

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207426 DDID 702– NA 840A Migration

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jamie Ng
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/2/2019	1.0	Original Draft	Jamie Ng
07/09/2019	1.1	Updates to Original	Brian Furlong
07/09/2019	1.2	<ul style="list-style-type: none"> <li>Updated Assumptions to reference CA-209369 for threshold language updates</li> <li>Updated section 2.4.2</li> </ul>	Amy Gill
07/10/2019	1.3	Updated Current Design and Assumptions to clarify that the NA 840-3 wording will continue to generate as a CW NOA fragment.	Amy Gill
07/25/2019	1.4	Updates made per draft DEL review	Brian Furlong

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# 1 OVERVIEW

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## 1.1 Current Design

NA 840A – Determination of Good Cause/No Good Cause (10/2003) – is used to notify customers of the result of their Welfare-to-Work non-compliance sanction.

LRS has each of the three sections of the NA 840A in its own template and triggers the relevant template as follows:

- 1) NA 840A-1 – Triggered when a Worker enters a Status of 'Non-Compl' with a Status Reason of 'Not Signing the WtW Plan' and sets the Good Reason indicator to Yes on the WTW Status List page.
- 2) NA 840A-2 – Triggered when a worker enters a Status of 'Non-Compl' with a Status Reason of 'In-Conciliation' on the WTW Status List page.
- 3) NA 840A-3 – A Notice of Action (NOA) fragment is triggered when CalWORKs EDBC runs and imposes the sanction on the CalWORKs program for individuals that did not sign a compliance plan and do not have good cause.

## 1.2 Requests

Migrate form NA 840 A (10/03)-Determination of Good Cause/No Good Cause and add the functionality of dynamically populating the form.

## 1.3 Overview of Recommendations

- 1) Remove the LRS NA 840A templates from CalSAWS.
- 2) Add the C-IV NA 840A to CalSAWS.
- 3) Update the population logic of NA 840A to work with the C-IV template.
- 4) Update the generation logic of NA 840A from the WtW Status List page.

## 1.4 Assumptions

1. Updates to threshold languages version of the form will be addressed through SCR CA-209369.
2. The NOA fragment from the NA 840A-3 will continue to be triggered through EDBC and populated on the CalWORKS NOA when a WTW sanction is imposed.
3. The NA 840A section with the NA 840A-3 language (on the right side of the form) will not be prepopulated on the form. It will instead be generated on a NOA when appropriate as described in the assumption above.
4. Updates to remove County or Agency specific references/logos from all State forms will be addressed with CA-207395 for DDID 1046.
5. The fields on the NA 840A will be editable even when pre-populated.
6. NA Back 9 will continue to be included as page 2 of the NA 840A.

## 2 RECOMMENDATIONS

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### 2.1 Remove LRS NA 840A Templates

#### 2.1.1 Overview

The NA 840A templates used in LRS will be turned off and replaced by the C-IV version of the NA 840A.

#### 2.1.2 Description of Change

Remove the following templates from LRS:

- 1) NA 840A-1
- 2) NA 840A-2

### 2.2 Add the C-IV NA 840A to CalSAWS

#### 2.2.1 Overview

The English and Spanish NA 840A templates used in C-IV will be migrated into CalSAWS.

#### 2.2.2 Description of Change

- 1) Migrate the English and Spanish NA 840A used in C-IV.

## 2.2.3 Mock Up

COUNTY OF LOS ANGELES  
DEPARTMENT OF PUBLIC SOCIAL SERVICES

### NOTICE OF ACTION

Date: \_\_\_\_\_  
Case Name: \_\_\_\_\_  
Case Number: \_\_\_\_\_  
Worker Name: \_\_\_\_\_  
Worker ID: \_\_\_\_\_  
Worker Phone Number: \_\_\_\_\_  
Customer ID: \_\_\_\_\_

Questions? Ask your Worker

State Hearing: If you think this action is wrong, you can ask for a hearing. The back of this page tells how.

The box that is checked applies to you:

\_\_\_\_\_, your cash aid will not go down on \_\_\_\_\_, as we told you it would. We are not lowering your cash aid because you had a good reason for not doing your welfare to Work assignment.

- This will not count as an instance of noncompliance in your case record.
- You still must participate in Welfare to Work activities unless we say you do not have to.

If you have any questions, call your Welfare to Work worker at: \_\_\_\_\_ right away.

\_\_\_\_\_, your cash aid will not go down on \_\_\_\_\_, as we told you it would. You did not have a good reason for not doing your Welfare to Work assignment, but you agreed to sign a compliance plan. If you complete the compliance plan, this will not count as an instance of noncompliance in your case record.

You may file for a State hearing if you disagree with our finding that you did not have a good reason for not doing your assignment.

If you do not do what the compliance plan says:

- We will lower your cash aid unless we decide you had a good reason for not completing the plan.
- You will get a new notice if we have to lower your cash aid.
- This will count as an instance of noncompliance in your case record.

If you have any questions, call your Welfare to Work worker at: \_\_\_\_\_ right away.

\_\_\_\_\_, your cash aid will go down on \_\_\_\_\_, as we told you it would in the Notice of Action (NA 840) sent to you on \_\_\_\_\_.

After talking to you and/or looking at information you gave us:

- We decided you did not have a good reason for not doing your Welfare to Work assignment; and
- You did not agree to sign a compliance plan as required.

You may file for a State hearing if you disagree with this decision.

If you have any questions, call your Welfare to Work worker at: \_\_\_\_\_ right away.

These rules apply: CalWORKs MPP Section 42-713 (good cause); 42-721 (good cause and noncompliance). You may review these rules at your welfare office.

## 2.3 Update Population Logic for NA 840A

### 2.3.1 Overview

The NA 840A is generated through the online form generation process for cases which have a newly created Welfare-to-Work Status of 'Non-Comp' with a Status Reason of either 'In-Conciliation' or 'Not Signing the WtW Plan' and the Good Reason indicator is set to Yes.

Population logic for NA 840A will be based on the Status Reason for which the NA 840A is generated.

1) Create new codes in CT221 for each of the NA 840A triggers:

### 2.3.2 In-Conciliation

[Redacted], as we told you it would. You did not have a good reason for not doing your Welfare to Work assignment, but you agreed to sign a compliance plan. If you complete the compliance plan, this will not count as an instance of noncompliance in your case record.

You may file for a State hearing if you disagree with our finding that you did not have a good reason for not doing your assignment.

If you do not do what the compliance plan says:

- We will lower your cash aid unless we decide you had a good reason for not completing the plan.
- You will get a new notice if we have to lower your cash aid.
- This will count as an instance of noncompliance in your case record.

If you have any questions, call your Welfare to Work worker at:

[Redacted] right away.

Field	Description
Checkbox	Will be checked for Status Reason of In-Conciliation
Person	WtW Participant
Date	Effective date when the sanction was schedule to become effective (MM/DD/YYYY)
WtW Phone	Worker phone number ((XXX)-XXX-XXXX Ext. XXXX)

### 2.3.3 Not Signing the WtW Plan and Good Reason set to Yes

\_\_\_\_\_,  
 your cash aid will not go down on \_\_\_\_\_, as we  
 told you it would. We are not lowering your cash aid because  
 you had a good reason for not doing your welfare to Work  
 assignment.

- This will not count as an instance of noncompliance in your case record.
- You still must participate in Welfare to Work activities unless we say you do not have to.

If you have any questions, call your Welfare to Work worker at:

\_\_\_\_\_ right away.

Field	Description
Checkbox	Will be checked for Status Reason of Not Signing the WtW Plan and the Good Reason indicator is set to Yes
Person	WtW Participant
Date	Effective date when the sanction was schedule to become effective (MM/DD/YYYY)
WtW Phone	Worker phone number ((XXX)-XXX-XXXX Ext. XXXX)



## 2.4 Update Generation Logic for NA 840A

### 2.4.1 Overview

Generation logic will be updated to render and display the form when a newly created Welfare-to-Work Status of 'Non-Comp' with a Status Reason of either 'In-Conciliation' or 'Not Signing the WtW Plan' and the Good Reason indicator is set to Yes.

### 2.4.2 Remove the Document Trigger Generation Logic

- 1) Remove the existing logic to render the PDF when the user navigates to Document List page.
- 2) Remove the existing logic to generate the WTW 27 along with the NA 840A.

### 2.4.3 Generate NA 840A when WtW Status Reasons are Saved

Generate the NA 840A when one of the following statuses are created on the Welfare to Work Status List page:

- 1) 'Non-Comp' with a Status Reason of 'In-Conciliation'
- 2) 'Non-Comp' with a Status Reason of 'Not Signing the WtW Plan' and the Good Reason indicator is set to Yes

## 3 REQUIREMENTS

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### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
702	The Contractor shall migrate form NA 840 A (10/03)- Determination of Good Cause/No Good Cause and add the functionality of dynamically populating the form.	N/A	Form updated as specified in the requirement.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207428 DDID 680 – Hold Correspondence for  
Minor Consent Cases

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jamie Ng
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/7/2019	1.0	Original Draft	Jamie Ng
7/2/2019	1.1	Updates to Original	Brian Furlong
07/22/2019	1.2	Updates per DEL1 draft review (numbering started on wrong page)	Brian Furlong
07/24/2019	1.3	Updates per DEL comments (removed homeless case scope)	Brian Furlong

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# 1 OVERVIEW

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## 1.1 Current Design

Los Angeles County holds Client Correspondence (forms/NOAs) for pickup at a county office when the forms/NOAs are flagged for Central Print on cases with a Minor Consent Medi-Cal program.

## 1.2 Requests

Hold forms/NOAs for pickup at county offices for the 57 Migration Counties when the forms/NOAs are flagged for Central Print on case with a Minor Consent Medi-Cal program.

## 1.3 Overview of Recommendations

Update the batch bundling process to update the forms/NOAs being sent to cases with a Minor Consent program to 'Hold For Pickup' status for the 57 Migration Counties.

## 1.4 Assumptions

The 57 Migration Counties will choose whether to use the 'Use Office Address' indicator check box in the Address Detail page to hold forms/NOAs for pickup at county offices with DDID 114 (SCR CA-207488).

## 2 RECOMMENDATIONS

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### 2.1 Suppress Mailings to Minor Consent Cases for the 57 Migration Counties

#### 2.1.1 Overview

Forms/NOAs generated for cases with a Minor Consent Medi-Cal and flagged for Central Print will be updated to 'Hold For Pickup' status during the Central Print Bundling Process.

#### 2.1.2 Description of Change

- 1) Update the Central Print Bundling process (PBxxP200/PBxxP300) for the 57 Migration Counties to not bundle forms/NOAs for Customers who are active on Minor Consent Medi-Cal.
- 2) Update the status of these forms/NOAs to 'Hold For Pickup'

## 3 REQUIREMENTS

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### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
680	The CONTRACTOR shall suppress Correspondence for Minor Consent cases and Homeless Cases for the 57 Counties.	Batch need to be updated to not pick up the forms/NOAs that are sent to the addresses agreed upon to be suppressed.	Form updated as specified in the requirement.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

DDID 654 CA-207429

Relabel "My Assignments" to "My New Assignments" on the Home page

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/26/2019	1.0	Original	Melissa Mendoza
07/25/2019	1.1	Added Home Page Mockup Section Title per Deliverable Comment.	Melissa Mendoza



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# 1 OVERVIEW

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## 1.1 Current Design

The Home page displays important sections with links for Users to quickly access information. This includes New Assignments that have been assigned to that worker.

## 1.2 Requests

Relabel "My Assignments" to "My New Assignments" on the Home page.

