CalSAWS

California Statewide Automated Welfare System

Design Document

CA-51879

Update Field Label in Maintain Worker Schedule Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Matthew Lower

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/24/2021	1.0	Initial Draft	Farhat Ulain

Table of Contents

1 OVERVIEW

Maintain Worker Schedule page allows workers to maintain their schedule. Workers can specify their availability/unavailability per appointment type in their schedule. Furthermore, workers can select the time, begin date and end date to specify their availability/unavailability within a time period.

1.1 Current Design

On the Maintain Worker Schedule page, workers create a schedule and select date in the Repeat Until field to specify their availability/unavailability in their schedule. This field serves as an end date for Maintain Worker Schedule page.

1.2 Requests

Update 'Repeat Until' field label to be 'End Date' in Maintain Worker Schedule page.

1.3 Overview of Recommendations

1. Update 'Repeat Until' field label to be 'End Date' in Maintain Worker Schedule page.

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.

2 RECOMMENDATIONS

2.1 Maintain Worker Schedule

2.1.1 Overview

Maintain Worker Schedule page allows workers to maintain their schedule. Workers can specify their availability/unavailability per appointment type in their schedule. Furthermore, workers can select the time, begin date and end date to specify their availability/unavailability within a time period. This change will update the field label in the page.

2.1.2 Maintain Worker Schedule Page Mockup

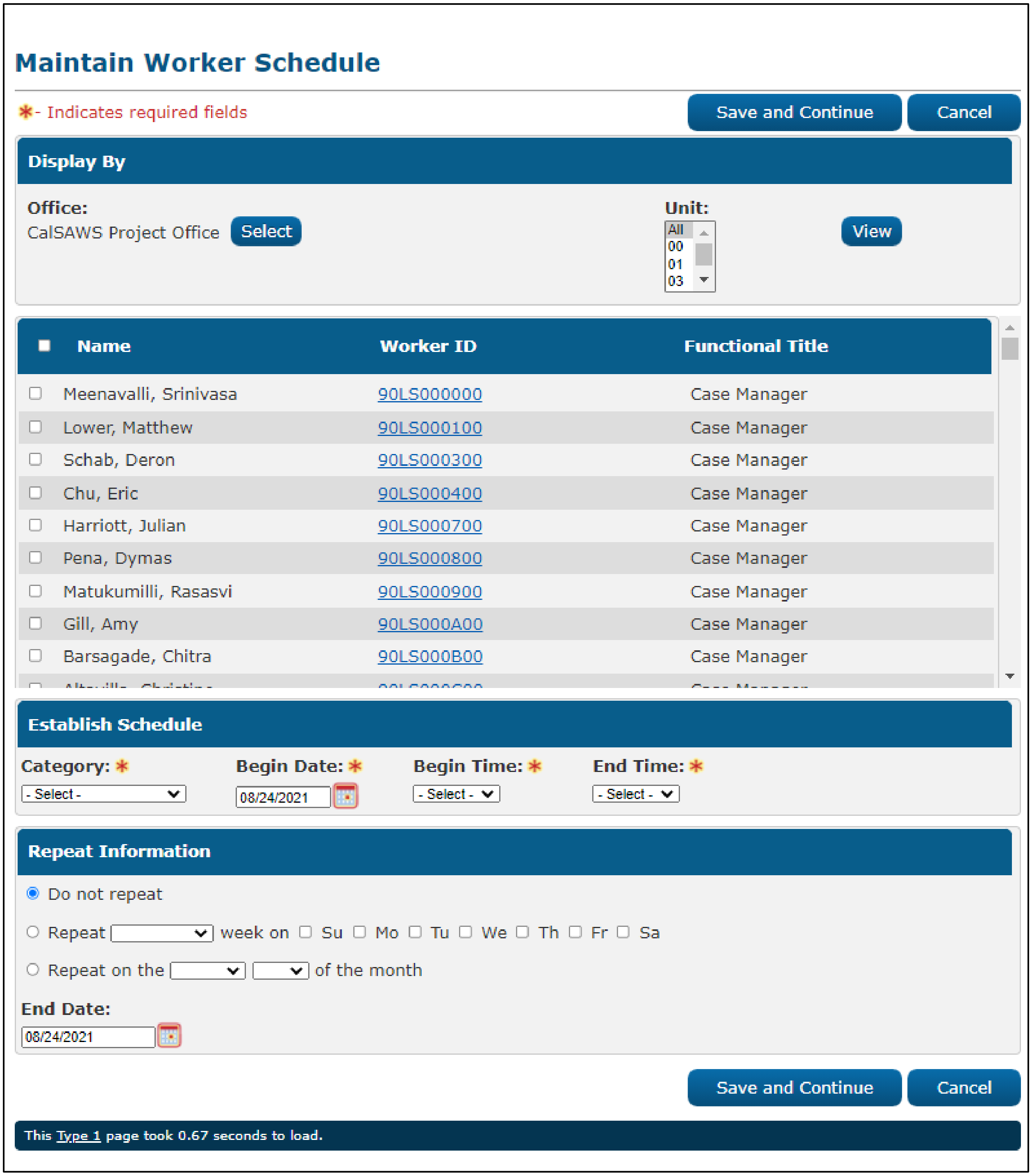


Figure 2.1.2-1 – Maintain Worker Schedule Page

2.1.3 Description of Changes

1. Update 'Repeat Until' field label to be 'End Date' in the Repeat Information section of the Maintain Worker Schedule page.

a. Functionality around this field will not change and continue to work as-is.

2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Schedule
- **Task:** Maintain Worker Schedule

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping for the field label.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.5	The CalSAWS shall provide field-level and cross-field validation upon completion of data entry by User and immediately display appropriate corrective instructions for the related field.	Repeat Until field label will be updated to be displayed as End Date.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-55681

Add New Correspondence Exceptions Report

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/28/2021	1.1	Initial Document	Remi Lassiter

Table of Contents

1 OVERVIEW

This SCR will create a new daily curated on request Correspondence Exceptions Report that will list correspondence that exceptions out of the batch processes. Offices will use this report to review and/or correct records to avoid future exceptions. The requests for this SCR are a part of Requirement 2.1.2.6 in the Deliverable 3.2.2 Requirements Traceability Matrix.

1.1 Current Design

There is no CalSAWS-wide mechanism in place to address correspondence that exceptions out of batch processes in order to notify the offices of corrective action on cases.

1.2 Requests

Create a daily curated on request report to notify offices of exception correspondences that require offices to review and/or correct records to avoid future exceptions.

1.3 Overview of Recommendations

1. Implement a new daily curated on request Correspondence Exceptions Report.

1.4 Assumptions

1. There are currently LA County ad-hoc queries, The DPSS Skipped Report and the DCFS Skipped Report, which provides correspondences exceptions information for DPSS and DCFS programs respectively. The logic from these queries will be used as a baseline in developing this new report.

2 RECOMMENDATIONS

2.1 Correspondence Exceptions Report

2.1.1 Overview

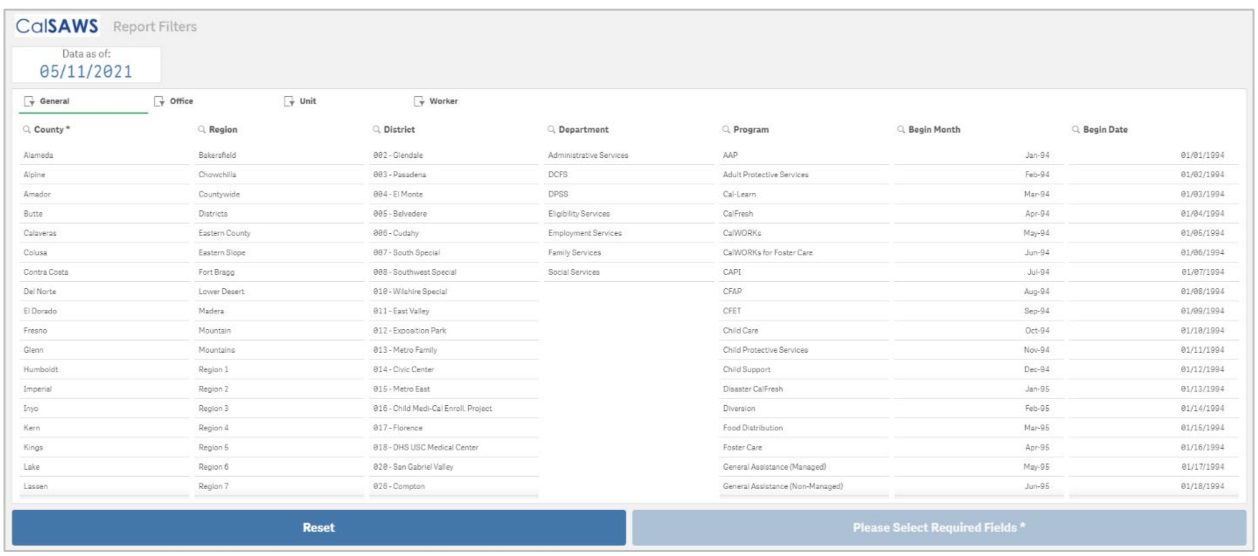
Implement a new daily curated on request Correspondence Exceptions Report.

2.1.2 Correspondence Exceptions Report Mockup

	A	B	C	D	E	F	G	H	I
1	Office	Worker ID	Worker Name	Case Number	Case Name	Document Numbe	Document Name	Exception Reason	Exception Date
2	XXXXXXXXXX	XXXXXXXXXX	WORKER NAME	XXXXXXX	CASE NAME	ABP 10	Approval – CW	No PDF Generated	12/31/2020
3	XXXXXXXXXX	XXXXXXXXXX	WORKER NAME	XXXXXXX	CASE NAME	CW 61	Additional Income	No PDF Generated	12/31/2020
4	XXXXXXXXXX	XXXXXXXXXX	WORKER NAME	XXXXXXX	CASE NAME	NOA	10 Day Employabil	No PDF Generated	12/31/2020
5									

Figure 2.1.2 – Correspondence Exception Report Export

2.1.3 Report Filters



The Correspondence Exceptions Report will have the following filter selections:

- **County:** restricts the base population to forms and NOAs associated with workers from the selected County. This is a required field.
- **Region:** restricts the base population to forms and NOAs associated with workers from the selected Region(s)
- **District:** restricts the base population to forms and NOAs associated with workers from the selected District(s)
- **Department:** restricts the base population to forms and NOAs associated with workers from the selected Department(s)
- **Program:** restricts the base population to forms and NOAs associated with the selected program(s).
    - **Note:** Users can filter by records that have no program associated by selecting the "No Program Associated" option in this filter.
- **Begin Month:** restricts the base population of the report to include forms and NOAs with an exception date in or after the the Begin Month through the current date.
- **Begin Date:** restricts the base population of the report to include forms and NOAs with an exception date on or after the Begin Date through the current date.
    - **Note:** The purpose of the Begin Month and Date filters is to give the option to narrow the results to all correspondence exceptions occurring after a certain date. If no selection is made for these filters, it is expected that the full history of correspondence exception data will be retrieved.
- **Office ID:** restricts the base population to forms and NOAs associated with workers from the selected Office ID(s)
- **Office Name:** restricts the base population to forms and NOAs associated with workers from the selected Office(s)
- **Office Type**: restricts the base population to forms and NOAs associated with workers from the selected Office Type(s)
- **Unit ID:** restricts the base population to forms and NOAs associated with workers from the selected Unit ID(s)
- **Unit Type:** restricts the base population to forms and NOAs associated with workers from the selected Unit Type(s)
- **Division:** restricts the base population to forms and NOAs associated with workers from the selected Division(s)
- **Worker ID:** restricts the base population to forms and NOAs associated with workers from the selected Worker ID(s)
- **Worker Name:** restricts the base population to forms and NOAs associated with workers from the selected Worker(s)
- **Classification Title:** restricts the base population to forms and NOAs associated with workers from the selected worker Classification Title(s)

2.1.4 Description of Change

1. Implement a new on request Correspondence Exceptions Report.
    a. The base population of the report will be all Forms and NOAs that exception out of the central print process for the parameters entered on the Report Filters page. **See Appendix 5.1 for technical details of this logic.**
    b. The data for the report will be refreshed daily via a nightly curation job.
    c. The report will contain the columns defined in the table below:

Column Name	Description
Office	The name of the office of the worker currently assigned to the program associated with the correspondence. Note: This value can be NULL for Forms that don't have a program associated.
Worker ID	The Worker ID currently assigned to the program associated with the correspondence. Note: This value can be NULL for Forms that don't have a program associated.
Worker Name	The name of the worker currently assigned to the program associated with the correspondence. Format: FirstName LastName Note: This value can be NULL for Forms that don't have a program associated.
Case Number	The Case Number associated with the correspondence. This value will include a hyperlink to the associated Case Summary page. Note: This value can be NULL for Forms or NOAs that don't have a case associated.
Case Name	The Case Name associated with the correspondence. Note: This value can be NULL for Forms or NOAs that don't have a case associated.
Program	The Program associated with the correspondence. Note: This value can be NULL for Forms that don't have a program associated.
Program Status	The latest status of the Program associated with the correspondence as of the day the report is generated. Note: This value can be NULL for Forms that don't have a program associated.

Document Number	The number associated with the correspondence. Some possible values are: “ABP 10”, “CW 61”, “NOA” (this is a non-exhuastive list)
Document Name	The descriptive name of the correspondence. Some possible values are: “10 Day Employability Status Change Notice”, Additional Income and Property Information Needed for Medi-Cal”, “Approval – CW” (this is a non-exhaustive list)
Exception Reason	The reason why the correspondence exceptioned out of the central print process. Possible Values: • “No Active Org/Employer address found” - correspondence is created for Organization/Employer without an active mailing address or no mailing address information set up for the resource. • “Batch Form Generation Exception” - correspondence could not successfully generate due to Batch related issues. • “No PDF Generated” - the PDF generation of the correspondence failed due to a technical error (e.g. Adobe server issues, Correspondence fragment issues, SQL Exceptions) and resulted in just an empty record on the document list page. • “Office does not have BRM” - Correspondence was not sent due to the office the worker is tied to not having Business Reply Mail • “Print Bundle Error” - Form/NOA not able to be transferred to Central print due technical errors during creation of the print bundles. • “No Active Mailing Address” - Correspondence is created for participants without an active mailing address or no mailing address information set up on the case. • “No Primary Applicant” - No primary applicant incorrectly set up for the case and program at the moment of generating the Form/NOA.

	• "No Participant/Provider Associated" - Correspondence created with no participant or provider information associated to them. • "BRM full zip not 9 digits" - The correspondence could not be sent out because the Business Reply Mail full zip code (e.g., XXXXX-XXXX) was not 9 digits. • "No Linked case" – Records created on document list page with no case information linked to them. • "No Position Id" - No worker/position correctly set up for the case and program at the moment of generating the Form/NOA. • "No participant associated" – Records created on document list page with no participant (pers_id) information associated to them. • "No valid mailing Address" – Correspondence is created for participants with an invalid mailing address or no mailing address information set up on the case.
Exception Date	The date the exception occurred. Format: MM/DD/YYYY

d. Default the report to sort by most recent Exception Date.

2.1.5 Report Location

- **Global:** Reports
- **Local:** On Request
- **Task:** Administrative
- **Description:** Provides details on all correspondence that exceptions out of the batch processes.

2.1.6 Counties Impacted

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

2.1.7 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

CorrespondenceExceptions Report	This right gives access to view the Correspondence Exceptions Report.	Correspondence Exceptions Report

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Correspondence Exceptions Report	This group gives access to view the Correspondence Exceptions Report.	• Clerical Staff • Clerical Supervisor • Eligibility Staff • Eligibility Supervisor • Employment Services Contracted Staff • Employment Services Contracted Supervisor • Employment Services Staff • Employment Services Supervisor • Regional Call Center Staff • Regional Call Center Supervisor • View Only • System Administrator

2.1.8 Report Usage/Performance

It is anticipated that this report will be accessed, on average, once per week per office.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Correspondence Exception Report Screenshot	Screenshot of Correspondence Excep
2	Reports	Security Matrix	Security Matrix

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.2.6	The LRS shall notify COUNTY-specified Users of exceptions that occur to cases online or during batch processing, and shall provide hyperlinks to the case individual(s) or case(s), and to the action(s) that need(s) correcting on the case(s) on which the exception(s) occurred.	Correspondence Exception Report implemented.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
N/A			

5 APPENDIX

5.1 Technical Column Descriptions

The base population of this report will be all Forms and NOAs that exception out of the central print process for the parameters entered on the Report Filters page. Correspondence exceptions are stored in multiple tables and can be covered by a union of the following six scenarios:

Note: these definitions are developed from the DPSS Skipped Report query.

1. **Scenario 1: Forms in GENERATE_DOC**
   a. The population for this scenario is all records in GENERATE_DOC where:
      i. STAT_CODE = 'PC'
      ii. BATCH_STAT_CODE = 'BT'
   b. The columns for this scenario are defined in the table below:

Column Name	Value	Tables
Office	OFFICE.OFFICE_NAME or NULL if GENERATE_DOC.PGM_ID is NULL	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > POS.OFFICE_ID > OFFICE
Worker ID	STAFF_WRKR.WRKR_NUM_IDENTIF or NULL if GENERATE_DOC.PGM_ID is NULL	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_WRKR
Worker Name	STAFF.FIRST_NAME ' ' STAFF.LAST_NAME or NULL if GENERATE_DOC.PGM_ID is NULL	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_POS_ASSIGN.STAFF_ID > STAFF
Case Number	CASE.SERIAL_NUM_IDENTIF or NULL if GENERATE_DOC.CASE_ID is NULL	GENERATE_DOC.CASE_ID > CASE
Case Name	CASE.CASE_NAME or NULL if GENERATE_DOC.CASE_ID is NULL	GENERATE_DOC.CASE_ID > CASE
Program	PGM.PGM_CODE or DOC_TEMPL_PGM.PGM_CODE if GENERATE_DOC.PGM_ID is NULL or NULL if GENERATE_DOC.DOC_TEMPL_PGM_ID is NULL	GENERATE_DOC.PGM_ID > PGM or GENERATE_DOC.DOC_TEMPL_PGM_ID > DOC_TEMPL_PGM
Program Status	PGM_DETL.STAT_CODE or NULL if GENERATE_DOC.PGM_ID is NULL	GENERATE_DOC.PGM_ID > PGM_DETL

Document Number	DOC_TEMPL.TEMPL_NUM_IDENTIF	GENERATE_DOC.DOC_TEMPL_LANG_ID > DOC_TEMPL_LANG.DOC_TEMPL_ID > DOC_TEMPL
Document Name	DOC_TEMPL.TEMPL_TITLE_NAME	GENERATE_DOC.DOC_TEMPL_LANG_ID > DOC_TEMPL_LANG.DOC_TEMPL_ID > DOC_TEMPL
Exception Reason	If GENERATE_DOC.PERS_ID and GENERATE_DOC.ORG_ID is NULL then 'No Participant/Provider Associated' Otherwise, 'No PDF Generated'	GENERATE_DOC
Exception Date	GENERATE_DOC.DOC_DATE	GENERATE_DOC

2. **Scenario 2: NOAs in GENERATE_DOC**
    a. The population for this scenario is all records in GENERATE_DOC where:
        i. NOA_ID is not NULL
        ii. (STAT_CODE = ‘PE’ and BATCH_STAT_CODE is NULL) or (STAT_CODE = ‘AC’ and BATCH_STAT_CODE = ‘BT’)
    b. The columns for this scenario are defined in the table below:

Column Name	Value	Tables
Office	OFFICE.OFFICE_NAME	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > POS.OFFICE_ID > OFFICE
Worker ID	STAFF_WRKR.WRKR_NUM_IDENTIF	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_WRKR
Worker Name	STAFF.FIRST_NAME ‘ ‘ STAFF.LAST_NAME	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_POS_ASSIGN.STAFF_ID > STAFF
Case Number	CASE.SERIAL_NUM_IDENTIF or NULL if GENERATE_DOC.CASE_ID is NULL	GENERATE_DOC.CASE_ID > CASE
Case Name	CASE.CASE_NAME or NULL if GENERATE_DOC.CASE_ID is NULL	GENERATE_DOC.CASE_ID > CASE
Program	PGM.PGM_CODE	GENERATE_DOC.PGM_ID > PGM
Program Status	PGM_DETL.STAT_CODE	GENERATE_DOC.PGM_ID > PGM_DETL
Document Number	‘NOA’	
Document Name	CODE_DELT.SHORT_DECODE_NAME ‘ – ‘ PGM.PGM_CODE	Select CODE_DELT.SHORT_DECODE_NAME | | ' - ' | | PGM.PGM_CODE

		From GENERATE_DOC, CODE DETL, PGM Where GENERATE_DOC.ACTN_CODE = CODE_DETL.CODE_NUM_IDENTIF And GENERATE_DOC.PGM_ID = PGM.ID And CODE_DETL.CATGRY_ID = '221'
Exception Reason	'No PDF Generated'	
Exception Date	GENERATE_DOC.DOC_DATE	GENERATE_DOC

3. **Scenario 3: Forms in BATCH_FORM_LOG**
    a. The population for this scenario is all records in GENERATE_DOC join BATCH_FORM_LOG on GENERATE_DOC.ID = BATCH_FORM_LOG.TABLE_SRC_ID where:
        i. GENERATE_DOC.STAT_CODE in ('PC','ER')
        ii. GENERATE_DOC.BATCH_STAT_CODE = 'BT',
        iii. BATCH_FORM_LOG.TABLE_NAME_IDENTIF = 'GENERATE_DOC'
    b. The columns for this scenario are defined in the table below:

Column Name	Value	Tables
Office	OFFICE.OFFICE_NAME	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > POS.OFFICE_ID > OFFICE
Worker ID	STAFF_WRKR.WRKR_NUM_IDENTIF	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_WRKR
Worker Name	STAFF.FIRST_NAME ' ' STAFF.LAST_NAME	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_POS_ASSIGN.STAFF_ID > STAFF
Case Number	CASE.SERIAL_NUM_IDENTIF	GENERATE_DOC.CASE_ID > CASE
Case Name	CASE.CASE_NAME	GENERATE_DOC.CASE_ID > CASE
Program	PGM.PGM_CODE	GENERATE_DOC.PGM_ID > PGM
Program Status	PGM_DETL.STAT_CODE	GENERATE_DOC.PGM_ID > PGM_DETL
Document Number	DOC_TEMPL.TEMPL_NUM_IDENTIF	GENERATE_DOC.DOC_TEMPL_LANG_ID > DOC_TEMPL_LANG.DOC_TEMPL_ID > DOC_TEMPL
Document Name	DOC_TEMPL.TEMPL_TITLE_NAME	GENERATE_DOC.DOC_TEMPL_LANG_ID > DOC_TEMPL_LANG.DOC_TEMPL_ID > DOC_TEMPL
Exception Reason	Decode of BATCH_FORM_LOG.REASON_CODE (CATGRY_ID 10471)	Select C1.SHORT_DECODE_NAME from CODE_DETL C1 where C1.CATGRY_ID = 10471 and C1.CODE_NUM_IDENTIF = BATCH_FORM_LOG.REASON_CODE

		and C1.BEG_DATE = (select max(C2.BEG_DATE) from CODE_DETL C2 where C2.CODE_NUM_IDENTIF = C1.CODE_NUM_IDENTIF and C2.CATGRY_ID = C1.CATGRY_ID)
Exception Date	GENERATE_DOC.DOC_DATE	GENERATE_DOC

4. **Scenario 4: NOAs in BATCH_FORM_LOG**
   a. The population for this scenario is all records in GENERATE_DOC join BATCH_FORM_LOG on GENERATE_DOC.ID = BATCH_FORM_LOG.TABLE_SRC_ID where:
      i. NOA_ID is not NULL
      ii. GENERATE_DOC.STAT_CODE = 'ER'
   b. The columns for this scenario are defined in the table below:

Column Name	Value	Tables
Office	OFFICE.OFFICE_NAME	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > POS.OFFICE_ID > OFFICE
Worker ID	STAFF_WRKR.WRKR_NUM_IDENTIF	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_WRKR
Worker Name	STAFF.FIRST_NAME ' ' STAFF.LAST_NAME	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_POS_ASSIGN.STAFF_ID > STAFF
Case Number	CASE.SERIAL_NUM_IDENTIF	GENERATE_DOC.CASE_ID > CASE
Case Name	CASE.CASE_NAME	GENERATE_DOC.CASE_ID > CASE
Program	PGM.PGM_CODE	GENERATE_DOC.PGM_ID > PGM
Program Status	PGM_DETL.STAT_CODE	GENERATE_DOC.PGM_ID > PGM_DETL
Document Number	'NOA'	
Document Name	CODE_DELT.SHORT_DECODE_NAME ' – ' PGM.PGM_CODE	Select CODE_DELT.SHORT_DECODE_NAME || ' - ' || PGM.PGM_CODE From GENERATE_DOC, CODE DETL, PGM Where GENERATE_DOC.ACTN_CODE = CODE_DETL.CODE_NUM_IDENTIF And GENERATE_DOC.PGM_ID = PGM.ID And CODE_DETL.CATGRY_ID = '221'

Exception Reason	Decode of BATCH_FORM_LOG.REASON_CODE (CATGRY_ID 10471)	Select C1.SHORT_DECODE_NAME from CODE_DETL C1 where C1.CATGRY_ID = 10471 and C1.CODE_NUM_IDENTIF = BATCH_FORM_LOG.REASON_CODE and C1.BEG_DATE = (select max(C2.BEG_DATE) from CODE_DETL C2 where C2.CODE_NUM_IDENTIF = C1.CODE_NUM_IDENTIF and C2.CATGRY_ID = C1.CATGRY_ID)
Exception Date	GENERATE_DOC.DOC_DATE	GENERATE_DOC

5. **Scenario 5: Forms in PRINT_FILE**
   a. The population for this scenario is all records in GENERATE_DOC join PRINT_FILE on GENERATE_DOC.ALF_FMS_NUM = PRINT_FILE.ALF_FMS_NUM where:
      i. GENERATE_DOC.STAT_CODE in (‘PC’,‘ER’)
      ii. PRINT_FILE.STATUS_NUM in (1 , '-1')
   b. The columns for this scenario are defined in the table below:

Column Name	Value	Tables
Office	OFFICE.OFFICE_NAME or NULL if GENERATE_DOC.PGM_ID is NULL	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > POS.OFFICE_ID > OFFICE
Worker ID	STAFF_WRKR.WRKR_NUM_IDENTIF or NULL if GENERATE_DOC.PGM_ID is NULL	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_WRKR
Worker Name	STAFF.FIRST_NAME ‘ ‘ STAFF.LAST_NAME or NULL if GENERATE_DOC.PGM_ID is NULL	GENERATE_DOC.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_POS_ASSIGN.STAFF_ID > STAFF
Case Number	CASE.SERIAL_NUM_IDENTIF or NULL if GENERATE_DOC.CASE_ID is NULL	GENERATE_DOC.CASE_ID > CASE
Case Name	CASE.CASE_NAME or NULL if GENERATE_DOC.CASE_ID is NULL	GENERATE_DOC.CASE_ID > CASE
Program	PGM.PGM_CODE or NULL if GENERATE_DOC.PGM_ID is NULL	GENERATE_DOC.PGM_ID > PGM
Program Status	PGM_DETL.STAT_CODE	GENERATE_DOC.PGM_ID > PGM_DETL

	or NULL if GENERATE_DOC.PGM_ID is NULL	
Document Number	DOC_TEMPL.TEMPL_NUM_IDENTIF	GENERATE_DOC.DOC_TEMPL_LANG_ID > DOC_TEMPL_LANG.DOC_TEMPL_ID > DOC_TEMPL
Document Name	DOC_TEMPL.TEMPL_TITLE_NAME	GENERATE_DOC.DOC_TEMPL_LANG_ID > DOC_TEMPL_LANG.DOC_TEMPL_ID > DOC_TEMPL
Exception Reason	If PRINT_FILE.STATUS_NUM = 1 If ENVELOPE_TYPE_CODE = 'PP' and BRM_FULL ZIP is NULL Then 'BRM full zip not 9 digits' (Note: this is a new scenario not currently captured in the DPSS Skipped Query logic) Otherwise 'Print Bundle Error' If PRINT_FILE.STATUS_NUM = '-1' and PRINT_FILE.PRIORITY_NUM = '04' Then 'Office does not have BRM'	PRINT_FILE
Exception Date	GENERATE_DOC.DOC_DATE	GENERATE_DOC

6. **Scenario 6: SYS_TRANSACT Records**
   a. The population for this scenario is all records in BATCH_FORM_LOG join SYS_TRANSACT
      on BATCH_FORM_LOG.TABLE_SRC_ID = SYS_TRANSACT.ID
      join CODE_DETL
      on SYS_TRANSACT.SUB_TYPE_CODE = CODE_DETL.CODE_NUM_IDENTIF
      join DOC_TEMPL_LANG
      on CODE_DETL. REFER_TABLE_9_DESCR = DOC_TEMPL_LANG.ID
      join DOC_TEMPL
      on DOC_TEMPL.ID = DOC_TEMPL_LANG.DOC_TEMPL_ID where:
      i. BATCH_FORM_LOG.TABLE_NAME_IDENTIF = 'SYS_TRANSACT'
      ii. AND BATCH_FORM_LOG.ID =
          (SELECT MAX(ID)
          FROM BATCH_FORM_LOG A
          WHERE A.TABLE_SRC_ID = BATCH_FROM_LOG.TABLE_SRC_ID)
      iii. CATGRY_ID = '942'
   b. The columns for this scenario are defined in the table below:

Column Name	Value	Tables

Office	OFFICE.OFFICE_NAME or NULL if SYS_TRANSACT.PGM_ID is NULL	SYS_TRANSACT.PGM_ID > PGM_ASSIGN.POS_ID > POS.OFFICE_ID > OFFICE
Worker ID	STAFF_WRKR.WRKR_NUM_IDENTIF or NULL if SYS_TRANSACT.PGM_ID is NULL	SYS_TRANSACT.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_WRKR
Worker Name	STAFF.FIRST_NAME ‘ ‘ STAFF.LAST_NAME or NULL if SYS_TRANSACT.PGM_ID is NULL	SYS_TRANSACT.PGM_ID > PGM_ASSIGN.POS_ID > STAFF_POS_ASSIGN.STAFF_ID > STAFF
Case Number	CASE.SERIAL_NUM_IDENTIF	BATCH_FORM_LOG.CASE_ID > CASE
Case Name	CASE.CASE_NAME	BATCH_FORM_LOG.CASE_ID > CASE
Program	PGM.PGM_CODE or NULL if SYS_TRANSACT.PGM_ID is NULL	SYS_TRANSACT.PGM_ID > PGM
Program Status	PGM_DETL.STAT_CODE or NULL if SYS_TRANSACT.PGM_ID is NULL	SYS_TRANSACT.PGM_ID > PGM_DETL
Document Number	DOC_TEMPL.TEMPL_NUM_IDENTIF	DOC_TEMPL
Document Name	DOC_TEMPL.TEMPL_TITLE_NAME	DOC_TEMPL
Exception Reason	Decode of BATCH_FORM_LOG.REASON_CODE (CATGRY_ID 10471)	Select C1.SHORT_DECODE_NAME from CODE_DETL C1 where C1.CATGRY_ID = 10471 and C1.CODE_NUM_IDENTIF = BATCH_FORM_LOG.REASON_CODE and C1.BEG_DATE = (select max(C2.BEG_DATE) from CODE_DETL C2 where C2.CODE_NUM_IDENTIF = C1.CODE_NUM_IDENTIF and C2.CATGRY_ID = C1.CATGRY_ID)
Exception Date	BATCH_FORM_LOG.CREATED_ON	BATCH_FORM_LOG

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-209502: MEDS: Add Alerts 9070 and 9073 on MEDS Alert Search page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Carlos Zepeda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/2/2021	1.0	Initial version	Jennifer Muna

Table of Contents

1 OVERVIEW

This SCR outlines the necessary requirements to add the new MEDS alert (9070 and 9073) into CalSAWS.

