CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215686

DDID 2384 FDS GA GR Batch Appointments

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/10/2022	1.0	Initial Draft.	Marqui Simmons
01/26/2022	2.0	Updates to add assumptions about task functionality.	Marqui Simmons

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1   OVERVIEW

This SCR outlines the necessary requirements to enable automated batch appointment scheduling for General Relief programs for the GA/GR Automated EDBC/CC Counties.

1.1   Current Design

Currently, a Recertification (RE) Appointment batch job for the GA/GR Automated EDBC/CC County Solution does not exist.

1.2   Requests

Create an automated GA/GR Appointment Scheduling batch job for the GA/GR Automated EDBC/CC County Solution.

1.3   Overview of Recommendations

1. Create a new batch job for scheduling RE appointments for the GR program for the GA/GR Automated EDBC/CC Counties.

1.4   Assumptions

1. The GA/GR Appointment Scheduling batch job designed in this document will not affect any existing Los Angeles County jobs.
2. The new GA/GR batch appointment job will only schedule appointments of Category 'Re-Evaluation GA/GR Interview'. All other appointment types must be scheduled manually. Additionally, appointments will not be scheduled on weekends or holidays by the batch job and must be scheduled manually.
3. There are no changes to the existing CW/CF RE Batch job for the GA/GR Automated EDBC/CC Counties.
4. Task functionality for appointments that cannot be scheduled by batch automatically will not be implemented as part of this SCR as it is not in scope. That functionality will be added to SCR CA-220119.

2   RECOMMENDATIONS

2.1   Create New Batch Job for GA/GR Recertification Appointment

2.1.1   Overview

This section outlines the necessary modifications to create a new batch job for the GA/GR Automated EDBC/CC County Solution for automated RE Appointments for GR programs. The batch appointment logic will be similar to the existing CalSAWS logic.

2.1.2 Description of Change

1. Create a batch job for the GA/GR Automated EDBC/CC Counties to schedule an RE appointment for GR programs.
2. Determine if the case is in an applicable county to schedule a 'Re-Evaluation GA/GR Interview' appointment and if the county allows automatic scheduling (Appointment Admin page).
3. Determine if a GR RE appointment exists for the case. If an appointment exists, then skip the case. If it does not exist, determine the worker's daily threshold amount for appointments. Batch job will only consider the daily threshold amount entered for 'Re-Evaluation GA/GR Interview'. 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.
4. 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.
5. 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.

	8 a.m.	9 a.m.	10 a.m.	11 a.m.	12 p.m.
	Appt 1	Appt 3	Appt 5	Unavailable	Lunch
	Appt 2	Appt 4	Appt 6	Unavailable	Lunch
Worker A	Available for Appointment				
	1 p.m.	2 p.m.	3 p.m.	4 p.m.	5 p.m.
	Appt 7	Appt 9		Desk Time	Desk Time
	Appt 8	Appt 10		Desk Time	Desk Time

	Available for Appointment		

6. Create an RE appointment with the following details:
   a. Category: Re-Evaluation GA/GR Interview
   b. Status: Scheduled
   c. Status Reason: Batch Initiated
   d. Begin Date: Appointment dates will be determined 75 days before the case's RE due month with the following period: the first business day of the RE due month until the 10th business day of the RE due month.
   e. Begin Time: Available appointment time based on worker's schedule.
   f. Duration: 60 mins.
7. Create a Journal entry for the case with appointment details when the appointment is created.
   a. Appointment Type: Re-Evaluation GA/GR Interview
   b. Appointment Date: MM/DD/YYYY
   c. Program Type: GR
   d. RE Description: Recertification

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 GR RE Appointment is scheduled for case

2.1.3 Execution Frequency

Monthly on the 10th day.

2.1.4 Key Scheduling Dependencies

Successor: Batch EDBC Processing jobs.

2.1.5 Counties Impacted

GA/GR Automated EDBC/CC Counties

2.1.6 Data Volume/Performance

TBD.

2.1.7 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2384	The Contractor shall update the CalSAWS software to be able to generate/render current available automated CalWIN county specific non-eligibility related GA/GR Forms and NOAs when the following actions are taken: benefit issuance/benefit recovery, appointments and periodic reporting	Batch/Interfaces - Batch Programs: Estimating only for Batch Appointments. RRR\RD or any appointments for forms or NOA will be covered in Correspondence estimates.	This SCR meets this requirement by implementing a new Batch Job to schedule GA/GR Recertification appointments.