## 1.3 Overview of Recommendations

Update the title from My Assignments to My New Assignments on the Home page.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

### 2.1 Home Page

#### 2.1.1 Home Page Mockup

The screenshot displays a web application interface for a user named 'Test User 8'. At the top, there is a header with the date 'Monday, June 03, 2019'. Below the header, there are two input fields: 'Worker ID: 19LS980005' and 'Case Number:'. Both fields have a 'Submit' button next to them. The main content area is divided into several sections:

- Announcements:** A table with columns 'Type' and 'Date'. It lists two items: 'Release 17.11.0.05-Release Notes' and 'Release Note Report', both of type 'LRS'.
- LRS Quick Links:** A list of links including 'Reception Log' and 'Reminders'.
- My Tasks:** A section with a right-pointing arrow.
- My Schedule:** A section with a right-pointing arrow.
- My New Assignments:** A section with a right-pointing arrow.
- My Reminders:** A section with a right-pointing arrow and a 'Due Date' label.
- LRS Business Intelligence:** A section with a link to 'DPSSTATS Data Warehouse Homepage'.

A large image of a 'Los Angeles' street sign is overlaid on the left side of the page. At the bottom, a footer indicates 'This Type\_1 page took 1.86 seconds to load.'

Figure 2.1.1 Home Page Mockup

#### 2.1.2 Description of Changes

Update the title from My Assignments to My New Assignments on the Home page.

#### 2.1.3 Page Location

**Global Navigation:** Home Page

**Local Navigation:**

**Task Navigation:**

#### 2.1.4 Security Updates

N/A

### 2.1.5 Page Mapping

N/A

### 2.1.6 Page Usage/Data Volume Impacts

N/A

## 3 REQUIREMENTS

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### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
654	The CONTRACTOR shall relabel "My Assignments" to "My New Assignments" on the Home page.	N/A	Relabel "My Assignments" to "My New Assignments" on the Home page.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207430 DDID 653

Add the name of the CalSAWS County of the logged in user under the application logo

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/26/2019	1.0	Original	Melissa Mendoza
07/25/2019	1.1	Added Home Page Section title per Deliverable Comment.	Melissa Mendoza

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# 1 OVERVIEW

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## 1.1 Current Design

The CalSAWS Home Page does not currently display the county of the logged in User until the application logo.

## 1.2 Requests

Migrate the functionality that displays the name of the CalSAWS County of the logged in User under the application logo.

## 1.3 Overview of Recommendations

The County associated to the User logged in should display under the system logo.

## 1.4 Assumptions

N/A



## 2 RECOMMENDATIONS

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### 2.1 Home Page

#### 2.1.1 Home Page Mockup



Figure 2.1.1 Home Page Mockup

#### 2.1.2 Description of Changes

Add the name of the CalSAWS County of the logged in user under the application logo.

#### 2.1.3 Page Location

**Global Navigation:** Home Page

**Local Navigation:**

**Task Navigation:**

#### 2.1.4 Security Updates

N/A

#### 2.1.5 Page Mapping

N/A

#### 2.1.6 Page Usage/Data Volume Impacts

N/A

### 3 REQUIREMENTS

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#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
653	The CONTRACTOR shall migrate the functionality that displays the name of the CalSAWS County of the logged in user under the application logo.	N/A	Add the county of the logged in User below the Logo.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

DDID 647 CA-207431

Update the YBN label on the Document List  
Page”

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/26/2019	1.0	Original	Melissa Mendoza
07/26/2019	1.1	Update Section 1.4 and 2.1 (all subsections) per Deliverable comments	Kristine Lim

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# 1 OVERVIEW

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## 1.1 Current Design

The Document List page has a column that identifies when a document has been viewed in the YBN Self-Service Portal site.

## 1.2 Requests

Update the "Viewed Via YBN" column in the Search Results Summary section of the "Document List" page to "Viewed Via Self-Service Portal".

## 1.3 Overview of Recommendations

Update the Column Name from Viewed Via YBN to Viewed Via Self-Service Portal on the Document List page.

## 1.4 Assumptions

No change to the business logic involved in column name changes.

## 2 RECOMMENDATIONS

### 2.1 Document List

#### 2.1.1 Overview

The Document List page has a column that identifies when a document has been viewed in the YBN Self-Service Portal site. Update the "Viewed Via YBN" column in the Search Results Summary section of the "Document List" page to "Viewed Via Self-Service Portal".

#### 2.1.2 Document List Mockup

### Document List

\*- Indicates required fields

► Refine Your Search

Search Results Summary					Results 1 - 25 of 426	
Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal	Details
06/03/2019 2:00 PM	<a href="#">NOA - FC - AP - Emergency Caregiver Funding Approval</a>		Foster Care	Preview		<a href="#">Details</a>
06/03/2019 1:49 PM	<a href="#">NOA - FC - AP - Emergency Caregiver Funding Approval</a>		Foster Care	Pending Review		<a href="#">Details</a>
06/03/2019 1:40 PM	<a href="#">NOA - FC - AP - FC APPROVED</a>		Foster Care	Preview		<a href="#">Details</a>

Figure 2.1.2 Document List

#### 2.1.3 Description of Changes

Update the Document List page as follows:

- 1) Update the column from Viewed Via YBN to Viewed Via Self-Service Portal.
- 2) Update Page Mapping to use the new column name Viewed Via Self-Service Portal.

### 2.1.4 Page Location

**Global Navigation:** Eligibility

**Local Navigation:** Document List

**Task Navigation:** Document List

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

Update Viewed Via YBN to Viewed Via Self Service Portal.

### 2.1.7 Page Usage/Data Volume Impacts

N/A

## 3 REQUIREMENTS

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### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
647	The CONTRACTOR shall replace the "YBN" reference in the "Viewed Via YBN" column in the Search Results Summary section of the "Document List" page to the name of the new self-service portal.	The name of the new statewide self-service portal will be provided by the third GD Deliverable to update the column name on the page.	Update the column name to "Viewed Via Self-Service Portal" so that it can be used for whatever name is decided in the future as well as the current systems being used.



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207436 DDID-582 – Updates to the IEVS  
Abstracts Search page

CalSAWS	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/2/2019	0.1	Initial Draft	Avi Bandaranayake
6/5/2019	0.2	Revised requirement to remove #2 and #3	Avi Bandaranayake
7/25/2019	0.3	Updated 1.4, 2.1 Title, 2.1.2 per Deliverable comments	Avi Bandaranayake

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# 1 OVERVIEW

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## 1.1 Current Design

The IEVS Abstract search page allows the user to filter and find records based on available criteria. The Workload Status dropdown currently has Assigned, Backlog, Completed and Unassigned as options. These values are not saved with records in the database, but instead use logic to determine which records to display when returning search results. For example:

Assigned: When the abstract is assigned to the worker, the search page will display the status as Assigned.

Backlog: Same criteria as 'Assigned' but the assignment is 45 days old (90 days for IFDS abstracts).

Completed: After the user dispositions the abstract, it will be considered Completed.

Unassigned: No worker assigned and no associated disposition.

## 1.2 Requests

1. Migrate the value of "In Review" in the "Workload Status" dropdown.
2. Update the existing DPA 482 report to account for the "In Review" status in Part B of the report
3. Update the automated batch job that sets the "Backlog" status when the user does not complete the IEVS disposition within 45 days to not include "In Review" statuses

## 1.3 Overview of Recommendations

Add "In Review" to the Workload Status dropdown using CATGRY\_ID 1814 and the appropriate reference table.

Modify the search query to return records based on "In Review" value stored in the database.

## 1.4 Assumptions

1. This recommendation is based on additional functionality described in DDID 1346 and DDID 1393.
2. For request #2 above: There are no changes required to DPA 482 since the report is concerned only with closed findings regardless of whether the abstract was In Review or not. Requirement will be removed.
3. For request #3 above: No changes are required since there is no automated batch job currently in either system that sets the "Backlog" status as described. Requirement will be removed.
4. Functionality associated with existing Workload Status dropdown options (Assigned, Backlog, Completed and Unassigned) will remain unchanged.



## 2 RECOMMENDATIONS

### 2.1 IEVS Abstracts Search

#### 2.1.1 Overview

The new "In Review" value will be added to the Workload Status dropdown. For the search to return results changes described in DDID 1346 and DDID 1393 will be required. This will allow for records saved with the disposition status "In Review" to be returned once the query on the IEVS Abstract Search page has been updated to use the new status.

#### 2.1.2 IEVS Abstracts Search Mockup

**IEVS Abstracts Search**

\*- Indicates required fields

**IEVS Abstracts**

- IEVS Abstracts Search
- IEVS Dispositions Search
- IEVS Assignment
- IEVS Review Case
- Disposition Search

**IEVS Abstract Type: \*** [All] Search By: \* [Case]

**Case Number: \*** [ ] [Select]

**Workload Status:** [ ]

- Assigned
- Backlog
- Completed
- Unassigned
- In Review

**End Date:** [07/15/2019] [Calendar Icon]

Results per Page: [25] [Search]

This Type\_1 page took 0.09 seconds to load.

Figure 2.1.1 – IEVS Abstract Search

#### 2.1.3 Description of Changes

Add value "In Review" to the Workload Status dropdown. (CATGRY\_ID 1814)

Modify the search query to include filtering for "In Review". Use the appropriate code\_num\_identif created for "In Review" in the database table IEVS\_FINDINGS and column REVIEW\_STAT\_CODE.

#### 2.1.4 Page Location

**Global: Special Units**

**Local: IEVS Abstracts**

**Task: IEVS Abstracts Search**

### 3 REQUIREMENTS

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
582	<p><b>Original:</b> The CONTRACTOR shall update the IEVS Abstracts Search page as follows:</p> <ol style="list-style-type: none"> <li>1) Migrate the value of "In Review" in the "Workload Status" dropdown</li> <li>2) Update the existing DPA 482 report to account for the "In Review" status in Part B of the report</li> <li>3) Update the automated batch job that sets the "Backlog" status when the user does not complete the IEVS disposition within 45 days to not include "In Review" statuses</li> </ol> <p><b>Revised:</b> The CONTRACTOR shall update the IEVS Abstracts Search page as follows:</p> <ol style="list-style-type: none"> <li>1) Migrate the value of "In Review" in the "Workload Status" dropdown</li> </ol>	<p><b>Original:</b></p> <ul style="list-style-type: none"> <li>• The automated "Backlog" batch job referenced in item 3 does not require any additional county configurations.</li> </ul> <p><b>Revised:</b> N/A</p>	<ol style="list-style-type: none"> <li>1) CTCR and code changes for query</li> <li>2) Removed see assumptions</li> <li>3) Removed see assumptions</li> </ol>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207439 DDID 557 Migrate Value to IEVS  
Abstract type field



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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/26/2019	0.1	Initial Draft	Avi Bandaranayake
5/28/2019	0.2	Updating design based on updated requirement text	Avi Bandaranayake
7/25/2019	0.3	Updated 2.1.2, 2.1.3, 2.1.4 per Deliverable comments	Avi Bandaranayake
7/25/2019	0.4	Updated revised requirement text 3.1	Avi Bandaranayake

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3.1	Migration Requirements.....	6

# 1 OVERVIEW

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## 1.1 Current Design

Currently the "All-Except ECM" value is available for selection via the "IEVS Abstract Type" field only in the C-IV system. Selecting this value in C-IV will return a subset of records that contain all abstract types except the records of the type Earnings Clearance (Medical).

The "All-Except ECM" value does not exist in CalSAWS. Additionally, the type "Earnings Clearance (Medical)" in C-IV is referred to as "IFDS – Medical Only" in CalSAWS.

## 1.2 Requests

Add the value "All-Except IFDS Medical Only" to the IEVS Abstract Type dropdown.