1.1 Current Design

CalSAWS currently does not display MEDS alert 9070 and 9073 on the MEDS Alert Search page and MEDS Alert Admin page. These alerts are stated under the work effort M4694 - Change Cycle letter 446. This work effort will prevent improper payments for ineligible nonresident beneficiaries when the case becomes active again.

1.2 Requests

Add MEDS alert to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS

- 9070 – MOVED OUT OF STATE PER FEDERAL DATA; ELIG RE-EVAL REQ
- 9073 – RECON ADD REJECTED – OOS TERM ON MEDS; ELIG RE-EVAL REQ

1.3 Overview of Recommendations

1. Add new MEDS alert 9070 and 9073 to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS.

1.4 Assumptions

1. The Task Information panel will have an initial Status of 'Inactive' on the MEDS Alert Admin page. If the County activates the Task Information panel, they can complete the configuration options for the Task processing. A page validation will also require the county to select a Task Type to be used.

2 RECOMMENDATIONS

2.1 Add New MEDS Alerts 9070 and 9073

2.1.1 Overview

Add MEDS Alert 9070 and 9073 into the CalSAWS system. The new MEDS Alerts will be displayed on the MEDS Alert Admin page and MEDS Alert Search page

2.1.2 Description of Change

1. Add new MEDS alert with the following details:
    a. Alert ID (External Number): 9070
    b. Internal Number (System use only): 0777
    c. Alert Description (Title Description): MOVED OUT OF STATE PER FEDERAL DATA; ELIG RE-EVAL REQ
    d. Alert Type: Critical
    e. Text Description: This daily alert is generated when beneficiary is closed in MEDS in connection with the residency verification program (PARIS or other).
    f. Action Description: Reevaluate beneficiary's eligibility and close their case in CalSAWS if the client is not a resident of California
2. Add new MEDS alert with the following details:
    a. Alert ID (External Number): 9073
    b. Internal Number (System use only): 0809
    c. Alert Description (Title Description): RECON ADD REJECTED – OOS TERM ON MEDS; ELIG RE-EVAL REQ
    d. Alert Type: Critical
    e. Text Description: This daily alert is generated when beneficiary is closed in MEDS in connection with the residency verification program (PARIS or other). The county did not update SAWS, and SAWS attempted to put the client back on at reconciliation, but it was rejected.
    f. Action Description: Reevaluate beneficiary's eligibility and close their case in CalSAWS if the client is not a resident of California

3. Set MEDS Alert 9070 and 9073 to 'Active' on the MEDS_ALERT_CONFIG table.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.3.7	The LRS shall provide a method for alerting COUNTY-specified Users when a discrepancy in LRS Data exists. When the LRS discovers a discrepancy, the LRS shall display information to the User for follow-up action, as necessary.	Adding MEDS Alert 9070 and 9073 to alert County Eligibility Workers when the beneficiary is closed in MEDS

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-210527: MEDS Alert Number 9581 for Age 25 years and 9 months old

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Carlos Zepeda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/27/2021	1.0	Initial version	Jennifer Muna

Table of Contents

1 OVERVIEW

MEDS installed a new MEDS alert (9581) with Change Cycle Letter 451:

"MEDS shall provide SAWS batch support during the transition of beneficiaries identified, ages 19-25, who meet the criteria as they are placed into specific full scope Medi-Cal aid codes beginning November 22, 2019. The expansion for beneficiaries ages 19-25 into full scope Medi-Cal will have a January 1, 2020, effective date.

A MEDS Alert(s) shall be generated requiring 'redetermination' when an individual (undoc. immigrant regardless of citizenship or immigration status) ages out of Full Scope Medi-Cal at age 26"

This SCR outlines the necessary requirements to add the new MEDS alert (9581) into CalSAWS.

1.1 Current Design

CalSAWS currently does not display MEDS alert 9581 on the MEDS Alert Search page and MEDS Alert Admin page.

1.2 Requests

Add MEDS alert 9581- Potential Eligibility Change – Age 25 years and 9 months, to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS.

1.3 Overview of Recommendations

1. Add MEDS alert 9581 to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS.

1.4 Assumptions

1. The Task Information panel will have an initial Status of 'Inactive' on the MEDS Alert Admin page. If the County activates the Task Information panel, they can complete the configuration options for the Task processing. A page validation will also require the county to select a Task Type to be used.

2 RECOMMENDATIONS

2.1 Add New MEDS Alert 9581

2.1.1 Overview

Add MEDS Alert 9581 into the CalSAWS system. The new MEDS Alert will be displayed on the MEDS Alert Admin page and MEDS Alert Search page.

2.1.2 Description of Change

1. Add new MEDS Alert with the following details:
   a. Alert ID (External Number): 9581
   b. Internal Number (System use only): 0819
   c. Alert Description (Title Description): POTENTIAL ELIG CHG-AGE 25YRS, 9MO
   d. Alert Type: Action
   e. Text Description: This renewal alert is generated when client's age is 25 years and 9 months, and the client is approaching the end of the acceptable age limit (26 years old) for this program.
   f. Action Description: Redetermination needed - initiate action to check the recipient's potential change in Medi-Cal.
2. Set MEDS Alert 9581 to 'Active' on the MEDS_ALERT_CONFIG table.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.3.7	The LRS shall provide a method for alerting COUNTY-specified Users when a discrepancy in LRS Data exists. When the LRS discovers a discrepancy, the LRS shall display information to the User for follow-up action, as necessary.	Adding MEDS Alert 9581 to alert County Eligibility Workers that the beneficiary is approaching the acceptable age limit (26 yrs. old) for the Medi-Cal program.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-210617

Updates to Categorically Eligible Logic for CF Program

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/26/2021	1.0	Initial Draft	T.Lazio
06/30/2021	2.0	Updated Sections 1.2, 1.3 and 2.1.2 to specify reasons of 'Fleeing Felon' and 'Probation/Parole Violator' based on committee feedback. Added Assumption 2	T.Lazio
07/12/2021	3.0	Updated 1.2, 1.3 and 2.1 updated to remove the "drug felon" specific verbiage per committee request. Added Assumption 3	T. Lazio
7/13/2021	4.0	Added Assumptions 4 and 5	T. Lazio
08/26/2021	5.0	Updated Sections 1.1, 1.2, 1.3 and 2.1 based on CDSS clarification from CRPC 2264	T. Lazio

Table of Contents

1 OVERVIEW

Per ACL 18-90, households receiving SSI/SSP benefits are considered to be 'Categorically Eligible" (CE) for the CalFresh (CF) program. Therefore, as a CE household for CF, the resource/property and gross/net income tests are waived. This SCR will accommodate the need to waive property eligibility test for CF households that have been designated as 'CE' for the CF program including those households receiving SSI/SSP benefits.

1.1 Current Design

CalSAWS considers households to be 'Categorically Eligible" (CE) when all of the active members of the household receive some type of public assistance in addition to CalFresh (CF), including CalWORKs, Tribal Temporary Assistance for Needy Families (TANF), SSI/SSP, and General Assistance/General Relief (GA/GR). CalSAWS does waive the gross income eligibility test for CE CF households but does not waive the property resource test. Also, CalSAWS still designates the household as 'CE' or Modified Categorical Eligible' (MCE) even when one or more participants has an effective eligibility non-compliance for CF.

1.2 Requests

If the CF household (HH) is designated as categorically eligible (CE), CalSAWS should always waive the property eligibility test for CF regardless of resource amounts or combination of public assistance (specifically CW, SSI/SSP, Tribal TANF or GR/GA) with CF. Per CRPC 2264, the CF HH should no longer be designated as 'CE' or 'MCE' and be subject to all CF eligibility requirements if the HH contains any of the following:

- One or more CF participants who are disqualified for an intentional program violation (IPV).
- One or more CF participants who are fleeing felons or parole/probation violators.
- One or more CF participants receiving GR/GA benefits who are disqualified for being an ineligible 'striker'.

1.3 Overview of Recommendations

1. Update CF EDBC logic to no longer designate CF HH as 'Categorically Eligible' or 'Modified Categorical Eligible' and reinstate CF eligibility requirements when one or more CF participants is non-compliant due to an intentional program violation, is a fleeing felon or parole/probation violator, or is an ineligible 'striker' receiving GR/GA benefits.

2. Update CF EDBC logic to waive property eligibility test when CF HH is designated as 'Categorically Eligible".

1.4 Assumptions

1. This SCR change will only apply to new CF EDBCs going forward and will not apply to previously saved EDBCs. Running EDBC for a month prior to the implementation of this SCR will apply the logic from this SCR.

2. CalSAWS currently waives property test results for CF programs eligible for Modified Categorical Eligibility (MCE).

3. Eligibility Non Compliance 'Type' label of 'Drug/Fleeing Felon' will be re-evaluated in a future effort through SCR CA-230959.

4. This SCR change does not impact CalWORKs or General Relief programs.

5. CalFresh EDBC rule updates for substantial lottery or gambling winnings will be addressed in a future effort through SCR CA-222827.

2 RECOMMENDATIONS

2.1 CalFresh EDBC Rule Updates

2.1.1 Overview

When a CF participant in a CE or MCE household (HH) has an effective eligibility non-compliance for an intentional program violation (IPV), fleeing felon or parole/probation violator or striker receiving GR/GA benefits, EDBC logic should be updated to no longer designate the CF HH as 'Categorically Eligible' or 'Modified Categorical Eligible' and should apply all CF eligibility requirements until the eligibility non-compliance is resolved.

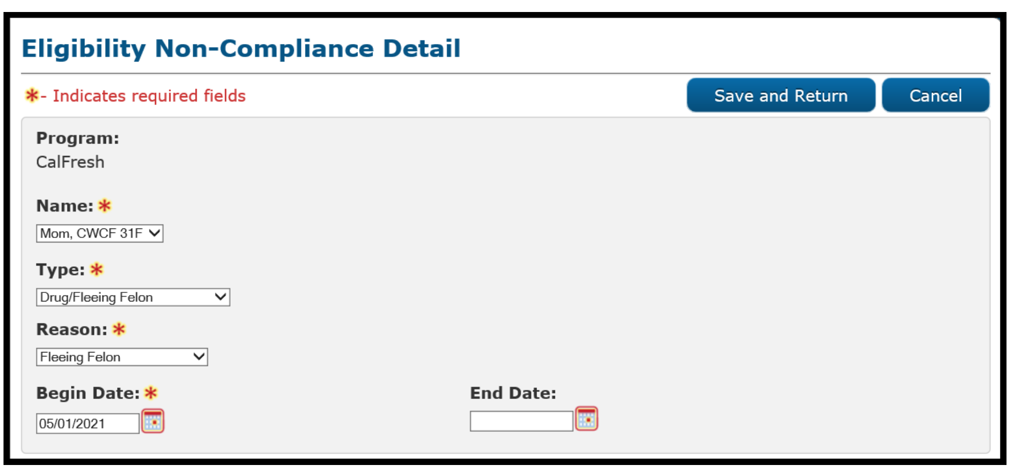


Figure 1: ***CalFresh Eligibility Non-Compliance Example***

When the EDBC does determine the CalFresh program to be 'Categorically Eligible' (CE), the EDBC logic should be updated to waive the Property Eligibility test for that program.

Figure 2: *CalFresh EDBC Property Eligibility Test Mockup*

2.1.2 Description of Changes

1. Update CF EDBC rules to not designate a CF program as 'Categorically Eligible' or 'Modified Categorical Eligible' and apply all CF eligibility requirements for benefit calculation if one or more of the following is true:

    a. One or more CF participants has Eligibility Non-Compliance for the 'CalFresh' program with type of 'Drug/Fleeing Felon' with reason of 'Fleeing Felon' or 'Probation/Parole Violator' that is effective for the benefit period.

    b. One or more CF participants has Eligibility Non-Compliance for the 'CalFresh' program with type of 'IPV/Fraud' regardless of the reason or instance that is effective for the benefit period.

    c. One or more CF and GA/GR participants in a GR/GA/CF combo HH has Eligibility Non-Compliance for the 'CalFresh' program with type of 'Voluntary Quit/Striker' with reason of 'Striker' regardless of instance that is effective for the benefit period.

2. Update CF EDBC rules to set the property eligibility results to 'Waived' when the CalFresh program is determined to be 'Categorically Eligible'.

2.1.3 Programs Impacted

- CF

2.1.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.11	The LRS shall treat income and resources based on program-specific rules.	EDBC will 'waive' property test for households determined as 'Categorically Eligible' for the CalFresh program.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214916

DDID 2252

Task Mgt – Task QA Sampling

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/02/2021	1.0	Initial Revision	Rakan Ali

Table of Contents

1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to allow authorized users to define and schedule periodic sampling of Tasks for QA/QC purposes.

1.1 Current Design

The CalSAWS System does not include functionality to configure a one time or recurring retrieval of Tasks from defined sources for review.

1.2 Requests

Update the CalSAWS System Task Management functionality to allow authorized users to define and schedule a periodic sampling of Tasks. The periodic Task sample results will be accessible for review.

1.3 Overview of Recommendations

1. Add QA/QC Task Sample Search, Detail, and Results pages to the CalSAWS System to allow configuration and review of periodic QA/QC Task Sample instructions.
2. Add a QA/QC Task Sample Results Export icon to export sample results into a consolidated spreadsheet format.
3. Add batch processing to execute QA/QC Task Sample instructions based on the recurrence configuration.

1.4 Assumptions

1. This enhancement will not include any logic to make updates or changes to Task attributes. The QA/QC processing is a mechanism to configure a retrieval of a sampling of Tasks for review.
2. The new Security Groups being introduced with this enhancement will not be associated automatically to any Staff. Local Security Administrators (LSA) will administer the appropriate security as necessary.

2 RECOMMENDATIONS

This section will outline recommendations to include a set of pages that allow authorized users to add, edit, view, and schedule a configuration to retrieve a sample of Tasks for Quality Assurance/Quality Control (QA/QC) review.

2.1 QA/QC Task Sample Search Page

2.1.1 Overview

The QA/QC Task Sample Search page allows Users to search for and view QA/QC Task Sample instructions that exist for the county. From this page, Users can view, create, edit, and remove QA/QC Task Sample instructions.

2.1.2 QA/QC Task Sample Search Page Mockups

Figure 2.1.2.1 – Task Navigation Panel Mockup

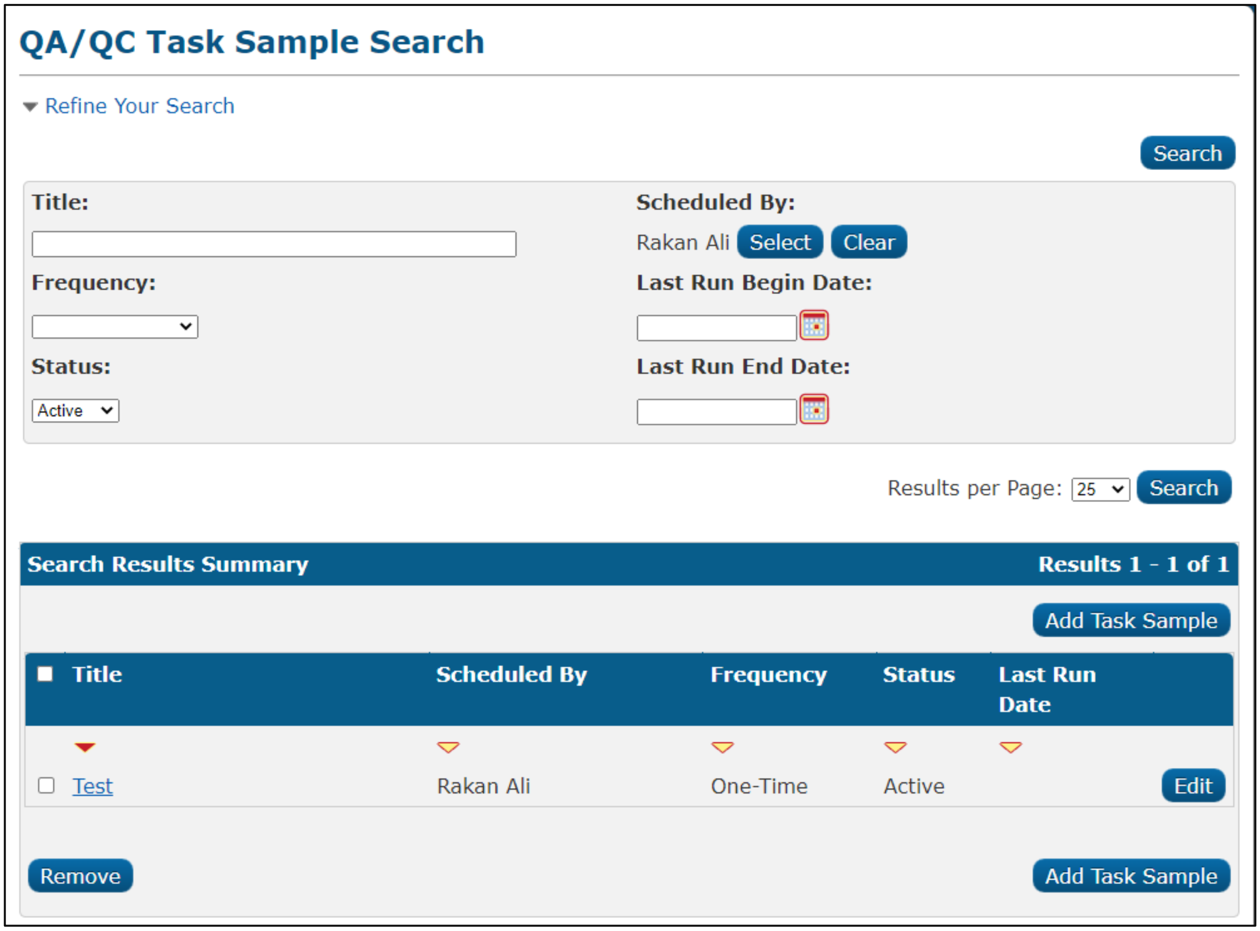


Figure 2.1.2.2 – QA/QC Task Sample Search Page Mockup

2.1.3 Description of Changes

Add a QA/QC Task Sample Search page to the CalSAWS System.

1. Add "QA/QC Tasks" to the Task Navigation menu that will navigate the worker to the QA/QC Task Sample Search page. This option will display if the user's security profile includes the "QAQCTaskView" security right.
2. **BUTTON:** Search – When clicked, the search results section is refreshed to display existing QA/QC Task Sample instructions based on the Search Parameters. If this button is clicked without filling in any parameters, all QA/QC Task Samples for the county will display. all records will display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the search results section.

3. <u>Search Parameters</u>

The following parameters display toward the top of the page and allow users to filter the QA/QC Task Sample instructions that exist for the county. This is an expandable section toward the top of the page that displays parameters which can be used to filter the Tasks displayed on the page. The Scheduled By field will default to the logged in worker, all other fields will default as blank.

a. Title – A text field which will filter QA/QC Task Sample instructions if the Title attribute includes the text within this field (upper/lower case does not matter). This field will only allow a maximum of 50 characters.

b. Scheduled By – A field that will allow QA/QC Task Sample instructions to be searched based on a Staff person.
   i. **BUTTON:** Select – When clicked, will navigate the User to the "Select Staff" page to search for and select a specific Staff to apply to the search. When a selection has been made, a "Clear" button will be available to clear the selection if needed.
   ii. **BUTTON**: Clear – This button appears when a Staff value exists in this field. Clicking this button will clear Staff person from the field.

c. Frequency – This field allows searching of QA/QC Task Sample instructions by a specific frequency. Options include blank, One-Time, Daily (M-F), Weekly, or Monthly.

d. Last Run Begin Date – This field sets a beginning date range filter to search for QA/QC Task Sample instructions by the date the instruction was last executed.

e. Status – This field allows searching of QA/QC Task Sample instructions by a specific Status. Options include blank, Active, and Inactive. At initial load of the page, the default status option is Active.

f. Last Run End Date – This field sets an ending date range filter to search for QA/QC Task Sample instructions by the date the instruction was last executed.

   Note: If a QA/QC Task Sample has not been run yet, the Last Run Date attribute is blank. These QA/QC Task Sample instructions will be included in the search results when the "Last Run Begin Date" and "Last Run End Date" search options are left blank.

4. <u>Search Results Summary:</u>

This table contains the resulting QA/QC Task Sample instructions that satisfy the User specified search criteria. Each column is sortable. The default filter displays Active results where the Scheduled By field is equal to the Staff User that is logged in. The default order of the results will be sorted alphabetically by Title.

a. **BUTTON**: Add Task Sample – This button will display if the worker's security profile contains the "QAQCTaskEdit" security right. Clicking this button will open the QA/QC Task Sample Detail page in create mode.

The results table consists of the following columns:

b. Selectable Checkbox –For each result displayed in this section, a selectable checkbox will display if the worker's security profile contains the "QAQCTaskEdit" security right.

c. Title – The title of the QA/QC Task Sample instruction. If the worker's security profile contains the "QAQCTaskView" security right, this field will display as a hyperlink that navigates to the QA/QC Task Sample Detail page in view mode for the QA/QC Task Sample instruction.

d. Scheduled By – The first and last name of the Staff person that created the QA/QC Task Sample instruction.

e. Frequency – The frequency attribute of the QA/QC Task Sample instruction.

f. Status – The current Status of the QA/QC Task Sample instruction.

g. Last Run Date – The Last Run Date attribute of the QA/QC Task Sample instruction.

h. **BUTTON**: Edit – This button will display if the worker's security profile contains the "QAQCTaskEdit" security right. Clicking this button displays the QA/QC Task Sample Detail page in Edit mode for the corresponding row.

i. **BUTTON**: Remove – This button will remove the Task Sample instruction(s) with a checkmark in the Selectable Checkbox column. This button will display if the worker's security profile contains the "QAQCTaskEdit" security right.

2.1.4 Page Validations

1. "Last Run End Date – The Last Run End Date must be later than the Last Run Begin Date. Please enter a different date."

   A validation message displays when Last Run End Date entered is before Last Run Begin Date in the "Refine Your Search" section.

2.1.5 Page Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
QAQCTaskView	• QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List;	• QA/QC Task View • QA/QC Task Edit
QAQCTaskEdit	• QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List;	• QA/QC Task Edit
SelectWorker	• Enter Report Parameters; • Select Worker; • Select Unit; • Select Office; Select Staff;	• QA/QC Task View • QA/QC Task Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
QA/QC Task View	View QA/QC Task Sample information.	• View Only

Security Group	Group Description	Group to Role Mapping
QA/QC Task Edit	View and Edit QA/QC Task Sample information.	• N/A

2.1.7 Page Mapping

Implement page mapping for the QA/QC Task Sample Search page.

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.2 QA/QC Task Sample Detail Page

2.2.1 Overview

The QA/QC Task Sample Detail page allows Users to manage the configuration and sample results for QA/QC Task Sample instructions. The QA/QC Task Sample Detail page includes general instruction information including Task Source, Sample Options and Recurrence configurations. Sample results can also be accessed from this page.

2.2.2 QA/QC Task Sample Detail Page Mockup

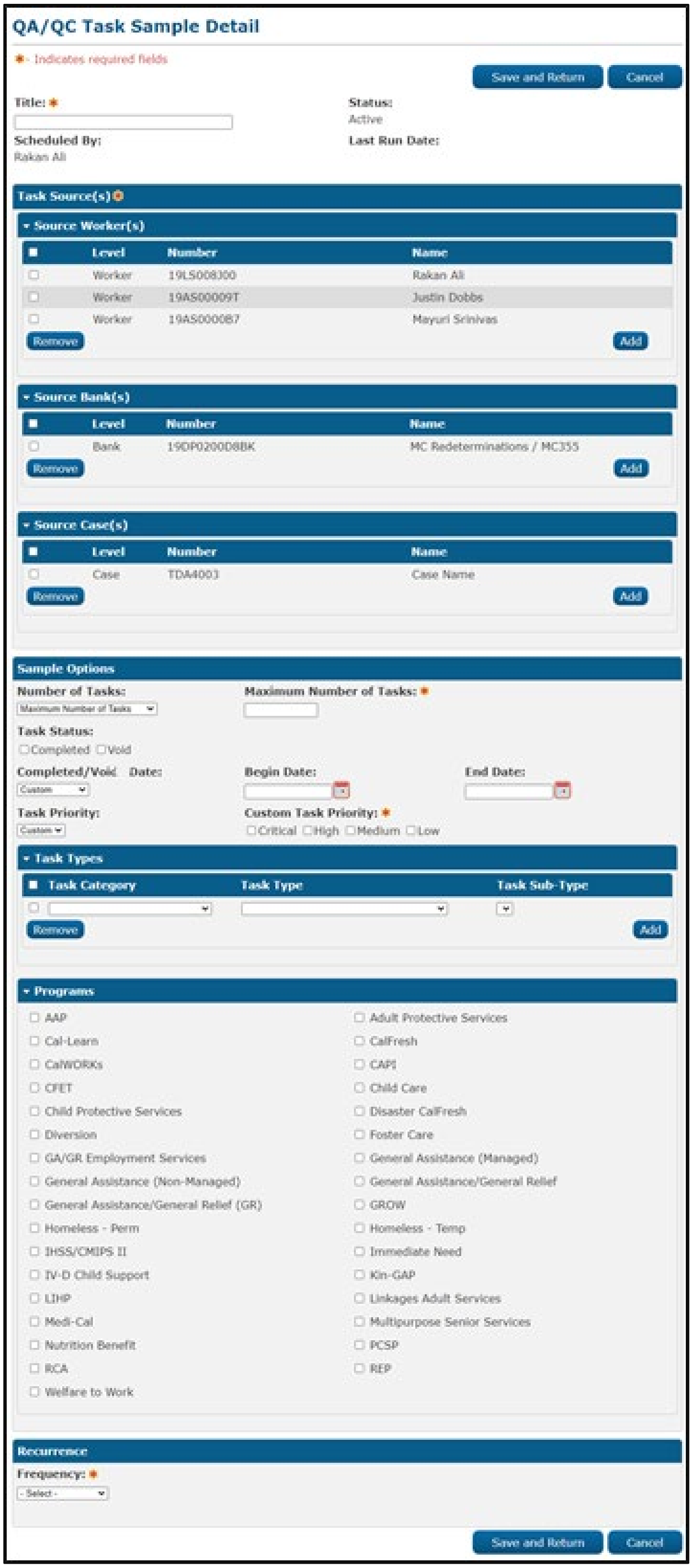
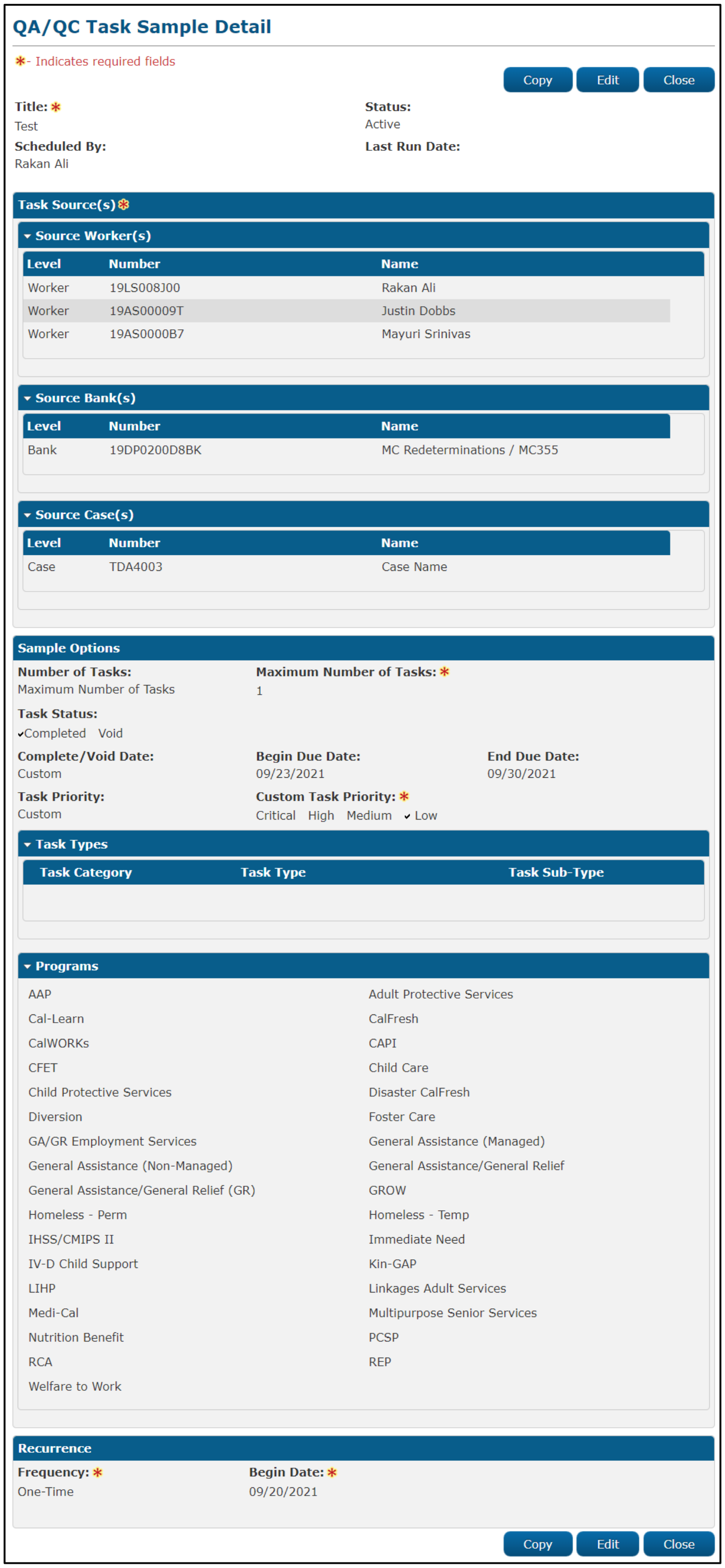


Figure 2.2.2.1 – QA/QC Task Sample Detail Create/Edit Page Mockup



QA/QC Task Sample Detail

*- Indicates required fields

Copy | Edit | Close

Title: *
Test

Status:
Active

Scheduled By:
Rakan Ali

Last Run Date:

Task Source(s) *

Source Worker(s)

Level	Number	Name
Worker	19LS008J00	Rakan Ali
Worker	19AS00009T	Justin Dobbs
Worker	19AS0000B7	Mayuri Srinivas

Source Bank(s)

Level	Number	Name
Bank	19DP0200D8BK	MC Redeterminations / MC355

Source Case(s)

Level	Number	Name
Case	TDA4003	Case Name

Sample Options

Number of Tasks:
Maximum Number of Tasks

Maximum Number of Tasks: *
1

Task Status:
✔Completed Void

Complete/Void Date:
Custom

Begin Due Date:
09/23/2021

End Due Date:
09/30/2021

Task Priority:
Custom

Custom Task Priority: *
Critical High Medium ✔ Low

Task Types

Task Category	Task Type	Task Sub-Type

Programs

AAP	Adult Protective Services
Cal-Learn	CalFresh
CalWORKs	CAPI
CFET	Child Care
Child Protective Services	Disaster CalFresh
Diversion	Foster Care
GA/GR Employment Services	General Assistance (Managed)
General Assistance (Non-Managed)	General Assistance/General Relief
General Assistance/General Relief (GR)	GROW
Homeless - Perm	Homeless - Temp
IHSS/CMIPS II	Immediate Need
IV-D Child Support	Kin-GAP
LIHP	Linkages Adult Services
Medi-Cal	Multipurpose Senior Services
Nutrition Benefit	PCSP
RCA	REP
Welfare to Work	

Recurrence

Frequency: *
One-Time

Begin Date: *
09/20/2021

Copy | Edit | Close

Figure 2.2.2.2 – QA/QC Task Sample Detail View Mode Page Mockup

2.2.3 Description of Changes – Create/View/Edit Mode

Add QA/QC Task Sample Detail page to the CalSAWS System.

