCal E-Mail/Password not valid' as shown on Figure 2.1.8.
 - ii. For a BenefitsCal E-Mail and Password that was not able to be

authenticated successfully by ForgeRock after 5 attempts display the following message: as shown on Figure 2.1.19.

1. 'Sorry, but it looks like your account is locked. Please visit BenefitsCal.org to unlock it.'

Note: Participants will need to go to BenefitsCal.org directly in order to reset their password.

2. Display the following pop up message 'BenefitsCal E-Mail and Password are mandatory.' when the 'OK' button is click but no information was inputted in either one or both editable text fields as shown on Figure 2.1.7.
 - a. Clicking on the 'OK' button on the pop up message will close the pop up message.
 - b. Clicking on the 'OK' button on the pop up message will close the pop up message.
11. Update the 'CalSAWS Self Service Kiosk' icon that display on the Apple device.
 - a. The CalSAWS Self Service Kiosk icon will be updated to the image as reference on Figure 2.1.16 and Figure 2.1.17.
 - i. Icon will have a gray background and have CalSAWS written on top, Self Service Kiosk at the bottom both in blue color along with an image in the middle of California in white with green background.
12. Update the CalSAWS Self Service Kiosk to upload documents to Hyland Imaging Solution.
13. Update the CalSAWS Self Service Kiosk to be integrated with ForgeRock SDK flow to communicate directly to ForgeRock system.
 - a. Through the SDK flow, the CalSAWS Self Service Kiosk will send BenefitsCal E-Mail and Password to be authenticated.
 - i. A successful credential is correct and is able to be authenticated successfully the associated GUID will be returned.
 - ii. For credential that is not correct, it will return an invalid credential message with a 200 response.
 - iii. For credential that is not correct and it is over the amount allotted the account lockout message is returned with a 200 response.

Note: Users will continue to be automatically be logged out of the CalSAWS Self Service Kiosk application after 1.5 minutes when it is left idle.

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 CalSAWS Lobby Check-In Application

2.2.1 Overview

The CalSAWS Lobby Check-In application allows worker to check-in customers that are visiting the county office. This SCR will update the application to remove the option for workers to look up customers by using the customer's YBN credentials, adding an option to look up customers using their BenefitsCal username and lastly the Purpose of Visit options will be updated.