## 1.3 Overview of Recommendations

Add the value "All-Except IFDS Medical Only" to the IEVS Abstract Type dropdown on the IEVS Abstracts Search page in CalSAWS.

Create a query to return records for all available abstract types except "IFDS – Medical Only". This query should also include any other search criteria chosen on the page.

## 1.4 Assumptions

- 1) The dropdown value of "IFDS - Medical only" in CalSAWS is equivalent to the value of "Earnings Clearance (Medical)" in C-IV.
- 2) The search criteria only includes values that are currently in the system.
- 3) Requirement will be revised to change/relabel the value "All-Except ECM" to "All-Except IFDS Medical Only"

## 2 RECOMMENDATIONS

### 2.1 IEVS Abstracts Search

#### 2.1.1 Overview

Adding a new value to the IEVS Abstract Type dropdown on the IEVS Abstracts Search page.

#### 2.1.2 IEVS Abstracts Search Mockup

**IEVS Abstracts Search**

\*- Indicates required fields  
▼ Refine your Search

**IEVS Abstract Type: \***

- All
- All-Except IFDS Medical Only
- CYA
- FF
- IFDS
- IFDS - Medical only
- NHR
- NPM
- PVS

**Search By: \***

Reviewer

**Begin Date:** 05/01/2019

**End Date:** 05/28/2019

Results per Page: 25

Case Number	Case Name	Abstract Type	Abstract Month	Active on Case	Reviewer Id	Assign Date	Workload Status
No Data Found							

This Type 1 page took 0.61 seconds to load.

Figure 2.1.1 – Mockup Name

#### 2.1.3 Description of Changes

Add the value "All-Except IFDS Medical Only" to the IEVS Abstract Type dropdown on the IEVS Abstracts Search page.

Create a query to return records for all available abstract types except "IFDS – Medical Only". This query should also include any other search criteria chosen on the page.

### 2.1.4 Page Location

Global: Special Units

Local: IEVS Abstracts

Task: IEVS Abstracts search

## 3 REQUIREMENTS

---

### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
557	<p><b>Original:</b> The CONTRACTOR shall migrate the value of "All-Except ECM" in the "IEVS Abstract Type" field on the IEVS Abstract Search page. ECM stands for Earnings Clearance Medi-Cal.</p> <p><b>Revised:</b> The CONTRACTOR shall migrate the value of "All-Except IFDS – Medical Only" in the "IEVS Abstract Type" field on the IEVS Abstracts Search page. IFDS stands for Integrated Fraud Detection System.</p>	N/A	New value added to dropdown.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

SCR CA-207445 – DDID 469 – M16-120B Wording  
Update

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Brian Furlong
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/19/2019	1.0	Original Draft	Brian Furlong
07/25/2019	1.1	Added assumtuons per draft DEL review comments	Brian Furlong

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# 1 OVERVIEW

---

M16-120B – EBT Dormant Account (08/2008) – is a notification of a Dormant EBT Account and is sent to the participant when their account has not been used in 180 days. It informs the program participant that access to their EBT card has been stopped, why that occurred, and how to report a lost card.

## 1.1 Current Design

M16-120B includes a rules section. This section has language which is not consistent with other CalSAWS notices.

## 1.2 Requests

Update the language in the rules section to be consistent with other CalSAWS notices.

## 1.3 Overview of Recommendations

Language in the rules section of the M16-120B will be updated to be consistent with other CalSAWS notices.

## 1.4 Assumptions

- 1) The logic to trigger the M16-120B will not be updated with this effort.
- 2) NA Back 9 will be included as page 2 of the M16-120B.

## 2 RECOMMENDATIONS

---

### 2.1 M16-120B – EBT Dormant Account (08/2008)

#### 2.1.1 Overview

M16-120B includes a rules section. This section has language which is not consistent with other CalSAWS notices.

#### 2.1.2 Description of Change

Update the language in the rules section of the M16-120B to be consistent with other CalSAWS notices.

Before:

**Rules:** These rules apply; you may review them at your **welfare** office: **EAS:** 16.120

---

After:

**Rules:** These rules apply; you may review them at your **social services** office: **MPP Section:** 16.120

---

## 2.1.3 Form Mockup

STATE OF CALIFORNIA - HEALTH AND WELFARE AGENCY

DEPARTMENT OF SOCIAL SERVICES

### EBT Dormant Account

---

Date:  
Case Name:  
Case Number:  
Worker Name:  
Worker ID:  
Worker Phone Number:  
Customer ID:

On \_\_\_\_\_, the County stopped access to your cash aid Electronic Benefit Transfer- EBT account.

**HERE'S WHY:**

You have not used your cash aid EBT card for over \_\_\_\_\_ days.

Call your County Worker to access your cash aid EBT account. If you have lost your card call the toll free number \_\_\_\_\_. If you need help using EBT, call your County Worker.

**This notice:**

- does not change your eligibility to get cash aid;
- does not change your responsibility to report changes that affect your eligibility;
- does not change the unused cash aid benefit in your EBT account;
- does not change your CalFresh or Medi-Cal benefits. If these benefits change, you will get a separate notice.

**EBT:** Keep your plastic Golden State Advantage Card if you use Electronic Benefit Transfer (EBT), even if your aid is terminated. Please do not throw it away.

**Rules:** These rules apply; you may review them at your social services office: MPP Section: 16.120

**Questions? Ask Your Worker**

**State Hearing:** If you think this action is wrong, you can ask for a hearing. The back of this page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

### 3 REQUIREMENTS

---

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
469	The Contractor shall update the form M16-120B (8/08)-EBT Dormant Account with the following updates: 1) Relabel "Welfare Office" to "Social Services Office" 2) Relabel "EAS" to "MPP Section"	N/A	Form updated as specified in the requirement.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207446 – DDID 466 – M16-120A Wording  
Update

CalSAWS	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Brian Furlong
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/10/2019	1.0	Initial Draft	Brian Furlong
07/25/2019	1.1	Updates per draft DEL review	Brian Furlong

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# 1 OVERVIEW

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M16-120A – EBT Dormant Account (08/2008) – is a notification of an inactive EBT account that is sent when an EBT account has not been used in 135 days. It informs the program participant that access to his or her EBT card is about to be stopped, when that will occur, and how to prevent it.

## 1.1 Current Design

M16-120A includes a rules section. This section has language which is not consistent with other CalSAWS notices.

## 1.2 Requests

Update the language in the rules section to be consistent with other CalSAWS notices.

## 1.3 Overview of Recommendations

Language in the rules section of the M16-120A will be updated to be consistent with other CalSAWS notices.

## 1.4 Assumptions

- 1) The logic to trigger the M16-120A will not be updated with this effort.
- 2) NA Back 9 will be included as page 2 of the M16-120A.



## 2 RECOMMENDATIONS

---

### 2.1 M16-120A – EBT Dormant Account (08/2008)

#### 2.1.1 Overview

M16-120A includes a rules section. This section has language which is not consistent with other CalSAWS notices.

#### 2.1.2 Description of Change

Language in the rules section of the M16-120A will be updated to be consistent with other CalSAWS notices.

Before:

**Rules:** These rules apply; you may review them at your **welfare** office: **EAS:** 16.120

---

After:

**Rules:** These rules apply; you may review them at your **social services** office: **MPP Section:** 16.120

---

## 2.1.3 Form Mockup

STATE OF CALIFORNIA - HEALTH AND WELFARE AGENCY

DEPARTMENT OF SOCIAL SERVICES

### EBT Inactive Account

---

Date:  
Case Name:  
Case Number:  
Worker Name:  
Worker ID:  
Worker Phone Number:  
Customer ID:

Our records tell us that you have not used your cash aid Electronic Benefit Transfer- EBT card for over      days.  
If you do not use your cash aid EBT card by      , the County will stop access to your EBT cash aid account.  
You can stop this action by using your cash aid EBT card.  
If you have lost your card call the toll free number      .  
If you need help using your EBT card, call your County Worker.

**This notice:**

- does not change your eligibility to get cash aid;
- does not change your responsibility to report changes that affect your eligibility;
- does not change the unused cash aid benefit in your EBT account;
- does not change your CalFresh or Medi-Cal benefits. If these benefits change, you will get a separate notice.

**EBT:** Keep your plastic Golden State Advantage Card if you use Electronic Benefit Transfer (EBT), even if your aid is terminated. Please do not throw it away.

**Rules:** These rules apply; you may review them at your social services office: MPP Section: 16.120

#### Questions? Ask Your Worker

**State Hearing:** If you think this action is wrong, you can ask for a hearing. The back of this page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

### 3 REQUIREMENTS

---

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
466	The Contractor shall update the form M16-120A (8/08)-EBT Inactive Account with the following updates: 1) Update "Welfare Office" to "Social Services Office" 2) Update "EAS" to "MPP Section"	N/A	Form is updated per requirement.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

SCR CA-207447 – DDID 463 – Remove TEMP 2215

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Brian Furlong
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/10/2019	1.0	Initial Draft	Brian Furlong

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# 1 OVERVIEW

---

TEMP 2215 - Electronic Benefit Transfer (EBT) Important Information (07/2002) – communicates the client's responsibility in the case of them believing their EBT card had been compromised. This form was given to clients when they were initially approved for CalFresh benefits.

The CF 285 – Application for CalFresh Benefits (11/2016) – was released with ACL 13-75. This form contains the information contained on the TEMP 2215. ACL 13-75 instructed counties to stop using the TEMP 2215 by October 1, 2013.

## 1.1 Current Design

TEMP 2215 is available in CalSAWS Template Repository in English.

## 1.2 Requests

Remove TEMP 2215 from CalSAWS.

## 1.3 Overview of Recommendations

TEMP 2215 will no longer be available in CalSAWS.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

---

### 2.1 TEMP 2215 - Electronic Benefit Transfer (EBT) Important Information (07/2002)

#### 2.1.1 Overview

Remove TEMP 2215 from CalSAWS.

#### 2.1.2 Description of Change

End-date TEMP 2215. This form is currently only available in English.



### 3 REQUIREMENTS

---

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
463	The Contractor shall remove form TEMP 2215 (07/02) - Electronic Benefit Transfer (EBT) Important Information.		Form will be removed.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207448 DDID 461– Migrate NA 840

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jamie Ng
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/2/2019	1.0	Original Draft	Jamie Ng
6/25/2019	1.1	Updates to Original	Brian Furlong
7/10/2019	1.2	Updated Assumptions	Amy Gill
7/29/2019	1.3	Updated made per draft DEL review comments	Brian Furlong

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# 1 OVERVIEW

---

## 1.1 Current Design

LRS sends an NA 840 – Notice of Action – Welfare to Work Plan – when a client fails or refuses to cooperate with the WTW/REP requirements and is a mandatory participant, and to schedule a good cause determination interview appointment.

Non-Compliance Status Reasons:

1. Not signing the WtW Plan
2. Not participating in activity
3. Not providing proof of satisfactory progress in assigned activity
4. Not accepting a job
5. Quitting a job
6. Reducing their earnings
7. Post WTW 24 MTC Fed Standards Not Met - Participation
8. Post WTW 24 MTC Fed Standards Not Met – Progress
9. Post WTW 24 MTC Failed to Sign Subsequent Fed Plan
10. Failed to sign post 24 MTC Fed Plan

LRS currently sends the WTW 27 as a separate form, along with the NA 840.  
LRS does not currently generate the NA 1242 (Budget Worksheet) with the NA 840.

## 1.2 Requests

Migrate form NA 840 (3/14) NOA-Participant Sanction and add the functionality of populating the form fields based on the Non-Compliance Status Reason used to trigger the form.