1. **BUTTON:** View Results -- This button navigates the User to the QA/QC Task Sample Results List page which includes the resulting details for each QA/QC Task Sample instruction execution (See Section 2.3). This button appears when the page is in View mode and the QA/QC Task Sample instruction has executed at least one time.

2. **BUTTON:** Copy – This button navigates the User to the QA/QC Task Sample Detail page in Create mode, with all details pre-populated to match the originating QA/QC Task Sample Detail page. This button appears when the page is in view mode and the user's security profile contains the "QAQCTaskEdit" security right.

   The following fields will not be copied over to the new QA/QC Task Sample Detail page. Standard defaults will apply for these fields:

   a. Scheduled By
   b. Last Run Date
   c. Recurrence Begin Date
   d. Recurrence End Date

3. **BUTTON:** Edit – This button appears when the page is in View mode and the user's security profile contains the "QAQCTaskEdit" security right. This button will refresh the page into Edit mode.

4. **BUTTON:** Close – This button displays when the page is in View mode and when clicked, will navigate the user back to the QA/QC Task Sample Search page.

5. **BUTTON:** Save and Return – This button appears when the page is in Create or Edit mode. When clicked, the page will be saved and the user will be directed back to the QA/QC Task Sample Search page.

6. **BUTTON:** Cancel – This button appears when the page is in Create or Edit mode. On click, any changes to the page will be discarded and the user will be directed back to the QA/QC Task Sample Search.

7. Title **(Required)** – The Title of the QA/QC Task Sample instruction. This field will display a text box when the page is in Create or Edit mode with a maximum length of 50 characters. If this field contains the "<" or ">" characters, they will be removed on Save.

8. Status – The Status of the QA/QC Task Sample instruction. Possible values for this field are:
    a. Active: The QA/QC Task Sample instruction is set to execute based on the Recurrence/Frequency set by the authorized User.
    b. Inactive: The QA/QC Task Sample instruction will not be executed.

When the page is in Create mode, the default value is Active and cannot be modified until after the page is initially saved.

9. Scheduled by – This column will display the Staff name of the user who created the QA/QC Task Sample instruction. When the page is in Create mode, this field will pre-populate with the Staff name of the logged in worker.

10. Last Run Date – The most recent run date of the QA/QC Task Sample instruction. This field will be blank if the QA/QC Task Sample instruction has not yet been executed.

11. Task Source(s) **(Required)**:

    a. Source Worker(s):
        i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Workers can be removed by checking the selectable checkbox and clicking the "Remove" button.
        ii. Level – This column displays the Level of the organization selected for a given row. The possible values are "- Select -" (as default), Worker, Unit, or Office. When a value is selected, the Select button is displayed in the same row in the table.
        iii. Number – This column displays the Number or Code associated to the selected organization or Worker.
        iv. Name – This column displays the Name associated to the selected organization or Worker.
        v. **BUTTON**: Select – This button will open Select Worker, Select Unit, or Select Office page depending on the value selected in the Level dropdown. Once a value is selected from the Select Worker, Select Unit or Select Office page, the Add button can be used to add the row to the Source Worker table. This button will display when the page is in Create or Edit mode.

vi. **BUTTON**: Add – This button inserts a new row in the table. A new row will not be inserted if a row was previously added and has not been completed. This button will display when the page is in Create or Edit mode.
vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in Create or Edit mode.

b. Source Bank(s):
   i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Banks can be removed by checking the selectable checkbox and clicking the "Remove" button.
   ii. Level – This column will display "Bank"
   iii. Number – This column displays the Bank ID for each Bank displayed in this section.
   iv. Name – This column displays the Bank Name for each Bank displayed in this section.
   v. **BUTTON**: Select – This button will display the Select Bank page. This button will display when the page is in create or edit mode.
   vi. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the rows allowing the user to select a specific Bank. This button will display when the page is in create or edit mode.
   vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

c. Source Case(s):
   i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Cases can be removed by checking the selectable checkbox and clicking the "Remove" button.
   ii. Level – This column will display "Case"
   iii. Number – This column displays the Case Number for each Case displayed in this section.
   iv. Name – This column displays the Case Name for each Case displayed in this section.
   v. **BUTTON**: Select – This button will display the Person Search page. This button will display when the page is in create or edit mode.

vi. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the row allowing the user to select a specific Case. This button will display when the page is in create or edit mode.

vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

12. Sample Options

a. Number of Tasks – This dropdown allows the User to configure the size of the QA/QC Task Sample.

i. Maximum Number of Tasks – When the page is in Create mode, this value is the default. When selected, a **Required** "Maximum Number of Tasks" field will appear prompting the user to enter a number indicating the maximum number of Tasks to be sampled. This field has a maximum length of four characters. Valid inputs are numbers from 1-2500 only due to the sample size limit of 2500.

ii. Number of Tasks per Worker - When selected, a **Required** "Number of Tasks per Worker" field will appear prompting the user to enter a number indicating the maximum number of Tasks to be sampled per worker configured in the Task Source(s) section. Valid inputs are numbers from 1-2500 only due to the sample size limit of 2500. This attribute will only be applied to the pool of workers within the configured Task Source(s), it will not apply to Source Banks.

iii. Percentage of Tasks – When selected, a **Required** "Percentage of Tasks" field will appear prompting the user to enter a percentage of tasks to be sampled. This field has maximum length of three characters. Valid inputs are numbers from 1-100 only.

b. Task Status – This field will display two values each with a checkbox for selection. The options available for the Task Status are:

i. Completed

ii. Void

c. Completed/Void Date – A dropdown allowing configuration of a specific timeframe based on Task completion or void action. The following options will be included:

i. Previous 7 Days (default) – Only Tasks with a Completed/Void date within the previous 7 calendar days of the QA/QC Task Sample instruction's run date will be sampled.

ii. Previous Month – Only Tasks with a Completed/Void date within the previous month of the QA/QC Task Sample instruction's run date will be sampled.

iii. Custom – Begin Date and End Date fields will display allowing the User to specify a specific date range for Task Completed/Void date restriction.

d. Task Priority – This dropdown allows the User to configure the QA/QC Task Sample instruction for specific Task priority values. Options include:

i. Any (default)

ii. Custom – When selected, a **Required** "Custom Task Priority" section will display the four possible Priority values each with a checkbox. Priorities that have been selected to apply to the QA/QC Task Sample instruction have check marks to the left of them when the page is in View mode. The Field is only visible when Custom is chosen in the Task Priority field. When visible, this field is required to have at least one of the Task Priority checkboxes selected. The QA/QC Task Sample will only sample Tasks if the Priority of their associated Task Types matches one of the values checked in this field. The following are the options for Custom Task Priority:

1. Critical
2. High
3. Medium
4. Low

13. <u>Task Types:</u>

By default, this section loads in collapsed view with no rows specified. An empty section means Tasks of any Type and Sub-Type will be included in the QA/QC Task Sample processing. Note: This section will load in expanded mode if at least one row is available in the table. The User may expand this section and specify Task Types and Task Sub-Types to be included in the QA/QC Task Sample processing. The following columns and buttons are available in this section:

a. Selectable checkbox – For each result displayed, when the page is in Create or Edit mode, a selectable checkbox will display at the beginning of the row. Task Type rows can be removed by checking the selectable checkbox and clicking the "Remove" button.

b. Task Category – This column displays the Task Category for each row, if the worker has selected a Task Category for the row. When adding a new row, Task Category is not a required field; the user may choose a Task Type without selecting a Task

Category. However, if the user selects a Task Category, the Task Type dropdown will only display Task Types available within the selected Task Category. Similarly, if the user does not select a Task Category value, and they do select a Task Type value, the Task Category value will remain blank. The Task Category dropdown will include all available Task Categories.

c. Task Type – This column displays the Task Type for each row. When adding a new row, a dropdown will display with all available Task Types for the county. However, if the user has selected a value in the Task Category dropdown, the Task Type dropdown will only display Task Types available within the selected Task Category for the county. A value is not required in this field as a user may choose to sample Tasks based on a Task Category alone.

d. Task Sub-Type – This column contains Task Sub-Type information. When adding a new row, a dropdown will display with all available Task Sub-Types for the Task Type selected in the Task Type dropdown.

e. **BUTTON**: Add – This button inserts a new row in the table and will display when the page is in Create or Edit mode.

f. **BUTTON**: Remove – This button will display when the page is in Create or Edit mode. On click, processing will remove rows within the table with a checkmark in the Selectable Checkbox.

14. Programs: By default, this section loads in collapsed view with no programs checked. This means Tasks regardless of program association will be included in the QA/QC Task Sample Search process.

    The User may expand this section and choose to identify a program, or set of programs, from which to draw Tasks. Programs that are considered intake programs or external programs will be displayed. Refer to Appendix (See Section 7) for a current list of intake/external programs.

15. Recurrence:

    a. Frequency **(Required)** – Four options are available with the default displaying as "- Select - ":

        i. One-Time – The QA/QC Task Sample instruction will only run one time.

        ii. Daily (M-F) – The QA/QC Task Sample instruction will run on a daily basis- Monday through Friday.

        iii. Weekly – This instruction will run every week on the weekday(s) selected- Monday through Friday.

        iv. Monthly – This instruction will run every month.

b. Begin Date **(Required)** – This is the start date for the QA/QC Task Sample instruction. The value is defaulted to the current CalSAWS System date.

Note: This field is not editable after the QA/QC Task Sample instruction has been executed for the first time. This field displays for any value selected in the Frequency dropdown.

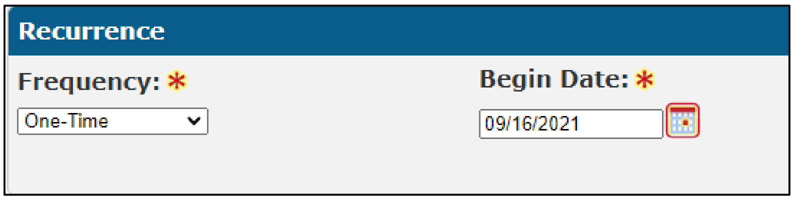


Figure 2.2.3.1 – QA/QC Task Sample Detail One-Time Mockup

c. End Date **(Required)** – Displays when the value selected in the Frequency dropdown is "Daily (M-F)" or "Weekly". This is the end date for QA/QC Task Sample instruction.

This value is defaulted to one year from the CalSAWS System date when the page is in Create mode. It cannot be edited to be more than one year from the CalSAWS System date.

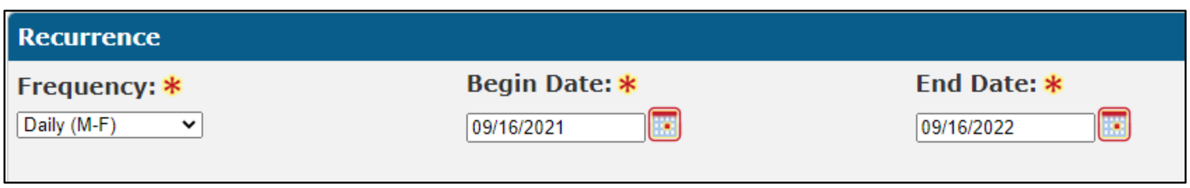


Figure 2.2.3.2 – QA/QC Task Sample Detail Daily (M-F) Mockup

d. Weekday(s) **(Required)** – Displays when the value selected in the Frequency dropdown is "Weekly". Weekday names (Monday through Friday) will display with a checkbox available for each day allowing the user to select one or more weekdays.

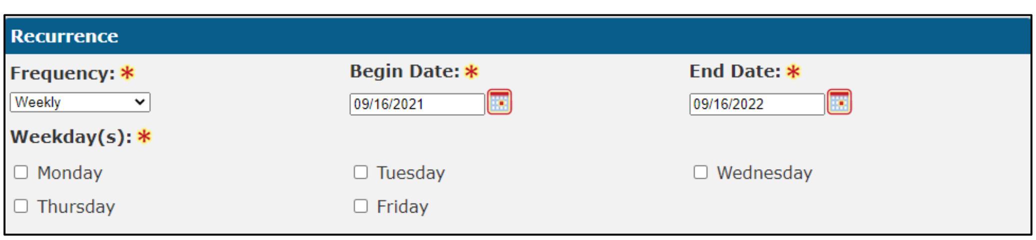


Figure 2.2.3.3 – QA/QC Task Sample Detail Weekly Mockup

e. Begin Month **(Required)** – Displays when the value selected in the Frequency dropdown is "Monthly". This is the start month for the QA/QC Task Sample instruction. The value is defaulted to the current CalSAWS System month.

   Note: This field is not editable after the QA/QC Task Sample instruction has been executed for the first time. This field displays for any value selected in the Frequency dropdown.

f. End Month **(Required)** – Displays when the value selected in the Frequency dropdown is "Monthly". This is the end month for QA/QC Task Sample instruction.

   This value is defaulted to one year from the CalSAWS System date when the page is in Create mode. It cannot be edited to be more than one year from the CalSAWS System date.

   Example – Begin Month: 08/2021 and End Month: 09/2021

g. Day of the Month **(Required)** – Displays when the value selected in the Frequency dropdown is "Monthly". This value determines at what point during the month the QA/QC Task Sample instruction will execute. The field is a dropdown menu with the following options:
   i. First Day of the Month
   ii. Last Day of the Month

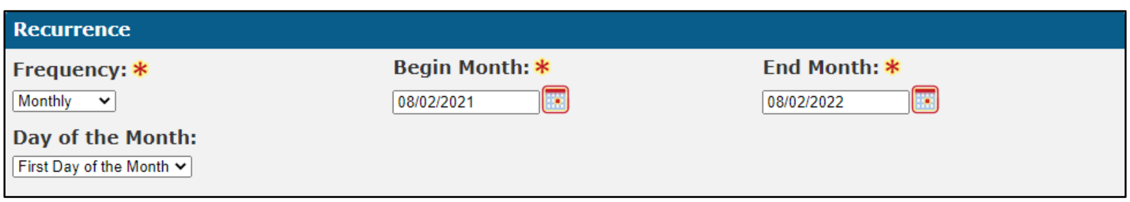


Figure 2.2.3.4 – QA/QC Task Sample Detail Monthly Mockup

2.2.4 Description of Changes – Results Mode

Display the top pane of the QA/QC Task Sample Detail page in Results mode when navigating from the QA/QC Task Sample Results List page (See Section 2.3). When the QA/QC Task Sample Detail page is accessed through the QA/QC Task Sample Results List Page, there are additional fields displayed related to the specific QA/QC Task Sample occurrence that ran. The QA/QC Task Sample Detail page will also display a snapshot of the detail settings for the QA/QC Task Sample instruction as they were at the time the sample was retrieved.

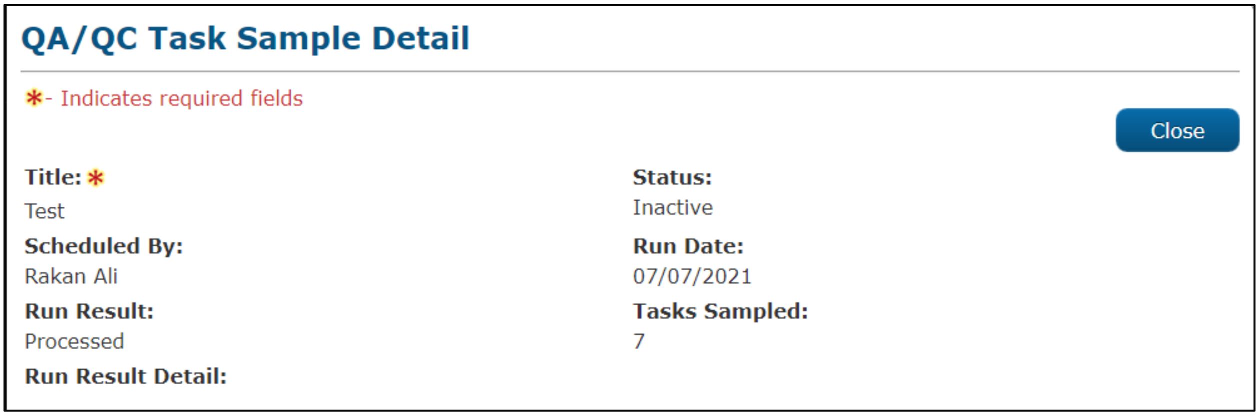

QA/QC Task Sample Detail
*- Indicates required fields
Close
Title: *
Test
Status:
Inactive
Scheduled By:
Rakan Ali
Run Date:
07/07/2021
Run Result:
Processed
Tasks Sampled:
7
Run Result Detail:

Figure 2.2.4.1 – QA/QC Task Sample Detail Results Mode Page Mockup

1. **BUTTON:** Close – This button closes the page and navigates the User back to the QA/QC Task Sample Results List page.

The following fields display only when the page is in Results mode:

2. Run Date – This field displays the date the QA/QC Task Sample was run.
3. Run Result – This field displays the result status for the QA/QC Task Sample. The value will be one of the following options:
   a. Processed
   b. Not Processed
4. Tasks Sampled – This field displays the number of Tasks that were sampled.
5. Run Result Detail – This field displays additional information if the Run Result is Not Processed. Possible values include:
   a. Task Source(s) Do Not Have Task Assignments
   b. Number of Tasks to Sample Is Over Limit

2.2.5 Page Validations

1. "Title – The title is already in use by the staff member listed in the Scheduled By field."
   a. A validation message is displayed when the User attempts to save a QA/QC Task Sample instruction with a Title that already exists for a QA/QC Task Sample instruction where the Scheduled By value is the logged in worker. Upper and Lower case is not considered for uniqueness.

2. "Task Source(s) – A new row may not be added until the last row has been completed."
    a. A validation message displays when the User attempts to add a row in the Task Source(s) table before completing the last row on that table.

3. "Task Types – A new row may not be added until the last row has been completed."
    a. A validation message displays when the User attempts to add a row in the Task Types table before completing the last row on that table.

4. "Maximum Number of Tasks – Input value must be a number from 1 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Maximum Number of Tasks secondary prompt.

5. "Percentage of Tasks – Input value must be a number from 1 – 100. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Percentage of Tasks secondary prompt.

6. "Begin Date – The Recurrence Begin Date must not be in the past. Please enter a different date."
    a. A validation message displays when the Users attempts to save a QA/QC Task Sample instruction with a Begin Date in the past.

7. "End Date – The Recurrence End Date must not be in the past, earlier than the Begin Date, or greater than a year from the current date."
    a. A validation message displays when the Users attempts to save an active QA/QC Task Sample instruction with an End Date in the past, an End Date prior to the Begin Date, or an End Date greater than a year from the current date.

8. "Begin Month - The Recurrence Begin Month must not be in the past. Please enter a different month."
    a. A validation message displays when the Users attempts to save a QA/QC Task Sample instruction with a Begin Month in the past.

9. "End Month – The Recurrence End Month must not be in the past, earlier than the Begin Month, or greater than a year from the current month."

a. A validation message displays when the Users attempts to save an active QA/QC Task Sample instruction with an End Month in the past, an End Month prior to the Begin Month, or an End Month greater than a year from the current month.

10. "Completed/Void End Date – The End Date must be later than the Begin Date. Please enter a different date."
    a. A validation message displays when End Due Date entered is before Begin Due Date in the Task Sample Options Panel for "Custom" Due Date.

11. "Task Source(s) – A Worker, Bank or Case must be included as a source."
    a. Add a validation to display when the User attempts to save the QA/QC Task Sample instruction without populating at least one Worker, Bank or Case in the Task Source(s) section.

12. "Source Worker(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Source Worker(s) section before completing the last row added to that table.

13. "Source Bank(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Source Bank(s) section before completing the last row added to that table.

14. "Custom Task Priority – The values selected conflict with the priorities associated to the selected Task Types. Please select additional values for Custom Task Priority."
    a. If the User attempts to save a QA/QC Task Sample instruction having checked at least one Custom Task Priority and chosen at least one Task Type, but none of the checked Priorities match a Priority of the selected Task Types or Sub-Types, a validation message is triggered. This is to prevent Users from saving QA/QC Task Sample instruction that will not return any Tasks.

       This validation also displays if the User has selected at least one Custom Task Priority and not chosen any Task Types, but none of the Task Types or Sub-Types in the County have a Priority that match at least one of the Custom Task Priority selections.

15. "Number of Tasks per Worker – Input value must be a number from 1 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Number of Tasks per Worker field.

2.2.6 Page Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks > Click on a hyperlink of the desired result displayed in the QA/QC Task Sample Search page or the "Add Task Sample" button to navigate to the QA/QC Task Sample Detail page.

2.2.7 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
QAQCTaskView	• QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List;	• QA/QC Task View • QA/QC Task Edit
QAQCTaskEdit	• QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List;	• QA/QC Task Edit
SelectWorker	• Enter Report Parameters; • Select Worker; • Select Unit; • Select Office; Select Staff;	• QA/QC Task View • QA/QC Task Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
QA/QC Task View	View QA/QC Task Sample Details.	• View Only

Security Group	Group Description	Group to Role Mapping
QA/QC Task Edit	View and Edit QA/QC Task Sample details. Access to Select pages for Worker, Unit, Office and Staff.	• N/A

2.2.8 Page Mapping

Implement page mapping for the QA/QC Task Sample Detail page.

2.2.9 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 QA/QC Task Sample Results List Page

2.3.1 Overview

This page lists the QA/QC Task Sample Results for the QA/QC Task Sample that was displayed on the QA/QC Task Sample Detail page. The User can view the results and details of the QA/QC Task Sample instruction for each run.

2.3.2 QA/QC Task Sample Results List Mockup

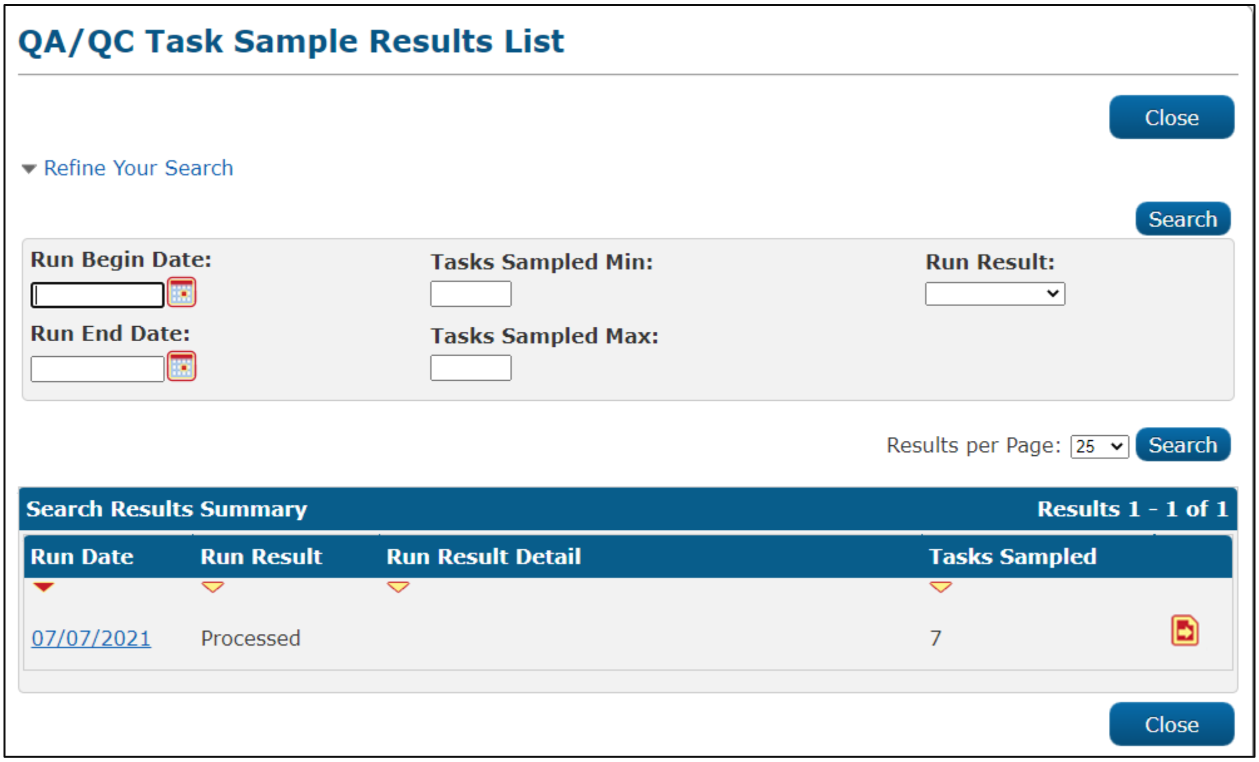


Figure 2.3.2.1 – QA/QC Task Sample Results List Page Mockup

2.3.3 Description of Changes

Add a QA/QC Task Sample Results List page to the CalSAWS System. This page will provide information for each execution of the QA/QC Task Sample instruction. The results included on this page allow access to a maximum of 12 months of historic samples. The page will include an Export Report icon for each row/result with Task Sample results displayed in the Search Results Summary table.

1. **BUTTON:** Close – This button closes the page and navigates the User back to the QA/QC Task Sample Detail page.

2. **BUTTON:** Search – When clicked, the Search Results Summary is refreshed to display QA/QC Task Sample results for the specific QA/QC Task Sample instruction used to access the page. If this button is clicked without filling in any parameters, all results for the QA/QC Task Sample instruction will display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

3. <u>Refine Your Search:</u> Allows User to choose the number of search results displayed per page. This is an expandable section toward the top of

the page that displays parameters which can be used to filter the QA/QC Task Sample instruction results displayed on the page. This section will be collapsed on initial load. The default order for the search results is by Run Date chronologically. The 'Run Date', 'Run Result', 'Run Result Detail', and 'Tasks Sampled' fields will be sortable. The following search parameters are available defaulting to blank:

  a. Run Begin Date – This field allows the User to input the beginning date for the search range to be compared to the QA/QC Task Sample run date.
  b. Run End Date – This field allows the User to input the end date for the search range to be compared to the QA/QC Task Sample run date.
  c. Tasks Sampled Min – This text field allows the User to input a value for the minimum number of Tasks that were sampled for each run. Valid inputs are numbers from 0 – 2500 only.
  d. Tasks Sampled Max – This text field allows the User to a value for the maximum number of Tasks that were sampled for each run. Valid inputs are numbers from 0 – 2500 only.
  e. Run Result – This dropdown field allows the User to search by specific Run Result values for the QA/QC Task Samples. Options include:
     i. Processed
     ii. Not Processed

4. <u>Search Results Summary:</u> Contains the following information for the result set that matches the User specified search criteria. Each column is sortable. Default sort is Run Date descending.

   Note: Results are kept up to one year from their run date. After one year, the results are purged from the CalSAWS System.

  a. Run Date – This column indicates the date the sample was retrieved. This field will display as a hyperlink that leads to the QA/QC Task Sample Detail page in Results mode (See Section 2.2.4) for the selected run date. All options displayed on this page, will be the settings that were used at the time the sample was pulled.
  b. Run Result – This column indicates the run result for the QA/QC Task Sample execution. Options include:
     i. Processed
     ii. Not Processed
  c. Run Result Detail – This column indicates additional information if the Run Result is Not Processed. Possible values are:
     i. Task Source(s) Do Not Have Task Assignments.
     ii. Number of Tasks to Sample Is Over Limit.
  d. Tasks Sampled – This column indicates the number of Tasks that were retrieved by the QA/QC Task Sample execution.

e. **ICON:** Export Icon – An icon for each row in the Search Results Summary table, with a Tasks Sampled value greater than 0. On click, the specifics for the Tasks sampled will be exported into a spreadsheet format. (See Section 2.4)

2.3.4 Page Validations

1. "Run End Date – Run End Date must be later than the Run Begin Date. Please enter a different date."
    a. A validation message displays when Run End Date entered is before the Run Begin Date in the "Refine Your Search" section.
2. "Run Begin Date – QA/QC Task Sample results are limited to one year. Please enter a different date."
    a. A validation message displays when the User enters Run Begin Date more than a year in the past.
3. "Tasks Sampled Max – Input value must be a number from 0 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Tasks Sampled Max field.
4. "Tasks Sampled Min – Input value must be a number from 0 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Tasks Sampled Min field.
5. "Tasks Sampled Max – Task Sampled Max must be greater than or equal to the Task Sampled Min value. Please enter a different value."
    a. A validation message displays when the User attempts to input a value in Tasks Sampled Min field that is greater than the value in Tasks Sampled Max.