2.2.2 CalSAWS Lobby Check-In Application Mockup

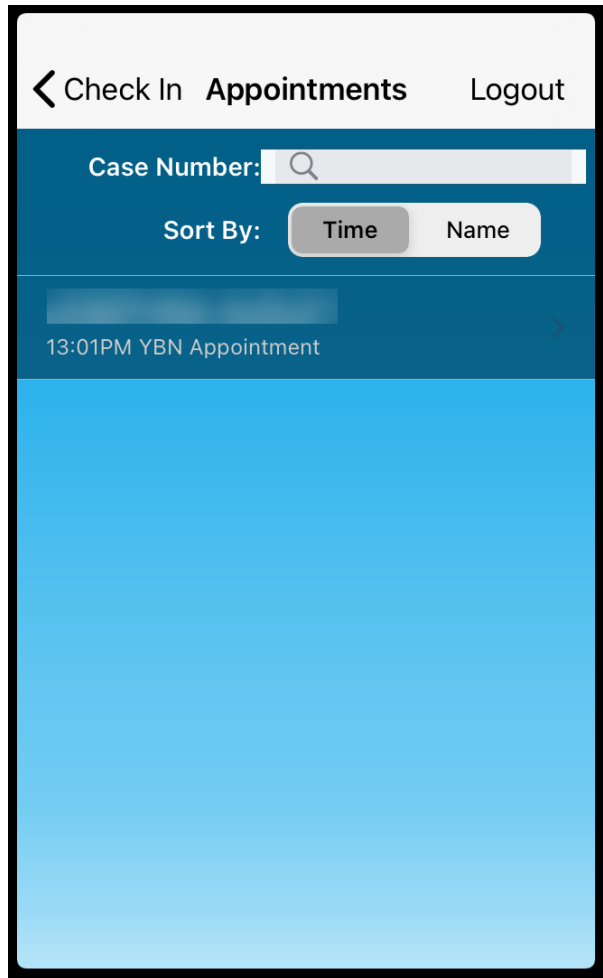


Figure 2.2.1 – Appointment screen

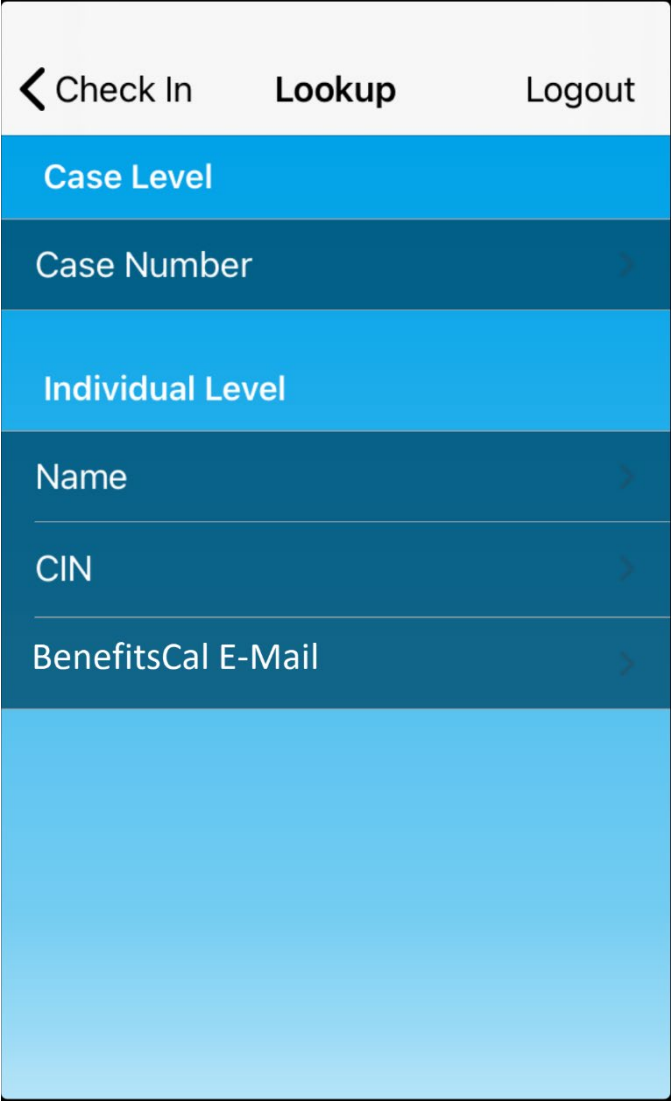


Figure 2.2.2 – Lookup screen

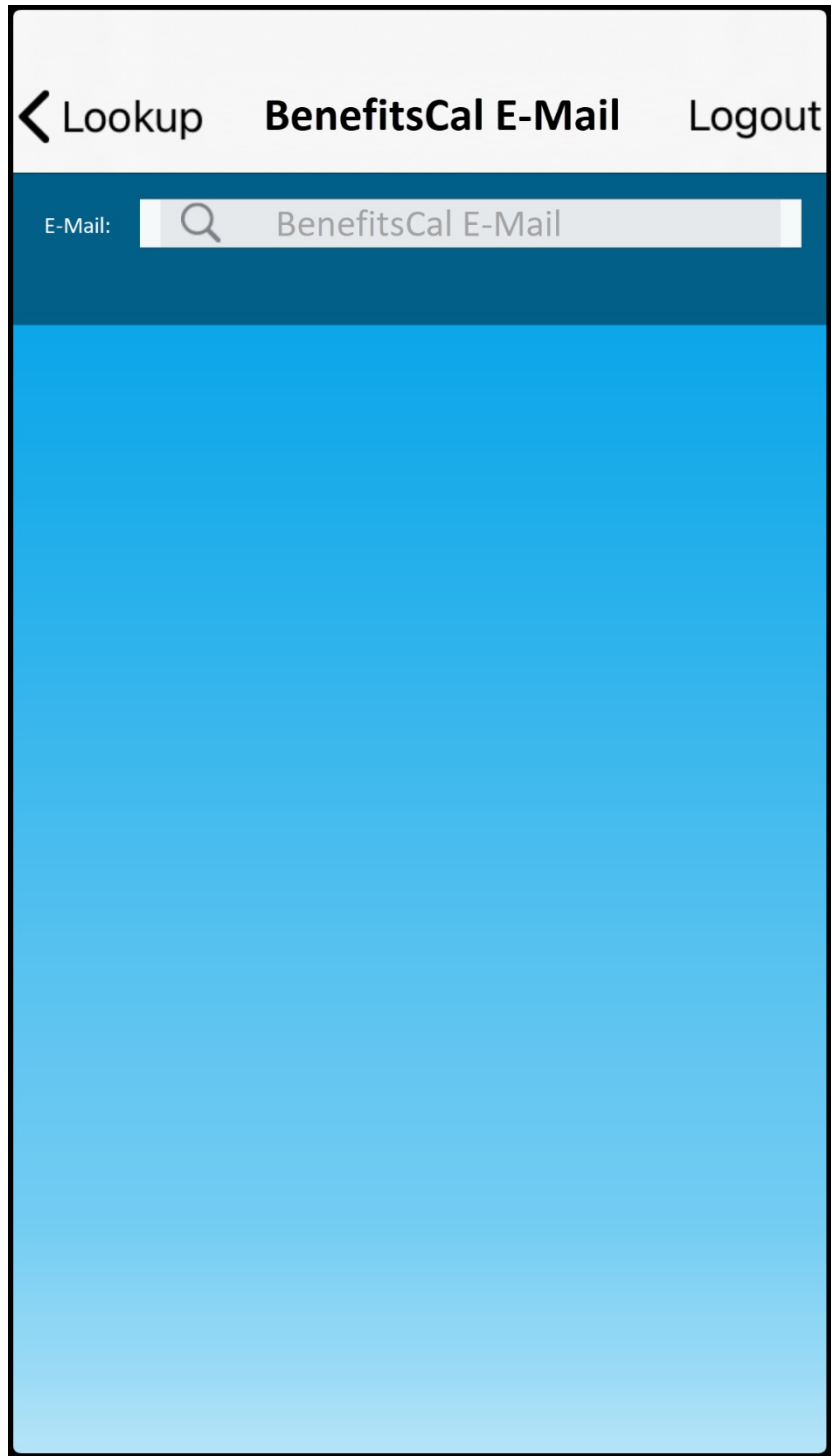


Figure 2.2.3 – BenefitsCal E-Mail Name screen

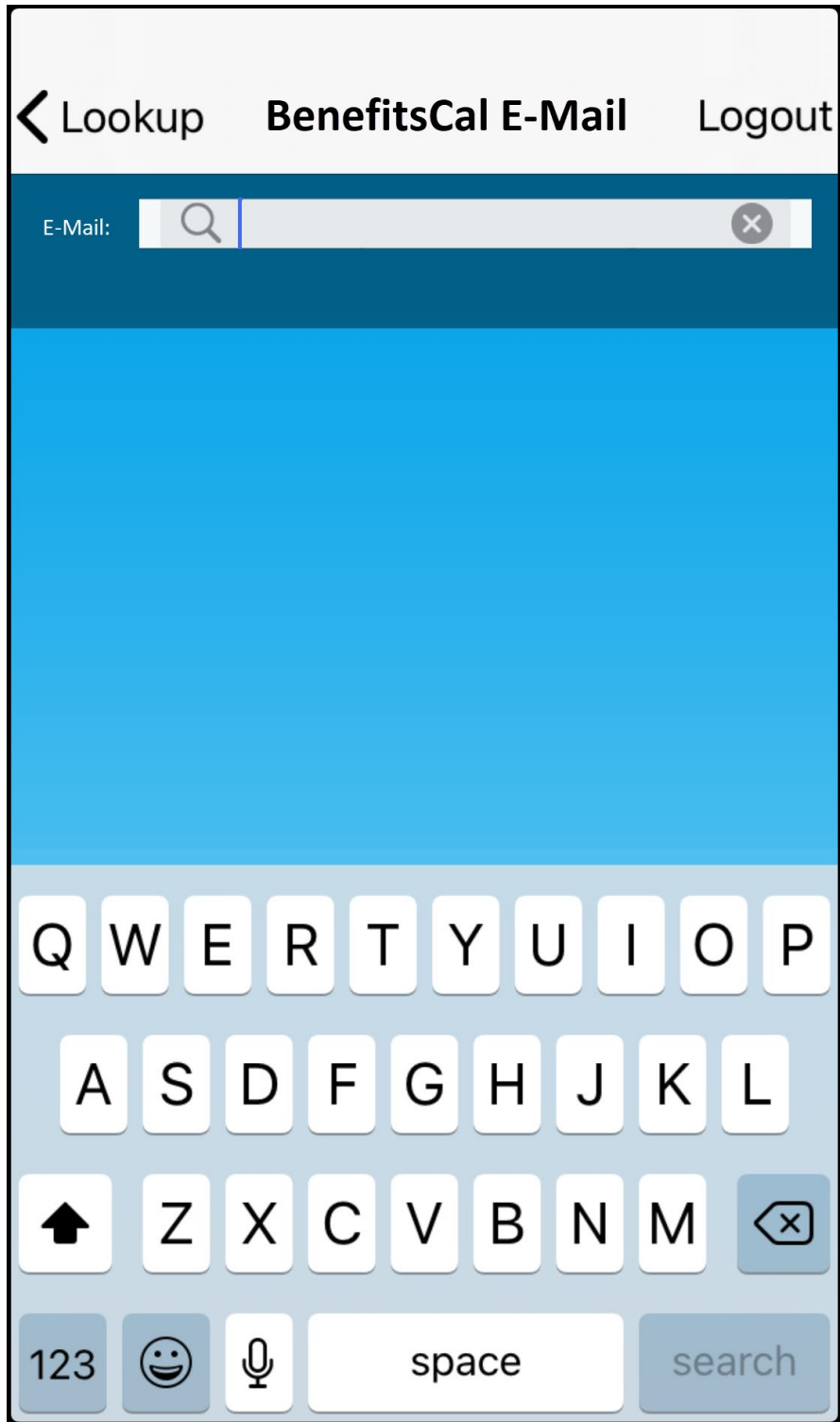


Figure 2.2.4 – BenefitsCal E-Mail Name screen

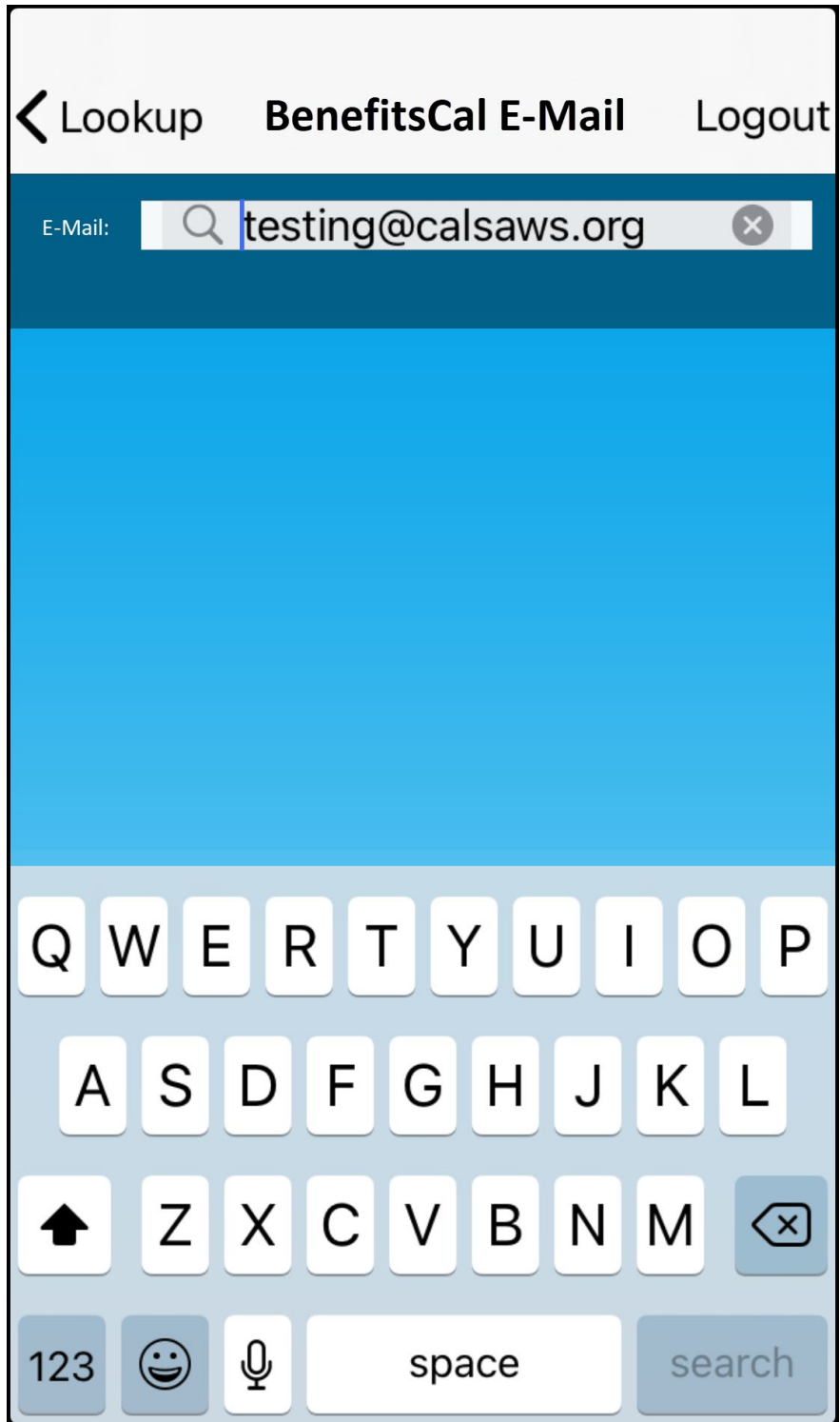


Figure 2.2.5 – BenefitsCal E-Mail screen

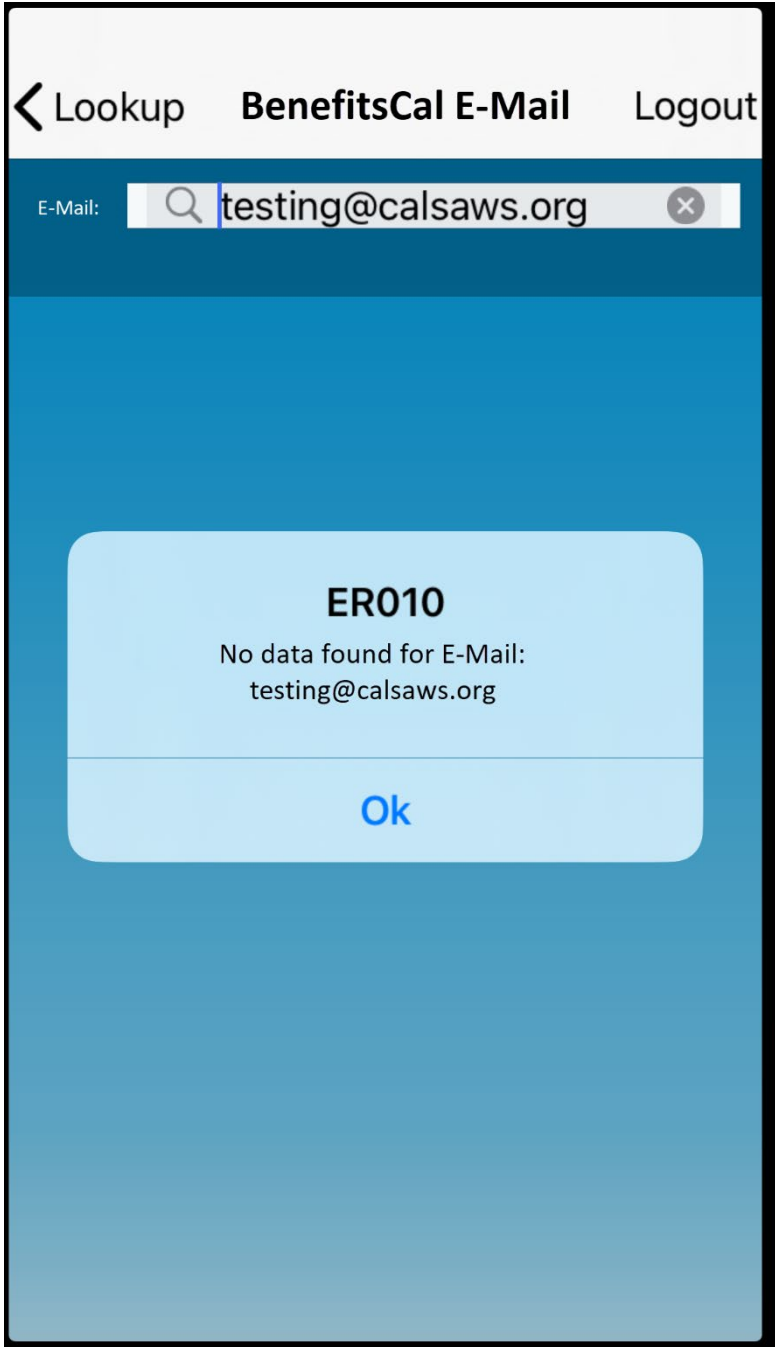


Figure 2.2.6 – BenefitsCal E-Mail screen with error

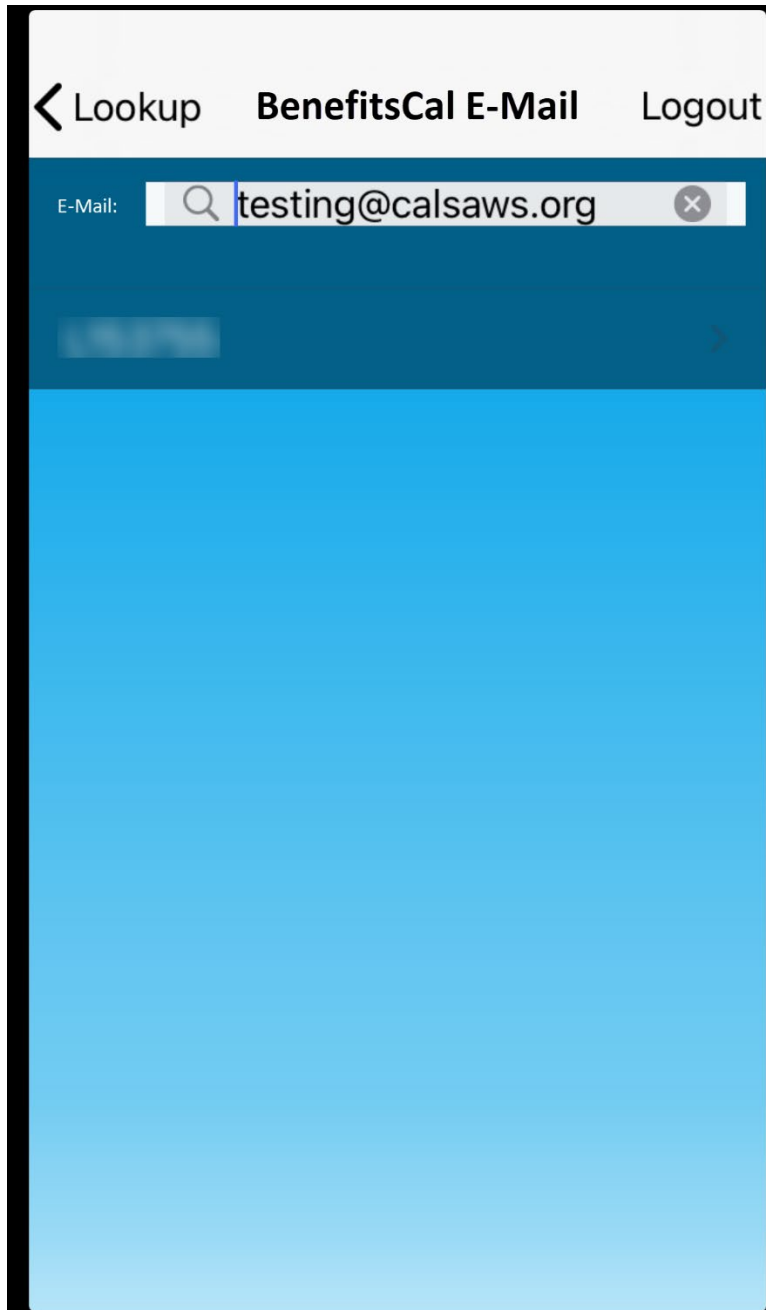


Figure 2.2.7 – BenefitsCal E-Mail screen

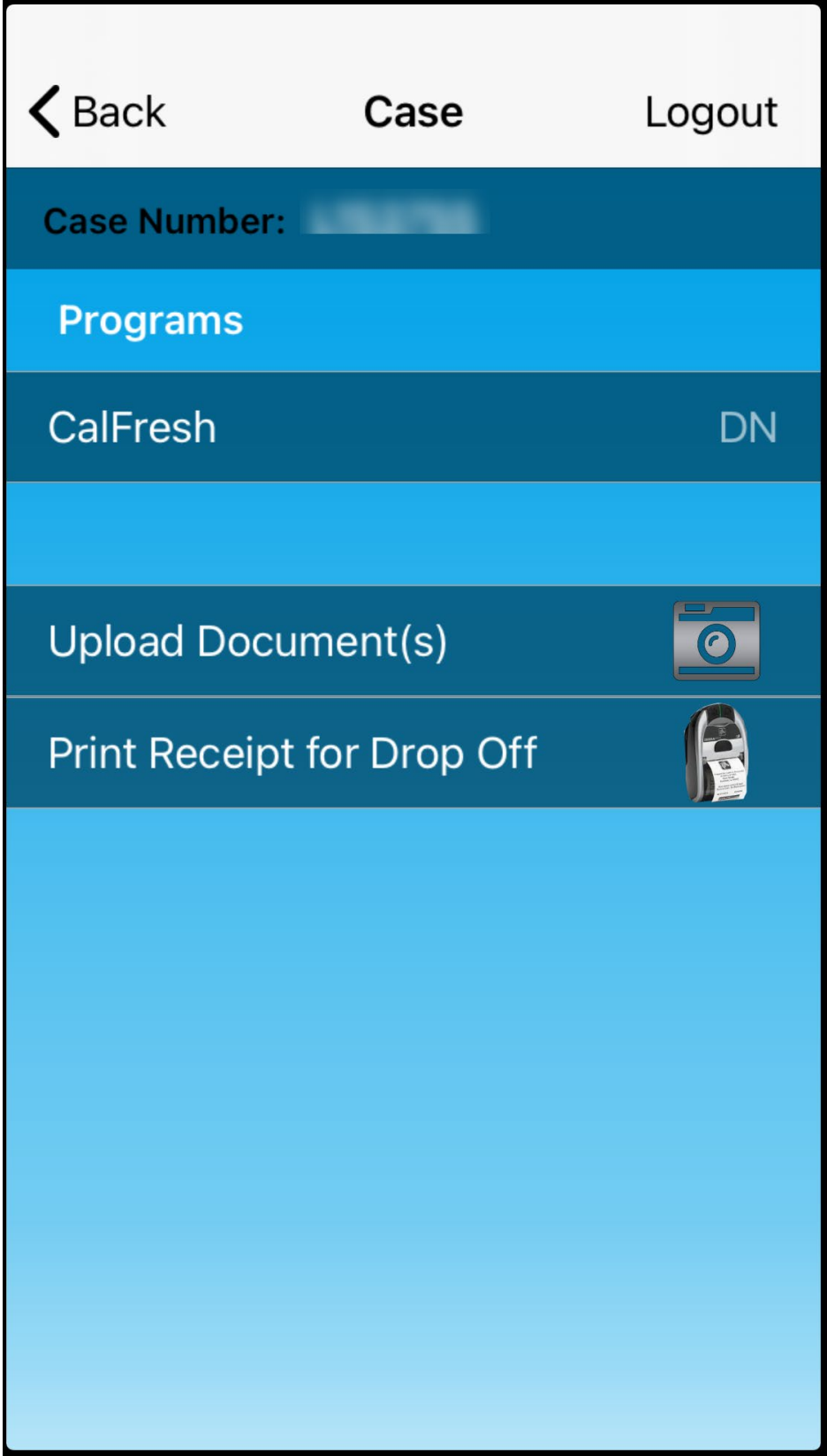


Figure 2.2.8 – Case screen (reference only)

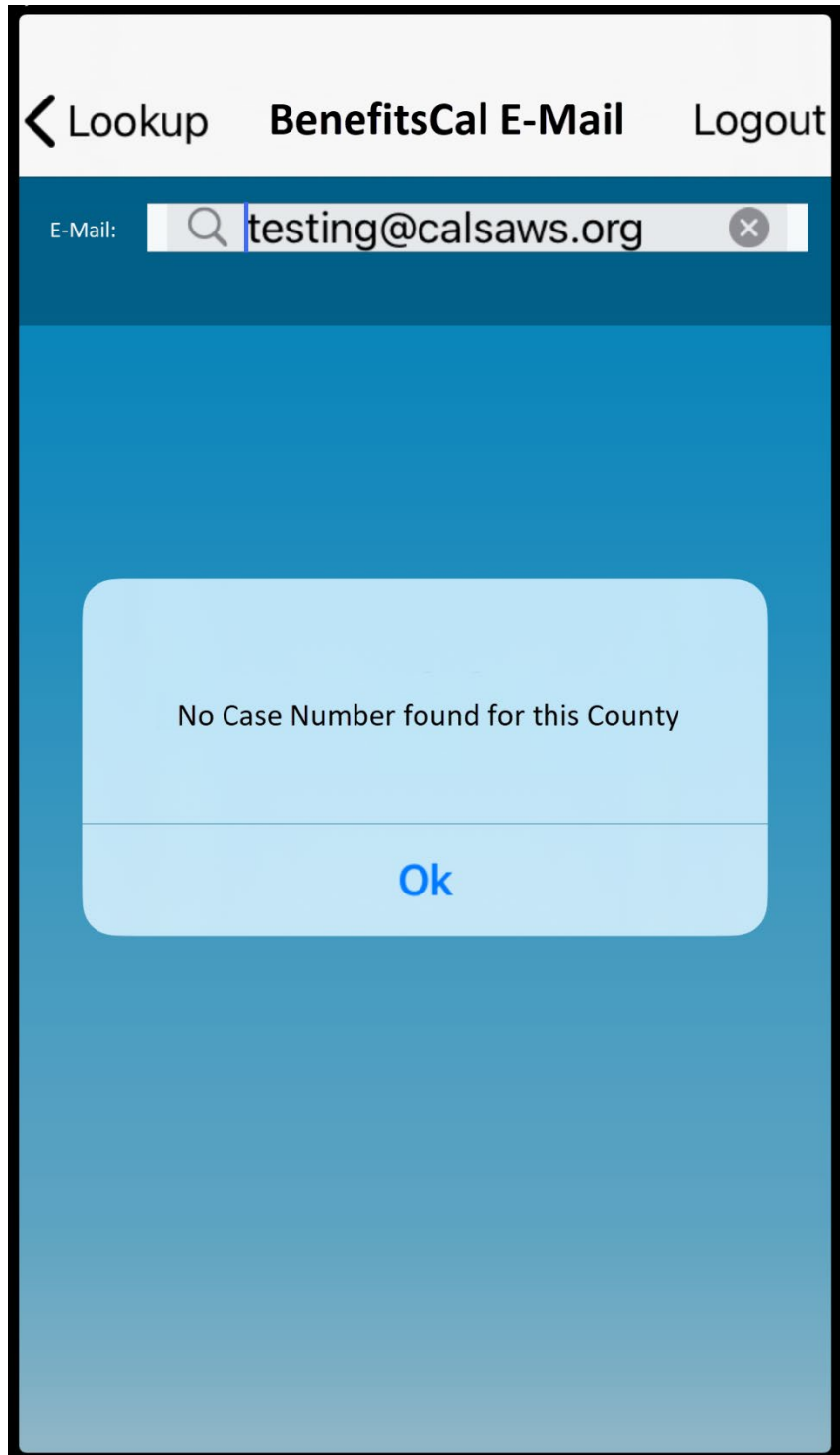


Figure 2.2.9 – BenefitsCal E-Mail screen no cases found for the selected County