## 1.3 Overview of Recommendations

- 1) Add the C-IV NA 840 to CalSAWS.
- 2) Update the population logic of the NA 840 to work with the C-IV template.

## 1.4 Assumptions

- 1) The C-IV NA 840 includes the following forms:
  - a. NA Back 9 – Page 2
  - b. NA 1242 (Budget Worksheet) – Page 3
  - c. Blank page – Page 4
  - d. WTW 27 – Page 5

These forms will be included in the migrated NA 840 in CalSAWS.

- 2) The form generation logic will not be updated with this effort.
- 3) The migration counties will use the existing Appointment Scheduling functionality.
- 4) There are no changes to the generation logic for the WTW 27 when it is generated with other forms (e.g., NA 841, NA 845).

- 5) Updates to remove County or Agency specific references/logos from all State forms will be addressed with CA-207395 for DDID 1046.
- 6) Los Angeles County contact phone numbers (e.g., Local Legal Aid Office) will continue to populate on the NA 840. Updates to populate contact phone numbers for the 57 Migration counties, as well as updates for Los Angeles County to utilize the Correspondence Detail page, will be addressed through SCR CA-201992: DDID 1967: DDCR 3170: Update Forms to Use County's Collections Information.
- 7) The fields on the NA 840 will be editable even when pre-populated.

## 2 RECOMMENDATIONS

---

### 2.1 Replace the LRS NA 840 Template with the C-IV NA 840 Template in CalSAWS

#### 2.1.1 Overview

NA 840 templates used in C-IV will be migrated into CalSAWS, which includes the following forms:

- a. NA Back 9 – Page 2
- b. NA 1242 (Budget Worksheet) – Page 3
- c. Blank page – Page 4
- d. WTW 27 – Page 5

#### 2.1.2 Description of Changes

- 1) Migrate NA 840 used in C-IV to CalSAWS. NA 840 will be migrated with the following languages:
  - 1) Arabic
  - 2) Armenian
  - 3) Cambodian
  - 4) Chinese
  - 5) English
  - 6) Farsi
  - 7) Korean
  - 8) Russian
  - 9) Spanish
  - 10) Tagalog
  - 11) Vietnamese
- 2) Turn off the set logic which generates a WTW 27 as a separate form when a NA 840 is generated in LRS.

## 2.1.3 Mock Up

### NOTICE OF ACTION

- \_\_\_\_\_, our records show that you did not:
- Sign the Welfare-to-Work plan on \_\_\_\_\_.
  - Participate in \_\_\_\_\_ on \_\_\_\_\_.
  - Make good progress in your \_\_\_\_\_ activity because \_\_\_\_\_.
  - Accept a job at \_\_\_\_\_.
  - Keep your job at \_\_\_\_\_.
  - Keep the same amount of earnings.

#### WE NEED TO TALK TO YOU

To keep your family's cash aid from being lowered, we must talk with you about this problem. An appointment has been made for you

on \_\_\_\_\_, at \_\_\_\_\_ o'clock,

at \_\_\_\_\_.

If you need transportation or child care to go to this meeting, call your Welfare-to-Work worker at the telephone number listed below.

Welfare-to-Work Worker's Name: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

If you cannot go to this meeting, you must call your worker to set a new time. Unless you have a good reason, you can change this meeting only once. You can also call your worker to talk about the problem instead of going to the meeting. You must call your worker to set a new time to meet, or to talk about your problem on the telephone, by \_\_\_\_\_.

When you talk to your worker, you will be asked if you had a good reason ("good cause") for not doing what we asked you to do. If we verify that you had a good reason, your family's cash aid will not be lowered because of this problem. Some examples of good reasons are not having child care or not having transportation. For other good reasons, see the "Request For Good Cause Determination" form sent with this notice.

Your family's cash aid will also not be lowered if you can show us that you should have been exempt at the time you did not do your Welfare-to-Work activity.

If you do not have a good reason for not doing what we asked you to do, you can agree to a compliance plan to meet Welfare-to-Work rules. Your family's cash aid will not be lowered if you agree to a compliance plan and then do what it says. If you agree to a compliance plan and then later do not do what it says, your family's cash aid will be lowered. If this happens, you will get a separate notice.

Rules: These rules apply: CalWORKs MPP § 42-712 (exemptions); 42-713 (good cause); 42-721 (noncompliance and good cause). CalFresh MPP § 63.407.521. You may review these rules at your welfare office.

NA 840 (3/14) REQUIRED FORM - SUBSTITUTES PERMITTED

### DEPARTMENT OF PUBLIC SOCIAL SERVICES

Date: \_\_\_\_\_  
Case Name: \_\_\_\_\_  
Case Number: \_\_\_\_\_  
Worker Name: \_\_\_\_\_  
Worker ID: \_\_\_\_\_  
Worker Phone Number: \_\_\_\_\_  
Customer ID: \_\_\_\_\_

Questions? Ask your Worker.

**State Hearing:** If you think this action is wrong, you can ask for a hearing. Your benefits may not be changed if you ask for a hearing before this action takes place. If you and the county disagree or if you have not heard back from your worker, do not wait to ask for a hearing. You must ask for the hearing before a certain number of days. See the back of this notice for more information and to find out how to ask for a hearing.

#### HOW TO STOP YOUR FAMILY'S CASH AID FROM BEING LOWERED

As of \_\_\_\_\_, your family's cash aid will be lowered from \$ \_\_\_\_\_ to \$ \_\_\_\_\_ as shown on the following page, unless you show us you had a good reason for not doing what we asked you to do. If you do not have a good reason, you can agree to a compliance plan to keep your family's cash aid from being lowered. If you do not agree to a compliance plan, you will not get another notice before your family's cash aid is lowered.

See the next page for more information about how we figured how much your family will get if your family's cash aid is lowered.

We will not pay for transportation, or work- or training-related expenses if you are off cash aid. We may pay for child care, if you work or attend school.

#### HOW TO GET YOURSELF BACK ON CASH AID

Your family's cash aid is being lowered because you did not do what we asked you to do and you are being removed from the Assistance Unit. If your family's cash aid is lowered, you can get your portion of the cash aid back if you are eligible for it by contacting the county and telling them you want your cash aid back; then doing what the county asks.

#### TO CONTACT THE COUNTY ABOUT GETTING BACK ON CASH AID,

CALL \_\_\_\_\_.

**DO YOU NEED FREE LEGAL HELP?** You can get free help with this problem from:

Local Legal Aid Office: \_\_\_\_\_

State Welfare Rights Organization: \_\_\_\_\_

**CalFresh:** If the failure to meet Welfare-to-Work requirements also causes a CalFresh penalty, you may not be able to get CalFresh benefits. If there is a CalFresh penalty, you will get another notice telling you how long your CalFresh benefits will be stopped.

**Medi-Cal:** This Notice of Action does NOT change or stop Medi-Cal benefits. **Keep your plastic Benefits Identification Card(s).**



**YOUR HEARING RIGHTS**

You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh benefits will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing, check below:

Yes, lower or stop:  Cash Aid  CalFresh  Child Care

**While You Wait for a Hearing Decision for:**

**Welfare to Work:**

You do not have to take part in the activities.

You may receive child care payments for employment and for activities approved by the county before this notice.

If we told you your other supportive services payments will stop, you will not get any more payments, even if you go to your activity.

If we told you we will pay your other supportive services, they will be paid in the amount and in the way we told you in this notice.

- To get those supportive services, you must go to the activity the county told you to attend.
- If the amount of supportive services the county pays while you wait for a hearing decision is not enough to allow you to participate, you can stop going to the activity.

**Cal-Learn:**

- You cannot participate in the Cal-Learn Program if we told you we cannot serve you.
- We will only pay for Cal-Learn supportive services for an approved activity.

**OTHER INFORMATION**

**Medi-Cal Managed Care Plan Members:** The action on this notice may stop you from getting services from your managed care health plan. You may wish to contact your health plan membership services if you have questions.

**Child and/or Medical Support:** The local child support agency will help collect support at no cost even if you are not on cash aid. If they now collect support for you, they will keep doing so unless you tell them in writing to stop. They will send you current support money collected but will keep past due money collected that is owed to the county.

**Family Planning:** Your welfare office will give you information when you ask for it.

**Hearing File:** If you ask for a hearing, the State Hearing Division will set up a file. You have the right to see this file before your hearing and to get a copy of the county's written position on your case at least two days before the hearing. The state may give your hearing file to the Welfare Department and the U.S. Departments of Health and Human Services and Agriculture. (W&I Code Sections 10850 and 10950.)

**TO ASK FOR A HEARING:**

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:

OR

- Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

**HEARING REQUEST**

I want a hearing due to an action by the Welfare Department of \_\_\_\_\_ County about my:

Cash Aid  CalFresh  Medi-Cal

Other (list) \_\_\_\_\_

Here's Why: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you need more space, check here and add a page.

I need the state to provide me with an interpreter at no cost to me. (A relative or friend cannot interpret for you at the hearing.) My language or dialect is: \_\_\_\_\_

NAME OF PERSON WHOSE BENEFITS WERE DENIED, CHANGED OR STOPPED

BIRTH DATE PHONE NUMBER

STREET ADDRESS

CITY STATE ZIP CODE

SIGNATURE DATE

NAME OF PERSON COMPLETING THIS FORM PHONE NUMBER

I want the person named below to represent me at this hearing. I give my permission for this person to see my records or go to the hearing for me. (This person can be a friend or relative but cannot interpret for you.)

NAME PHONE NUMBER

STREET ADDRESS

CITY STATE ZIP CODE

# NOTICE OF ACTION

(Continued)

Notice Date: \_\_\_\_\_  
Case Name: \_\_\_\_\_  
Case Number: \_\_\_\_\_

You reported the following income for the quarter.

Month	_____	_____
Month	_____	_____
Month	_____	_____

### Monthly Cash Aid Amount

<b>Section A. Countable Income</b>	
Total Self-Employment Income .....	\$ _____
Self-Employment Expenses:	
a. 40% Standard .....	- _____
OR	
b. Actual .....	- _____
Net Earnings from Self-Employment .....	= _____
Total Disability-Based Unearned Income (DBI) (Assistance Unit + Non-Assistance Unit Members) .....	\$ _____
\$225 DBI Disregard (if DBI is greater than \$225) .....	- _____
Nonexempt Unearned Disability-Based Income .....	= _____
OR	
Unused DBI Disregard .....	= _____
Total Earned Income .....	\$ _____
Net Earnings from Self-Employment (from above) .....	+ _____
Subtotal .....	= _____
Unused Amount of \$225 (from above) .....	- _____
Subtotal .....	= _____
Earned Income Disregard 50% .....	- _____
Subtotal .....	= _____
Nonexempt Unearned Disability-Based Income (from above) .....	+ _____
Other Nonexempt Income (Assistance Unit + Non- Assistance Unit Members) .....	+ _____
_____ .....	+ _____
_____ .....	+ _____
<b>Net Countable Income .....</b>	<b>= _____</b>

### Section B. Your Cash Aid

1. Maximum Aid _____ Persons (Assistance Unit + Non-Assistance Unit Members) .....	\$ _____
2. Special Needs (Assistance Unit + Non-Assistance Unit Members) .....	+ _____
3. Net Countable Income from Section A .....	- _____
4. Subtotal .....	= _____
5. Maximum Aid _____ Persons (Assistance Unit Only) (Excluding MFG, or Penalized Persons) .....	\$ _____
6. Special Needs (Assistance Unit only) .....	+ _____
7. Maximum Aid Subtotal .....	= _____
8. <b>Full Month Aid Subtotal</b> (Lowest Amount on Line 4 or 7) .....	= _____
9. Adjustments: 25% Child Support Penalty(ies) .....	- _____
Overpayment .....	- _____
Cal-Learn Penalty(ies) .....	- _____
Cal-Learn Bonus .....	+ _____
10. <b>Monthly Cash Aid Amount</b> (Line 8 Adjusted) .....	<b>= _____</b>

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# REQUEST FOR GOOD CAUSE DETERMINATION

CLIENT'S NAME	CASE #	DATE
WELFARE TO WORK WORKER'S NAME	WORKER #	PHONE #

**Returning this form is optional.** You can still claim that you had a good reason ("good cause") for not meeting Welfare to Work rules if you do not return this form. Even if you do return this form, you must still call your Welfare to Work worker before your appointment OR go to the appointment to talk about your Welfare to Work participation problem. If you do not go to your appointment or call, your cash aid may be lowered if you do not give us enough information on this form to show us you had a good reason for not participating. The date, time, and place of your appointment are on the Notice of Action (NA 840) that the county sent to tell you about your participation problem.