2.3.5 Page Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks > QA/QC Task Sample Search > Click on a hyperlink of the desired result to navigate to the QA/QC Task Sample Detail page > Click the View Results button which will display if the QA/QC Task Sample instruction has run at least once.

2.3.6 Security Updates

This page does not have specific security assigned because it is accessed through the QA/QC Task Sample Detail page. The user can only access the QA/QC Task Sample Detail page with the security defined (See Section 2.2.7), which by default also allows access to the QA/QC Task Sample Results List page.

2.3.7 Page Mapping

Implement page mapping for the QA/QC Task Sample Results List page.

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 QA/QC Task Sample Results Export Report

2.4.1 Overview

The QA/QC Task Sample Results Export Report contains information for QA/QC Task Sample results.

2.4.2 QA/QC Task Sample Results Export Mockup

General Information
Report: QA/QC Task Sample Results Export
County: Los Angeles
Export Date: 07/07/2021 08:30 AM
QA/QC Task Sample Title: ES
Run Date: 07/16/2021

Figure 2.4.2.1 – QA/QC Task Sample Results Export - General Information Sheet Mockup

Case Number	Case Name	Worker ID	Bank ID	Program	Completed/Void Date	Category	Type	Sub-Type	Status	Priority	Date Created	Long Description
B16N522	Case Name		19DP1700EWBK	Program Name	06/15/2021	SAR7	SAR 7 Received		Void	High	07/7/2021	SAR 7 Received 08/01/2021 SAR 7 submit month August Customer note regarding delay in return of form Award letter from SSA for Robin dated 01/01/2021 Imaged in Barcode mode/indexed Set Task
B1YSV20	Case Name	19DP62U12E		Program Name	06/15/2021	IEVS	IEVS IFDS Verification Received		Completed	High	07/7/2021	

Figure 2.4.2.2 – QA/QC Task Sample Results Export – Exported Data Sheet Mockup

2.4.3 Description of Changes

1. Add a QA/QC Task Sample Results Export Report that will allow exporting of data from the QA/QC Task Sample Results List page for a particular QA/QC Task Sample execution. Reference the Supporting Documents section for an example report template which includes the report layout and column placement.
   a. General Information Sheet
      This sheet will contain general information informing the User of the parameters that were used to generate the Report. This

sheet will include a single table with a single column titled "General Information" that will include the following rows:

i. Report Name formatted as "Report: <Report Name>". For example, "Report: QA/QC Task Sample Results Export".
ii. The county name formatted as "County: <County Name>". For example, "County: Los Angeles".
iii. The date and time the export was generated formatted as "Export Date: <mm/dd/yyyy hh:mm AM/PM>". For example, "Run Date: 07/07/2021 08:30 AM".
iv. The QA/QC Task Sample Title formatted as "QA/QC Task Sample Title: <QA/QC Task Sample Title>". For example, "QA/QC Task Sample Title: ES".
v. The QA/QC Task Sample Run Date formatted as "Run Date: <mm/dd/yyyy>". For example, "Run Date: 07/16/2021".

b. Exported Data Sheet

Column Name	Description
Case Number	The Case Number associated to the Task.
Case Name	The Case Name of the Case associated to the Task.
Worker ID	The Worker ID that is associated to the Task
Bank ID	The Bank ID that is associated to the Task.
Program	The Program associated to the Task.
Completed/Void Date	The Completed Date of the Task formatted as MM/DD/YYYY.
Category	The Category of the Task Type of the Task.
Type	The Task Type associated with the Task.
Sub-Type	The Task Sub-Type associated to the Task. This column will be blank if no Sub-Type exists.
Status	The Status of the Task.
Priority	The Priority of the Task.

Column Name	Description
Date Created	The date the Task was created formatted as MM/DD/YYYY.
Long Description	The Long Description attribute of the Task.

2.4.4 Report Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks > QA/QC Task Sample Search > Click on a hyperlink of the desired result displayed in the QA/QC Task Sample Search page to navigate to the QA/QC Task Sample Detail page > Click the View Results button which will display if the QA/QC Task Sample instruction has run at least once > Click on Export Icon.

2.4.5 Counties Impacted

All CalSAWS counties are impacted.

2.4.6 Security Updates

N/A – The report does not have specific security.

2.4.7 Report Usage/Performance

There are no expected page report usage/performance impacts

2.5 QA/QC Task Sample Sweep Job

2.5.1 Overview

The QA/QC Tasks Sweep job is responsible for updating QA/QC Task Sample statuses, deleting QA/QC Task Sample results that are older than one year, and creating new transactions to be processed for QA/QC Task Sample instructions. This section will outline the required modifications to implement the QA/QC Task batch sweep job.

2.5.2 Description of Change

1. Create a new daily batch job to sweep active QA/QC Task Samples that are scheduled for execution on the same batch run date. This sweep will be responsible for the following:

    a. Updating the QA/QC Task Sample Status from 'Active' to 'Inactive' for one-time QA/QC Task Samples or recurring sampling that have reached or passed the End Date of the recurrence.
    b. Deleting QA/QC Task Sample results that are older than one year.
    c. Creating the transactions to be processed for active QA/QC Task Samples that are scheduled for execution on the current day (same batch run date).
2. The batch process will evaluate QA/QC Task Sample instructions to determine which instructions are configured to be executed during the current night. The batch process will use the following logic for each Recurrence Frequency to determine if a QA/QC Task Sample should be executed.
    a. One-time: Run if the QA/QC Task Sample Recurrence Begin Date is today or in the past and the instruction has not been executed.
    b. Daily (M-F): Run if the QA/QC Task Sample Recurrence Begin Date is today or in the past, and the End Date is today or in the future.
    c. Weekly: Run if the QA/QC Task Sample Recurrence Begin Date is today or in the past, the End Date is today or in the future, and today has been selected as one of the Weekday(s) in the Recurrence section of the QA/QC Task Sample Detail page.
    d. Monthly: Run if the first of the QA/QC Task Sample Recurrence Begin Month is today or in the past and the first of the End Month is today or in the future, the Day of the Month field is set to "First Day of the Month" and the current day is the first of a month.
       OR
       Run if the last day of the QA/QC Task Sample Recurrence Begin Month is today or in the past and the last of the End Month is today or in the future, the Day of the Month field is set to "Last Day of the Month" and the current day is the last day of a month.

2.5.3 Execution Frequency

This sweep job will be scheduled to run daily for all CalSAWS System business days, excluding Sundays and Holidays.

2.5.4 Key Scheduling Dependencies

Schedule this batch job as a predecessor to the QA/QC Task Sample Execution job.

2.5.5 Counties Impacted

All CalSAWS counties.

2.5.6 Data Volume/Performance

There are no anticipated volume/performance concerns.

2.5.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.6 QA/QC Task Sample Execution Job

2.6.1 Overview

The QA/QC Task Sample Execution job will be responsible for processing the QA/QC Task Sample instructions determined by the QA/QC Task Sample Sweep job. This section outlines the required modifications to implement the QA/QC Task Execution batch job.

2.6.2 Description of Change

1. Create a new daily batch job per county to process active QA/QC Task Sample instructions as determined by the sweep job.

   This process will determine if any QA/QC Task Samples will result in more than the maximum limit of 2500 Tasks. These QA/QC Task Samples will not be processed, and the Run Result Detail will be marked as "Number of Tasks to Sample Is Over Limit". The Run Result is available on the QA/QC Task Sample Detail page in Results mode. This batch job is also responsible for setting the status to 'Inactive' for QA/QC Task Samples with a recurrence of 'One-Time' after processing is completed.

2. <u>QA/QC Task Sample Processing:</u>

   The execution of a QA/QC Task Sample instruction will result in a sample of Tasks being associated to the QA/QC Task Sample instruction which will be accessible on the QA/QC Task Sample Results List page.

3. <u>QA/QC Task Detail:</u>
   The following section provides additional details into the logic required associated to each option displayed on the QA/QC Task Sample Detail Page.
   a. Task Source(s) – This section defines the sources within the organization to draw Tasks from. Batch will use Task Sources to

determine the Source Worker(s), Source Bank(s) and/or Source Case(s) information associated with the Tasks to be sampled.

b. Sample Options – This section contains the Task Sample options the user can use to filter tasks.
    i. Number of Tasks – Defines a limit over the number of Tasks to be sampled from Workers, Banks and Cases. The User can select one of the following options for the number of Tasks:
        - Maximum Number of Tasks: Sample at most, a specific number of Tasks from the Source(s).
        - Percentage of Tasks: Sample a specific percentage (rounded to the nearest number) of all Tasks from the Source(s).
        - Number of Tasks Per Worker: Sample a maximum number of Tasks from each worker determined from the Source(s).
    ii. Task Status – Defines which specific Task Status filters to apply to the Task Samples. Sampled Tasks may be Completed, Void or both.
    iii. Completed/Void Date – The Completed/Void Date filter determines which date range to apply to Tasks based on the Completed/Voided date. The Completed/Voided Date can be set to one of the following options:
        - Previous 7 Days: Only Tasks with a Completed or Void Date within the past 7 calendar days of the QA/QC Task Sample run date will be retrieved.
        - Previous Month: Only Tasks with a Completed or Void Date within the month prior to the current month will be retrieved.
        - Custom: Only Tasks with a Completed or Void Date between the specific date range will be retrieved.
    iv. Task Priority – The Task Priority filter determines the priority of the Tasks to be sampled. The Task Priority can be set to one of the following options:
        - Any: Priority is not evaluated as part of the sample processing. All Tasks are candidates regardless of Priority.
        - Custom: Only Tasks with a Priority value that matches one of the selected Task Priorities will be retrieved.
    v. Task Types – The Task Type filter defines the Task Categories, Task Types and Task Sub-Types to be sampled. Only Task Categories, Task Types and Task Sub-Types identified by the User will be sampled. If no filters are defined, all Task Types will be included for the QA/QC Task Samples. If a Task Type is identified, and no corresponding Task Sub-Types are identified, all Task Sub-

Types are identified, then all Task Sub-Types for that Task Type will be included in the Task Samples. If a Task Category is identified, and no corresponding Task Types are identified, all Task Types for the selected Task Category will be included in the Task Samples.

vi. Programs – This filter defines the Programs that are associated to the Tasks to be sampled. Only the Tasks that are linked to the specified Program types will be sampled. If no filters are defined, all Program Tasks will be included in the QA/QC Task Sample processing.

4. QA/QC Task Sample Results:
    a. After running each QA/QC Task Sample, the processing will log the following information for future reference.
        i. Run Result – The results status for the QA/QC Task Sample. This value will be one of the following options:
            - Processed – At least 1 Task has been sampled per instructions.
            - Not Processed – No Tasks have been sampled per instructions.
        ii. Run Result Detail – If the Run Result is Not Processed, additional details are captured in this field. The additional detail can be one of the following scenarios:
            - Task Source(s) do not have Task Assignments – This means no Tasks were assigned to the Workers, Units, Offices, Banks or Cases identified in the Task Source(s) section.
            - Number of Tasks to Sample is Over Limit – This means the task sample instructions specified return more than 2500 Tasks.
        iii. Run Date – The date the QA/QC Task Sample executed.
5. Task Samples – The total number of Tasks that were sampled, along with the individual Task IDs, and point in time QA/QC Task Sample configuration.

2.6.3 Execution Frequency

The batch job will be scheduled to run daily, excluding Sundays and Holidays.

2.6.4 Key Scheduling Dependencies

Schedule the Task Sample Execution Batch job to run after the Task Sample Sweep job.

2.6.5 Counties Impacted

All CalSAWS counties.

2.6.6 Data Volume/Performance

There are no expected data volume or performance concerns as daily volume is anticipated to be low.

2.6.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	QA/QC Task Sample Search Report	QAQC%20Task%20S ample%20Search%2(
2	Security	Security Matrix	CA-214916 DDID 2252 Security Matrix.›

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2252	The CONTRACTOR shall update the Task Management solution to allow authorized users to define and schedule a periodic sampling of tasks. The periodic task sampling results must be viewable to the user that requested it.	None	This design incorporates pages to configure the CalSAWS System to retrieve a sample of Tasks for QA/QC purposes and access the results.

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

1. List of Programs
    a. AAP
    b. Adult Protective Services
    c. CAPI
    d. CFET
    e. Cal-Learn
    f. CalFresh
    g. CalWORKs
    h. Child Care
    i. Child Protective Services
    j. Disaster CalFresh
    k. Diversion
    l. Foster Care
    m. Homeless - Perm
    n. Homeless – Temp
    o. Immediate Need
    p. IHSS/CMIPS II
    q. Kin-GAP
    r. Linkages Adult Services
    s. Medi-Cal
    t. Multipurpose Senior Service
    u. Nutrition Benefit
    v. RCA
    w. REP
    x. Welfare to Work

In addition to the above, the following GA/GR programs will be included based on the viewing county:

County	Programs
Los Angeles	a. GROW b. General Assistance/General Relief
1. Alpine 2. Amador 3. Butte 4. Calaveras 5. Colusa 6. Del Norte 7. El Dorado 8. Glenn 9. Humboldt 10. Imperial 11. Inyo 12. Kern	a. General Assistance (Managed) b. General Assistance (Non-Managed)

County	Programs
13. Kings 14. Lake 15. Lassen 16. Madera 17. Marin 18. Mariposa 19. Mendocino 20. Merced 21. Modoc 22. Mono 23. Monterey 24. Napa 25. Nevada 26. Plumas 27. Riverside 28. San Benito 29. San Bernardino 30. San Joaquin 31. Shasta 32. Sierra 33. Siskiyou 34. Stanislaus 35. Sutter 36. Tehama 37. Trinity 38. Tuolumne 39. Yuba	
1. Alameda 2. Contra Costa 3. Fresno 4. Orange 5. Placer 6. Sacramento 7. San Diego 8. San Francisco 9. San Luis Obispo 10. San Mateo 11. Santa Barbara 12. Santa Clara 13. Santa Cruz 14. Solano 15. Sonoma 16. Tulare 17. Ventura 18. Yolo	a. General Assistance/General Relief b. GA/GR Employment Services

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216211

Update Benefit Reductions to Allow Cents

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	John B, Kapil S.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/12/2021	1.0	Initial Version	Jimmy Tu

Table of Contents

1 OVERVIEW

1.1 Current Design

The Daily Excess Recoupment Report is a fiscal report that provides a listing of all the recovery accounts with negative balances with detailed information on the last transactions for the report date requested. Through the review of this report, it was discovered that many Recovery Accounts remained open, up to the cent level.

Modification of the system is necessary to process recoupment accounts that contain cents.

1. Currently the system does not have the functionality to allow the collection of outstanding recovery account balances under a dollar ($1.00).

Currently only General Relief has the functionality to process recoupment amounts under a dollar. This functionality can be leveraged and possibly be used as a baseline for the other remaining programs.

1.2 Requests

1. Update Overpayment adjustment logic to allow for recoupment of recovery account balances under a dollar ($1.00).

1.3 Overview of Recommendations

1. Update Overpayment adjustment logic to allow for recoupment of recovery account balances under a dollar ($1.00).

1.4 Assumptions

1. This SCR will not data change past records and will only modify the EDBC page to allow for recoupments under $1.00.
2. With the implementation of SCR CA-56515 and CIV-106691 benefit reductions can now contain cents.
3. LA County General Assistance / General Relief (Program Code: GA) already has the functionality to recoup balances under a dollar ($1.00) and there will be no updates to the functionality.

2 RECOMMENDATIONS

2.1 EDBC Summary Page

2.1.1 Overview

This page allows the worker to view the EDBC results of a program for an individual. We will be updating the overpayment adjustment logic to allow for recoupment of recovery account balances under a dollar.

2.1.2 EDBC Summary Page Mockup

No Page Changes.

2.1.3 Description of Changes

1. Update Overpayment adjustment logic to allow for recoupment of recovery account balances under a dollar ($1.00) for all EDBC eligible programs.
    a. For Example:
        i. Remaining balance of a recovery account is $0.70.
        ii. Benefit Reduction is applying $10 per month.
        iii. Batch EDBC will need to be triggered or the user will need manually run EDBC to recalculate the overpayment adjustment amount to be $0.70.
        iv. The Overpayment readjustment logic will apply $0.70 to the recovery account and apply the remaining $9.30 to a different recovery account if another recovery account exists.

2.1.4 Page Location

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

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

None.

2.1.7 Page Usage/Data Volume Impacts

None.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.11.2.6	The LRS shall include the ability to post, adjust, change, refund, reverse, and transfer an overpayment/overissuance claim balance, payment, and/or amounts.	This requirement is being met by updating the overpayment adjustment logic to allow recoupment of cents on recovery accounts.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

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

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216551 | DDID 2150

Migrate CalWIN County Batch jobs:

Batch RE Appointment Scheduling for CW/CF

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/2/2021	1.0	Initial version	Jennifer Muna and Farhat Ulain
9/9/2021	2.0	Updates based on committee feedback	Jennifer Muna
9/20/2021	3.0	Updates based on Build feedback • Overlap appt logic description • Additional column to Appt duration table • Define Journal entry variables • Regression test for CW/CF RE packet jobs	Jennifer Muna

Table of Contents

1 OVERVIEW

This SCR outlines the necessary requirements to enable automated batch appointment scheduling for CalWORKs and CalFresh programs for the CalWIN Migration counties.

1.1 Current Design

The existing Redetermination/Recertification (RE) Appointment batch job is specific to Los Angeles County's business process. The batch job retrieves CalWORKs only, CalFresh only, and CalWORKs/CalFresh combination (including Transitional CalFresh) cases that need an RE appointment with a program worker to evaluate the customer's ongoing eligibility. This is a two-day batch job that determines an available appointment date and time based on the worker's schedule.

If an RE appointment already exists for a case (i.e., created manually), then the case will be skipped. If an appointment does not exist, the logic retrieves case information and appointment details then determines the worker's daily threshold for number of appointments. The logic only considers the daily threshold of a 'General Appointment' with type of 'Telephone Interview Recertification'. If the worker's daily threshold equals 0, then no appointments will be scheduled for the worker. Additionally, no task will be generated for the worker.

With the given daily threshold, the logic finds an available appointment date and time slot based on the worker's schedule availability. If unable to find an available date/time slot, the case will be picked up on the second day and re-attempt to find an available date/time slot. If unable to schedule an appointment on the second day, a task is created for the worker to manually schedule the redetermination appointment and send the RE packet.

When an available date and time slot is found, a 15-minute appointment is created with the program worker for 'General Appointment' with the type 'Telephone Interview Recertification', a journal entry is created, and the RE packet is generated.

There is no automated process for scheduling CalWORKs/CalFresh Redetermination Appointments for the CalWIN Migration Counties in CalSAWS, and there is no capability to schedule overlapping appointments through batch.

1.2 Requests

Create an automated CalWORKs/CalFresh Appointment Scheduling batch job for the CalWIN Migration counties.

1.3 Overview of Recommendations

1. Update the Position Detail page by adding a field to indicate if a worker can accept overlapping appointments.
2. Create a new batch job for scheduling RE appointments for CalWORKs and CalFresh programs for the CalWIN Migration Counties.

3. Create a new Task Automated Action for the CalWIN Migration Counties when the RE appointment cannot be scheduled.

1.4 Assumptions

1. Manage Personnel set up will include setting the Daily Threshold for each worker's position on the Position Detail page for General Appointment with Telephone Interview Recertification type. The batch appointment job will not schedule appointments for CalWIN Counties that do not set up the Daily Threshold on the Position Detail page for their workers.
2. Per ACL 20-145 and 20-126, RE interview requirements for CalFresh Elderly Simplified Application Project (ESAP) households has been waived. CF ESAP recipients will no longer be required to complete a SAR 7 at the 12th and 24th month of their 36-month certification period. This change will be applied in CA-220040.
3. The new batch appointment job will not trigger any forms. When the batch job creates the RE appointment, all appointment details will be included in the Appointment letter, which is included in the RE packet. CA-207399 migrated the CF RE Packet (PB00R543), CW RE Packet (PB00R544) and CW/CF RE Packet (PB00R547) into CalSAWS for the 57 Migration Counties. The RE Packets are generated on the 15th of each month.
4. The new batch appointment job will only schedule appointments of Category 'General Appointment' and Type 'Telephone Interview Recertification.' All other appointment types, including face-to-face appointments, must be scheduled manually. Additionally, appointments will not be scheduled on weekends or holidays by the batch job and must be scheduled manually.
5. CA-233206 is created to allow C-IV Counties to opt in to the CalWIN RE batch appointment job in a future release.
6. There are no changes to the Los Angeles County existing CW/CF RE Batch job (RE Packet and Appointment Scheduling).

2 RECOMMENDATIONS

2.1 Position Detail

2.1.1 Overview

The Position Detail page displays detailed information about a worker, including the ability to configure the threshold of appointments that can be scheduled in a day. This change will add a column to the Appointment Threshold section of the page to specify the number of overlapping appointments that can be scheduled for each time slot by the batch appointment job.

2.1.2 Position Detail Page Mockup

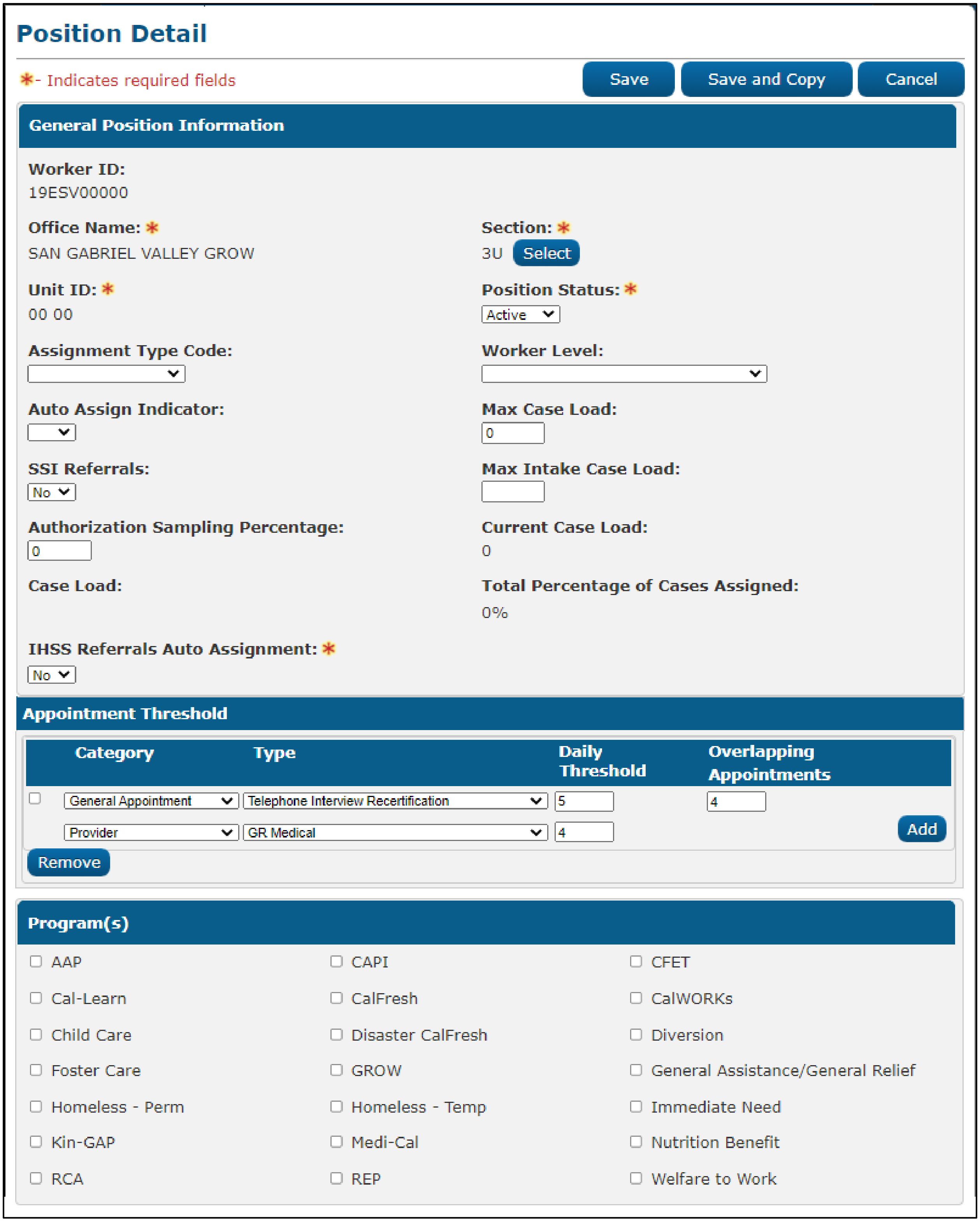


Figure 2.1.2-1 – Position Detail Page

2.1.3 Description of Changes

1. Add an 'Overlapping Appointments' column in the Appointment Threshold section of the Position Detail page.
    a. A text box will be displayed in this column to enter the number of overlapping appointments that can be scheduled during each available appointment time slot for the position.
    b. The text box will only be displayed when the Category is selected as 'General Appointment' and the Type is selected as 'Telephone Interview Recertification'.
    c. The overlapping appointment count will not exceed the daily threshold of the appointment. A validation will be displayed: "Overlapping Appointment – The overlapping appointments cannot exceed the daily threshold."

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add page mapping for the new fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Create New Batch Job for CW/CF Recertification Appointment

2.2.1 Overview

This section outlines the necessary modifications to create a new batch job for the CalWIN Migration Counties for automated RE Appointments for CalWORKs and CalFresh programs. The batch appointment logic will be similar to the existing CalSAWS logic but with additional functionality for the CalWIN counties process.

2.2.2 Description of Change

1. Create a batch job for the CalWIN Migration Counties to schedule an RE appointment for Active CalWORKs only, CalFresh only, and CalWORKs/CalFresh combination cases (including Transitional CalFresh) with their assigned worker for which the RE Due Date falls in the upcoming month. Exclude CF only ESAP households from automatically scheduling an RE appointment. An ESAP household is identified as the following:
    a. Active CalFresh program
    b. Meets ESAP Criteria is 'Yes'
2. Determine if a CW/CF RE appointment exists for the case. If an appointment exists, then skip the case. If it does not exist, determine the phone number with Type of Main, Home or Cell of the CW/CF program Payee. If there is no phone number (Type of Main, Home or Cell) associated to the Payee, then create a task for the worker (See Task section for details) and do not create an appointment. If there is a valid phone number associated to the Payee, then determine the worker's daily threshold amount for appointments. Batch job will only consider the daily threshold amount entered for 'General Appointment' with type 'Telephone Interview Recertification'. The number of RE Appointments will be scheduled based on the Daily Threshold amount entered in the worker's Position Detail record. If the Daily Threshold entered is '0' or blank, then the batch job will not schedule any appointments for the worker and will not generate a task.
3. Determine available dates and time slots based on the worker's schedule indicated as 'Available for Appointments'. The worker's blocked times will be bypassed when scheduling RE appointments (i.e., lunch time, break time, vacation, etc.). Additionally, the batch job will not schedule appointments on weekends or County holidays.
4. Appointments will be scheduled on the earliest available date and time slot indicated on the worker's schedule. Schedule the number of overlapping appointments for a worker based on the information entered on the Position Detail page, if applicable. When scheduling overlapping appointments, batch will schedule appointments in the earliest available time slot(s) until the maximum number of overlapping

appointments is reached and will continue throughout the worker's available time slot(s) until the worker's daily threshold is reached. The number of overlapped appointments cannot exceed the daily threshold amount. If there is no overlapped appointment information entered, then the batch job will not schedule overlapped appointment for the worker.

Example: Worker has a daily threshold set to 10 and overlapping appointments set to 2. Batch will only schedule 2 overlapped appointments per available appointment time slot, and not exceed 10 appointments per day.

<table>
<tr><td rowspan="8">Worker A</td><td>8 a.m.</td><td>9 a.m.</td><td>10 a.m.</td><td>11 a.m.</td><td>12 p.m.</td></tr>
<tr><td>Appt 1</td><td>Appt 3</td><td>Appt 5</td><td rowspan="3">Unavailable</td><td rowspan="3">Lunch</td></tr>
<tr><td>Appt 2</td><td>Appt 4</td><td>Appt 6</td></tr>
<tr><td colspan="3">Available for Appointment</td></tr>
<tr><td>1 p.m.</td><td>2 p.m.</td><td>3 p.m.</td><td>4 p.m.</td><td>5 p.m.</td></tr>
<tr><td>Appt 7</td><td>Appt 9</td><td></td><td rowspan="3">Desk Time</td><td rowspan="3">Desk Time</td></tr>
<tr><td>Appt 8</td><td>Appt 10</td><td></td></tr>
<tr><td colspan="3">Available for Appointment</td></tr>
</table>

5. Create an RE appointment with the following details:
   a. Category: General Appointment
   b. Type: Telephone Interview Recertification
   c. Status: Scheduled
   d. Status Reason: Batch Initiated
   e. Begin Date: Appointment dates will be scheduled for the following period in the RE due month: the first business day of the RE due month until the day that is 2 business days prior to the 10-day cutoff date of the RE due month.
      i. Example: If RE Due Month is in December, appointment dates will be scheduled from Dec 1st through Dec 20th.
   f. Begin Time: Available appointment time based on worker's schedule.
   g. Duration: Appointment duration will be based on the following county configurations per program type. Create a new table to store county configurations.

County	Appointment Category	Appointment Type	CW Only Duration (min.)	CF Only Duration (min.)	CW/CF Combo Duration (min.)
Alameda	General Appointment	Telephone Interview Recertification	60	60	90
Contra Costa	General Appointment	Telephone Interview Recertification	60	60	90
Fresno	General Appointment	Telephone Interview Recertification	60	60	90
Orange	General Appointment	Telephone Interview Recertification	60	60	90
Placer	General Appointment	Telephone Interview Recertification	60	60	90
Sacramento	General Appointment	Telephone Interview Recertification	90	90	90
San Diego	General Appointment	Telephone Interview Recertification	60	60	90
San Francisco	General Appointment	Telephone Interview Recertification	60	60	90
San Luis Obispo	General Appointment	Telephone Interview Recertification	60	60	90
San Mateo	General Appointment	Telephone Interview Recertification	60	60	90
Santa Barbra	General Appointment	Telephone Interview Recertification	60	60	90
Santa Clara	General Appointment	Telephone Interview Recertification	60	60	90

Santa Cruz	General Appointment	Telephone Interview Recertification	60	60	90
Solano	General Appointment	Telephone Interview Recertification	60	60	90
Sonoma	General Appointment	Telephone Interview Recertification	60	60	90
Tulare	General Appointment	Telephone Interview Recertification	60	60	90
Ventura	General Appointment	Telephone Interview Recertification	60	60	90
Yolo	General Appointment	Telephone Interview Recertification	60	60	90

6. Create a Journal entry for the case with appointment details when the appointment is created.
    a. Appointment Type: Telephone
    b. Appointment Date: MM/DD/YYYY
    c. Program Type: CW, CF, CW/CF or TCF
    d. RE Description: 'Recertification' for CF only and 'Redetermination' for all other program types including TCF

Journal Entry	Description
New/Update	No
Journal Category	All
Journal Type	CT363_83 - RE Appointment Scheduled
Short Description	{Appointment Type} Appointment Scheduled.
Long Description	{Appointment Type} appointment was scheduled for {Appointment Date} for {Program Type} {RE Description}
Trigger Condition	When CW/CF RE Appointment is scheduled for case

7. Create a BSCR to schedule the new batch job to run 5 calendar days prior to the CalWIN RE Packet generation.
8. Create a task for the worker, when unable to find an available date/time slot for an appointment. See task section for details.