 Case Purpose of Visit Logout

Individual:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special
Circumstances:

Check In



Figure 2.2.11 – Individual Type field non-mandatory

[← Check In](#) **Add Individual** [Logout](#)

First Name*:

Last Name*:

Middle Initial:

Suffix:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special Circumstances:

Check In

Figure 2.2.12 – Add Individual Screen

[← Case](#) **Purpose of Visit** [Logout](#)

Individual:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special Circumstances:

[Done](#)

Immediate Need
Expedite Services
Homeless Situation

Figure 2.2.13 – Purpose of Visit Screen

[← Case](#) **Purpose of Visit** [Logout](#)

Individual:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special Circumstances:

[Done](#)

Agency Partners
Apply for Benefits
Appointment
Cashier/Repayment
Collections

Figure 2.2.14 – Purpose of Visit Screen



Figure 2.2.15 – CaISAWS Lobby Check-In Icon for Apple device



Figure 2.2.16 – Lobby Check-In Icon for Apple device

2.2.3 Description of Changes

1. Remove the YBN Appt Number field from the Appointments screen as shown on Figure 2.2.1.
 - a. Update the Appointments screen on the CaISAWS Lobby Check-In application to remove the field titled 'YBN Appt Number:'
2. Update the Lookup screen on the CaISAWS Lobby Check-In application as shown on Figure 2.2.2
 - i. Remove the field titled 'YBN User Name'
 1. This option is currently only available if the worker that is logged in to the CaISAWS Lobby Check-In

application is associated to an office located in Los Angeles County.