**Instructions:** If you had a good reason for not doing what you were supposed to do in Welfare to Work, fill out this form. Give us any information you may have (for example, a doctor's note) to show us that you had a good reason. You can also tell us about your good reason by giving us the details in the section below.

After you fill out the form:

- 1) Make a copy of the form for you to keep; **AND**
- 2) Mail or take the form back to your Welfare to Work worker before the date of your appointment to discuss your participation problem; OR bring the completed form to the appointment.

**If you have any questions, call your Welfare to Work worker.**

\_\_\_\_\_, our records show that you did not:

- Sign the Welfare to Work plan on \_\_\_\_\_.
- Participate in \_\_\_\_\_ on \_\_\_\_\_.
- Make good progress in your \_\_\_\_\_ activity because \_\_\_\_\_.
- Accept a job at \_\_\_\_\_.
- Keep your job at \_\_\_\_\_.
- Keep the same amount of earnings.

Your cash aid will not be lowered if you had a good reason for not doing what we asked. Examples of good reasons are listed to the right.

You may have to give your worker more information to prove your reason.

If you do not have a good reason, your cash aid will not be lowered if you agree to a compliance plan and do what the plan says.

### Good Cause Reasons:

Check all the reasons that apply to you. If your reasons are not on the list, you can check the last box and write in your reason.

- I was sick.
- My child or another member of my household was sick and needed my care.
- I did not have child care.
- I recently had a death in my family (spouse, parent, child, or close relative).
- I did not have transportation or money for gas.
- The round trip travel time would be more than:
  - two hours by bus or other public transportation
  - two miles round trip on foot
- Weather or other act of nature prevented travel.
- I need help with a learning disability, mental health impairment, domestic violence issue, or substance abuse problem.
- I am homeless or living in unstable, temporary housing.
- I had legal problems.
- I was in jail.
- I was working that day.
- I never got a written notice.
- I have language problems.
- Any other reason that you believe should be considered.

(Explain:) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Give us any details or information that will show us that you had a good reason for not participating.**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

CLIENT'S NAME (PLEASE PRINT)  
 \_\_\_\_\_  
 CLIENT'S SIGNATURE  
 \_\_\_\_\_  
 CLIENT'S PHONE NUMBER      DATE  
 \_\_\_\_\_      \_\_\_\_\_

WTW 27 (10/03) REQUIRED FORM - SUBSTITUTE PERMITTED

## 2.2 Update Population Logic for NA 840

### 2.2.1 Overview

Population logic for the NA 840 will be maintained where able and updated where necessary to work with the new NA 840 template.

### 2.2.2 NA 840 Form

Field	Description
Name	Name of Sanctioned Person
Sign the Welfare to Work plan on	<p>Date the Welfare to Work Plan was Not Signed</p> <p>Checkbox will be checked on the NA 840 if the Non-Compliance Status Reason is one of the below:</p> <ul style="list-style-type: none"> <li>• Not signing the WTW Plan</li> <li>• Failed to sign Post 24 MTC Fed Plan</li> <li>• Post WTW 24 MTC Failed to Sign Subsequent Fed Plan</li> </ul>
Participate in	<p>Name of the activity that the participant did not participate in</p> <p>Checkbox will be checked on the NA 840 if the Non-Compliance Status Reason is one of the below:</p> <ul style="list-style-type: none"> <li>• Not participating in activity</li> <li>• Post WTW 24 MTC Fed Standards Not Met - Participation</li> </ul> <p>WTW Assigned Activity will be captured from the WTW Status Detail page</p> <p>Exceptions:</p> <ul style="list-style-type: none"> <li>• Appraisal activities; form will only populate "Appraisal"</li> <li>• Employment activities; form will only populate "Employment"</li> <li>• Work Study activities; form will only populate "Work Study"</li> </ul>
On	Date Participant Did Not Participate in Assigned Activity (MM/DD/YYYY)

	<p>Populate the date if any of the following Non-Compliance Status Reasons were added:</p> <ul style="list-style-type: none"> <li>• Not participating in activity</li> <li>• Post WTW 24 MTC Fed Standards Not Met - Participation</li> </ul>
Make good progress in your	<p>Activity in which Participant did not make adequate progress</p> <p>Checkbox will be checked on the NA 840 and populate the assigned WTW Activity when the Non-Compliance Status Reason is one of the following:</p> <ul style="list-style-type: none"> <li>• Not providing proof of satisfactory progress in assigned activity"</li> <li>• Post WTW 24 MTC Fed Standards Not Met – Progress</li> </ul> <p>Exceptions:</p> <ul style="list-style-type: none"> <li>• Appraisal activities; form will only populate "Appraisal"</li> <li>• Employment activities; form will only populate "Employment"</li> <li>• Work Study activities; form will only populate "Work Study"</li> </ul>
Because	<p>Reason participant did not make adequate progress</p> <p>If the Non-Compliance Status Reason selected on WTW Status Detail Page is "<b>Not providing proof of satisfactory progress in assigned activity</b>" then populate the reason as, '<b>Not providing proof of satisfactory progress</b>' on this field.</p> <p>If the Non-Compliance Status Reason selected on WTW Status Detail Page is "<b>Post WTW 24 MTC Fed Standards Not Met - Progress</b>" then populate the reason as, "<b>Not providing proof of satisfactory progress</b>" on this field.</p>
Accept a Job at	<p>Checkbox will be checked on the NA 840 if the Non-Compliance Status Reason is "Not accepting a job".</p> <p>NOTE: The name of the job field will be left as an editable field for user to populate. This field will be left blank when the form is generated via batch</p>

Keep your job at	Check box will be checked-in when the Non-Compliance Status Reason is "Quitting a job" NOTE: The name of the job field will be left as an editable field for user to populate. This field will be left blank when the form is generated via batch
Keep the same amount of earnings	Check box will be checked in when the Non-Compliance Status Reason is "Reducing their earnings" from the WTW status detail page.
Appointment Date	Date of scheduled interview (MM/DD/YYYY)  Appointment date from the Appointment Detail page.
Appointment Time	Time of Interview (hh:mi AM/PM)  Appointment Time from the Appointment Detail page
Appointment Place	Location of Interview  Appointment location from the Appointment Detail page
WTW Worker's Name	WTW/REP Worker Name
Telephone #	WTW/REP worker Phone Number
Date	Deadline for person to take care of participation issue. 21 Calendar Days from form generation date (MM/DD/YYYY)
Date	Effective Date Cash Aid Will be Lowered (MM/DD/YYYY)
Amount	Old Cash Aid Amount
Amount	New Cash Aid Amount
Telephone #	WTW/REP Phone Number
Telephone #	Local Legal Aid Office Telephone Number
Telephone #	State Welfare Rights Office Telephone Number

### 2.2.3 NA Back 9 Form

NA Back 9 is added to forms as a fragment when used. It will continue to populate per the fragment population as it does today.

### 2.2.4 NA 1242 Form

Field(s)	Description
Total Self-Employment Income	CalWORKs budget total business income
40% Standard	CalWORKs budget Standard Business Deduction
Actual	CalWORKs budget Actual Business Deduction
Net Earnings from Self-Employment	CalWORKs budget total business income minus the value of the greater of standard business deduction or actual business deduction
Assistance Unit + Non-Assistance Unit Members	CalWORKs budget Disability Income Amount
\$225 DBI Disregard (if DBI is greater than \$225)	CalWORKs budget with the least Disability Income Amount or \$225 if Disability Income Amount is larger
Nonexempt Unearned Disability-Based Income	CalWORKs Budget Total Disability Income minus \$225 Disregard (if amount greater than \$225) 0 if amount less than \$225
Unused DBI Disregard	\$225 minus CalWORKs Budget Total Disability Income or \$225 if no Total Disability Income
Total Earned Income	CalWORKs Budget Earned Income Amount
Net Earnings from Self-Employment (from above)	CalWORKs budget total business income
Subtotal	Sum of previous two fields
Unused Amount of \$225 (from above)	Same as \$225 DBI Disregard (if DBI is greater than \$225) field above
Subtotal	Difference of previous two fields
Earned Income Disregard 50%	Unused DBI Disregard
Subtotal	Difference of previous two fields



Nonexempt Unearned Disability-Based Income (from above)	CalWORKs Budget Total Disability Income minus \$225 Disregard (if amount greater than \$225) 0 if amount less than \$225
Other Nonexempt Income (Assistance Unit + Non-Assistance Unit Members)	UIB
Net Countable Income	Earned Income Disregard 50% field + Nonexempt Unearned Disability-Based Income field + UIB
Maximum Aid _ Persons	CalWORKs Budget Unit MAP Size if role is MC Member Only. Otherwise, Unit MAP Size minus 1
(Assistance Unit + Non-Assistance Unit Members)	Reference table lookup for EDBC limit based on MAP size
Special Needs (Assistance Unit + Non-Assistance Unit Members)	Previous field + Family Special Needs Amount minus Net Countable Income
Net Countable Income from Section A	Net Countable Income from Section A
Subtotal	(Assistance Unit + Non-Assistance Unit Members) + Special Needs (Assistance Unit + Non-Assistance Unit Members) minus Net Countable Income from Section A
Maximum Aid _ Persons (Assistance Unit Only)	CalWORKs Budget Assistance Unit Size Quantity
(Excluding MFG, or Penalized Persons)	CalWORKs Budget Assistance Unit MAP Amount
Special Needs (Assistance Unit Only)	CalWORKs Budget Assistance Unit Special Need Amount
Maximum Aid Subtotal	Assistance Unit MAP amount + Assistance Unit Special Need amount
(Lowest Amount on Line 4 or 7)	CW Budget Aid Payment Amount

25% Child Support Penalty(ies)	EDBC adjustments for non-cooperation penalty
Overpayment	Active recovery account amount attached to EDDB
Cal-Learn Penalty(ies)	0
Cal-Learn Bonus	0.00
(Line 8 Adjusted)	New cash aid amount (should be same as on NA 840 new benefit amount)

### 2.2.5 WTW 27 Form

Field(s)	Description
Name	Name of Sanctioned Person
Sign the Welfare to Work plan on	<p>Date the Welfare to Work Plan was Not Signed (MM/DD/YYYY)</p> <p>Checkbox will be checked on the WTW 27 if the Non-Compliance Status Reason is one of the below:</p> <ul style="list-style-type: none"> <li>• Not signing the WTW Plan</li> <li>• Failed to sign Post 24 MTC Fed Plan</li> <li>• Post WTW 24 MTC Failed to Sign Subsequent Fed Plan</li> </ul>
Participate in	<p>Name of the activity that the participant did not participate in</p> <p>Checkbox will be checked on the WTW 27 if the Non-Compliance Status Reason is one of the below:</p> <ul style="list-style-type: none"> <li>• Not participating in activity</li> <li>• Post WTW 24 MTC Fed Standards Not Met - Participation</li> </ul> <p>WTW Assigned Activity will be captured from the WTW Status detail page</p> <p>Exceptions:</p> <ul style="list-style-type: none"> <li>• Appraisal activities; form will only populate "Appraisal"</li> <li>• Employment activities; form will only populate "Employment"</li> </ul>