2.2.3 Execution Frequency

Schedule batch job to run monthly on the 10th, 5 calendar days prior to the CalWIN CW/CF RE Packet Batch jobs (PB00R543, PB00R544, and PB00R547). If the batch run date falls on a Sunday or holiday, then the batch job will run on the next business day.

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

CalWIN Migration Counties

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

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

2.3 Task Automated Action - RE Appointment Not Scheduled

2.3.1 Overview

Create a new Task Automated Action for the CalWIN Migration Counties if the batch appointment job is unable to schedule an RE appointment. This section outlines the task details for the Automated Action for the 18 CalWIN Migration Counties.

2.3.2 Description of Change

1. Create the following Automated Action for the CalWIN Migration Counties.
    a. Action Information
        i. Name: CalWORKs/CalFresh: RE Appointment Not Scheduled
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): CW, CF
        v. Run Date: Monthly (10th day of the month)
        vi. Source: Batch
        vii. Scenario: Unable to find available date and time slot for the RE appointment, manually schedule the RE appointment.
    b. Task Information
        i. Task Type: N/A
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 5 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Manually schedule the RE Appointment.

Note: The Automated Action Status will initially be 'Inactive' with a blank Task Type and Task Sub-Type. This is because each county can set a custom Task Type for the Automated Action. If a county decides to Activate the Automated Action, the page validation will require that the county also select a Task Type to be used.

2.4 Regression Test CW/CF RE Packet Generation jobs

2.4.1 Overview

The CalWIN RE Packets are generated on the 15^{th} of each month. The Appointment letter is included in the RE packet and provides details of the recipient's RE appointment. This section outlines the regression test activities needed for the existing batch jobs that generates the CW/CF RE Packet and Appointment letter.

2.4.2 Description of Change

1. Test existing CW/CF RE Packet Batch jobs (PB00R543, PB00R544, and PB00R547) to confirm that the RE appointment details created by the new Batch RE Appointment job are properly displayed in the Appointment letter:
    a. GEN 102 is generated for CalWORKs only and CW/CF combination cases.
    b. CF 29 is generated for CalFresh only cases.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2150	The CONTRACTOR shall update and incorporate into the CalSAWS Software an agreed upon list of CalWIN County specific batch processes.		Implement batch RE appointment scheduling functionality for CalWIN Migration counties.

4 APPENDIX

This section displays a timeline example of the CW/CF RE Appointment batch job for a case with a December RE Due Month.

Scenario: RE Appointment for CW/CF combo case

A CW/CF recipient will receive a NEC (CF 377.2) notifying them their CF Certification is ending. The CW/CF RE Appointment batch job (new job for CalWIN) runs on the 10th of November to determine cases for which their RE Due Month is December and schedule an appointment. Based on the worker's daily threshold and availability, the batch job schedules an appointment on December 6th at 9 am. When the CW/CF RE packet generates on the November 15th, the appointment details will be included in the Appointment Letter. If the recipient misses the RE appointment, a NOMI (CF 386) will be generated and sent to recipient. The CW M40-181A Discontinuance NOA will be generated and sent on December 18th. The recipient will be discontinued effective January 1, 2022, unless they take action before the end of the RE Due Month when the Batch EDBC Discontinuance job runs on December 31st.

November 2021						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4 CF NEC generated	5	6
7	8	9	10 CW/CF RE Appointment Batch	11	12	13
14	15 CW/CF RE Packet and Appointment Letter Generation	16	17	18	19	20
21	22	23	24 Mail Out CW/CF RE Packet	25	26	27
28	29	30				

December 2021						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 *Begin of Batch Appt period for Dec RE	2	3	4
5	6 **CW/CF RE Appointment @ 9 a.m.** *CF NOMI generated	7 CF NOMI sent for missed appointment	8	9	10	11
12	13	14	15	16	17	18 CW M40-181A Disc. NOA generated
19	20 *End of Batch Appt period for Dec RE	21	22 EDBC 10-Day Cut Off	23	24	25
26	27	28	29	30	31 CW/CF RE Disc. Batch Job	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216757

2nd Level Authorization When Issuing an EBT Card

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eric Wu
	Reviewed By	S. Garg, D. Vang, K. Santosh, J. Besa, Eric C, H. Jain, S. Suddavanda, J Caicedo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/08/2020	1.0	Initial Version	Eric Wu

Table of Contents

1 OVERVIEW

1.1 Current Design

The EBT Card Print List page allows users to view a list of EBT cards that are ready for issuance. The default search result displays EBT Cards with "Ready to Print" status for the office of a logged-in user. When printing an EBT Card, a user can choose from EBT printers associated to his or her Office. Printing functionality is also available on the EBT Card Detail page for pickup. Only users with the proper security rights can issue EBT Cards but authorizations are not required.

1.2 Requests

Update the CalSAWS system to require 2nd Level authorization when issue an EBT Card to a new payee or issue an EBT Card with a new name to the existing payee.

1.3 Overview of Recommendations

1. Update the County Authorizations page "Fiscal" Section to include a row "EBT Card Issuance for New Cardholders or Name Changes" for counties to configure the proper authorization level.
2. Update the EBT Card Detail page to follow the appropriate authorization levels set on the County Authorizations page.
3. Update the EBT Card Print List page to allow users search for EBT Cards in pending approval status.
4. Update Pending Authorizations page to include a task type for EBT Card Issuance.

1.4 Assumptions

1. This SCR will not impact the process to issue an EBT Card via external systems, E.g., Admin Portal or EBTedge.
2. Adding clients' EBT Cards info into CalSAWS system by using Manual Add function will not require any authorizations.
3. EBT Card issuance for Disaster CalFresh benefits will not require authorizations.
4. Existing EBT Cardholders in CalSAWS will be considered authorized cardholders and will not require additional authorization when issuing new cards.
5. EBTedge stores and prints only first name, middle initial, and last name for an EBT Card.

2 RECOMMENDATIONS

2.1 County Authorizations Page

2.1.1 Overview

The County Authorizations page is used to configure supervisor authorizations as appropriate for each county.

Below changes is to allow each county to manage the authorization process for issuing EBT Cards.

2.1.2 County Authorizations page mockup

Fiscal	
Auxiliary Authorization	1st Level Authorization
EBT Card Issuance for New Cardholders or Name Changes	2nd Level Authorization
External Recovery Account	1st Level Authorization
Interest Allocation	1st Level Authorization
Invoice	1st Level Authorization
Issuance Method	1st Level Authorization
Issuance Reissue	2nd Level Authorization
Issuance Replacement	2nd Level Authorization
Transaction Refund	2nd Level Authorization

Figure 2.1.2 – County Authorizations

2.1.3 Description of Changes

1. Update the "Fiscal" section to include a new row as EBT Card Issuance for New Cardholders or Name Changes. The following options will be available in Edit Mode:
    a. No
    b. 1st Level Authorization
    c. 2nd Level Authorization

2.1.4 Page Location

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

2.1.5 Security Updates

No Changes.

2.1.6 Page Mapping

No Changes

2.1.7 Page Usage/Data Volume Impacts

None.

2.2 EBT Card Detail Page

2.2.1 Overview

The EBT Card Detail page allows the User to view and edit information for an existing card, add an additional cardholder or re-issue a lost or stolen card. This page displays EBT Card Detail information including Card Number, Account Number, Card Information, and Status History.

This update is to require appropriate authorizations before issuing an EBT Card for Pickup and Mail.

2.2.2 EBT Card Detail Page Mockup

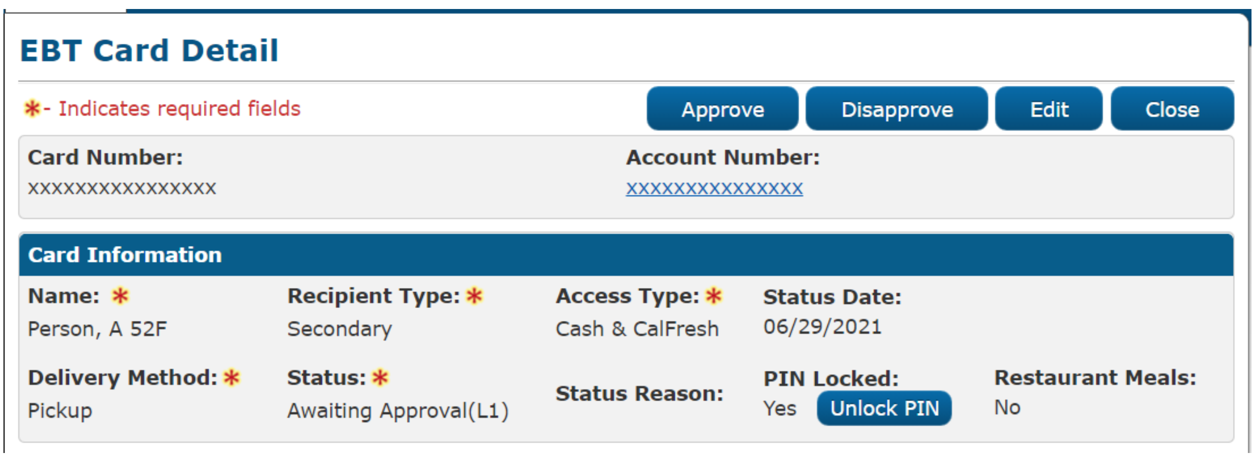


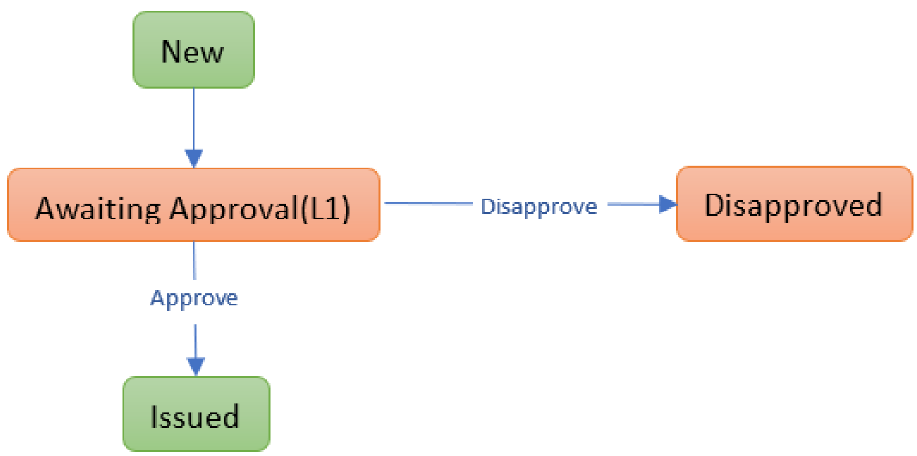
Figure 2.1.2 – EBT Card Detail

2.2.3 Description of Changes

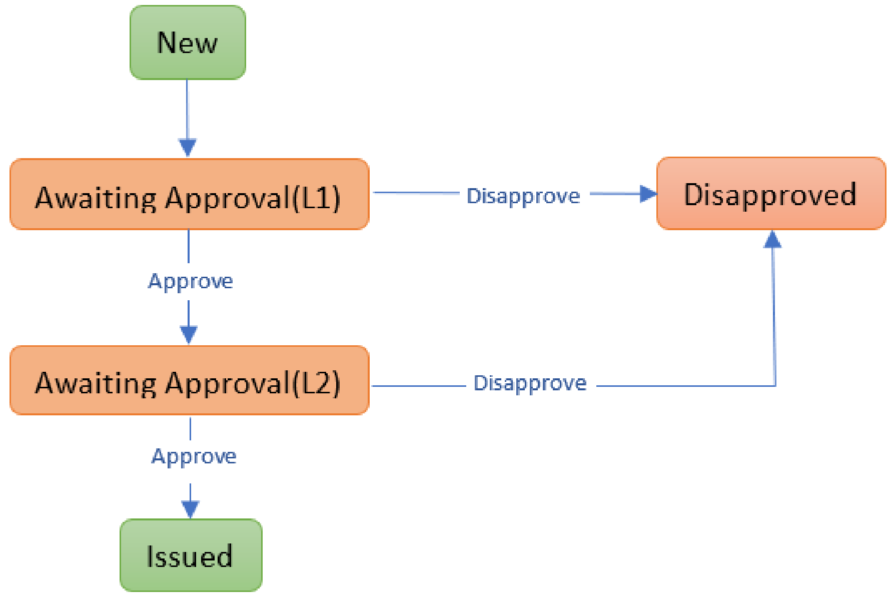
1. Update the page to require the proper level of approval when issuing an EBT Card with a new cardholder name under a case.
   Note:

I. A Cardholder name is the name that will be printed on an EBT Card and the format is first name, middle initial, and last name.
II. A new Cardholder name can either be a new payee under a case or an existing cardholder with the name change.
III. Any mismatch in spelling (including special characters) and letter case of the first name, middle initial, or last name will be considered a new name.
IV. Cardholders in the following scenarios will not require authorizations for EBT Card issuance until the name is changed:
    - The first cardholder under a case.
    - Cardholders added by using "Add Manual" button on the EBT Account List page or using "Add Manual" button in "Current Cards" section of the EBT Account Detail page.
V. By setting "No" for "EBT Card Issuance for New Cardholders or Name Changes" on the County Authorization page, counties can issue EBT Cards without requiring any authorizations.

For EBT Cards delivered by Mail, the page will follow below approval process based on the county configuration:



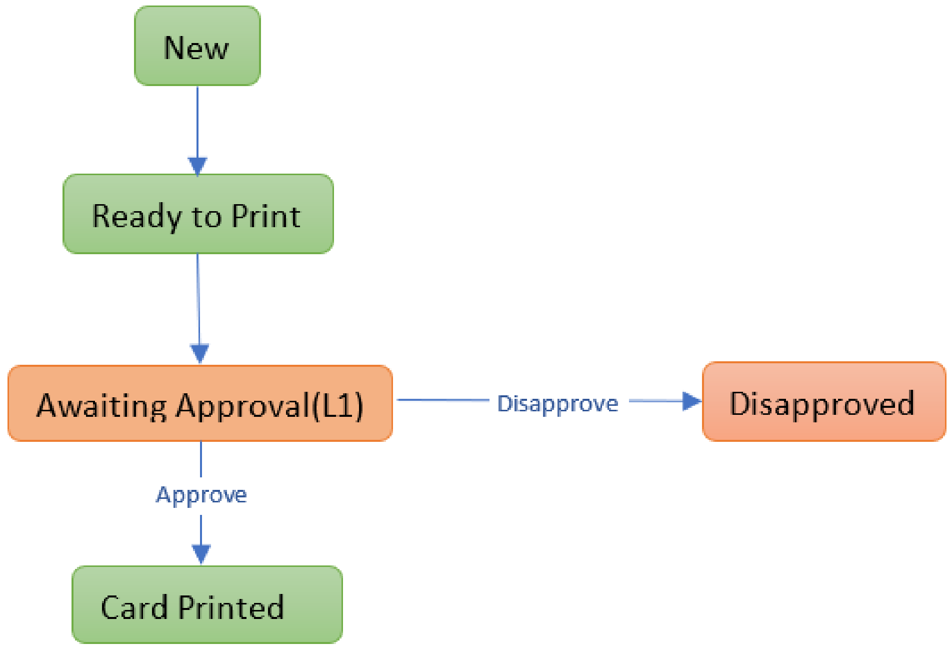
1st Level Authorization



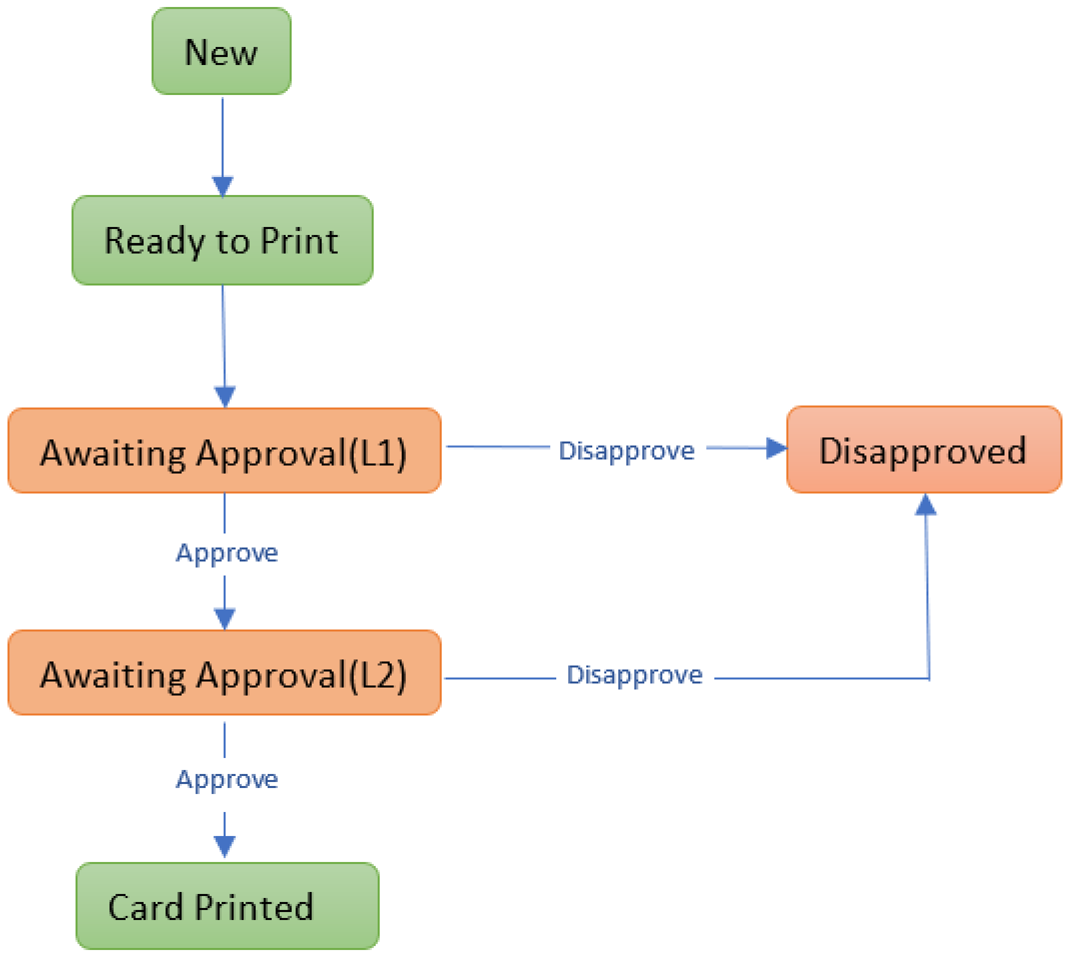
2nd Level Authorization

- Awaiting Approval(L1): This will be the status after users create and save an EBT Card record. Users with proper security rights can see the following buttons:
  - Approve – This button will update the Status to "Awaiting Approval(L2)" when 2nd Level Authorization is required. Otherwise, it will update the Status to "Issued".
  - Disapprove – This button will update the Status to "Disapproved".
  - The Status field will be disabled in Edit Mode and users cannot reissue the EBT Card.
- Awaiting Approval(L2): This will be the Status when 2nd Level Authorization is required and L1 has approved. Users with proper security rights can see the following buttons:
  - Approve – This button will update the Status to "Issued".
  - Disapprove – This button will update the Status to "Disapproved".
  - The Status field will be disabled in Edit Mode and users cannot reissue the EBT Card.
- Disapproved: This will be the Status after L1 or L2 disapprove an EBT Card, and no further actions can be taken.

For EBT Cards that will be picked up by customers, the page will follow below approval process based on the county configuration:



1st Level Authorization



2nd Level Authorization

- Awaiting Approval(L1): This will be the status after users select a printer and click "Print" button on the EBT Card Print List page or EBT Card Print Detail page. Users with proper security rights can see the following buttons:
    - Approve – This button will update the Status to "Awaiting Approval(L2)" when 2nd Level Authorization is required. Otherwise, the EBT Card will be printed out and the status will be updated to "Card Printed".
    - Disapprove – This button will update the Status to "Disapproved".

  The Status field will be disabled in Edit Mode and users cannot reissue the EBT Card.
- Awaiting Approval(L2): This will be the Status when 2nd Level Authorization is required and L1 has approved. Users with proper security rights can see the following buttons:
    - Approve – This button will print out the EBT Card and update the status to "Card Printed".
    - Disapprove – This button will update the Status to "Disapproved".

The Status field will be disabled in Edit Mode and users cannot reissue the EBT Card.

- Disapproved: This will be the Status after L1 or L2 disapprove an EBT Card, and no further actions can be taken.

2.2.4 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Account List**

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
EBTCardDetailDisapprove	This right grant access to the Disapprove button on the "EBT Card Detail" page.	EBT Card Detail Disapprove
EBTCardDetailApprovalL1	This right grant access to the Approve button on the "EBT Card Detail" page.	EBT Card Detail Approval L1
EBTCardDetailApprovalL2	This right grant access to the Approve button on the "EBT Card Detail" page.	EBT Card Detail Approval L2

1. Security Groups

Security Group	Group Description	Group to Role Mapping
EBT Card Detail Approval L1	Gives users ability to approve Level 1 authorization records for EBT Cards.	TBD
EBT Card Detail Approval L2	Gives users ability to approve Level 2 authorization records for EBT Cards.	TBD
EBT Card Detail Disapprove	Gives users ability to disapprove authorization records for EBT Cards.	TBD

Note: County will determine which roles will have the new security groups based on the business process.

2.2.6 Page Mapping

No changes.

2.2.7 Page Usage/Data Volume Impacts

None.

2.3 EBT Card Print List Page

2.3.1 Overview

The EBT Card Print List page allows the User to view a list of EBT card records in a Ready to Print Status. The Search Results Summary displays the Case Number, Card Number, Card Holder, Status Date, Status Reason and Printer Name. The User may refine the Search criteria by selecting a Status, Status Reason, Date Range or Card Number.

Below changes is to allow users to search for EBT Cards that are in pending approval or disapproved status.

2.3.2 Description of Changes

1. Update the Status dropdown field to include "Awaiting Approval(L1)" and "Awaiting Approval(L2)". The search result will include EBT Cards with Pickup Delivery Method and selected status.

2.3.3 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Account List**

2.3.4 Security Updates

No Changes.

2.3.5 Page Mapping

No Changes.

2.3.6 Page Usage/Data Volume Impacts

None.

2.4 Pending Authorizations

2.4.1 Overview

The Pending Authorizations page is used to allow approvers to review requests that are currently in pending approval.

2.4.2 Description of Changes

1. Update the "Category" dropdown field to include a new category for "EBT Card Issuance".

   Note: This category will also be visible on the Worklist page/Task Search page.
2. Update the page to include task records for the following authorization task types:
   a. CT 399 – EBT Card Issuance - Awaiting Approval (L1).
   b. CT 399 – EBT Card Issuance - Awaiting Approval (L2).
   c. CT399 – EBT Card Issuance – Disapproved.

   Note:

   - Confirm CT399 entries are included in the page logic.
   - These new EBT Card authorization tasks being created will be searchable via the Worklist page similar to authorization tasks.

2.4.3 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Approvals

2.4.4 Security Updates

N/A

2.4.5 Page Mapping

None.

2.4.6 Page Usage/Data Volume Impacts

None.

2.5 Data Change Request

2.5.1 Overview

This data change request is to add additional rows to the County Auth and one time Data update to insert into new EBT Card Authorized Persons table.

2.5.2 Description of Change

1. Update County Auth table to include authorization levels for "EBT Card Issuance for New Cardholders or Name Changes" for all 58 counties.
    a. Default the authorization level required for EBT Card Issuance Authorization to 2nd Level Authorization for all 58 counties.

    Note: After this SCR is implemented, all 58 counties will be able to update the authorization level required for EBT Card Issuance via the County Authorizations page as their business processes allow.
2. Update Task Types table to include new entries for EBT Card Issuance:
    a. CT 399 – EBT Card Issuance - Awaiting Approval (L1).
    b. CT 399 – EBT Card Issuance - Awaiting Approval (L2).
    c. CT399 – EBT Card Issuance – Disapproved.
3. Perform one-time data insert to the new EBT Card Authorized Persons table with all cardholders' info.

2.5.3 Estimated Number of Records Impacted/Performance

1. 58 additional rows for County Auth table.
2. 2 additional rows for Task Types table.
3. Approximately 5500000 rows for EBT Card Authorized Persons table.

2.6 Database Change Request

1. Add a new EBT Card Authorized Persons table to record approved cardholders by cases.

Case ID – This is a system generated unique identifier for an instance of the Case table.
First Name – This is the first name of the authorized cardholders.
Middle Initial - This is the middle initial of the authorized cardholders.
Last Name – This is the last name of the authorized cardholders.

2.7 Code Table Change Request

2.7.1 Overview

This code table change request is to update CT 10585, CT 10350, CT 399, and CT 10507 to include the appropriate selections for EBT Card Issuance.

2.7.2 Description of Change

1. Add a new County Authorizations Type Code (CT 10585) for EBT Card Issuance.
2. Add a new Task Category Code (CT 10350) for EBT Card Issuance.
3. Add new tasks to Task Reference Table (CT 399):
   a. EBT Card Issuance - Awaiting Approval (L1).
   b. EBT Card Issuance - Awaiting Approval (L2).
   c. EBT Card Issuance – Disapproved.
4. Add the following to Task Orchestration Rules (CT 10507):
   a. Supervisor Authorization EBT Card Issuance
      i. Reference Table 1: EBT Card Issuance (Category 10350)
      ii. Reference Table 2: Supervisor Authorization EBT Card Issuance (Category 399)
      iii. Reference Table 3: Deputy Authorization EBT Card Issuance (Category 399)
   b. Deputy Authorization EBT Card Issuance
      i. Reference Table 1: EBT Card Issuance (Category 10350)
      ii. Reference Table 2: Deputy Authorization EBT Card Issuance (Category 10350)

Note: This section is only for development purposes.

2.7.3 Estimated Number of Records Impacted/Performance

1. One additional row added to Code Detail table CT 10585.
2. One additional row added to Code Detail Tale CT10350.
3. Three additional rows added to Code Detail Table CT 399.
4. Three additional rows added to Code Detail Table CT 10507.

2.8 Data Conversion for CalWIN counties

Data conversions for CalWIN counties to add existing cardholders into the new authorized EBT Cardholders before migrations.

Note: Without the data conversions, the system will require approval based on county configuration when issuing EBT Cards to the existing cardholders.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Fiscal	Scenarios as examples when the authorization is required when issuing an EBT Card.	Sample Scenarios.xlsx
2	Security	New security matrix for the new Authorization process when issuing an EBT card.	CA 216757 2nd Level Authorization When Issuing an EBT Card - Security Matrix.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.29	The LRS shall include a method for COUNTY-specified Users to issue the following cards: a. EBT; b. Temporary paper BIC; and C. Pre-embossed EBT card.	This requirement is met by implementing authorization process when issuing an EBT Cards.

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
TBD	Fiscal	SCR-216757 is adding new	One time data insert to new	Low	At migration

		table to track authorized EBT Cardholders in the system.	authorized EBT Cardholders table with existing cardholder info is needed.		

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-228215 | Add EApp info to Case API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Dana Petersen

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/22/2021	1.0	Initial Draft	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

The Case API returns data about all the people associated to a case. It also includes confidential flags and case flag(s). Please refer to CA-214740 for more details on the API.

1.2 Requests

Update the Case API to return eApplication number if available.

Add a new endpoint to allow clients to search cases by eApplication number.

Add x-county-code 00 handling.

1.3 Overview of Recommendations

Add eApplication details to the response for all existing endpoints.

Create a new endpoint to allow clients to search cases by eApplication number.

Add the countyCode field to all endpoints and modify the endpoints to handle a third party application that has an x-county-code of 00.

1.4 Assumptions

1. Results are limited to county level data unless an application is granted '00' access.
2. Code table values for this API can be found in the Appendix.
3. Code table values are limited to those available as of the API release date.
4. Requests and Responses will use Code Table values as described in the Appendix.
5. Offset and limits will apply only if paginated results are available.
6. Offset beyond the max available will return a 404 error.
7. Offset and limits will only apply to the root element
8. Sorting and ordering only applies to the root element.
9. Null or empty values will not be returned in the response objects.
10. Requests sent with improper data types will result in 400 error with a stack trace.
11. In the special situation where an application is given a countyCode of 00 during onboarding, the calling application will have to provide county code as an additional request parameter.
12. Input values described as being from code tables are case sensitive.

2 RECOMMENDATIONS

2.1 Case API

2.1.1 Overview

This API will expose case data from the CalSAWS system including eApp information.

2.1.2 Description of Changes

1) The eAppNum, begDate and endDate data from the Case_eApp table will be added to the response objects for all existing endpoints.
2) Create a new GET endpoint that will return case data when the input is an eAppNum.
3) Add the countyCode field and x-county-code 00 handling for all existing and new endpoints for the Case API.

See **cases.html** for technical specifications.

2.1.3 Request

The API will include the following request parameters for case:

1. EBT card number
2. Case number
3. SSN
4. CIN
5. First name
6. Last name
7. DOB
8. Phone number
9. eAppNum

2.1.4 Response

Please refer to the **cases.html** document for the technical specifications and data element definitions.

2.1.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.
X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county. In the special situation where an application is given a x-county-code of 00 during onboarding, the calling application will have to provide county code as an additional request parameter.

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

2.1.6 Error Messages

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

2.2 Automated Regression Test

2.2.1 Overview

Transition the automated scripts created during the system test phase into the CalSAWS API regression test suite.