- ii. Remove the field titled 'IVR/CustomerID'.
 - iii. Add a field to the Lookup screen titled 'BenefitsCal E-Mail'.
 1. New field will be located below the field titled 'CIN'.
 2. Choosing the 'BenefitsCal E-Mail field will take the worker to the screen titled 'BenefitsCal E-Mail' as shown on Figure 2.2.3 (please reference #3 below for more details on the BenefitsCal E-Mail screen).
3. Create a new screen titled 'BenefitsCal E-Mail as shown on Figure 2.2.3.
- a. The BenefitsCal User Name screen will be accessible through Lookup screen by clicking the 'BenefitsCal E-Mail' field (reference Figure 2.2.2).
 - b. BenefitsCal E-Mail field will have an editable text field titled 'E-Mail:'.
 - i. Editable text field will have a magnifying glass icon and the text 'BenefitsCal E-Mail' in the background.
 1. Both the Magnifying glass icon and BenefitsCal E-Mail text will be in Gray.
 - ii. Editable text field will not have a limit on the amount of characters that can be inputted on the field.
 - iii. Clicking on the editable text field will bring up the keyboard as shown on Figure 2.2.4 and Figure 2.2.5
 - c. Clicking the 'Search' button on the keyboard will invoke the newly created webservices (reference Section 2.3 and 2.4 for more details on the web services) that will search ForgeRock for the inputted BenefitsCal E-Mail information.

Note: For BenefitsCal E-mail that's found in ForgeRock, the corresponding GUID will be provided. The GUID will then be used to search in CalSAWS for a of all the Case Numbers along with the County information.

- i. The CalSAWS Lobby Check-In application will refresh and display the list of cases that belongs to the County that is being accessed by the CalSAWS Lobby Check-In application as shown on Figure 2.2.7.
 1. Example: For CalSAWS Lobby Check-In application that is accessed for an office located in Riverside County, only cases that is link to Riverside County will be displayed. Even if the BenefitsCal E-Mail is link to other cases that belong to other counties such as such as Los Angeles.

- a. Clicking on the Case number will take the worker to the Case Screen as shown on Figure 2.2.8).
 - ii. The CalSAWS Lobby Check-In application will display the following error message as shown on Figure 2.2.9.
 - 1. 'No Case Number found for this County'
 - 2. Error message will display when none of the Case Numbers that are link to the BenefitsCal E-Mail belong to the County that is being accessed by the CalSAWS Lobby Check-In application.
 - iii. For BenefitsCal E-Mail that's not found in ForgeRock display the following error message (as reference on Figure 2.2.6):
 - 1. 'ER010 No data found for E-Mail: 'XXXX''
 - a. 'XXXX' will be the BenefitsCal E-Mail that was inputted.
 - d. Clicking on the 'Lookup' field located on the top left side of the screen will take the worker back to the Lookup Screen.
 - e. Clicking on the 'Logout' field located on the top right side of the screen will direct logout the worker and take the worker back to the Main Login screen.
 - i. This will follow existing functionality anytime a worker click on the 'Logout' field through out the application.
- 4. Update all 'Visit Purpose' field on the 'Purpose of Visit screen to be editable.
 - a. Update the value available to be selected in the 'Visit Purpose' field on the 'Purpose of Visit' screen.
 - i. Add the following values as referenced on the Visit Purpose Tab on the CA-217869 Updates to Lobby App values.docx
 - ii. Remove the following values as referenced on the Values to be removed tab on the CA-217869 Updates to Lobby App values.docx
 - iii. Values will be listed in alphabetical order.
- 5. Update the 'Visit Purpose' field on the 'Add Individual' Screen to be editable as shown on shown on Figure 2.2.12.
 - a. Clicking on the Text field for the 'Visit Purpose' field will bring up the scroll box with a list of values available to be selected. Please reference the Visit Purpose Tab on the CA-217869 Updates to Lobby App values.docx for available list.
 - i. Values will be listed in alphabetical order.
- 6. Update the Individual Type field to no longer be mandatory.
 - a. The '*' symbol will be removed from the 'Individual Type' field as shown on Figure 2.2.11 and Figure 2.2.12.
 - b. Update to the Individual Type field apply for all the screens throughout the application
 - i. Add Individual screen
 - ii. Purpose of Visit screen

- c. Add the following values as referenced on the Individual Type Tab on the CA-217869 Updates to Lobby App values.docx
 - d. Remove the following values as referenced on the Values to be removed tab on the CA-217869 Updates to Lobby App values.docx
 - e. Values to be listed in alphabetical order.
7. Add a new editable text field titled 'Emergency Requests':
- a. 'Emergency Requests' field will not be a mandatory field.
 - b. Clicking on the Text field will bring up a list that the worker can scroll through as shown on Figure 2.2.13
 - i. The values to be displayed will be:
 - 1. Immediate Need
 - 2. Expedite Services
 - 3. Homeless Situation
 - ii. Clicking on 'Done' will input the value selected on the text field.
 - c. Value selected on this field will translate to the Emergency Requests field on the Reception Log page in CalSAWS.
Note: Reception Log record will be associated with a red exclamation mark icon on the Initial Time field. This is an existing functionality in Reception Log.
 - d. Emergency Requests field will display on the following screens:
 - i. Purpose of Visit screen
 - 1. New field 'Emergency Requests' will be located below the 'Individual Type' field as shown on Figure 2.2.11 and Figure 2.2.13
 - ii. Add Individual screen
 - 1. New field 'Emergency Requests' will be located below the 'Individual Type' field as shown on Figure 2.2.12.
8. Remove the field titled 'Drop In Purpose' from the Purpose of Visit.
9. Update the 'DPSS Lobby' icon and title for the Lobby Check-In application that display on the Apple device.
- a. The DPSS Lobby icon will be updated to the image as reference on Figure 2.2.14 and Figure 2.2.15.
 - i. Icon will have a blue background and have CalSAWS written on top, Lobby Check-In at the bottom both in white color along with an image in the middle of California in white with green background.
 - b. The DPSS Lobby icon will be renamed from 'DPSS Lobby' to 'Lobby Check-In' as referenced on Figure 2.2.15.

2.2.4 Page Location

N/A

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 CalSAWS Lobby Check-In Application web service

2.3.1 Overview

The Lobby Check-In application will be updated to allow County workers to look up an individual using their BenefitsCal E-Mail. As part of this SCR a new webservice will be created in order to support this new functionality.

2.3.2 Description of Change

1. Create new REST web service that will be invoke when a user search for an individual Case information using their BenefitsCal E-Mail.
 - a. Web service will send the BenefitsCal E-Mail in the Request and return the GUID information that are link to the BenefitsCal E-Mail in the Response.
 - i. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER010 No data found for E-Mail: XXXX'.
 1. XXXX will be the BenefitsCal E-Mail that was inputted.

Note: A new REST web service will be created that will send the GUID information (GUID will be provided by ForgeRock if one does exist) in the request and will receive the Case Number and County information back in the response. This web service will be used by both the CalSAWS Lobby Check-In application and the CalSAWS Self Service Kiosk application. Please See point number 12 from Section 2.4.2 for more details.