	<ul style="list-style-type: none"> <li>• Work Study activities; form will only populate “Work Study”</li> </ul>
On	<p>Date Participant Did Not Participate in Assigned Activity (MM/DD/YYYY)</p> <p>Populate the date of any of the following Non-Compliance Status Reasons were added:</p> <ul style="list-style-type: none"> <li>• Not participating in activity</li> <li>• Post WTW 24 MTC Fed Standards Not Met - Participation</li> </ul>
Make good progress in your	<p>Activity in which Participant did not make adequate progress</p> <p>Checkbox will be checked on the WTW 27 and populate the assigned WTW Activity when the Non-Compliance Status Reason is one of the following:</p> <ul style="list-style-type: none"> <li>• Not providing proof of satisfactory progress in assigned activity”</li> <li>• Post WTW 24 MTC Fed Standards Not Met – Progress</li> </ul> <p>Exceptions:</p> <ul style="list-style-type: none"> <li>• Appraisal activities; form will only populate “Appraisal”</li> <li>• Employment activities; form will only populate “Employment”</li> <li>• Work Study activities; form will only populate “Work Study”</li> </ul>
Because	<p>Reason participant did not make adequate progress</p> <p>If the Non-Compliance Status Reason selected on WTW Status Detail Page is “<b>Not providing proof of satisfactory progress in assigned activity</b>” then populate the reason as, ‘<b>Not providing proof of satisfactory progress</b>” on this field.</p> <p>If the Non-Compliance Status Reason selected on WTW Status Detail Page is “<b>Post WTW 24 MTC Fed Standards Not Met - Progress</b>” then populate the reason as, “<b>Not providing proof of satisfactory progress</b>” on this field.</p>

Accept a Job at	Checkbox will be checked on the WTW 27 if the Non-Compliance Status Reason is "Not accepting a job". NOTE: The name of the job field will be left as an editable field for user to populate. This field will be left blank when the form is generated via batch
Keep your job at	Check box will be checked-in when the Non-Compliance Status Reason is "Quitting a job" NOTE: The name of the job field will be left as an editable field for user to populate. This field will be left blank when the form is generated via batch
Keep the same amount of earnings	Check box will be checked in when the Non-Compliance Status Reason is "Reducing their earnings" from the WTW status detail page.

### 3 REQUIREMENTS

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#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
461	The Contractor shall migrate form NA 840 (3/14) NOA-Participant Sanction with the ability of automatically populating this form	N/A	Form updated as specified in the requirement.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207449 DDID 458 – Remove AR 2 CR

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Jamie Ng
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/7/2019	1.0	Original Draft	Jamie Ng

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# 1 OVERVIEW

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The AR 2 CR form requests a CalWORKs participant to report when their total monthly income reaches a certain level. The form also informs the participant when to report.

## 1.1 Current Design

LRS has AR 2 CR (7/15) CR – Reporting Changes for CalWORKs and CalFresh – available in English and Spanish in Template Repository.

## 1.2 Requests

Change Reporting is no longer a reporting type as of July 2016. The AR 2 CR needs to be removed from LRS.

## 1.3 Overview of Recommendations

Remove the AR 2 CR from LRS Template Repository

## 1.4 Assumptions

N/A



## 2 RECOMMENDATIONS

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### 2.1 Client Correspondence

#### 2.1.1 Overview

LRS has the AR 2 CR (7/15) CR – Reporting Changes for CalWORKs and CalFresh available in English and Spanish in Template Repository.

#### 2.1.2 Description of Change

Remove the AR 2 CR (7/15) form from the LRS Template Repository. Both English and Spanish versions will no longer be available after this change.

## 3 REQUIREMENTS

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### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
458	The CONTRACTOR shall remove form AR 2 CR (7/15) CR-Reporting Changes for CalWORKs and CalFresh.	Change Reporting is going away July 2016, Requirement Design Differences document will need to be updated.	Form updated as specified in the requirement.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207450 - DDID 456 – CW 2208 Wording  
Update

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Jamie Ng
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/1/2019	1.0	Original Draft	Jamie Ng

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# 1 OVERVIEW

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CW 2208 is generated when participants are in the following situations: when a participant applies for cash aid, during the annual redetermination, after the participant used 18 months of the WTW 24-month time clock, and after the participant used 20 months, but prior the end of the 21st month of the WTW 24-month time clock. Also the NA Back 9 will be included on the back of this form, and provides information on the participant's right to a hearing and instructions on how to request a hearing.

## 1.1 Current Design

CW 2208 includes a chart. This chart has language which is not consistent with the State form.

## 1.2 Requests

Update the language in the chart section to be consistent with the State form.

## 1.3 Overview of Recommendations

Language in the chart section of the CW 2208 will be updated to be consistent with language on the State form.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

---

### 2.1 CW 2208 - INFORMATION ABOUT YOUR WTW 24-MONTH TIME CLOCK

#### 2.1.1 Overview

CW 2208 includes a chart. This chart has language which is not consistent with the State form.

#### 2.1.2 Description of Change

Update the CW 2208 (2/13)-Your Welfare-To-Work 24-Month Time Clock with the following updates:

1) Add "Required # of Core Hours" in the table for "During 24-Month Clock" and "After the 24-Month Clock."

Before:

Number of Adults in the Family (Assistance Unit)	Weekly Hours of Participation	During 24-Month Clock	After the 24-Month Clock
Single-adult with a child under 6 years old	20	0	20
Single-adult with no children under 6 years old	30	0	20
Two-parent families	35	0	30

After:

Number of Adults in the Family (Assistance Unit)	Weekly Hours of Participation	Required # of Core Hours During 24-Month Clock	Required # of Core Hours After the 24-Month Clock
Single-adult with a child under 6 years old	20	0	20
Single-adult with no children under 6 years old	30	0	20
Two-parent families	35	0	30

## 2.1.3 Form Mockup

### **THIS FORM GIVES YOU INFORMATION ABOUT YOUR WTW 24-MONTH TIME CLOCK.**

As of \_\_\_\_\_, you have \_\_\_\_ months left on your WTW 24-Month Time Clock. During your WTW 24-Month Time Clock, you may participate in many different activities in WTW to help you move toward self-sufficiency.

Months will not count when:

- you are in the process of developing a WTW plan.
- you are meeting the required number of participation hours in certain activities that meet federal work rules.
- you are in Cal-Learn.
- you are exempt from participating in WTW.
- the county finds that you have a good reason for not participating in WTW. This could include the county not having the supportive services you need to do your assignment.
- you have been sanctioned in WTW.
- You have been granted a domestic abuse waiver to the WTW 24-Month Time Clock.

After you have used all months of your WTW 24-Month Time Clock, the types of activities you must do in WTW will change. You will have fewer allowable activities, and you will need to meet core hourly requirements unless you qualify for an extension to the WTW 24-Month Time Clock. The core activities may include employment, work experience, and community service. Vocational education and training may also be allowed for up to one year as a core activity if you have not already used your 12-Month lifetime limit where vocational education can count as a core activity. The chart below shows you the difference in core activity requirements during and after the WTW 24-Month Time Clock.

Number of Adults in the Family (Assistance Unit)	Weekly Hours of Participation	Required # of Core Hours During 24-Month Clock	Required # of Core Hours After the 24-Month Clock
Single-adult with a child under 6 years old	20	0	20
Single-adult with no children under 6 years old	30	0	20
Two-parent families	35	0	30

If you do not meet these hours with an allowable core activity after using all of your WTW 24-Month Time Clock, you may be removed from the Assistance Unit and your cash aid may be lowered. In addition to this informing notice received at application and redetermination, the county will give you a Notice of Action (NOA) between your 18th and 21st months on the WTW 24-Month Time Clock and when you have used all 24 months of your WTW 24-Month Time Clock.

### **CONTACT YOUR WORKER RIGHT AWAY IF YOU:**

- want to change your WTW plan because of the participation requirements;
- think you should not have months counted toward the WTW 24-Month Time Clock;
- need more information about the WTW 24-Month Time Clock requirements or how to ask for an extension to your clock.

**CONTACT YOUR WORKER IF YOU THINK THIS NOTICE IS WRONG. YOU MAY ALSO ASK FOR A STATE HEARING. "YOUR HEARING RIGHTS" FORM ON THE BACK SIDE OF THIS PAGE TELLS YOU HOW TO ASK FOR A STATE HEARING.**

CW 2208 (2/13) REQUIRED FORM - SUBSTITUTES PERMITTED

### 3 REQUIREMENTS

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#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
456	The Contractor shall update the CW 2208 (2/13)-Your Welfare-To-Work 24-Month Time Clock with the following updates: 1) Add "Required # of Core Hours" in the table for "During 24-Month Clock" and "After the 24-Month Clock"	N/A	Form updated as specified in the requirement.



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207462 DDID 386 –

Updates to WINS Aid Code Descriptions

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/27/2019	1.0	Initial Revision	Duke Vang
7/24/2019	1.1	Updated long decode name based on CTCR Review feedback to spell out WINS and TCFAP	Duke Vang

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# 1 OVERVIEW

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## 1.1 Current Design

Work Incentive Nutritional Supplement (WINS) was introduced at part of All County Letter (ACL) 13-71 to provide an additional \$10 food benefit to Non-Assistance CalFresh (NACF) households to meet the eligibility work requirements. CalFresh (CF) households that meet the WINS eligibility are assigned one of the following WINS Aid Codes:

- R4 – WINS
- R5 – WINS
- R6 – WINS
- R7 – WINS
- R8 – WINS
- R9 - WINS

## 1.2 Requests

Per Design Differences Identification (DDID) 386, the current WINS Aid Code descriptions do not convey the household composition of the WINS Aid Code. Update all the WINS Aid Codes (R4, R5, R6, R7, R8, and R9) descriptions to include the household composition and funding.

## 1.3 Overview of Recommendations

Update the WINS Aid Code Short and Long descriptions to include the household composition and funding.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

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### 2.1 Aid Code

#### 2.1.1 Overview

Update the WINS Aid Code Short and Long descriptions to include the household composition and funding.

#### 2.1.2 Description of Changes

Update the WINS Aid Code (CT 184) as follows:

Aid Code	Old Short Description	Old Long Description	New Short Description	New Long Description
R4	R4 – WINS	R4 – WINS	R4-WINS Non-Two-Parent	R4-Work Incentive Nutritional Supplement Program Non-Two-Parent
R5	R5 – WINS	R5 – WINS	R5-WINS Two-Parent	R5- Work Incentive Nutritional Supplement Two-Parent
R6	R6 – WINS	R6 – WINS	R6-WINS CFAP	R6- Work Incentive Nutritional Supplement California Food Assistance Program
R7	R7 – WINS	R7 – WINS	R7-WINS Non-Two Parent TCF	R7- Work Incentive Nutritional Supplement Non-Two Parent Transitional CalFresh
R8	R8 – WINS	R8 – WINS	R8-WINS Two-Parent TCF	R8- Work Incentive Nutritional Supplement Two-Parent

				Transitional CalFresh
R9	R9 – WINS	R9 – WINS	R9-WINS TCFAP	R9- Work Incentive Nutritional Supplement Transitional California Food Assistance Program

Note: There will be no changes to the effective dating of the old Aid Code descriptions. All new and historic Aid Code records will now have the new descriptions effective immediately and retroactively.