2.2.2 Description of Change

For each of the automated scripts created and executed to support system test execution, perform the necessary tasks to integrate the script into the CalSAWS API regression test suite by the end of the system test phase. This includes the following:

1. Peer and/or lead review to confirm the script aligns with the project standards.
2. Verify that the top-level "Purpose" and "Scenario Details" comments are present and accurately reflect the scripted commands.
3. Verify that the script successfully executes to completion.
4. Confirm any service, environment, and county restrictions for the script. For example, some scripts require emulated vs. live services, and some functionality is only available within certain counties per system design.
5. Add the script details into the Regression Script Inventory.
6. Add the script name and environment / service indicators into the CalSAWS APIs test suite.

Note: If a system test scenario is determined to not be a candidate for automation (ex., due to technical limitations) and is manually executed during the system test phase, the scenario will not be incorporated into the automated regression test suite.

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
CAR-3330 (DDID 2297)	The CONTRACTOR shall create a service allowing 58 Counties to retrieve case information utilizing a CalSAWS API. The service will allow the 58 Counties to search for cases by case number, EBT card/account number, individual demographic information, or participant phone number. The service will return a list of cases and a list of people on the case including individual demographic information and contact information. The case level information will return any confidentiality indicators associated to the case and case flags.		Update the Case API.

California Statewide Automated Welfare System

Design Document

CA-228239 e-Application API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Dana Petersen

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/26/2021	1.0	Initial Draft	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

This is a new API made available to expose e-application data from the CalSAWS system. An API service to expose this data does not exist in the CalSAWS System.

1.2 Requests

Create a service that returns the status of an e-application for a specific e-app number.

1.3 Overview of Recommendations

1. Create a new endpoint to retrieve application status.

1.4 Assumptions

1. Results are limited to county-level data unless an application is granted '00' access.
2. Results returned will be paginated to 20 values by default.
3. Limit parameter will allow a maximum of 250 values returned by default. Requesting a larger value will result in a 400 error response.
4. Results are limited to county level data.
5. Code Table values in the appendix are subject to change.
6. Requests and Responses will use Code Table values as described in the appendix.
7. Offset and limits will apply only if paginated results are available.
8. Offset beyond the max available will return a 404 error.
9. Offset and limits will only apply to the root element
10. Sorting and ordering only applies to the root element.
11. Null or empty values will not be returned in the response objects.
12. Requests sent with improper data types will result in 400 error with a stack trace.
13. In the special situation where an application is given a x-county-code of 00 during onboarding, the calling application will have to provide county code as an additional request parameter.
14. The field eAppNum in the request is not case sensitive.

2 RECOMMENDATIONS

2.1 E-Application API

2.1.1 Overview

This API will expose the eApplication status from the CalSAWS system.

2.1.2 Description of Changes

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

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

2.1.3 Request fields

The eApplications API will include the following query parameters:

1. eAppNum (required)

2.1.4 Response

Please refer to the **eApplications.html** document for the technical specifications and data element definitions.

2.1.5 Headers

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

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county. In the special situation where an application is given a x-county-code of 00 during onboarding, the calling application will have to provide county code as an additional request parameter.

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

2.1.6 Error Messages

The eApplications API will return error messages in the following Scenarios:

1. Bad request. {parameter name} is invalid. {Reason}
2. Authorization information is missing or invalid.
3. The specified {param name(s)} was not found.
4. Request Timeout.
5. Internal Server Error.
6. Forbidden. Access denied.

2.2 Automated Regression Test

2.2.1 Overview

Transition the automated scripts created during the system test phase into the CalSAWS API regression test suite.

2.2.2 Description of Change

For each of the automated scripts created and executed to support system test execution, perform the necessary tasks to integrate the script into the CalSAWS API regression test suite by the end of the system test phase. This includes the following:

1. Peer and/or lead review to confirm the script aligns with the project standards.
2. Verify that the top-level "Purpose" and "Scenario Details" comments are present and accurately reflect the scripted commands.
3. Verify that the script successfully executes to completion.
4. Confirm any service, environment, and county restrictions for the script. For example, some scripts require emulated vs. live services, and some functionality is only available within certain counties per system design.
5. Add the script details into the Regression Script Inventory.
6. Add the script name and environment / service indicators into the CalSAWS APIs test suite.

Note: If a system test scenario is determined to not be a candidate for automation (ex., due to technical limitations) and is manually executed during the system test phase, the scenario will not be incorporated into the automated regression test suite.

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.5.4 (CAR-2700)	4. The LRS shall include the appropriate API's necessary for integrating third-party tools.	Create new eApplication API

5 APPENDIX

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

CT 2138 - E-App Status
Data Transfer
GR-Rescission
Not Accepted
Pending Clearance
Posted
Transferred to System

CT 15 County Code	
01	Alameda
02	Alpine
03	Amador
04	Butte
05	Calaveras
06	Colusa
07	Contra Costa
08	Del Norte
09	El Dorado
10	Fresno
11	Glenn
12	Humboldt
13	Imperial
14	Inyo
15	Kern
16	Kings

17	Lake
18	Lassen
19	Los Angeles
20	Madera
21	Marin
22	Mariposa
23	Mendocino
24	Merced
25	Modoc
26	Mono
27	Monterey
28	Napa
29	Nevada
30	Orange
31	Placer
32	Plumas
33	Riverside
34	Sacramento
35	San Benito
36	San Bernardino
37	San Diego
38	San Francisco
39	San Joaquin
40	San Luis Obispo
41	San Mateo
42	Santa Barbara
43	Santa Clara
44	Santa Cruz
45	Shasta
46	Sierra
47	Siskiyou
48	Solano
49	Sonoma
50	Stanislaus
51	Sutter
52	Tehama
53	Trinity
54	Tulare
55	Tuolumne
56	Ventura
57	Yolo

58	Yuba

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-229088

CalHEERS Verification Caching Phase II

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tisha Mutreja
	Reviewed By	Renee Gustafson, Geetha Ramalingam, Maksim Volf, Prashant Goel, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/17/2021	0.1	Original Draft	Tisha Mutreja
08/26/2021	0.2	Updated MAGI Person Detail page post BA review	Tisha Mutreja

Table of Contents

1 OVERVIEW

The purpose of this document is to satisfy the functional specifications in support of changes with CalHEERS Change Request 172212.

CalHEERS will send an interpretation of the verification response and error code(s) along with the corresponding error code description received from all the verification hub/services to clarify the verification status via eHIT to CalSAWS.

CalHEERS will also send the display of income sources verification codes to include SSA in the list of sources when SSA is used for checking reasonable compatibility.

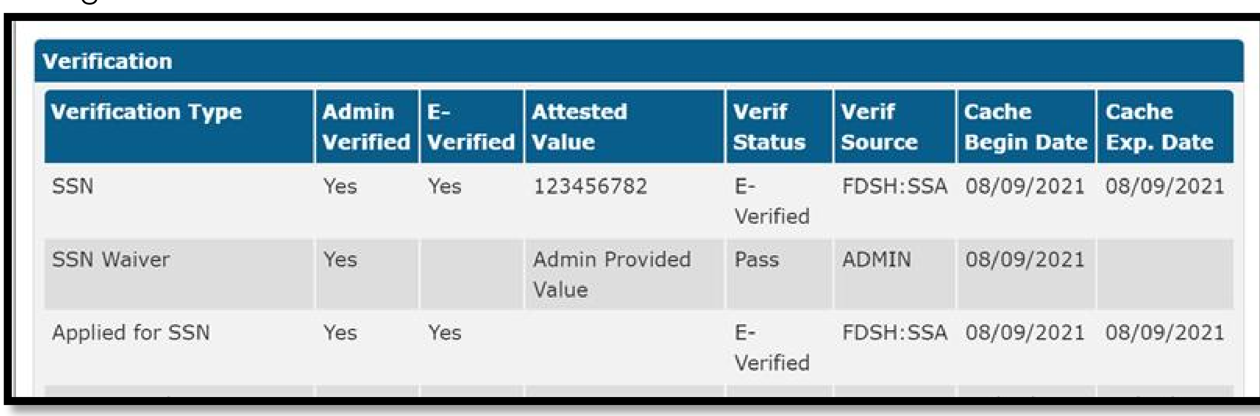
CalHEERS to also add a new data element on Personal Verification screen to send the verification response received date from the hub/services on DER/DER-U transactions.

CalHEERS will send the 'Date of Death' when received from SSA as informational only field.

CalSAWS will display the above the information received via eHIT on MAGI Person Detail Page.

1.1 Current Design

CalSAWS MAGI Person Detail Page for the Determination Received (DER) has an existing Verification section which looks like below:



Verification

Verification Type	Admin Verified	E-Verified	Attested Value	Verif Status	Verif Source	Cache Begin Date	Cache Exp. Date
SSN	Yes	Yes	123456782	E-Verified	FDSH:SSA	08/09/2021	08/09/2021
SSN Waiver	Yes		Admin Provided Value	Pass	ADMIN	08/09/2021	
Applied for SSN	Yes	Yes		E-Verified	FDSH:SSA	08/09/2021	08/09/2021

CalSAWS does not display Verification Response Received Date, Verification Interpretation response and Error Codes associated to a Verification Status since it is not received in eHIT as of today.

Existing Verification Source received in eHIT referencing Federal Data Services Hub (FDSH) and does not reference Social Security Administration (SSA) even when SSA is called by the hub.
The list of Verif Sources is as below –

- FDSH:IRS

- FDSH:FTB
- FDSH:EDD
- FDSH:FTB:EDD
- EDD
- FTB:EDD

1.2 Requests

1. CalHEERS is updating eHIT to add additional information for Verifications in a DER.

   CalHEERS is also updating their Verification Caching rules to no longer use Cache Expiration Date.
   CalSAWS will update the MAGI Person Detail Page Verification section for the received DER to display the following–

   a. New and updated Verification Source Codes
   b. Verification Interpretation Response
   c. Error Codes and Description received via eHIT for "Pending" or "Not Verified" Verification Status
2. CalHEERS will send the 'Date of Death' when received from SSA.
   CalSAWS will add new EERC code 'DD' received via eHIT.

1.3 Overview of Recommendations

1. Update the MAGI Person Detail Page Verification section with the following –
   a. Remove Cache Exp. Date column
   b. Update Cache Beg Date column name
   c. Add Verification Response Received Date
   d. Add Verification Interpretation Response to the Verification status to display responses via eHIT
   e. Add Error Codes and description to the Verification Status if "Pending" or "Not Verified"
   f. Update Verification source code received via eHIT to include income verifications with SSA
2. Add EERC code received via eHIT.

1.4 Assumptions

1. Fields not mentioned to be modified within the Online Description of Changes will retain their current functionality.

2 RECOMMENDATIONS

2.1 MAGI Person Detail Page

2.1.1 Overview

Update the MAGI Person Detail Page Verification section to display updated Verification information from CalHEERS via eHIT.

2.1.2 Description of Changes

Verification

Verification Type	Admin Verified	E-Verified	Attested Value	Verif Status	Verif Source	Verif Cache Date	Error
SSN	Yes	Yes	123456782	E-Verified	IRS:SSA	08/09/2021	
SSN Waiver	Yes		Admin Provided Value	Pass	ADMIN	08/09/2021	
Applied for SSN	Yes	Yes		E-Verified	IRS:FTB:SSA	08/09/2021	
US Citizenship				Pending	IRS:EDD:SSA	08/09/2021	HX010001

Figure 2.1.2 Updated changes to MAGI Person Detail Page>Verification

Verification

Verification Type	Admin Verified	E-Verified	Attested Value	Verif Status	Verif Source	Verif Cache Date	Error
SSN	Yes	Yes	123456782	E-Verified	IRS:SSA	08/09/2021	
SSN Waiver	Yes		Admin Provided Value	Pass	ADMIN	08/09/2021	
Applied for SSN	Yes	Yes		E-Verified	IRS:FTB:SSA	08/09/2	
US Citizenship				Pending	IRS:EDD:SSA	08/09/2021	HX010001

Error Description

Unexpected System Error

Figure 2.1.2.1 Hover over column: Error Description

Verification

Verification Type	Admin Verified	E-Verified	Attested Value	Verif Status	Verif Source	Verif Cache Date	Error
SSN	Yes	Yes	123456782	E-Verified	IRS:SSA	08/09/2021	
SSN Waiver	Yes		Admin Provided Value	Pass	ADMIN	08/09/2021	
Applied for SSN	Yes	Yes		E-Verifie			
US Citizenship				Pending	IRS:EDD:SSA	08/09/2021	HX010001

eHIT Response

Need more information on Citizenship

Figure 2.1.2.2 Hover over column: eHIT Response

Verification

Verification Type	Admin Verified	E-Verified	Attested Value	Verif Status	Verif Source	Verif Cache Date	Error
SSN	Yes	Yes	123456782	E-Verified	IRS:SSA	08/09/2021	
SSN Waiver	Yes		Admin Provided Value	Pass	ADMIN	08/09/2021	
Applied for SSN	Yes	Yes		E-Verified	IRS:FTB:SSA		
US Citizenship				Pending	IRS:EDD:SSA	08/09/2021	HX010001

Verif Response Received Date
08/09/2021

Figure 2.1.2.3 Hover over column: Verif Response Received Date

1. Update the column name "Cache Beg Date" to display "Verif Cache Date".
2. Remove the column "Cache Exp Date" from the section.
3. Add a new column "Error" after column "Verif Cache Date".
   This column will display only for verification status of "Pending" or "Not Verified" with the errors received in eVerificationErrorCode via eHIT else will display a blank value.
   a. Add a new hover over field on the column as a tool tip to display the Error Code Description received in a DER for associated Error.
      The tool tip displays a table.
      The header of the table is "**Error Description**"
      i. This section will display description for the errors received in eVerificationErrorDescription via eHIT.
      ii. The value will be a text field with max. 60 char
4. Add a new hover over field on existing "Verif Status" column as a tool tip to display the Verification Interpretation Response received in a DER.
   The tool tip displays a table.
   The header of the table is "**eHIT Response**"
   i. This section will display the plain language interpretation of the Verification Response received in eVerificationResponseInterpretation and ManualVerificationResponseInterpretation via eHIT.
   ii. The value will be a text field with max. 60 chars
5. Add a new hover over field on existing "Verif Cache Date" column as a tool tip to display the Verification Response Received Date received in a DER.
   The tool tip displays a table.
   The header of the table is "**Verif Response Received Date**"
   i. This section will display the date of the last successful response from the data source

associated with the Verification as received in a DER via eHIT.

2.1.3 Page Location

- **Global:** IAT Summary
- **Local:** MAGI Referral Detail
- **Task:** MAGI Person Detail

2.1.4 Security Updates

No change.

2.1.5 Page Mapping

Update Page Mapping to display new/updated fields.

2.1.6 Page Usage/Data Volume Impacts

No Impacts.

2.2 eHIT Update

2.2.1 Overview

Update Code table to add and update received EERC Code and Verification Source codes via eHIT

2.2.2 Description of Change

1. Add a new EERC to the Codes table (CT_466) as mentioned in the table below when Date of Death is received from SSA and received via eHIT as part of the eVerification node.

Code	Short Description	Long Description
DD	Deceased-Date of Death Received from SSA	Date of Death is received from the Electronic Verification source.

The new EERC will display on the following pages, when applicable.

- MAGI Determination Summary
- MAGI Determination Detail
- MAGI Referral Detail

2. Update the Verification Sources (CT_10592) received via eHIT in the eVerificationSource data element to indicate the following additional income verification sources that include SSA:

Old Code	Updated Short Description	Updated Long Description
FDSH:IRS	IRS:SSA	Internal Revenue System: Social Security Administration
FDSH:FTB	IRS:FTB:SSA	Internal Revenue System: Franchise Tax Board: Social Security Administration
FDSH:EDD	IRS:EDD:SSA	Internal Revenue System: Employment Development Department: Social Security Administration
FDSH:FTB:EDD	IRS:FTB:EDD:SSA	Internal Revenue System: Franchise Tax Board: Employment Development Department: Social Security Administration
EDD	EDD:SSA	Employment Development Department: Social Security Administration
FTB:EDD	FTB:EDD:SSA	Franchise Tax Board: Employment Development Department: Social Security Administration

3. Add the following new eHIT Verification Source for income verification(CT_10592):

Code Num Identif	Short Description	Long Description
FTS	FTB:SSA	Franchise Tax Board: Social Security Administration

4. Update eHIT to receive and save the below:
   a. eVerificationResponseInterpretation
   b. ManualVerificationResponseInterpretation
   c. eVerificationErrorDescription
   d. eVerificationErrorCode
   e. eVerificationResponseReceivedDate

2.2.3 Interface Partner

CalHEERS

2.2.4 eHIT Schema Version

eHIT Version 18

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.5.5	The LRS shall maintain information on what LRS Data must be verified by external interfaces.	CalSAWS will display the information received via eHIT on MAGI Person Detail Page.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-230136

Add initiatedBy field to Journal API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Dana Petersen

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/22/2021	1.0	Initial Draft	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

The journal API response object does not contain any information about how the journal was created.

1.2 Requests

Add a field initiatedBy to the response object that describes who created the journal entry.

Add x-county-code 00 handling.

1.3 Overview of Recommendations

1. Update the API response to return who initiated the journal entry.
2. Add the countyCode field to the GET endpoints and modify the GET endpoint to handle a third party application that has an x-county-code of 00.

1.4 Assumptions

1. Results are limited to county level data unless an application is granted ‘00’ access.
2. Results are limited to county level data.
3. Sorting and ordering only applies to the root element.
4. Null or empty values will not be returned in the response objects.
5. In the special situation where an application is given a x-county-code of 00 during onboarding, the calling application will have to provide county code as an additional request parameter.

2 RECOMMENDATIONS

2.1 Journal API

2.1.1 Overview

This API will expose the Journal_Entry data object from the CalSAWS system and return if an entry was initiated by the SYSTEM or a USER

2.1.2 Description of Changes

1) Add an initiatedBy field to the response object of the GET endpoint.
   a. The field will return USER if the journal entry was created by a worker.
   b. The field will return SYSTEM if the journal was created by any system process.
2) Add the countyCode field and x-county-code 00 handling for all existing endpoints.

2.1.3 Request fields

The API will include the following query parameters for Journal:

1. Case number (required)
2. Start Date
3. End Date
4. Journal Category Code (CT 278)
5. Journal Type (CT 141)

2.1.4 Response

Please refer to the **journals.html** document for the technical specifications and data element definitions.

2.1.5 Headers

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

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county. In the special situation where an application is given a x-county-code of 00 during onboarding, the calling application will have to provide county code as an additional request parameter.

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

2.1.6 Error Messages

The Journal API will return error messages in the following Scenarios:

1. Bad request. {parameter name} is invalid. {Reason}
2. Authorization information is missing or invalid.
3. A Journal with the specified {param name(s)} was not found.
4. Request Timeout.
5. Internal Server Error.
6. Forbidden. Access denied.

2.2 Automated Regression Test

2.2.1 Overview

Transition the automated scripts created during the system test phase into the CalSAWS API regression test suite.

2.2.2 Description of Change

For each of the automated scripts created and executed to support system test execution, perform the necessary tasks to integrate the script into the CalSAWS API regression test suite by the end of the system test phase. This includes the following:

1. Peer and/or lead review to confirm the script aligns with the project standards.
2. Verify that the top-level “Purpose” and “Scenario Details” comments are present and accurately reflect the scripted commands.
3. Verify that the script successfully executes to completion.
4. Confirm any service, environment, and county restrictions for the script. For example, some scripts require emulated vs. live services, and some functionality is only available within certain counties per system design.
5. Add the script details into the Regression Script Inventory.
6. Add the script name and environment / service indicators into the CalSAWS APIs test suite.

Note: If a system test scenario is determined to not be a candidate for automation (ex., due to technical limitations) and is manually executed during the system test phase, the scenario will not be incorporated into the automated regression test suite.

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
DDID 2348 (CAR-3341)	The CONTRACTOR shall create a service for the 58 Counties that returns all journal entries for a specific case. The service will allow users to filter by case number, date, journal category and journal type. A list of all journal entries that meet the search criteria will be returned.	Update journal API

CalSAWS

California Statewide Automated Welfare System

Design Document

DDID 2342 | CA-230664

Send email when an appointment is cancelled via API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Lawrence Samy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/17/2021	1.0	Initial Draft	Avi Bandaranayake
8/19/2021	1.1	Updated based on QA comments	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

The Appointments API is used to return, create, and update county specific appointment data. The PUT operation allows the caller to update the status of an appointment and no other action is taken.

CalSAWS core system functionality will send a cancellation email to the worker when the status of an appointment is cancelled. The cancellation email is only sent to counties that have opted in to this functionality.

1.2 Requests

Update the appointment API to send a cancellation email to the worker(s) assigned to the appointment when the appointment status is updated to cancelled.

1.3 Overview of Recommendations

1. Modify the appointment API to send the worker(s) assigned to the appointment an email notifying them the appointment has been cancelled.

1.4 Assumptions

1. If any parameter substitutions in the email body aren't available in the database, the field will be blank.
2. The appointment will be cancelled even if the email is not sent successfully.
3. If the email is not sent successfully the failure is logged.

2 RECOMMENDATIONS

2.1 Appointments API

2.1.1 Overview

When the status of an appointment is changed to 'Cancelled' the system should send an email to the worker(s) assigned to the appointment in addition to updating the status in the system.

The cancellation email is only sent to counties that have opted in to this functionality and use the same mechanism as the online pages.

2.1.2 Description of Changes

1. Modify the Appointment API to call the email service and send an email to the worker(s) assigned to the appointment if the status of the appointment is updated to 'Cancelled' via the PUT operation.
2. The subject of the email should be: "<appointmentType> Canceled"
3. The body of the email should be:

   "A customer appointment has been canceled within CalSAWS.

   Please update your local e-mail calendar.

   Date: <appointment date>(see format below)

   Time: <appointment start time> - <appointment end time>(see format below)

   Location: <location>

   Case Number: <Case Number>

   Customer(s): <customer name> <phone number>(see note below)

   Comments: <comments>"

   Date format: The date in the email should have the alpha-numerical representation of the DayOfTheWeek, Month Day, Year (i.e., Monday, January 01, 2001)

   Time format: The time in the email should be the numerical representation of Hour:minute AM/PM (i.e. 12:45 PM)

   Customers note: This should be a list of all the people on the appointment and their phone numbers

2.1.3 Request

No Changes.

2.1.4 Request Body

No Changes.

2.1.5 Response

No Change.

2.1.6 Headers

No Change.

2.1.7 Error Messages

No Change.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2342	The CONTRACTOR shall create a service allowing 58 Counties to retrieve, update, and create appointments utilizing a CalSAWS API. The service will allow the 58 Counties to do the following: 1) Search for scheduled appointments by EBT card number, case number, Document ID, person information and appointment type, worker number, date and status. The service will return a list of appointments based on the search parameters provided by the user. When searching by date or status a worker number, case number, or person information will be required. 2) Allow users to update the status of an appointment and create new appointments based on identified worker availability from a separate worker schedule API. This API will update and create appointments when called utilizing required data elements as specified by the CalSAWS Software.	The API complexity accounts for including the ability to read, write, and update appointments. It also includes the ability to search for appointments utilizing a variety of parameters.	Updated API to send email.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-231137

Updates to promotions on Lobby Monitor Detail page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Amy Gill, Long Nguyen, Michael Wu, Shilpa Suddavanda, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/11/2021	1.0	Initial	Kusnadi.E

Table of Contents

1 OVERVIEW

Currently in CalSAWS county offices are able to select from three designed promotions (C-IV Migration Counties only) and add a maximum of three office specific promotions to be displayed through Lobby Monitor. Two of those designed promotions are specific to C4Yourself. With the sunsetting of C4Yourself in September 2021, these design promotions must be updated. This SCR will update the existing designed promotions to remove C4Yourself related promotions and replace them with BenefitsCal, and allow the county offices to add more than 3 office specific promotions.

1.1 Current Design

Currently, CalSAWS has designed promotions that are C4Yourself specific that the C-IV Migration County offices are able to select from. Secondly, each county office is only able to create a maximum of three office promotions at a time.

1.2 Requests

Remove all C4Yourself specific designed promotions from CalSAWS and create a BenefitsCal designed promotion that all 58 counties are able to select along with the IVR designed promotions. Increase the number of office promotions from three to ten that each county offices are able to create.

1.3 Overview of Recommendations

1. Remove all C4Yourself specific designed promotions from CalSAWS.
2. Create a new BenefitsCal designed promotion that the county offices can select.
3. Update CalSAWS to allow the IVR designed promotions to be selected by all county offices.
4. Increase the number of office promotions that each county office can create from three to ten.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless it is called out as part of this design document.
2. Counties must use the CalSAWS Lobby Monitor to have Design Promotions and Office Promotions to display on their Lobby Monitor.
3. The BenefitsCal website is 'BenefitsCal.com' and will be used by all 58 counties.
4. Los Angeles county and CalWIN counties will need to be using the IVR 58 county solution, as the IVR phone number displayed on the 'IVR' designed promotions will be dependent on this.
5. Office Promotions that are already set up will not be lost, when the number of Office Promotions allowed is increased from 3 to 10.

2 RECOMMENDATIONS

The designed promotions that are available for C-IV Migration County offices to select from will be updated to remove C4Yourself specific designed promotions and add a new BenefitsCal designed promotion. All designed promotions will be available to all 58 counties to select as well. The office promotions that each county office can create will be increased from three to ten.

2.1 Lobby Monitor Detail

2.1.1 Overview

The Lobby Monitor Detail page contains all of the elements that control the customer facing Lobby Monitor including designed promotions and office promotions. Currently, there are C4Yourself specific designed promotions and users are only able to create a maximum of three office promotions. This SCR will update the Lobby Monitor Detail to remove C4Yourself specific designed promotions and create a new BenefitsCal designed promotion. All of the designed promotions will be updated to be available for all 58 counties to select from and the office promotions that each county office can create will be increased from three to ten.

2.1.2 Lobby Monitor Detail Mockup

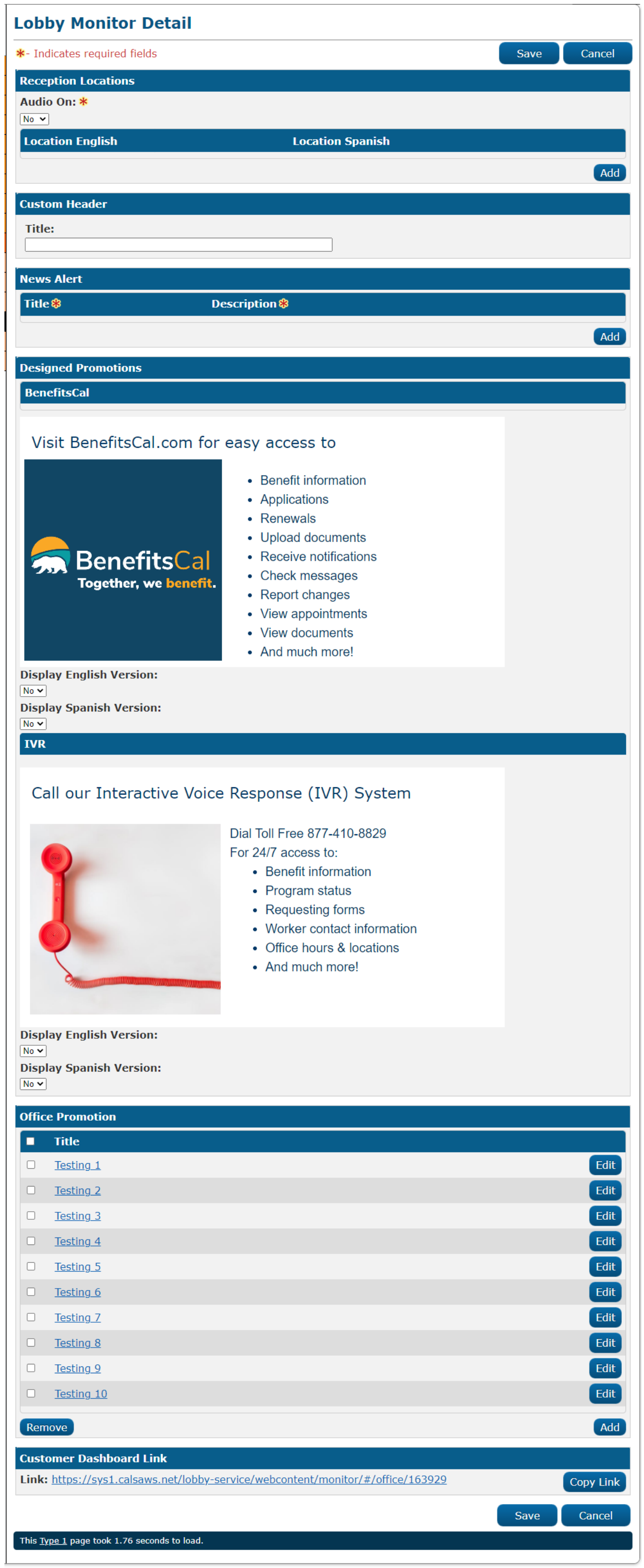


Figure 2.1.1 – Lobby Monitor Detail

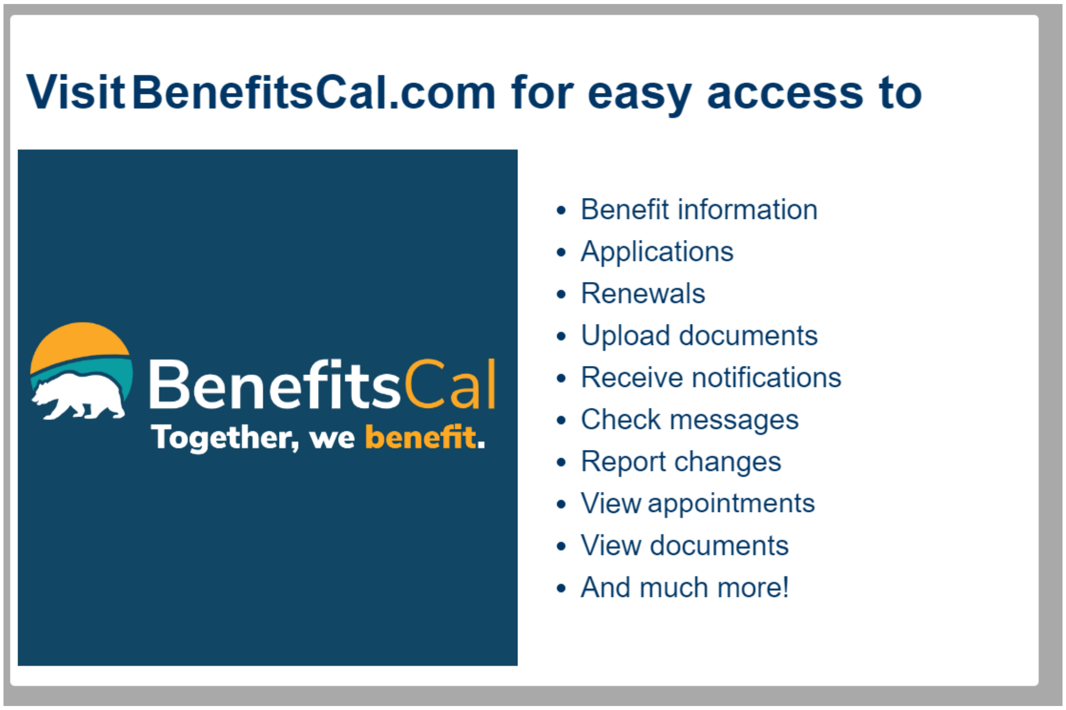


Figure 2.1.2 – BenefitsCal Designed promotion in English

Figure 2.1.3 – BenefitsCal Designed promotion in Spanish

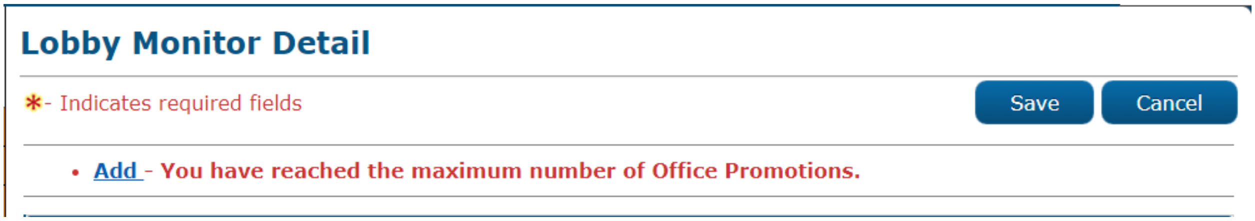


Figure 2.1.4 – Validation for maximum number of Office Promotions (reference only)