2. Update the following existing webservices to send Emergency Request information as part of the Request.
 - a. <https://HOSTNAME/lobby-service/lobbycheckin/checkin>
 - b. <https://HOSTNAME/lobby-service/lobbycheckin/checkinLobbyTraffic>
 - c. <https://HOSTNAME/lobby-service/lobbycheckin/selfService/checkin>

3. Update the existing web service to no longer have the 'Individual' parameter in the request to be mandatory.
 - a. <https://HOSTNAME/lobby-service/lobbycheckin/checkin>
 - b. <https://HOSTNAME/lobby-service/lobbycheckin/checkInLobbyTraffic>
 - c. <https://HOSTNAME/lobby-service/lobbycheckin/selfService/checkIn>
4. Create new REST web service that will be invoke when a GUID is provided by ForgeRock application.
 - a. Web service will send the GUID information and County Code in the Request and returns the list of Case Numbers associated to that GUID.

2.3.3 Execution Frequency

N/A

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

N/A

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

N/A

2.3.8 Failure Procedure/Operational Instructions

N/A

2.4 CalSAWS Self Service Kiosk Application web services

2.4.1 Overview

The current web services for the CalSAWS Self Service Kiosk application currently reside in the YBN application. As part of this SCR, these web services will be updated to REST web services along with creating new web services in order to allow participants to Log In using their BenefitsCal User name.

2.4.2 Description of Change

1. Port over the 'ebtAccountBalance' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, County Code and EBT Account Type. The web service will return the EBT Details (EBT balance and balance indicator) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER008: Invalid Case Number for this county'.
2. Port over the 'ebtAccountHistory' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, County Code, EBT Account Type, Search Type, Date, and FNS. The web service will return the EBT Transaction Details (Details for the past 7 days) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER008: Invalid Case Number for this county'.
3. Port over the 'caseInfo' web service to the Lobby Springboot App.
 - a. Web service will send Case Number and County Code. The web service will return the customer data (case detail – Cash issuance, program information, amount, method, date, warrant number, warrant date, available date) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER999 Something is not right here, please contact a lobby worker'.
4. Port over the 'caseAuthRequest' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, County Code, Date of Birth, Zip Code, Social Security Number (Last 4 Digits) EBT Number, and Medi Cal BIC Card Number to authenticate the user and logging the person to the CalSAWS Self Service Kiosk Check-In App. The web service will return Case Number, CIN, Middle Initial, SuffixName, First Name, Last Name, Last 4 SSN, DOB, Gender, Program status, Program Code, Worker ID Number, and Special Need in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when an Invalid Parameter is provided. Error will display the following

- message: 'ER029: Unable to authenticate due to invalid input'.
- iii. Web service will return a 204 Non Content when the request parameter don't have a minimum of 2 parameters sent. Error will display the following message: 'ER019: Must have minimum 2 answered questions'.
5. Port over the 'caseIndividuals' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, **officeNumber** and County Code. The web service will return the Case Number, CIN, middleInitial, **sufxName**, First Name, Last Name, Last 4 SSN, DOB, Gender, Program statuses (Program code, program status and worker ID number), Special Need Flag, **caseId, caseName, officeName** and Case Confidential Flag in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 6. Port over the 'caseProgramParticipants?caseNumber=<CaseNumber>' web service to the Lobby Springboot App.
 - a. Web service will send Case Number and County Code. The web service will return the Case Number, CIN, First Name, **SufxName, caseFilenumber**, Middle Initial, Last Name, Last 4 SSN, DOB, Gender, Participant Program List (program code, program status, workerid number, first name, last name, special need flag) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data found for the case. Error will display the following message: 'ER008: Invalid Case Number for this county'.
 7. Port over the 'isVerificationUploadAllowedService' web service to the Lobby Springboot App.
 - a. Web service will send Case Number and County Code, **CIN, Document Type and Program Type**. The web service will return either a 'true' response when verification upload is allowed in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ~~8. Port over the 'verificationUploadService' web service to the Lobby Springboot App.

 - a. Web service will send Case Number, County Code, CIN, Document Type, Program Code, Upload Source, and the ImageStringFields'. The web service will return an 'OK' status in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)~~
 9. Port over the 'appointments' web service to the Lobby Springboot App.

- a. Web service will send 'Office Number, County Code, **confirmationNumber** and Case number. The web service will return the appointment detail (appointment type, begin time, end time, begin date, name, case number, special need flag) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data found for the search parameter. Error will display the following message: 'ER007: No data found for Search Parameter.
 - iii. Web service will return a 204 No Content when no appointments are found in the office. Error will display the following message: 'ER030: No Appointments Found in this Office'.
10. Port over the 'signout' web service to the Lobby Springboot App.
- a. Web service will send the session id and the web service will return a 200 'OK' status in the response.
- 11. Port over the 'login' webservice to the Lobby Springboot App.**
- a. Web service parameter will be updated to send GUID and County Code (county code of 19 will always be sent, until the application is updated to support all 58 counties). The web service will return Case Number, CIN, Middle Initial, SuffixName, First Name, Last Name, Last 4 SSN, DOB, Gender, Program status, Program Code, Worker ID Number, and Special Need in the response.
 - b. Webservice will return a 204 No Content when no Case Number exist for that County (in this case Los Angeles) for the GUID that is provided. Error will display the following message: No Case Number found, please contact a lobby worker.
- 12. Create new REST web service that will be invoke when a user log in to the CalSAWS Self Service Kiosk Check-In application using their BenefitsCal E-Mail and Password.**
- a. Web service will send the BenefitsCal E-Mail and Password in the Request and returns the GUID information that are link to the enefitsCal E-Mail in the Response.
 - i. Web service will return a 204 No Content when no BenefitsCal E-Mail and Password are found. Error will display the following message: 'ER005: BenefitsCal E-Mail/Password not valid.
 - ii. Web service will return a 401 Unauthorized when Forgerock is not able to authenticate the BenefitsCal E-Mail and Password after 5 tries. Error will display the following message: Sorry, but it looks like your account is locked. Please visit BenefitsCal.org to unlock it.

Note: A new REST web service will be created that will send the GUID information (GUID will be provided by Forgerock if one

does exist) in the request and will receive the Case Number and County information back in the response. This web service will be used by both the CalSAWS Lobby Check-In application and the CalSAWS Self Service Kiosk application. Please See point number 12 from Section 2.4.2 for more details.

13. Create new REST web service that will be invoke when a GUID is provided by Forgerock application.

a. Web service will send the GUID information in the Request and returns the list of Case Numbers and the County Code in the response to either the CalSAWS Lobby Check-In application or the CalSAWS Self Service Kiosk application.

Note: County Code information that will be sent as part of the Request for the above webservices will automatically be set to '19' (for Los Angeles). This parameter will be updated in the future as part of the same effort that will expand the CalSAWS Self Service Kiosk to support all 58 Counties (CA-229814).

2.4.3 Execution Frequency

[Indicate if this is daily/weekly/monthly etc.... in addition to the day that they batch job should run if not daily.]

2.4.4 Key Scheduling Dependencies

[Provide any of the predecessors and/or successors for this job.]

2.4.5 Counties Impacted

[Indicate if all counties or the specific counties that are impacted by this Change.]

2.4.6 Data Volume/Performance

[Provide the anticipated number of records created/processed and the impact on performance.]

2.4.7 Interface Partner

[Document who the interface is with and include any assumptions, constraints, and details. For example, what days will they process files, if there is a return interface what is the turnaround.]

2.4.8 Failure Procedure/Operational Instructions

[Document the process for handling interface failures.]

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.0	Online	Lobby Application values update	CA-217869 Updates to Lobby App values.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
DDID 1778	<p>Original: The CONTRACTOR shall expand the Los Angeles County's iOS solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties.</p> <p>Revised: The CONTRACTOR shall expand the Los Angeles County's iOS CalSAWS Self Service Kiosk Check-in solution to support all 58 Counties, remove all dependency from the YBN application and to communicate to the Hyland Imaging Solution.</p>	<p>The CalSAWS Self Service Kiosk Check-In Application will be updated to no longer be county specific and to communicate to the new Hyland Imaging Solution. Secondly, all dependency to YBN application will be removed from both the CalSAWS Self Service Kiosk Check-In application and the Lobby Check-In Application. Secondly, both the CalSAWS Self Service Kiosk Check</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-220013 | DDID 2255

Add Imaging Barcodes to all Forms – Phase 2

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Amy Gill, Lawrence Samy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/19/2020	1.0	Original Document	Jasmine Chen
07/07/2021	1.1	Content Revision-2: Added assumption for BCIV forms	Jasmine Chen

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1 OVERVIEW

CA-207108 updated the CalSAWS system to use a standardized imaging (2D, QR) barcode on templates from counties that have opted into the CalSAWS Imaging Solution. When scanned, this single barcode helps retrieve all information necessary to identify the document, customer, and case.