### 3 REQUIREMENTS

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
368	<p>The CONTRACTOR shall update the short description for aid codes R4, R5, R6, R7, R8 and R9 as follows:</p> <ul style="list-style-type: none"> <li>1) R4 WINS to R4-WINS Non-Two Parent</li> <li>2) R5 WINS to R5-Two-Parent</li> <li>3) R6 WINS to R6-CFAP</li> <li>4) R7 WINS to R7-Non-Two Parent TCF</li> <li>5) R8 WINS to R8-Two-Parent TCF</li> <li>6) R9 WINS to R9-TCFAP</li> </ul>	N/A	<ul style="list-style-type: none"> <li>1. Updated "R4 WINS" to "R4-WINS Non-Two Parent"</li> <li>2. Updated "R5 WINS" to "R5-WINS Two-Parent"</li> <li>3. Updated "R6 WINS" to "R6-WINS CFAP"</li> <li>4. Updated "R7 WINS" to "R7-WINS Non-Two Parent TCF"</li> <li>5. Updated "R8 WINS" to "R8-WINS Two-Parent TCF"</li> <li>6. Updated "R9 WINS" to "R9-WINS TCFAP"</li> </ul>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

SCR CA-207464 DDID 368 – Add New Homeless  
Customer Need Type Codes



<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/9/2019	1.0	Initial Revision	Duke Vang
4/30/2019	1.1	Added recommendations for CT 1870	Duke Vang
7/25/2019	1.2	Updates based on DEL 1 comments	Duke Vang

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# 1 OVERVIEW

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## 1.1 Current Design

The Need Detail page documents the needs of a Customer to meet an Activity. In documenting the Need, a Worker must select a "Category" (Customer Need Category). The "Category" will drive the available options under the "Type" (Customer Need Type) dropdown field. Only certain "Type" values will be available under certain "Category" values. The mechanism that controls the dynamic display of "Type" values is the code hierarchy.

## 1.2 Requests

Per Design Differences ID (DDID) 368, the Customer Need Type of "Permanent" and "Temporary" need to be made as available options when the Customer Need Category of "Homeless Assistance" is selected.

## 1.3 Overview of Recommendations

The Customer Need Type of "Permanent" and "Temporary" need to be created and made as available Customer Need Types when a "Homeless Assistance" Customer Need Category is chosen.

## 1.4 Assumptions

1. No new Pay Codes and Fund Codes will be required for the new "Permanent" and "Temporary" Customer Need Types.
2. No county interface testing is required.
3. The County Code reference column for the Customer Need to Program Map (CT 1870) codes table is not utilized by the Service Arrangement Detail page. All codes tables entries for CT 1870 will be applicable for all counties.
4. Supervisor and Deputy Approval on the Service Arrangement Detail page are county configurable and is only enabled for Los Angeles County.

## 2 RECOMMENDATIONS

### 2.1 Need Detail Page

#### 2.1.1 Overview

“Permanent” and “Temporary” will be available Customer Need Type Codes when “Homeless Assistance” is selected as the Customer Need Category on the Need Detail page.

#### 2.1.2 Need Detail Mockup

The screenshot shows a web form titled "Need Detail". At the top right, there are two buttons: "Save And Return" and "Cancel". Below the title, a red asterisk icon is followed by the text "\* - Indicates required fields".

The form contains the following fields:

- Name: \***: A dropdown menu with "- Select -" selected.
- Category: \***: A dropdown menu with "Homeless Assistance" selected.
- Type: \***: A dropdown menu with a list of options: "Select -", "Permanent", "Temporary", and "Supplemental Homeless Assistance".
- Begin Date: \***: A date input field with "04/18/2019" and a calendar icon.
- Description:**: A text input field.
- Status: \***: A dropdown menu with "- Select -" selected.
- Status Reason: \***: A dropdown menu with "- Select -" selected.

At the bottom right, there are two buttons: "Save And Return" and "Cancel". At the bottom of the form, a dark blue bar contains the text: "This Type\_1 page took 0.19 seconds to load."

Figure 2.1.1 – Need Detail

#### 2.1.3 Description of Changes

1. Make the following updates to the code hierarchy for Customer Need Category (CT 163):

Parent Category ID	Parent Code ID	Parent Code Description	Child Code ID	Child Code Description
163	6403	Homeless Assistance	6460	Permanent
163	6403	Homeless Assistance	6461	Temporary

Note 1: The new entries will be effective retroactively and going forward (from MIN\_DATE to HIGH\_DATE)

Note 2: All pages that displays dropdown fields for Need Category and Need Type will reflect these code hierarchy changes, including, but not limited to the Need List page.

2. Add new entries to the Customer Need to Program Map (CT 1870) for the following Customer Need Type with the following new values:

a. Permanent

- i. Need Category: HO
- ii. Need Type: 56
- iii. Program Code: HP
- iv. Issuance Category: SB
- v. Max Dollar: 1000
- vi. Max Quantity: null
- vii. Period: null
- viii. Supervisor Approval: Y
- ix. Deputy Approval: null
- x. County Code: null
- xi. EBT: Y
- xii. Warrant: Y
- xiii. Direct Deposit: null

b. Temporary

- i. Need Category: HO
- ii. Need Type: 57
- iii. Program Code: HT
- iv. Issuance Category: SB
- v. Max Dollar: 1000
- vi. Max Quantity: null
- vii. Period: null
- viii. Supervisor Approval: Y
- ix. Deputy Approval: null
- x. County Code: null
- xi. EBT: Y
- xii. Warrant: Y
- xiii. Direct Deposit: null

#### **2.1.4 Page Location**

**Global: Employment Services**

**Local: Supportive Services**

**Task: Needs**

## 3 REQUIREMENTS

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### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
368	<p>The CONTRACTOR shall migrate the values of "Permanent" and "Temporary" in the "Type" field when "Homeless" is selected from the "Category" field on the Needs List page and the Need Detail page.</p>	<ol style="list-style-type: none"> <li>1. No new Pay Codes and Fund Codes will be required for the new "Permanent" and "Temporary" Customer Need Types.</li> <li>2. No county interface testing is required.</li> <li>3. The County Code reference column for the Customer Need to Program Map (CT 1870) codes table is not utilized by the Service Arrangement Detail page. All codes tables entries for CT 1870 will be applicable for all counties.</li> <li>4. Supervisor and Deputy Approval on the Service Arrangement Detail page are county configurable and is only enabled for Los Angeles County.</li> </ol>	<p>Updated the Customer Need Category hierarchy to allow "Permanent" and "Temporary" as selectable Customer Need Types when "Homeless Assistance" is selected as a Customer Need Category.</p>



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207465 DDID 360 –

Updates to Payment Request Search Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/27/2019	1.0	Initial Revision	Duke Vang

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# 1 OVERVIEW

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## 1.1 Current Design

The Payment Request Search page is used to search for Supportive Services Payment Requests that have been created. Users can choose to search a Payment Request by the Case, Status, Invoice Number, Service Arrangement, Voucher Number, Payee, and Payment Request Number. When searching Payment Requests by Status, "Pending Deputy Approval" and "Pending Deputy Approval (L2)" are two of the possible values under "Status".

## 1.2 Requests

Per CalSAWS Migration Design Differences Identification (DDID) 360, the "Pending Deputy Approval" Payment Request Status needs to be relabeled to "Awaiting Approval (L2)" and the "Pending Deputy Approval (L2)" Payment Request Status needs to be relabeled to "Awaiting Approval (L3)" under the "Status" dropdown value.

## 1.3 Overview of Recommendations

Relabel the "Pending Deputy Approval" and "Pending Deputy Approval (L2)" Payment Request Statuses to be more generic and applicable to all 58 CalSAWS Counties.

## 1.4 Assumptions

1. All existing issuance batch processes will continue to function the same with the label changes.

## 2 RECOMMENDATIONS

### 2.1 Payment Request Search

#### 2.1.1 Overview

The Payment Request Search page is used to search for Payment Requests that have been created. Per DDID 360, the “Pending Deputy Approval” and “Pending Deputy Approval (L2)” Payment Request Statuses need to be relabeled under the “Status” dropdown value when the “Search By” field is “Status”.

#### 2.1.2 Payment Request Search Mockup

The screenshot displays the "Payment Request Search" interface. At the top left, there is a legend: "\* - Indicates required fields". The main search area contains several fields: "Search By:" with a dropdown menu set to "Status"; "Office Name:" with the text "Management Information Evaluation" and a "Remove" button; "Status:" with a dropdown menu showing a list of options including "Approved", "Awaiting Approval", "Awaiting Approval (L2)", "Awaiting Approval (L3)", "Disapproved", "Denied", "In Progress", "Pending", and "Issuance Created", with "Advanced Search" at the bottom; and "Status Date To:" with a date input field containing "06/27/2019" and a calendar icon. A "Search" button is located at the top right of the search area. Below the search area, there is a "Results per Page:" dropdown set to "25" and another "Search" button. At the bottom of the page, a dark blue banner contains the text: "This Type 1 page took 0.31 seconds to load."

Figure 2.1.1 – Payment Request Search

#### 2.1.3 Description of Changes

Update the Short and Long Description of the following Payment Request Statuses (CT 109) as follows:

<b>Code</b>	<b>Old Short Description</b>	<b>Old Long Description</b>	<b>New Short Description</b>	<b>New Long Description</b>
PD	Pending Deputy Approval	Pending Deputy Approval	Awaiting Approval (L2)	Awaiting Approval (L2)
D2	Pending Deputy Approval (L2)	Pending Deputy Approval (L2)	Awaiting Approval (L3)	Awaiting Approval (L3)

Note 1: There will be no changes to the effective dating of the old status descriptions. All new and historic Payment Requests will now have the new status descriptions effective immediately and retroactively.

Note 2: The label changes to “Pending Deputy Approval” and “Awaiting Approval (L2)” will propagate to the Payment Request Detail page, Task List page, and any other pages that displays the long description for Payment Request Status (CT 109).

#### **2.1.4 Page Location**

**Global: Fiscal**

**Local: Payment Request**

**Task: Payment Request Search**

### 3 REQUIREMENTS

---

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
360	<p>The CONTRACTOR shall update the Payment Request Search page as follows:</p> <ol style="list-style-type: none"><li>1) Relabel Pending Deputy Approval to Awaiting Approval (L2) in the "Status" field when the Search By field is "Status"</li><li>2) Relabel Pending Deputy Approval (L2) to Awaiting Approval (L3) in the "Status" field when the Search By field is "Status"</li></ol>	N/A	<ol style="list-style-type: none"><li>1. Relabeled "Pending Deputy Approval" to "Awaiting Approval (L2)".</li><li>2. Relabeled "Pending Deputy Approval (L2)" to "Awaiting Approval (L3)".</li></ol>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

SCR 207466 DDID 348 – Migrate Local Warrant  
Print Functionality to CalSAWS



CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/22/2019	1.0	Initial Revision	Duke Vang
7/25/2019	1.1	Updates based on comments from DEL 1	Duke Vang

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# 1 OVERVIEW

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## 1.1 Current Design

The Local Warrant Print page allows counties without a Warrant Print Interface batch job (i.e. no auditor to handle the county's check printing) to print warrants locally through the CalSAWS System. The Local Warrant Print page is currently disabled in the CalSAWS System.

## 1.2 Requests

Per Design Differences ID 348, the latest Local Warrant Print functionality from the C-IV System will be ported over to the CalSAWS System along with the the Local Warrant Print stock templates of the 57 Migration Counties.

Note: DDID 347 will be migrating the rush warrant print stock templates from the 57 Migration Counties into the CalSAWS System.