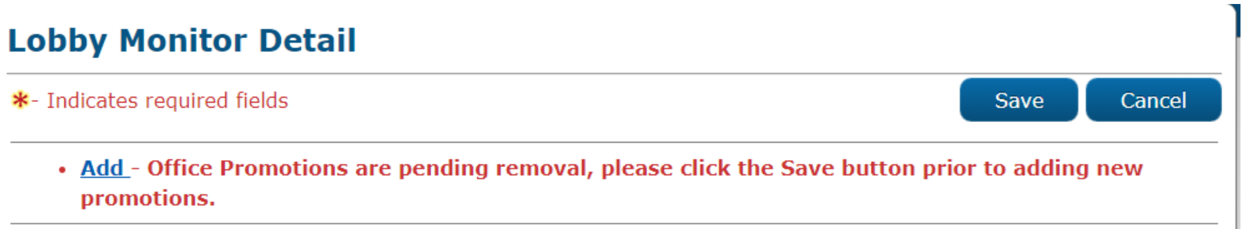


Figure 2.1.5 – Validation for pending removal of Office Promotions (reference only)

2.1.3 Description of Changes

1. Update the Designed Promotions section on the Lobby Monitor Detail page to remove C4Yourself specific designed promotions and add a BenefitsCal designed promotion.
    a. The C4Yourself designed promotion and the Mobile App designed promotion will be removed from the Lobby Monitor Detail page.
    b. Add a new BenefitsCal designed promotion to the Designed Promotions section. Existing functionality on how designed promotions currently work applies to the new BenefitsCal designed promotion.
        i. The subsection will be titled 'BenefitsCal' and will display a custom promotion as shown on Figure 2.1.1. and will be located above the 'IVR' designed promotion. The custom promotion will be available in both English and Spanish (please see supporting document for the Spanish translation).
            1. Custom promotion will be titled 'Visit BenefitsCal.com for easy access to'
            2. Below the custom promotion title on the left side will be a dark blue box with the BenefitsCal logo along with the text 'BenefitsCal' and 'Together, we benefit.'
            3. Below the custom promotion title on the right side will be a list of information in bullet points.
                a. Benefit information
                b. Applications
                c. Renewals
                d. Upload documents
                e. Receive notifications

f. Check messages
g. Report changes
h. View appointments
i. View documents
j. And much more!

ii. Add two dropdown fields directly below the custom promotion.
   1. First dropdown field will be titled 'Display English Version'.
      a. This field will have two different dropdown values and it will be listed in the following order:
         i. 'No' (Default value)
         ii. 'Yes'
   2. Second dropdown field will be titled 'Display Spanish Version'.
      a. This field will have two different dropdown values and it will be listed in the following order:
         i. 'No' (Default value)
         ii. 'Yes'

iii. BenefitsCal designed promotion will be available for all 58 counties.

c. Update the 'IVR' designed promotion to be available for all 58 counties (currently it is only available for CIV counties only).

2. Increase the number of Office Promotions that can be created and saved on the 'Office Promotions' section of the Lobby Monitor Detail page.
   a. Increase the maximum number of Office promotions that can be created from three to ten.
   b. Update the existing logic for the existing validation "Add – You have reached the maximum number of Office Promotions." Please reference Figure 2.1.4 for reference.
      i. Logic will be updated to display the above validation when a user clicks on the "Add' button after ten office promotions have been added.
   c. Update the logic for the existing validation "Add – Office Promotions are pending removal, please click the Save button prior to adding new promotions." Please reference Figure 2.1.5 for reference.
      i. Logic will be updated to display the above validation when there are ten custom office promotions and the user has checked off one or more of the custom office promotions and clicks the 'Remove' button, and then clicks the 'Add' button.

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Monitor**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	Spanish Translation	CA-231137 Spanish Translation.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.2.1	The LRS shall provide a method of tracking the following contacts via the traffic log: a. Face-to-face contacts; d. Inter-County transfer contacts; e. Traffic in the traditional office setting; f. Outreach User contacts in both fixed and non-fixed locations; g. Non-DPSS COUNTY Users; h. Non-COUNTY agencies; i. General public contacts, including e-Government; and j. Other contacts.	Provide the most up to date information for each office to provide promotions information on Self Service and other office promotions that are of value to the participants.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-231692

Older Adult Expansion - Add Full/Restricted Scope verbiage for MAGI/Non-MAGI NOAs

(CH-159158)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Tiffany H., Priya S.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/03/2021	1.0	Initial Document	Jasmine Chen
08/26/2021	1.1	Updated more details on generation conditions for retro verbiage	Jasmine Chen
09/22/2021	1.2	Updated per suggestions from Medi-Cal Correspondence Committee	Jasmine Chen

Table of Contents

1 OVERVIEW

Effective 05/01/2022 and per ACWDL 21-13, CalHEERS and CalSAWS will grant full scope Medi-Cal to individuals 50 years of age or older, who do not have satisfactory immigration status, if otherwise eligible. This new coverage is referred to as Older Adult Expansion. CalSAWS SCR CA-228957 will support eligibility changes alongside CalHEERS Change Request (CR) 159158. This SCR will implement the correlated correspondence changes.

1.1 Current Design

CalSAWS grants restricted scope Medi-Cal for all eligible individuals aged 26 years or older, if they meet all other eligibility criteria but does not have satisfactory citizenship or immigration status. CalSAWS generates corresponding MAGI and Non-MAGI NOAs that explain the approval or change of Medi-Cal eligibility to the individual.

1.2 Requests

When Older Adult Expansion becomes effective on 05/01/2022, CalSAWS will need to populate certain Medi-Cal - Approval and Change NOAs with the appropriate and updated verbiage. CalSAWS will also populate the verbiage in threshold languages.

1.3 Overview of Recommendations

1. Effective date the existing NOA fragments to continue to populate for certain conditions.
2. Start populating the new State-provided NOA fragments if the NOA is generated for certain conditions.
3. Provide the NOAs in the system-supported threshold languages.

1.4 Assumptions

1. CA-228957 will address the eligibility changes for Older Adult Expansion.
2. CA-229939 will implement a one-time batch to transition restricted scope Medi-Cal individuals, 50 years or older, to full scope Medi-Cal.
3. There will be no changes to CMSP correspondence.
4. There will be no changes on how current Mixed MAGI NOAs generate.
5. Any historical NOAs which EDBC generated for benefit months prior to Older Adult Expansion's effective date will retain the existing MAGI and Non-MAGI verbiage. The existing verbiage will remain in the system for historical purposes.
6. Regulations will not be translated for MAGI Fragments. CA-214024 will add common NOA fragments and missing regulations in threshold language for the Medi-Cal program.
7. CA-232581 will add these fragments in the missing threshold languages (including, but not limited to: Hindi, Japanese, Mien, Punjabi, Thai, Ukrainian)

8. Per existing system functionality, GEN 1365 will be added to all the envelopes mailed to the customer.

2 RECOMMENDATIONS

2.1 Effective date existing MAGI and Non-MAGI fragments

2.1.1 Overview

The existing MAGI and Non-MAGI fragments will continue to trigger and populate in Medi-Cal NOAs under certain conditions.

2.1.2 Description of Change

1. Update the generation conditions to effective date the existing MAGI and Non-MAGI fragments to populate as-is on their respective NOAs when they are generated:
    a. With a benefit month prior to Older Adult Expansion's effective month and
    b. Prior to the Older Adult Expansion's effective date

	Fragment Name	**Fragment ID**
MAGI Fragments	H_CH_FULL_SCOPE_TO_RESTRICTED_SCOPE_H807 H_CH_RESTRICTED_SCOPE_TO_FULL_SCOPE_H808 H_AP_RESTRICTED_SCOPE_APP_H912	7627 7628 7626
Non-MAGI Fragments	MC_CH_ALIEN_STATUS_VERIF_FAIL_M780 MC_CH_RESTR_TO_FULL_M781 MC_AP_RESTRICT_MC_NO_SOC_M224	7631 7632 7629

2. Update the generation conditions for the following, existing retro fragments to populate as-is on the Restricted Retro Approval NOAs when they are generated:
    a. Prior to the Older Adult Expansion's effective date
        i. With a retro benefit month prior to Older Adult Expansion's effective month or

    b. After the Older Adult Expansion's effective date
        i. With a retro benefit month on or prior to Jan 2022 or
        ii. With a retro benefit month of Feb, Mar, or Apr 2022 and the <Person> variable is under 50 years of age

	Fragment Name	**Fragment ID**
MAGI	H_AP_RESTRICTED_SCOPE_RETRO_H911	7625
Non-MAGI	MC_AP_RESTRICT_RETRO_MC_M225	7630

2.2 Add new MAGI Reason Verbiage for 'Restricted Scope Approval'

2.2.1 Overview

A new MAGI Approval fragment will be created to accommodate for the updated verbiage presented in ACWDL 21-13.

This new reason fragment will mimic the old fragment of H_AP_RESTRICTED_SCOPE_APP_H912 (Fragment ID: 7626).

Known State NOA: ACWDL 21-13

NOA Template: H_NOA_TEMPLATE (Fragment ID = 3033)

Program(s): MAGI Medi-Cal

Action Type(s): Approval

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A, none attached with this NOA

Languages (10): English, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

2.2.2 NOA Reason Verbiage

Add new Reason Fragment XDP

Add a new reason fragment XDP to display the following new verbiage.

The formatting of below text in English is Arial, font size 10. (The text in Spanish and threshold will generate based on project standards for that language.)

Description	Text per ACWDL 21-13	Notice Type
<STATIC_SECTION>	You have been approved for only restricted scope Medi-Cal because you are 26 through 49 years of age and you did not send us proof of U.S. citizenship or satisfactory immigration status for Medi-Cal purposes. California law covers full scope Medi-Cal only for individuals who are under the age of 26 or 50 years of age or older and who do not have or cannot provide proof of citizenship or satisfactory immigration status.	(MAGI) Restricted Scope Approval

	Because you are within the age limit of 26 through 49 years of age, you only qualify for restricted scope Medi-Cal. Restricted scope Medi-Cal only covers emergency services, pregnancy related services such as prenatal care, labor, delivery, and postpartum care, and long-term care services. If you are not sure if a service is covered by restricted scope Medi-Cal, ask your medical provider. Your eligibility for restricted scope Medi-Cal begins <month dd, yyyy>. Your restricted scope Medi-Cal coverage will continue unless you are found no longer eligible. This could happen at the time your eligibility is renewed or when your situation changes. If you have proof of your citizenship or immigration status that you can give us now, or want to let us know you are having problems getting your document, please call your county Medi-Cal office at the number listed on this notice. Your benefits may change from restricted scope to full scope when you provide us with your documents. Full scope benefits allow you to see a doctor for all of your medical needs. We counted your household size and income to make our decision. For Medi-Cal, your household size is <household size> and your monthly household income is <modified adjusted gross income>. The monthly Medi-Cal income limit for your household size is <MAGI limit>. Your income is below this limit, so you qualify for Medi-Cal. You received restricted scope Medi-Cal because you did not provide proof of your citizenship or satisfactory immigration status. <Regulation> is the Regulation or law we relied on for this decision. If you think we made a mistake, you can appeal. See "Your Hearing Rights" on the back of the first page of this notice to learn how to appeal. You have only 90 days to ask for a hearing. The 90 days started the day after the date on this notice.	

2.2.3 NOA Reason Variable Population

1. **Update Fragment Variable Population**

   Update the variables variable population from existing Fragment ID: 7626 to work with this new fragment.

2. **Add Fragment Regulations**

   Add the regulations from existing Fragment ID: 7626 to be used and tied with this new fragment.

3. **Add NOA Title and Footer Reference**

   The below, existing details from Fragment ID: 7626 will be used for this new fragment:

   NOA Reference on Document List Page: MAGI Approval

   NOA Title: Medi-Cal Approval

   NOA Footer: MC-MAGI-A (11/2015)

2.2.4 NOA Reason Fragment Generation

Add Reason Fragment Generation

The existing generation conditions of H_AP_RESTRICTED_SCOPE_APP_H912 (Fragment ID: 7626) are still valid for this new fragment.

Though in addition, update the existing generation conditions to populate the new verbiage when the NOA is generated with a benefit month on or after the Older Adult Expansion's effective month.

2.3 Add new MAGI Reason Verbiage for 'Restricted Scope Retro Approval'

2.3.1 Overview

A new MAGI Approval fragment will be created to accommodate for the updated verbiage presented in ACWDL 21-13.

This new fragment will mimic the old fragment of H_AP_RESTRICTED_SCOPE_RETRO_H911 (Fragment ID: 7625).

Known State NOA: ACWDL 21-13

NOA Template: H_NOA_TEMPLATE (Fragment ID = 3033)

Program(s): MAGI Medi-Cal

Action Type(s): Approval

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A, none attached with this NOA

Languages (10) : English, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

2.3.2 NOA Reason Verbiage

Add new Reason Fragment XDP

Add a new reason fragment XDP to display the following new verbiage.

The formatting of below text in English is Arial, font size 10. (The text in Spanish and threshold will generate based on project standards for that language.)

Description	**Text**	**Notice Type**
<26-49_H>	You asked us to check if you could get Medi-Cal to cover your bills for any of the three months before you applied. You qualified for restricted scope Medi-Cal in <month yyyy> because you are 26 through 49 years of age and you did not send us proof of U.S. citizenship or satisfactory immigration status for Medi-Cal purposes. Restricted scope Medi-Cal only covers emergency services, pregnancy related services such as prenatal care, labor, delivery, and postpartum care, and long-term care services. If you are not sure if a service is covered by restricted scope Medi-Cal, ask your medical provider. You may get, or may have already received, other notices about your eligibility for other time periods. This notice is only telling you that you got restricted scope Medi-Cal coverage for <month yyyy>.	(MAGI) Restricted Scope Retro Approval
<50+_H>	You asked us to check if you could get Medi-Cal to cover your bills for any of the three months before you applied. You qualified for restricted scope Medi-Cal in < month yyyy> because you are 50 years of age or older and you did not send us proof of U.S. citizenship or satisfactory	

	immigration status for Medi-Cal purposes. Starting on May 1, 2022, California law covers full scope Medi-Cal for individuals who are 50 years of age or older and who do not have or cannot provide proof of citizenship or satisfactory immigration status. Restricted scope Medi-Cal only covers emergency services, pregnancy related services such as prenatal care, labor, delivery, and postpartum care, and long-term care services. If you are not sure if a service is covered by restricted scope Medi-Cal, ask your medical provider. You may get, or may have already received, other notices about your eligibility for other time periods. This notice is only telling you that you got restricted scope Medi-Cal coverage for < month yyyy>.	
<STATIC SECTION>	If you have proof of your citizenship or immigration status that you can give us now, or want to let us know you are having problems getting your document, please call your county Medi-Cal office at the number listed on this notice. Your benefits may change from restricted scope to full scope when you provide us with your documents. Full scope benefits allow you to see a doctor for all of your medical needs. We counted your household size and income to make our decision. For Medi-Cal, your household size is <household size> and your monthly household income is <modified adjusted gross income>. The monthly Medi-Cal income limit for your household size is <MAGI limit>. Your income is below this limit, so you qualify for Medi-Cal. You received restricted scope Medi-Cal because you did not provide proof of your U.S. citizenship or satisfactory immigration status. <Regulation> is the Regulation or law we relied on for this decision. If you think we made a mistake, you can appeal. See "Your Hearing Rights" on the back of the first page of this notice to learn how to appeal. You have only 90 days to ask for a hearing. The 90 days started the day after the date on this notice.	

Add Dynamic Fragment Sections

The new XDP file will have dynamically generated fragment sections (<26-49_H>, <50+_H>) to compile for two different MAGI 'Restricted Scope Retro Approval' NOAs, dependent on age.

2.3.3 NOA Reason Variable Population

1. Update Fragment Variable Population

Update the variable population from existing Fragment ID: 7625 to work with this new fragment.

2. Add Fragment Regulations

Add the regulations from existing Fragment ID: 7625 to be used and tied with this new fragment.

3. Add NOA Title and Footer Reference

The below details from Fragment ID: 7625 can be used for this new fragment:

NOA Reference on Document List Page: MAGI Approval
NOA Title: Medi-Cal Approval
NOA Footer: MC-MAGI-A (11/2015)

2.3.4 NOA Reason Fragment Generation

1. Add Reason Fragment Generation

The existing generation conditions of H_AP_RESTRICTED_SCOPE_RETRO_H911 (Fragment ID: 7625) are still valid for this new fragment.

Though in addition, update the existing generation conditions to populate the new verbiage:

a. When satisfying generation conditions of a dynamic fragment section (shown below)

2. Add Dynamic Fragment Section Generation

At least one dynamic fragment section of the new reason fragment will be triggered and visible on the NOA per below conditions. The other dynamic fragment will be hidden.

Fragment Section	Generation Conditions
<26-49_H>	Generation conditions of the new reason fragment are satisfied. With the additional conditions checking the NOA is generated for a retro benefit month on or after the Older Adult Expansion's effective month.
<50+_H>	Generation conditions of the new reason fragment are satisfied. With the additional conditions checking: • The NOA is generated on or after the Older Adult Expansion's effective date and • For retro benefit months – Feb, Mar, or Apr 2022 and • The <Person> variable is 50 years of age or older Derived by: Benefit Month on NOA, MM/YYYY – <Person>'s DOB, MM/YYYY =>50 Note: NOAs generated on or after the policy's effective date for retro benefit months Feb, Mar, or Apr 2022 and <Person> is under 50 years of age is detailed in Section 2.1.2.2.

2.4 Add new MAGI Reason Verbiage for 'Full Scope to Restricted Scope'

2.4.1 Overview

A new MAGI Change fragment will be created to accommodate for the updated verbiage presented in ACWDL 21-13.

This new fragment will mimic the old fragment of H_CH_FULL_SCOPE_TO_RESTRICTED_SCOPE_H807 (Fragment ID: 7627).

Known State NOA: ACWDL 21-13

NOA Template: H_NOA_TEMPLATE (Fragment ID = 3033)

Program(s): MAGI Medi-Cal

Action Type(s): Change

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A, none attached with this NOA

Languages (10): English, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

2.4.2 NOA Reason Verbiage

Add a new Reason Fragment XDP

Add a new reason fragment XDP to display the following new verbiage.

The formatting of below text in English is Arial, font size 10. (The text in Spanish and threshold will generate based on project standards for that language.)

NOA Mockups/Examples: See Supporting Documents #1

Description	Text per ACWDL 21-13	Notice Type
<STATIC_SECTION>	Important change to your benefits. Your Medi-Cal is changing to restricted scope on <month dd yyyy>. Your Medi-Cal is changing from full scope to restricted scope because you are 26 through 49 years of age and you did not send us proof that you are a U.S. citizen or have satisfactory immigration status for Medi-Cal purposes. You have not contacted us to let us know that you are trying to provide this proof. California law covers full scope Medi-Cal only for individuals who are under the age of 26 or 50 years of age or older and who do not have or cannot provide proof of citizenship or satisfactory immigration status. Now that you are within this age limit, your Medi-Cal is changing to restricted scope. Restricted scope Medi-Cal only covers emergency services, pregnancy related services such as prenatal care, labor, delivery, and postpartum care, and long-term care services. If you are not sure if a service is covered by restricted scope, call your medical provider. If you have proof of your citizenship or immigration status that you can give us now, or want to let us know you are having problems getting your document, please call your county Medi-Cal office at the number listed on this notice. Your benefits may change from restricted	(MAGI) Full Scope to Restricted Scope

	scope to full scope when you send us your documents. Full scope benefits allow you to see a doctor for all of your medical needs. If you give us acceptable proof within one year, your Medi-Cal may change back to full scope Medi-Cal starting the month your restricted benefits began. In the meantime, your restricted scope Medi-Cal coverage will continue unless you are found no longer eligible. This could happen at the time your eligibility is renewed or when your situation changes. <Regulation> is the Regulation or law we relied on for this decision. If you think we made a mistake, you can appeal. See "Your Hearing Rights" on the back of the first page of this notice to learn how to appeal. You have only 90 days to ask for a hearing. The 90 days started the day after the date on this notice.	

2.4.3 NOA Reason Variable Population

1. Update Fragment Variable Population

Update the variable population from existing Fragment ID: 7627 to work with this new fragment.

2. Add Fragment Regulations

Add the regulations from existing Fragment ID: 7627 remain the same to be used and tied with the new fragment.

3. Add NOA Title and Footer Reference

The below details from Fragment ID: 7627 can be used for this new fragment:

NOA Reference on Document List Page: MAGI Change
NOA Title: Medi-Cal Change
NOA Footer: MC-MAGI-C (11/2015)

2.4.4 NOA Reason Fragment Generation

Add Reason Fragment Generation

The existing generation conditions of H_CH_FULL_SCOPE_TO_RESTRICTED_SCOPE_H807 (Fragment ID: 7627) are still valid for this new fragment.

Though in addition, update the existing generation conditions to populate the new verbiage when the NOA is generated with a benefit month on or after the Older Adult Expansion's effective month.

2.5 Add new MAGI Reason Verbiage for 'Restricted Scope to Full Scope'

2.5.1 Overview

New MAGI Change fragments will be created to accommodate for the updated verbiage presented in ACWDL 21-13.

This new fragment will mimic the old fragment of H_CH_RESTRICTED_SCOPE_TO_FULL_SCOPE_H808 (Fragment ID: 7628).

Known State NOA: ACWDL 21-13

NOA Template: H_NOA_TEMPLATE (Fragment ID = 3033)

Program(s): MAGI Medi-Cal

Action Type(s): Change

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A, none attached with this NOA

Languages (10): English, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

2.5.2 NOA Reason Verbiage

Add new Reason Fragment XDP

Add a new reason fragment XDP to display the following new verbiage.

The formatting of below text in English is Arial, font size 10. (The text in Spanish and threshold will generate based on project standards for that language.)

Description	Text	Notice Type
<Under50_ H >	Good news! Your Medi-Cal changed to full scope on <month dd, yyyy>. Your Medi-Cal changed from restricted scope to full scope because you were able to prove your U.S. citizenship or satisfactory immigration status or you are under 26 years old. Your full scope Medi-Cal coverage will continue unless you are found to be no longer eligible. This could happen at the time your eligibility is renewed or when your situation changes.	(MAGI) Restricted Scope to Full Scope
<50Older_H > **NOA Mockups/ Examples**: See Supporting Documents #2	Good news! Your Medi-Cal changed to full scope on <month dd, yyyy>. Your Medi-Cal changed from restricted scope to full scope because you were able to prove your U.S. citizenship or satisfactory immigration status or you are 50 years of age or older. Full scope Medi-Cal is available to all eligible people age 50 and older starting May 1, 2022. Your full scope Medi-Cal coverage will continue unless you are found to be no longer eligible. This could happen at the time your eligibility is renewed or when your situation changes.	
<STATIC SECTION>	Your eligibility for full scope Medi-Cal benefits may cover past months. If you paid for medical care that was not an emergency, pregnancy related, or long-term care service while you had restricted Medi-Cal benefits, you may be able to get your money back. Call Beneficiary Services at the Department of Health Care Services for answers to your reimbursement questions at 1-916-403-2007. <Regulation> is the Regulation or law we relied on for this decision. If you think we made a mistake, you can appeal. See "Your Hearing Rights" on the last page of this notice to learn how to appeal. You have only 90 days to ask for a hearing. The 90 days started the day after the date on this notice.	

Add Dynamic Fragment Sections

The new XDP file will have dynamically generated fragment sections (<Under50_H>, <50Older_H>) to compile for two different MAGI 'Restricted Scope to Full Scope' Change NOAs, dependent on age.

2.5.3 NOA Reason Variable Population

1. Update Fragment Variable Population

Update the variable population from existing Fragment ID: 7628 to work with this new fragment.

2. Add Fragment Regulations

Add the regulations from existing Fragment ID: 7628 to be used and tied with the new fragment.

In addition, WIC 14007.8 will also be added into the regulations.

3. Add NOA Title and Footer Reference

The below details from Fragment ID: 7628 can be used for this new fragment:

NOA Reference on Document List Page: MAGI Change
NOA Title: Medi-Cal Change
NOA Footer: MC-MAGI-C (11/2015)

2.5.4 NOA Reason Fragment Generation

1. Add Reason Fragment Generation

The existing generation conditions of H_CH_RESTRICTED_SCOPE_TO_FULL_SCOPE_H808 (Fragment ID: 7628) are still valid for this new fragment.

Though in addition, update the existing generation conditions to populate the new verbiage:

a. When satisfying generation conditions of a dynamic fragment section (shown below)
b. And when the NOA is generated with a benefit month on or after the Older Adult Expansion's effective month.

2. Add Dynamic Fragment Section Generation

At least one dynamic fragment section of the new reason fragment will be triggered and visible on the NOA per below conditions. The other dynamic fragment will be hidden.

Fragment Section	Generation Conditions
<Under50_H>	Generation conditions of the new reason fragment are satisfied. With the additional condition that <50Older_H> fragment section did not generate.
<50Older_H>	Generation conditions of the new reason fragment are satisfied. With the additional condition checking the <Person> variable is 50 years of age or older. Derived by: Benefit Month on NOA, MM/YYYY – <Person>'s DOB, MM/YYYY =>50

2.6 Add new Non-MAGI Reason Verbiage for 'Restricted Scope Approval'

2.6.1 Overview

A new Non-MAGI Approval fragment will be created to accommodate for the updated verbiage presented in ACWDL 21-13.

This new reason fragment will mimic the old fragment of MC_AP_RESTRICT_MC_NO_SOC_M224 (Fragment ID: 7629).

Known State NOA: ACWDL 21-13

NOA Template: MC_NOA_TEMPLATE (Fragment ID = 3028)

Program(s): Non-MAGI Medi-Cal

Action Type(s): Approval

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A, none attached with this NOA

Languages (10): English, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

2.6.2 NOA Reason Verbiage

Add new Reason Fragment XDP

Add a new reason fragment XDP to display the following new verbiage.

The formatting of below text in English is Arial, font size 10. (The text in Spanish and threshold will generate based on project standards for that language.)

NOA Mockups/Examples: See Supporting Documents #3

Description	Text per ACWDL 21-13	Notice Type
<STATIC_SECTION>	<Person> You have been approved for only restricted scope Medi-Cal because you are 26 through 49 years of age and you did not send us proof of your U.S. citizenship or satisfactory immigration status for Medi-Cal purposes. California law covers full scope Medi-Cal only for individuals who are under the age of 26 or 50 years of age or older and who do not have or cannot provide proof of citizenship or satisfactory immigration status. Because you are within this age limit, you only qualify for restricted scope Medi-Cal. Restricted scope Medi-Cal only covers emergency services and pregnancy related services such as prenatal care, labor, delivery and postpartum care. If you are not sure if a service is covered by restricted scope Medi-Cal, ask your medical provider. Your eligibility for restricted scope Medi-Cal begins <month dd, yyyy>. Your restricted scope Medi-Cal coverage will continue unless you are found no longer eligible. This could happen at the time your eligibility is renewed or when your situation changes. If you have proof of your citizenship or immigration status that you can give us now, or want to let us know you are having problems getting your document, please call your county Medi-Cal office at the number listed on this notice. Your benefits may change from restricted scope to full scope when you provide us with your documents. Full scope benefits allow you to see a doctor for all of your medical needs.	(Non-MAGI) Restricted Scope Approval

	<Regulation> is the Regulation or law we relied on for this decision. If you think we made a mistake, you can appeal. See "Your Hearing Rights" on the back of the first page of this notice to learn how to appeal. You have only 90 days to ask for a hearing. The 90 days started the day after the date on this notice.	

2.6.3 NOA Reason Variable Population

1. Update Fragment Variable Population

Update the variable population from existing Fragment ID: 7629 to work with this new fragment.

2. Add Fragment Regulations

Add the regulations from existing Fragment ID: 7629 remain the same to be used and tied with the new fragment.

In addition, add 'WIC' in front of existing '14007.8' in the regulations.

3. Add NOA Title and Footer Reference

The below details from Fragment ID: 7629 can be used for this new fragment:

NOA Reference on Document List Page: Restricted Scope Approval
NOA Title: Medi-Cal Approval
NOA Footer: MC 239 A3

2.6.4 NOA Reason Fragment Generation

Add Reason Fragment Generation

The existing generation conditions of MC_AP_RESTRICT_MC_NO_SOC_M224 (Fragment ID: 7629) are still valid for this new fragment.

Though in addition, update the existing generation conditions to populate the new verbiage when the NOA is generated with a benefit month on or after the Older Adult Expansion's effective month.

2.7 Add new Non-MAGI Reason Verbiage for 'Restricted Scope Retro Approval'

2.7.1 Overview

A new Non-MAGI Approval fragment will be created to accommodate for the updated verbiage presented in ACWDL 21-13.

This new fragment will mimic the old fragment of MC_AP_RESTRICT_RETRO_MC_M225 (Fragment ID: 7630).