1.1 Current Design

Majority of the forms in CalSAWS do not include an imaging barcode.

1.2 Requests

For the new CalSAWS Imaging Solution, the request is for all applicable Forms to include a standardized imaging 2D barcode.

1.3 Overview of Recommendations

1. Apply a DCR to applicable Forms to enable the standardized imaging 2D barcode.
2. Display the standardized imaging 2D barcode on applicable Forms that do not currently have one.

1.4 Assumptions

1. There are no changes to barcode and placement design implemented with CA-207108.
2. Efforts for adding the imaging barcode to all Forms are split into CA-217626 for Phase 1 and CA-220013 for Phase 2.
3. Forms from counties not opted into the Imaging Solution will not display the standardized imaging 2D barcode. These forms will retain their existing, separate barcodes.
 - a. Technical Test Note:
By Phase 2 CA-220013, only some counties are opted into the Imaging Solution (referenced by the value, 'Hyland' in CODE_DETL.REFER_TABLE_23_DESCR with category id = 15). For counties that have not yet opted in, a CTCR can be done in Test environments to temporarily mark them with 'Hyland' so the standardized barcode can be generated and tested.
4. CA-214197 implemented functionality to categorize all forms to be visible in the Template Repository by either: (ALL) 58 counties, (MIG)ration counties, or only Los Angeles County (LAC), depending on the county of the logged-in user.
5. Phase 1 CA-217626 will apply recommendations to approximately half of total forms needing a barcode, targeting forms not categorized with 'LAC' (i.e., 'ALL', 'MIG'). Phase 2 will target the remaining forms (i.e., 'LAC').
6. Forms added into the system after CA-220013 and part of the CalSAWS Imaging Solution will have the standardized imaging 2D barcode.

7. CA-212833 will remove certain Non-State Los Angeles County Forms from CalSAWS. Since these forms will be removed, this SCR will exclude these forms.
8. Static templates are generated without case or customer parameters, thus will not require any tracking nor imaging. This SCR will exclude these forms.
9. Templates named with 'Set' is a form set containing multiple forms. Sets will not need the standardized imaging barcode, thus this SCR will exclude them.
10. CA-207449 and CA-207447 removed AR 2 CR and TEMP 2215 respectively, to be end-dated in the system and removed from the Template Repository. This SCR will exclude these forms.
11. Vendor forms BCIV-15, BCIV-9 are not associated to a case and won't require tracking nor imaging. This SCR will exclude these forms.

2 RECOMMENDATIONS

2.1 Add Imaging Barcode to All Applicable Forms

2.1.1 Overview

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

2.1.2 Description of Change

1. Apply a DCR to the applicable templates mentioned in Supporting Document 1 to enable DOC_TEMPL_LANG.IMG_BARCODE_IND = Y.
2. Display the standardized imaging 2D barcode on the applicable templates mentioned in Supporting Document 1.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	The list of templates (categorized with 'LAC', etc.) scoped for Phase 2 to include an imaging barcode.	CA 220013 – Phase2_Templates needing IMG_BARCODE Y DCR.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2255	The CONTRACTOR shall configure the imaging solution to read a unique 2D barcode from all CalSAWS Software system generated forms. This barcode will contain the barcode number which is used to identify the document(s) metadata from the CalSAWS Software.	N/A	All applicable Forms will include a standardized imaging barcode to help identify the document, customer, and case.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227257

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

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/07/2021	1.0	Initial Revision	Rainier Dela Cruz
05/21/2021	1.1	Added recommendation to not display the reprint centrally button for previously generated packets.	Rainier Dela Cruz
06/14/2021	1.2	Added a note about the header on the coversheet.	Rainier Dela Cruz
06/15/2021	1.3	Updated the technical note in Section 2.6.2 to have correct indicator.	Rainier Dela Cruz
07/23/2021	1.4	Updated the technical note in Section 2.6.2 to update the cutover date of the new print vendor.	Rainier Dela Cruz

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1 OVERVIEW

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

1. Update the Template Repository county visibility for the Non-MAGI Screening Packet to all counties.
2. Update the Template Repository county visibility for the Non-MAGI Turning 65 Packet to all counties.
3. Update the Non-MAGI Turning 65 Packet batch process to run for all counties.
4. Update the scheduling of Mailing Priority 05 bundling batch jobs for the C-IV Migration Counties to run daily.
5. Create the Mailing Priority 05 bundling batch jobs for the CalWIN Migration Counties.
6. Conduct central print testing with the new print vendor by generating test bundles of the Non-MAGI Screening and Turning 65 Packets.
7. Update the Document Detail page to not display the Reprint Centrally button for the Non-MAGI Screening and Turning 65 packets if the document date is before the implementation of the updates to the packets.

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Non-MAGI Screening Packet

2.1.1 Overview

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

State Form: N/A

Current Programs: Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Application

Existing Languages: English, Spanish

2.1.2 Description of Change

1. Update the Template Repository visibility from 'Los Angeles County only' to 'All Counties'.
2. Update the mailing priority from '04' to '05'.
3. Update the coversheet:
 - a. Align the addresses on the first page to match the address windows on the half size flat mail envelope.
Technical Note: *The header used for the first page of the coversheet is the RD_MIG_Header.*
 - b. Update the second page to use the BRM header.

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

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

2.2 Non-MAGI Turning 65 Packet

2.2.1 Overview

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

State Form: N/A

Current Programs: Medi-Cal
Current Attached Form(s): N/A
Current Forms Category: Application
Existing Languages: English, Spanish

2.2.2 Description of Change

1. Update the Template Repository visibility from 'Los Angeles County only' to 'All Counties'.
2. Update the mailing priority from '04' to '05'.

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

3. Update the coversheet:
 - a. Align the addresses on the first page to match the address windows on the half size flat mail envelope.
Technical Note: The header used for the first page of the coversheet is the RD_MIG_Header.
 - b. Update the second page to use the BRM header.

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

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

2.3 Non-MAGI Turning 65 Packet Batch Job

2.3.1 Overview

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

2.3.2 Description of Change

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

2.3.3 Execution Frequency

No change.

2.3.4 Key Scheduling Dependencies

No change.

2.3.5 Counties Impacted

All counties.

2.3.6 Data Volume/Performance

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

2.3.7 Failure Procedure/Operational Instructions

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

2.4 Mailing Priority 05 Bundling Batch Jobs

2.4.1 Overview

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

2.4.2 Description of Change

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

2.4.3 Execution Frequency

These batch jobs run daily.

2.4.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County job (PB19P405).

2.4.5 Counties Impacted

Migration Counties.

2.4.6 Data Volume/Performance

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

2.4.7 Failure Procedure/Operational Instructions

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

2.5 Central Print Testing

2.5.1 Overview

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

2.5.2 Description of Change

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

2.6 Update Reprint Functionality for Packets

2.6.1 Overview

Currently, previously generated Non-MAGI Screening and Turning 65 packets can be reprinted centrally. Since the Non-MAGI Screening and Turning 65 packets are being moved to mailing priority 05 so that the packets are placed in the half size flat mail envelopes for all counties, when the previously generated packets are reprinted, the address

location will not align with the half size flat mail envelope. Update the logic that displays the reprint centrally button to hide the button for previously generated packets.

2.6.2 Description of Change

1. Update the reprint functionality to not allow the Non-MAGI Screening and Turning 65 packets to be reprinted centrally if the document date is before the implementation of the updates to the packets.

Technical Note: The reprint buttons on the Document Detail page is controlled by the print button visibility indicator for a form. Update the logic in the Generated Document Controller to set the print button visibility indicator of the packet to 'PL' (Print Locally) is the document date of the packet is before 8/27 (cutover to the new CalSAWS print vendor).