Known State NOA: ACWDL 21-13

NOA Template: MC_NOA_TEMPLATE (Fragment ID = 3028)

Program(s): Non-MAGI Medi-Cal

Action Type(s): Approval

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A, none attached with this NOA

Languages (10): English, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

2.7.2 NOA Reason Verbiage

Add new Reason Fragment XDP

Add a new reason fragment XDP to display the following new verbiage.

The formatting of below text in English is Arial, font size 10. (The text in Spanish and threshold will generate based on project standards for that language.)

Description	Text	Notice Type
<26-49>	<Person> You asked us to check if you could get Medi-Cal to cover your bills for any of the three months before you applied. You qualified for restricted scope Medi-Cal in <month yyyy> because you are 26 through 49 years of age and you did not send us proof of U.S. citizenship or satisfactory immigration status for Medi-Cal purposes.	(Non-MAGI) Restricted Scope Retro Approval

NOA Mockups/ **Examples**: See Supporting Documents #4	Restricted scope Medi-Cal only covers emergency services, pregnancy related services such as prenatal care, labor, delivery, and postpartum care. If you are not sure if a service is covered by restricted scope Medi-Cal, ask your medical provider. You may get, or may have already received, other notices about your eligibility for other time periods. This notice is only telling you that you got scope Medi-Cal coverage for < month yyyy >.	
<50+>	<Person> You asked us to check if you could get Medi-Cal to cover your bills for any of the three months before you applied. You qualified for restricted scope Medi-Cal in < month yyyy > because you are 50 years of age or older and you did not send us proof of U.S. citizenship or satisfactory immigration status for Medi-Cal purposes. Starting on May 1, 2022, California law covers full scope Medi-Cal for individuals who are 50 years of age or older and who do not have or cannot provide proof of citizenship or satisfactory immigration status. Restricted scope Medi-Cal only covers emergency services, pregnancy related services such as prenatal care, labor, delivery, and postpartum care. If you are not sure if a service is covered by restricted scope Medi-Cal, ask your medical provider. You may get, or may have already received, other notices about your eligibility for other time periods. This notice is only telling you that you got scope Medi-Cal coverage for < month yyyy >.	
<STATIC SECTION>	If you have proof of your citizenship or immigration status that you can give us now, or want to let us know you are having problems getting your document, please call your county Medi-Cal office at the number listed on this notice. Your benefits may change from restricted scope to full scope when you provide us with your documents. Full scope benefits allow you to see a doctor for all of your medical needs. <Regulation> is the Regulation or law we relied on for this decision. If you think we made a mistake, you can appeal. See "Your Hearing Rights" on the back of the first page of this notice to learn how to appeal. You have only 90 days to ask for a hearing. The 90 days started the day after the date on this notice.	

Add Dynamic Fragment Sections

The new XDP file will have dynamically generated fragment sections (<26-49>, <50+>) to compile for two different Non-MAGI 'Restricted Scope Retro Approval' NOAs, dependent on age.

2.7.3 NOA Reason Variable Population

1. Update Fragment Variable Population

Update the variable population from existing Fragment ID: 7630 to work with this new fragment.

2. Add Fragment Regulations

Add the regulations from existing Fragment ID: 7630 to be used and tied with the new fragment.

In addition, add 'WIC' in front of existing '14007.8' in the regulations.

3. Add NOA Title and Footer Reference

The below details from Fragment ID: 7630 can be used for this new fragment:

> **NOA Reference on Document List Page**: Restricted Scope Retro Approval
> **NOA Title**: Medi-Cal Approval
> **NOA Footer**: MC 239 A3

2.7.4 NOA Reason Fragment Generation

1. Add Reason Fragment Generation

The existing generation conditions of MC_AP_RESTRICT_RETRO_MC_M225 (Fragment ID: 7630) are still valid for this new fragment.

Though in addition, update the existing generation conditions to populate the new verbiage:

a. When satisfying generation conditions of a dynamic fragment section (shown below)

2. Add Dynamic Fragment Section Generation

At least one dynamic fragment section of the new reason fragment will be triggered and visible on the NOA per below conditions. The other dynamic fragment will be hidden.

Fragment Section	Generation Conditions
<26-49>	Generation conditions of the new reason fragment are satisfied. With the additional condition checking the NOA is generated for a retro benefit month on or after the Older Adult Expansion's effective month.
<50+>	Generation conditions of the new reason fragment are satisfied. With the additional conditions checking: • The NOA is generated on or after the Older Adult Expansion's effective date and • For retro benefit months – Feb, Mar, or Apr 2022 and • The <Person> variable is 50 years of age or older Derived by: Benefit Month on NOA, MM/YYYY – <Person>'s DOB, MM/YYYY =>50 Note: NOAs generated on or after the policy's effective date for retro benefit months Feb, Mar, or Apr 2022 and <Person> is under 50 years of age is detailed in Section 2.1.2.2.

2.8 Add new Non-MAGI Reason Verbiage for 'Full Scope to Restricted Scope'

2.8.1 Overview

A new Non-MAGI Change fragment will be created to accommodate for the updated verbiage presented in ACWDL 21-13.

This new fragment will mimic the old fragment of MC_CH_ALIEN_STATUS_VERIF_FAIL_M780 (Fragment ID: 7631).

Known State NOA: ACWDL 21-13

NOA Template: MC_NOA_TEMPLATE (Fragment ID = 3028)

Program(s): Non-MAGI Medi-Cal

Action Type(s): Change

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A, none attached with this NOA

Languages (10): English, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

2.8.2 NOA Reason Verbiage

Add a new Reason Fragment XDP

Add a new reason fragment XDP to display the following new verbiage.

The formatting of below text in English is Arial, font size 10. (The text in Spanish and threshold will generate based on project standards for that language.)

Description	**Text per ACWDL 21-13**	**Notice Type**
<STATIC_SECTION>	Important change to your benefits. Your Medi-Cal is changing to restricted scope on <month dd yyyy>. Here's why: <Person> Your Medi-Cal is changing from full scope to restricted scope because you are 26 through 49 years of age and you did not send us proof that you are a U.S citizen or have satisfactory immigration status for Medi-Cal purposes. You have not contacted us to let us know that you are trying to provide proof. California law covers full scope Medi-Cal only for individuals who are under the age of 26 or 50 years of age or older and who do not have or cannot provide proof of citizenship or satisfactory immigration status. Now that you are within the age limit of 26 through 49 years of age, your Medi-Cal is changing to restricted scope. Restricted scope Medi-Cal only covers emergency services, pregnancy related services such as prenatal care, labor, delivery, and postpartum care services. If you are not sure if a	(Non-MAGI) Full Scope to Restricted Scope

	service is covered by restricted scope, call your medical provider. If you have proof of your citizenship or immigration status that you can give us now, or want to let us know you are having problems getting your document, please call your county Medi-Cal office at the number listed on this notice. Your benefits may change from restricted scope to full scope when you send us your documents. Full scope benefits allow you to see a doctor for all of your medical needs. If you give us acceptable proof within one year, your Medi-Cal may change back to full scope Medi-Cal starting the month your restricted benefits began. In the meantime, your restricted scope Medi-Cal coverage will continue unless you are found no longer eligible. This could happen at the time your eligibility is renewed or when your situation changes. <Regulation> is the Regulation or law we relied on for this decision. If you think we made a mistake, you can appeal. See "Your Hearing Rights" on the back of the first page of this notice to learn how to appeal. You have only 90 days to ask for a hearing. The 90 days started the day after the date on this notice.	

2.8.3 NOA Reason Variable Population

1. Update Fragment Variable Population

Update the variable population from existing Fragment ID: 7631 to work with this new fragment.

2. Add Fragment Regulations

Add the regulations from existing Fragment ID: 7631 to be used and tied with the new fragment.

3. Add NOA Title and Footer Reference

The below details from Fragment ID: 7631 can be used for this new fragment:

NOA Reference on Document List Page: Alien Status – Full Scope to Restricted Scope
NOA Title: Medi-Cal Change
NOA Footer: MC 239

2.8.4 NOA Reason Fragment Generation

Add Reason Fragment Generation

The existing generation conditions of MC_CH_ALIEN_STATUS_VERIF_FAIL_M780 (Fragment ID: 7631) are still valid for this new fragment.

Though in addition, update the existing generation conditions to populate the new verbiage when the NOA is generated with a benefit month on or after the Older Adult Expansion's effective month.

2.9 Add new Non-MAGI Reason Verbiage for 'Restricted Scope to Full Scope'

2.9.1 Overview

A new Non-MAGI Change fragment will be created to accommodate for the updated verbiage presented in ACWDL 21-13.

This new fragment will mimic the old fragment of MC_CH_RESTR_TO_FULL_M781 (Fragment ID: 7632).

Known State NOA: ACWDL 21-13

NOA Template: MC_NOA_TEMPLATE (Fragment ID = 3028)

Program(s): Non-MAGI Medi-Cal

Action Type(s): Change

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A, none attached with this NOA

Languages (10)**:** English, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

2.9.2 NOA Reason Verbiage

Add new Reason Fragment XDP

Add a new reason fragment XDP to display the following new verbiage.

The formatting of below text in English is Arial, font size 10. (The text in Spanish and threshold will generate based on project standards for that language.)

Description	Text	Notice Type
<Under50>	<Person> Good news! Your Medi-Cal changed to full scope on <month dd, yyyy>. Your Medi-Cal changed from restricted scope to full scope because you were able to prove your U.S. citizenship or satisfactory immigration status or you are under 26 years old. Your full scope Medi-Cal coverage will continue unless you are found to be no longer eligible. This could happen at the time your eligibility is renewed or when your situation changes.	(Non-MAGI) Restricted Scope to Full Scope
<50Older>	<Person> Good news! Your Medi-Cal changed to full scope on <month dd, yyyy>. Your Medi-Cal changed from restricted scope to full scope because you were able to prove your U.S. citizenship or satisfactory immigration status or you are 50 years of age or older. Full scope Medi-Cal is available to all eligible people age 50 and older starting May 1, 2022. Your full scope Medi-Cal coverage will continue unless you are found to be no longer eligible. This could happen at the time your eligibility is renewed or when your situation changes.	
<STATIC SECTION>	Your eligibility for full scope Medi-Cal benefits may cover past months. If you paid for medical care that was not an emergency, pregnancy related service while you had restricted Medi-Cal benefits, you may be able to get your money back. Call Beneficiary Services at the Department of Health Care Services for answers to your reimbursement questions at 1-916-403-2007.	

	<Regulation> is the Regulation or law we relied on for this decision. If you think we made a mistake, you can appeal. See "Your Hearing Rights" on the back of the first page of this notice to learn how to appeal. You have only 90 days to ask for a hearing. The 90 days started the day after the date on this notice.	

Add Dynamic Fragment Sections

The new XDP file will have dynamically generated fragment sections (<Under50>, <50Older>) to compile for two different Non-MAGI 'Restricted Scope to Full Scope' Change NOAs, dependent on age.

2.9.3 NOA Reason Variable Population

1. Update Fragment Variable Population

Update the variable population from existing Fragment ID: 7632 to work with this new fragment.

2. Add Fragment Regulations

Add the regulations from existing Fragment ID: 7632 to be used and tied with the new fragment.

3. Add NOA Title and Footer Reference

The below details from Fragment ID: 7632 can be used for this new fragment:

NOA Reference on Document List Page: Restricted Scope to Full Scope
NOA Title: Medi-Cal Change
NOA Footer: MC 239 A

2.9.4 NOA Reason Fragment Generation

1. Add Reason Fragment Generation

The existing generation conditions of MC_CH_RESTR_TO_FULL_M781 (Fragment ID: 7632) are still valid for this new fragment.

Though in addition, update the existing generation conditions to populate the new verbiage:

a. When satisfying generation conditions of a dynamic fragment section (shown below)
b. And when the NOA is generated with a benefit month on or after the Older Adult Expansion's effective month.

2. Add Dynamic Fragment Section Generation

At least one dynamic fragment section of the new reason fragment will be triggered and visible on the NOA per below conditions. The other dynamic fragment will be hidden.

Fragment Section	Generation Conditions
<Under50 >	Generation conditions of the new reason fragment are satisfied. With the additional condition that <50Older> fragment section did not generate.
<50Older>	Generation conditions of the new reason fragment are satisfied. With the additional condition checking the <Person> variable is 50 years of age or older. Derived by: Benefit Month on NOA, MM/YYYY – <Person>'s DOB, MM/YYYY =>50

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	Mockup: MAGI Full Scope to Restricted Scope	CA-231692_MAGI - Full Scope to Restricted Scope.pdf
2	NOA	Mockup: MAGI Restricted Scope to Full Scope, 50 years of age and older	CA-231692_MAGI - Restricted Scope to Full Scope, 50+.pdf
3	NOA	Mockup: Non-MAGI Restricted Scope Approval	CA-231692_NonMAGI - Restricted Scope Approval.pdf
4	NOA	Mockup: Non-MAGI Restricted Scope Retro Approval, 26-49 years of age	CA-231692_NonMAGI - Restricted Scope Retro Approval, 26_49.pdf

4 REQUIREMENTS

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.7	The LRS shall identify case actions that require a notice, NOA, form, letter, stuffer, or flyer, and shall generate that appropriate notice, NOA, form, letter, stuffer, or flyer, using variable case-specific information.	CalSAWS will generate NOAs with updated verbiage with respect to policy changes of Older Adult Expansion.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-232882

e-Application Summary, e-notifications and Office Updates for BenefitsCal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Melissa Mendoza & Gillian Bendicio
	Reviewed By	Connie Buzbee, Laura Ould and Dymas Pena

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/08/2021	1.0	Initial Version	Melissa Mendoza

Table of Contents

1 OVERVIEW

e-Application has been updated to support the new BenefitsCal system. Migrated counties require a new email to send customers to the BenefitsCal website and updates to e-notifications.

1.1 Current Design

The Income section of the e-Application Summary does not display the Projected Annual Income information for each applicant.

The calculated Self-Employment Gross Amount displays as an income of category 'Miscellaneous' type 'Self-Employment' and appears as a duplicate entry to the Self-Employment earned income.

E-notification emails are sent to customers when they are opted-in and currently are sent out with a link to YBN.

1.2 Requests

1. Update the Income section to:
    a. Display the Projected Annual Income information per person
    b. Prevent the display of the calculated self-employment gross amount.

3. Update e-notifications email to support BenefitsCal.

4. Update Office ID to support BenefitsCal sending Office ZZ.

1.3 Overview of Recommendations

1. Create new fields that will display the Project Annual Income for this year and next year per person.
2. Update the Application Transfer API to not save the calculated self-employment gross amount.
3. Update the e-notifications email to navigate customers to the BenefitsCal URL.
4. Update Office Detail to no longer create an office id of ZZ to support BenefitsCal.
5. Update APIs to support the changes.

1.4 Assumptions

No updates will impact YBN.

2 RECOMMENDATIONS

BenefitsCal is going live for the Migrated Counties to CalSAWS. There are some additional requirements that need to take place in order to support BenefitsCal on the e-Application Summary page, e-notifications emails and an office id of 'ZZ'.

2.1 E-Application Summary

2.1.1 Overview

The e-Application Summary page displays information that the Self-Service Portal applicant entered on the portal. This page is updated to display information that is collected from the portal.

2.1.2 E-Application Summary Mockup

Root Questions

Income

Name	Category	Type	Frequency	Amount	End Date	Expect to Continue	Transfer Status
Cheetoe, Chester	Veterans	VEAP	Monthly	$800.00		No	Pending
Cheetoe , Hot Fries	Miscellaneous	Self Employment		$0.00			Pending
Cheetoe , Hot Fries	Earnings	Salary, Wages	Hourly	$606.20		Yes	Pending

Projected Annual Income

Name	Annual Income This Year	Annual Income Next Year
Cheetoe, Chester	$30000.00	$15000.00
Cheetoe , Hot Fries	$5000.00	

Free Rent, Utilities or Clothing

Name	Type	Value	Provider	Expect to Continue	Transfer Status
No Data Found					

Figure 2.1.1 – Projected Annual Income field

Income

Name	Category	Type	Frequency	Amount	End Date	Expect to Continue	Transfer Status
Cheetoe, Chester	Veterans	VEAP	Monthly	$800.00		No	Pending
Cheetoe , Hot Fries	Earnings	Salary, Wages	Hourly	$606.20		Yes	Pending

Projected Annual Income

Name	Annual Income This Year	Annual Income Next Year
Cheetoe, Chester		
Cheetoe , Hot Fries		

Figure 2.1.2 – Projected Annual Income when no income is available

2.1.3 Description of Changes

1. Update the Income section Projected Annual Income subsection of the page to have the following fields and display the information when they exist:
    a. Name
        i. Name of the person whose projected annual income belongs to
    b. Annual Income This Year
        i. Amount field for the annual income in the current year
    c. Annual Income Next Year
        i. Amount field for the estimated annual income next year

2.1.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update the page mapping to include the new fields.

2.1.7 Page Usage/Data Volume Impacts

No impact to this section.

2.2 Contact Detail

2.2.1 Overview

The Contact Detail page allows the worker to add, update and view contact information for a case member. Whenever contact information is available to the case's linked e-Application, e-Data mapping to this page is accessible.

2.2.2 Description of Changes

1. Update the page to not display the 'Send E-mail Verification' when the case is in a BenefitsCal-supported county.

2.2.3 Page Location

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

2.2.4 Security Updates

N/A

2.2.5 Page Mapping

N/A

2.2.6 Page Usage/Data Volume Impacts

N/A

2.3 Office Detail

2.3.1 Overview

The Office Detail page lets counties create offices to support county processing. BenefitsCal uses an Office Mapping API to pull back offices for an application to be submitted to. In the case that the API is not able to locate an office for that application BenefitsCal will send an Office ID of ZZ. CalSAWS needs to make sure that Office ZZ is not set when creating a new office.

2.3.2 Description of Changes

1. Update the Office Detail logic when creating a new ID for a new office to not use Office ZZ.

2.3.3 Page Location

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

2.3.4 Security Updates

N/A

2.3.5 Page Mapping

N/A

2.4 Email for e-notifications

2.4.1 Overview

When a notice is generated for customers that are opted-in to e-notifications, an email is generated and sent through a batch job, so the customer is aware they have new documents to view. That email is currently for YBN customers only.

2.4.2 Description of Changes

1. Update the e-notification email to the following text for BenefitsCal Customers only:

   Subject: BenefitsCal has new correspondence for you

   Email Body:

   You have new correspondence ready for your access.

   To view them, visit BenefitsCal website at benefitscal.com.

2.4.3 Page Location

- **Global: N/A**
- **Local: N/A**
- **Task: N/A**

2.4.4 Security Updates

N/A

2.4.5 Page Mapping

N/A

2.4.6 Page Usage/Data Volume Impacts

N/A

2.5 Email Notification to Customer for Manual Linking

2.5.1 Overview

When the worker manually links a CalSAWS person to a BenefitsCal account, a notification is needed to let the person know that they can view their information on BenefitsCal.

2.5.2 Description of Changes

1. Generate an email to the customer when the worker manually links their BenefitsCal account to their CalSAWS case. The customer must be opted-in for e-Notification:

   Subject: BenefitsCal Account Has Been Linked

   Email Body:

   Your BenefitsCal account has been linked. Please login to https://benefitscal.org to view your information.

2.5.3 Page Location

- **Global: N/A**
- **Local: N/A**
- **Task: N/A**

2.5.4 Security Updates

N/A

2.5.5 Page Mapping

N/A

2.5.6 Page Usage/Data Volume Impacts

N/A

2.6 Email Notification for e-Messages

2.6.1 Overview

When the worker sends a message to the customer, an alert will need to be sent out to notify that a message is available in BenefitsCal.

2.6.2 Description of Changes

1. Generate an email to the customer when a message is sent to the BenefitsCal customer thru CalSAWS. The customer must be opted-in for e-Notification and have a valid e-mail:

   Subject: You Have a BenefitsCal Message

   Email Body:

   A message has been sent to your BenefitsCal account. You will need to login to https://benefitscal.org to view your message.

2.6.3 Page Location

- **Global: N/A**
- **Local: N/A**
- **Task: N/A**

2.6.4 Security Updates

N/A

2.6.5 Page Mapping

N/A

2.6.6 Page Usage/Data Volume Impacts

N/A

2.7 Update Form Status batch job to new specifications

2.7.1 Overview

Form Status batch job sends information associated to redetermination, reporting and renewal packets when it is generated in CalSAWS.

2.7.2 Description of Change

1. Update the batch job that sends the MC Renewals (MC 210 RV, MC 216, and/or MC 217) to follow the new field types as specified by the BenefitsCal's Form Status API.
2. Update the Form Status batch job to run only for cases that are BenefitsCal-supported.
3. Update the batch job to sends the MC Renewals (MC 210 RV, MC 216, and/or MC 217) to send additional information regarding the household. Please refer to the list of transfer data in the supporting document.

2.7.3 Execution Frequency

No Change. Daily (mon-sat).

2.7.4 Key Scheduling Dependencies

No Change.

2.7.5 Counties Impacted

CalSAWS Counties.

2.7.6 Data Volume/Performance

N/A

2.7.7 Interface Partner

BenefitsCal Portal

2.7.8 Failure Procedure/Operational Instructions

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

2.8 Application Transfer API

2.8.1 Overview

The Application Transfer API transmits the information entered by the BenefitsCal applicant to the CalSAWS and creates an e-Application record. This record is viewable in the e-Application Summary page.

2.8.2 Description of Change

1. Update the Application Transfer API to not create an income record whenever a self-employment gross amount information is passed as a jobs object. (Note: this information is not entered by the applicant.)

2.8.3 Execution Frequency

N/A

2.8.4 Key Scheduling Dependencies

N/A

2.8.5 Counties Impacted

CalSAWS Counties.

2.8.6 Data Volume/Performance

N/A

2.8.7 Interface Partner

BenefitsCal Portal

2.8.8 Failure Procedure/Operational Instructions

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

2.9 Forms API

2.9.1 Overview

The Forms API takes information passed by the BenefitsCal portal and maps it to the form specified by the endpoint. The generated form with answers is then uploaded to Hyland.

2.9.2 Description of Change

1. Update the Forms API queue configuration to take 10 transactions simultaneously when the API is called.
2. Update the SAWS2Plus endpoint to not call the route method of the Imaging service when the application is stored in the external storage.
3. Update the SAWS2Plus endpoint error handling to return a 400 error response for the following:
    a. The request contains a case number, county code and barcode combination that does not exist in CalSAWS when it is submitted as an RE
    b. The application number is provided but missing county code or vice-versa.

2.9.3 Execution Frequency

N/A

2.9.4 Key Scheduling Dependencies

N/A

2.9.5 Counties Impacted

CalSAWS Counties.

2.9.6 Data Volume/Performance

N/A

2.9.7 Interface Partner

BenefitsCal Portal

2.9.8 Failure Procedure/Operational Instructions

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

2.10 Account Sync API

2.10.1 Overview

The Account Sync API is a one-time web service call to link the legacy Self-Service portal account to a BenefitsCal account.

2.10.2 Description of Change

1. Update the CalSAWS login table to have indices to improve the performance of the Account Sync API.

2.10.3 Execution Frequency

N/A

2.10.4 Key Scheduling Dependencies

N/A

2.10.5 Counties Impacted

CalSAWS Counties.

2.10.6 Data Volume/Performance

N/A

2.10.7 Interface Partner

BenefitsCal Portal

2.10.8 Failure Procedure/Operational Instructions

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

2.11 Office Mapping Import

2.11.1 Overview

The C-IV offices longitude and latitude information are stored in the C4Yourself database. This information needs to be migrated over to the CalSAWS database so that the Office Mapping API can use it in determining the closest office.

2.11.2 Description of Change

1. Update the C-IV office longitude and latitude information using the data found in the C4Yourself database.
2. Update the C-IV offices that are found in the C4Yourself database to accept e-Applications from the BenefitsCal portal.

2.11.3 Estimated Number of Records Impacted/Performance

Estimated 100 offices impacted by this change.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
01	Form Status Updates	Updates to Form Status for supporting BenefitsCal	Attached in Jira CA-232882 FormStatusMapping.xslx

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-232982

Update address location for NOAs to match Forms

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Jensen
	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/03/2021	0.1	Initial Draft	Maria Jensen
09/07/2021	0.2	Peer Review	Tiffany Huckaby, Maria Jensen
09/08/2021	0.3	BA review: Added reason for this change effort Added Assumption that nothing else will show through envelope window	Maria Jensen

Table of Contents

1 OVERVIEW

This SCR will update the NOA Templates in CalSAWS for all counties, so that the Customer Mailing Address location for NOAs matches the Customer Mailing Address location for Forms. This update has been requested by the Central Print vendor.

1.1 Current Design

Currently in CalSAWS for all counties the Customer Mailing Address location for NOAs does not match the Customer Mailing Address location for Forms.

1.2 Requests

Update the NOA Templates in CalSAWS so that the Customer Mailing Address location for NOAs matches the Customer Mailing Address location for Forms, as per the Central Print vendor's request.

1.3 Overview of Recommendations

Update the NOA Templates in CalSAWS so that the Customer Mailing Address location for NOAs matches the Customer Mailing Address location for Forms, as per the Central Print vendor's request.

1.4 Assumptions

1. This effort will only update the location of Customer Mailing Address occurrences in the NOA Template Header section. There will be no updates to the location of the Customer Mailing Address occurring in sections other than the NOA Template Header section.
2. This effort will be done in a singular phase.
3. Central Print testing will be required for this effort.
4. The State Hearing section and other information on the NOA will continue to not be viewable through the envelope window.

2 RECOMMENDATIONS

2.1 Update the Customer Mailing Address location for NOA Templates

2.1.1 Overview

This SCR will update the NOA Templates in CalSAWS for all counties, so that the Customer Mailing Address location for NOAs matches the Customer Mailing Address location for Forms.

2.1.2 Form/NOA Verbiage

Update the NOA Template XDPs to match the Form Customer Mailing Address location.

See Supporting Documents #1 for list of impacted NOA Templates.

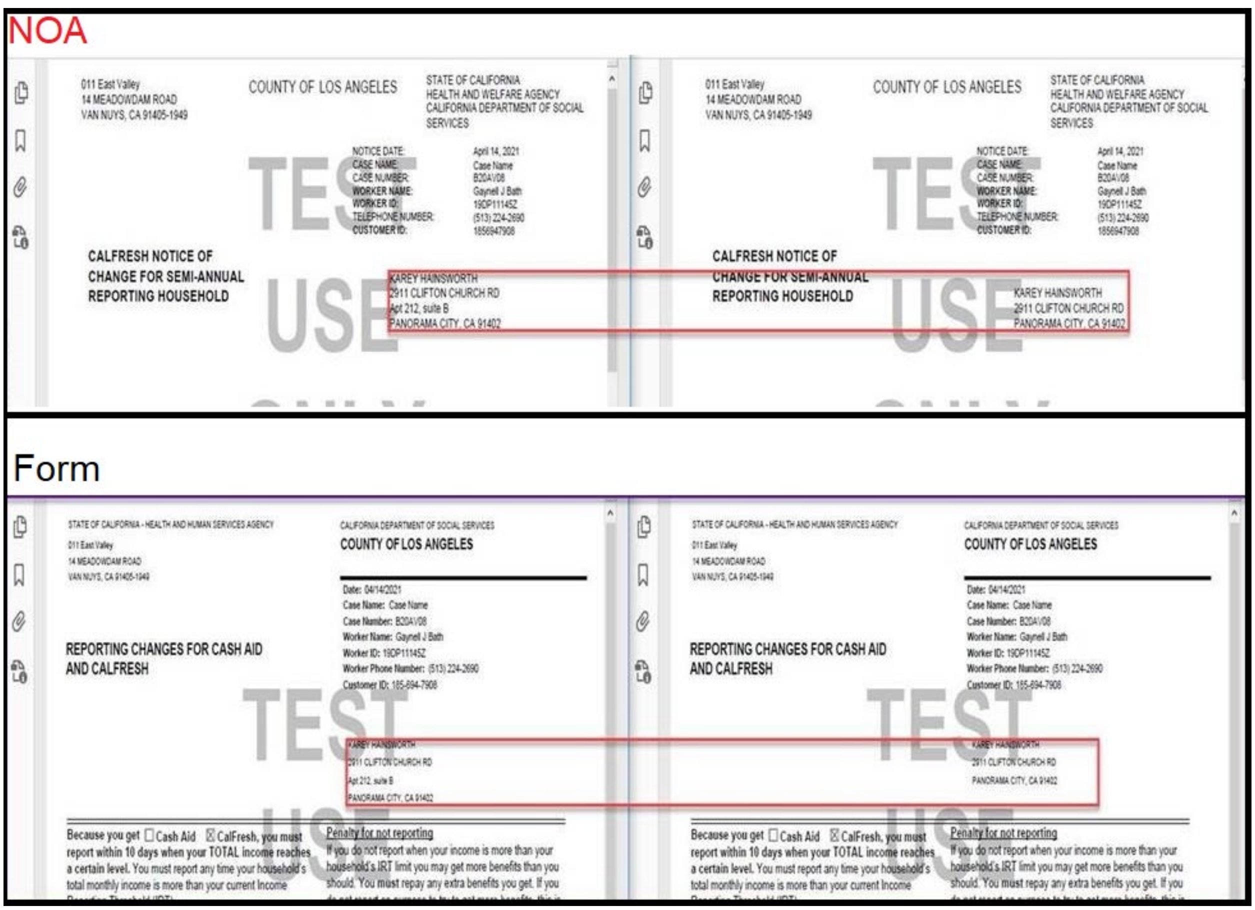


Fig. 2.1.1.1 NOA vs Form

Compared to the Customer Mailing Address location for Forms, the Address location for NOAs is closer to the rightmost edge of the page. Also, when an Address Line 2 is present on the NOA and the Customer Mailing Address is comprised of 4 lines, the starting point is moved up.

Update the Customer Mailing Address starting point location for the NOA Templates, so that the XY coordinates are the same as for Forms, regardless of the number of address lines. For each NOA Template listed in the Supporting Documents #1, make the necessary visual changes for the location of all Customer Mailing Address occurrences in the NOA Template Header section, for all available threshold languages.

2.1.3 Form/NOA Variable Population

N/A, there are no updates to the variable population for the NOA Templates.

2.1.4 Form/NOA Generation Conditions

N/A, there are no updates to the generation conditions for the NOA Templates.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	List of NOA Templates to be updated	CA-232982 Templates List.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.2.12 CAR-1234	The LRS shall support the central production and mailing of notices, NOAs, forms, letters, stuffers, and flyers by program.	With SCR CA-232982, the NOA Templates will be updated in the CalSAWS system for all counties, so that the Customer Address location for NOAs matches the Customer Address location for Forms.