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>The updates will allow the Non-MAGI Screening and Turning 65 Packets to be generated and sent out for all counties.</p>

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
6/24/2021	1.1	Content Revision #1 <ul style="list-style-type: none"> Recommendation to update Header of Guided Navigation/Task Navigation panel Updated Guided Navigation attribute editability Updated Section 3 - Guided Navigation Inventory Update the logic in Task Guided Navigation Hyperlink Conditions section <ul style="list-style-type: none"> Remove the Task is “assigned to the logged in user” condition for all three scenarios 	Mayuri Srinivas Rakan Ali
7/16/2021	1.2	Content Revision #2 <ul style="list-style-type: none"> Removed an invalid Automated Action reference from the inventory sheet 	Mayuri Srinivas

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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	<ul style="list-style-type: none"> 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. <p>Reference the workbook within the Supporting Documents section for an inventory of "system" tasks.</p>
2	All	<ul style="list-style-type: none"> 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". <p>Reference the workbook within the Supporting Documents section for an inventory of Automated Actions that will display the Guided Navigation attribute.</p>
3	Los Angeles	<ul style="list-style-type: none"> The Task does not meet Scenario #1 or #2. 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. <p>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.</p>

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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. My Tasks Pop-Up

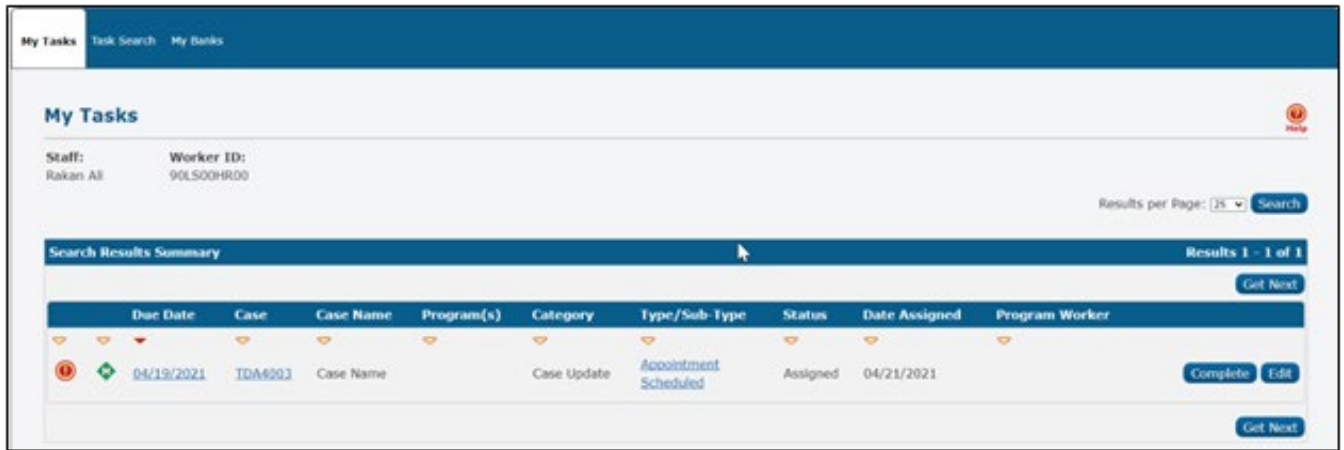


Figure 2.2.1.2.a-1 – Task Pop-Up My Tasks Page Mockup

- 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. Task Search Pop-Up

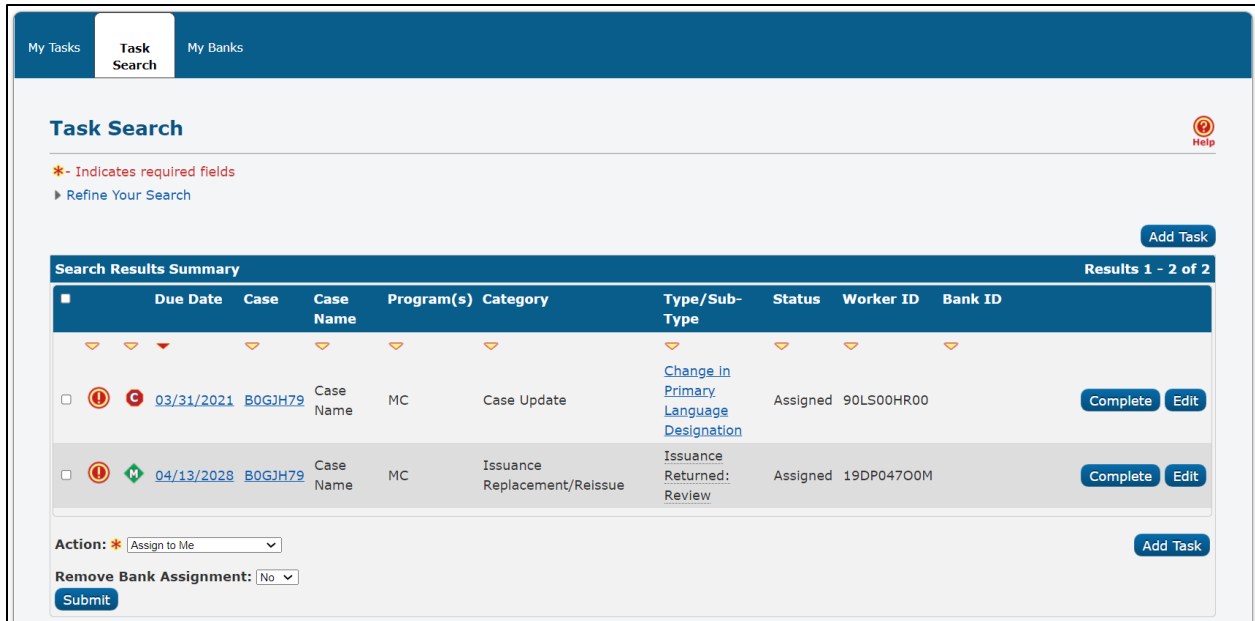


Figure 2.2.1.2.b-1 – Task Pop-Up Task Search Page Mockup

- 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

Task Detail
Result 1 of 1 - 3

*- Indicates required fields

← → Help

Edit Print Close

Case Number B0GJH79	Case Name: Case Name	Program(s): * Medi-Cal - PORFIRIO CONNOR	Status: * Assigned	Reference Number:
Category: * Case Update	Type: * Change in Primary Language Designation	Sub-Type:	Priority: Critical	
Due Date: * 03/31/2021	Date Created: 03/30/2021	Worker Assigned Date: 04/28/2021		
Assign to Program Worker: No	Worker ID: 90LS00HR00	Bank ID:	Automated Action: No	

Long Description:

▶ Instructions

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 Header verbiage of the Task Navigation panel to be “Guided Navigation” when in the context of a Task Guided Navigation page set.
3. Update the Guided Navigation Hyperlink display logic per Section 2.1 on the following Task pages.
 - a. Worklist
Guided Navigation hyperlink field: “Type / Sub-Type”
 - b. Worklist PR RE
Guided Navigation hyperlink field: “Type / Sub-Type”
 - c. Pending Authorizations
Guided Navigation hyperlink field: “Type”

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

Action Information

Name: 180 Day EC Good Cause set to expire	Type: Create Task	Status: * Active <input type="button" value="v"/>
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 <input type="button" value="v"/>	Default Due Date: 30 days
Due Date: Default Due Date <input type="button" value="v"/>	Program Worker: Currently Assigned Worker <input type="button" value="v"/>
Initial Assignment: Program Worker/Bank <input type="button" value="v"/>	Default Bank ID: <input type="text"/> <input type="button" value="Select"/>
Guided Navigation: * No <input type="button" value="v"/>	
Long Description: 180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.	

Figure 2.3.2.1 – Automated Action Detail Mockup Edit Mode

Automated Action Detail

Edit Close

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:

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.

Edit Close

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. This field will not be editable for the following Automated Actions:
 - i. Clearance
 - ii. Clearance: CMIPSI
 - iii. Clearance: ICT
 - iv. Clearance: e-Application
 - v. Intake
- d. 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	<p>The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows:</p> <ol style="list-style-type: none"> 1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base 2) Create a common task management data model 3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution) 4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County 5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing methodologies 6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker 7) Update the LRS Task 	<ul style="list-style-type: none"> - CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV. - CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks. - OBIEE Task Dashboard will be migrated over to new tool prior to Task Management implementation. 	<p>This design introduces a recommendation that will support Guided Navigation and process flow of completing Tasks, while considering configurable Automated Actions and "System Tasks".</p>

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

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A