## 1.3 Overview of Recommendations

C-IV Counties that are currently utilizing the Local Warrant Print page will have the CalSAWS Local Warrant Print page and functionality enabled by default. **CalWIN Counties will have the CalSAWS Local Warrant Print page and functionality enabled by DDID 2150 based on the County Request for Information (CRFI) process. The 57 Migration County Valuable Category and Valuable Type will be determined and migrated with DDID 1327.**

## 1.4 Assumptions

1. The Local Warrant Print templates are the same as the rush warrant print templates and has been accounted for in DDID # 347.
2. The Local Warrant Print pages and functionality exists in the CalSAWS System but are disabled/hidden.

## 2 RECOMMENDATIONS

### 2.1 Local Warrant Print

#### 2.1.1 Overview

Enable the Local Warrant Print page for the C-IV counties that are currently utilizing the Local Warrant Print page in C-IV. **The decision to opt-in a CalWIN County to the Local Warrant Print functionality will be determined by DDID 2150 in a subsequent release. The 57 Migration County Valuable Category and Valuable Type will be determined and migrated with DDID 1327 in a prior release.**

#### 2.1.2 Local Warrant Print Mockup

**Local Warrant Print**

Print Warrant Issuance			
Issuances:	Issuances to Print:	Starting Control Number:	Ending Control Number:
2	2	10006	10007

**Pending Warrant Issuance**

No Data Found

This [Type 1](#) page took 0.69 seconds to load.

Figure 2.1.1 – Local Warrant Print 1

## Local Warrant Print

**Print Warrant Issuance**

<b>Issuances:</b>	<b>Issuances to Print:</b>	<b>Starting Control Number:</b>	<b>Ending Control Number:</b>
0	0	10008	

**Pending Warrant Issuance**

<input type="checkbox"/>	Control Number	Case Number	Case Name	Program	Benefit / Service Month	Amount	Worker Id
<input type="checkbox"/>	<a href="#">10006</a>	<a href="#">2025991</a>	Case Name	Kin-GAP	05/2019	\$910.00	<a href="#">90AS9090WX</a>
<input type="checkbox"/>	<a href="#">10007</a>	<a href="#">2002228</a>	Case Name	Kin-GAP	05/2019	\$902.00	<a href="#">90AS9090WX</a>

This [Type 1](#) page took 1.40 seconds to load.

Figure 2.1.2 – Local Warrant Print 2

### 2.1.3 Description of Changes

1. Turn on the Local Warrant Print functionality for the following C-IV Counties:
  - a. Alpine
  - b. Amador
  - c. Calaveras
  - d. Colusa
  - e. Del Norte
  - f. Lake
  - g. Mariposa
  - h. Modoc
  - i. Napa
  - j. Nevada
  - k. Plumas
  - l. San Benito
  - m. Sierra
  - n. Siskiyou
  - o. Tehama
  - p. Trinity
  - q. Tuolumne

Note: The Local Warrant Print page and functionality will be turned on for the CalWIN Counties with DDID 2150.

2. Verify the functionality of the Local Warrant Print page. Verify that warrant issuances with a "Ready for Issuance" status within 30 days of the System Date show up on the "Print Warrant Issuance" section of the Local Warrant Print page. Also verify that the warrant issuances can be successfully printed (Issued). Steps to verify:
  - a. Navigate to the Local Warrant Print page
  - b. Click "Print" (see mockup Figure 2.1.1)
  - c. Verify under "Pending Warrant Issuance" section (see mockup Figure 2.1.2) that the warrant issuance is listed and is in a "Pending Approval" status by clicking on the control number link.
  - d. Click "Accept All" to update the warrant issuance status to "Issued".

Note: There must be Rush Warrant Valuables for the office in order to print warrant issuances through the Local Warrant Print page.

#### 2.1.4 Page Location

**Global: Fiscal**

**Local: Issuances**

**Task: Local Warrant Print**

#### 2.1.5 Security Updates

##### Security Rights

Security Right	Right Description	Right to Group Mapping
LocalWarrantPrintEdit	Local Warrant Print;	Local Warrant Print Edit Local Warrant Print View
LocalWarrantPrintView	Local Warrant Print;	Local Warrant Print View

##### Security Groups

Security Group	Group Description	Group to Role Mapping
Local Warrant Print Edit	View and Edit for Local Warrant Print Page	System Administrator County Discretion (See Appendix 1)
Local Warrant Print View	View Local Warrant Print page	Oversight Agency Staff View Only System Administrator County Discretion (See Appendix 2)

### 2.1.6 Page Mapping

Create page mappings for the Local Warrant Print page.

### 2.1.7 Page Usage/Data Volume Impacts

Average number of warrant issuances printed from the Local Warrant Print page monthly by county based on historical C-IV statistics:

- Alpine – 3
- Amador – 389
- Calaveras – 834
- Colusa – 359
- Del Norte – 1203
- Lake – 1840
- Mariposa – 329
- Modoc – 265
- Napa – 919
- Nevada – 1068
- Plumas – 323
- San Benito – 1031
- Sierra – 33
- Siskiyou – 1470
- Trinity – 452
- Tuolumne – 1019

### 3 REQUIREMENTS

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
348	<p>The CONTRACTOR shall migrate the following for the 58 Counties:</p> <ol style="list-style-type: none"> <li>1) The Local Warrant Print page</li> <li>2) The County Warrant Print Stock Template from C-IV</li> <li>3) The 18 County Warrant Print Stock Template files from CalWIN</li> </ol>	<ol style="list-style-type: none"> <li>1. The Local Warrant Print templates are the same as the rush warrant print templates and has been accounted for in DDID # 347.</li> <li>2. The Local Warrant Print pages and functionality exists in the CalSAWS System but are disabled/hidden.</li> </ol>	<ol style="list-style-type: none"> <li>1. Enabled the CalSAWS Local Warrant Print pages for C-IV Counties currently using the Local Warrant Print pages in C-IV</li> </ol>



## 4 APPENDIX

### 1. Local Warrant Print Edit Group to Role Mapping

County	Secure Role ID	Role Name
Amador	17029	Amador Admin Supervisor
Calaveras	17033	System ADM
Colusa	17040	Colusa County System Support
Colusa	17081	System Support
El Dorado	17042	Administrator Help Desk
Glenn	17037	Executive Admin
Humboldt	17023	Humboldt Program Analyst
Imperial	16978	Imperial System Administrator
Imperial	17041	Imperial System Support
Inyo	17058	Security Admin
Kings	17027	System Support
Marin	17031	System Support
Mariposa	17030	MAR SA
Mendocino	17052	Orphaned Security Rights
Merced	17034	In County Auditor
Merced	17044	Helpdesk
Merced	17045	System Administrator
Merced	17047	Policy Analyst
Mono	17281	security rights
Monterey	10149	BI Unit
Monterey	10169	Finance Supervisor
Monterey	10179	Finance Manager
Monterey	17055	Systems Support
Monterey	17082	BI BRU Staff
Monterey	17098	Systems Support Lite
Napa	17035	Napa Admin User
Napa	17102	Napa Admin Support
Nevada	12259	Nevada Fiscal Groups
Plumas	17053	Plumas Admin 1
Plumas	17054	Plumas Admin 2
San Joaquin	17051	San Joaquin Help Desk
Shasta	17096	Shasta Help Desk
Shasta	17386	Shasta Help Desk without Imaging
Stanislaus	17025	Copy of CIV System Administrator Security Role
Stanislaus	17048	Stan System Administrator
Sutter	14359	Sutter Fiscal Supervisor

Tehama	12289	Tehama Fiscal Extras
Tuolumne	17022	Tuolumne County SCA

## 2. Local Warrant Print View Group to Role Mapping

County	Secure Role Id	Role Name
Amador	17028	Amador System Administrator
Amador	17029	Amador Admin Supervisor
Calaveras	17033	System ADM
Colusa	16902	Temporary
Colusa	17040	Colusa County System Support
Colusa	17081	System Support
Colusa	17191	Colusa EWIII MEDS
Colusa	17279	Colusa DHHS VIEW ONLY
El Dorado	17042	Administrator Help Desk
Glenn	17037	Executive Admin
Humboldt	12399	Humboldt Inquiry
Humboldt	17023	Humboldt Program Analyst
Imperial	16978	Imperial System Administrator
Imperial	16981	Imperial View
Imperial	17041	Imperial System Support
Inyo	17058	Security Admin
Inyo	17085	Employment and Eligibility Supervisor
Kings	17027	System Support
Lake	17026	Lake Security Admin
Marin	17031	System Support
Mariposa	17030	MAR SA
Merced	17034	In County Auditor
Merced	17044	Helpdesk
Merced	17045	System Administrator
Merced	17047	Policy Analyst
Mono	17281	security rights
Monterey	10189	Executive Monterey
Monterey	10379	Stores and Records
Monterey	10409	Program Manager
Monterey	10429	DCSS Staff
Monterey	16249	View Only Non Confidential
Monterey	17055	Systems Support
Monterey	17093	CBAU Clerical Supervisor
Monterey	17098	Systems Support Lite
Monterey	17320	SIU Legal Secretary

Monterey	17321	SIU Investigative Aide
Napa	12939	State QC Reviewer
Napa	17035	Napa Admin User
Napa	17102	Napa Admin Support
Plumas	17053	Plumas Admin 1
Plumas	17054	Plumas Admin 2
Riverside	10699	RADS Staff
San Joaquin	17051	San Joaquin Help Desk
Shasta	11709	Shasta Inquiry only
Shasta	17096	Shasta Help Desk
Shasta	17386	Shasta Help Desk without Imaging
Stanislaus	11069	Stan Co View Only
Stanislaus	15989	Stan Co System Admin Backup
Stanislaus	17025	Copy of CIV System Administrator Security Role
Stanislaus	17048	Stan System Administrator
Sutter	14359	Sutter Fiscal Supervisor
Tehama	12269	Tehama Clerical Extras
Tuolumne	17022	Tuolumne County SCA

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

DDID 329 CA-207469

Add value “Any Other Carriers” in the MEDS  
OHC Code dropdown on Other Health Care  
Detail page

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Kristine Lim
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/20/2019	1.0	Original	Kristine Lim
07/25/2019	2.0	Updated Section 1.4 and 2.1 per Deliverable comments	Kristine Lim

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# 1 OVERVIEW

---

## 1.1 Current Design

The MEDS OHC Code dropdown on the Other Health Care Detail page displays available values in alphabetical order.

## 1.2 Requests

Per DDID 329, migrate the value “Any Other Carriers” in the MEDS OHC Code dropdown when All Other Health Coverage is selected for Health Coverage Type from the Other Health Care List page.

## 1.3 Overview of Recommendations

Update the MEDS OHC Code dropdown list to add “Any Other Carriers” when All Other Health Coverage is selected for Health Coverage Type in the Other Health Care List page.

## 1.4 Assumptions

MEDS OHC Code is for information only. Adding new value “Any Other Carriers” will not impact eligibility determination.

## 2 RECOMMENDATIONS

### 2.1 Other Health Care Detail

#### 2.1.1 Overview

Update the MEDS OHC Code dropdown list with the value “Any Other Carriers” when All Other Health Coverage is selected as the Health Coverage Type on the Other Health Care List page.

#### 2.1.2 Other Health Car Detail Mockup

**Other Health Care Detail**

\* - Indicates required fields

Save and Add Another Save and Return Cancel

**Beneficiary: \***  
- Select -  
Decker, Kris 66F  
Elliott, Liliana 3F  
Sherman, Lori 51F

**Health Coverage Type: \***  
All Other Health Coverage

**Health Insurance Information**

**Health Insurance Company Name:**  **Policy Number:**

**Policy Start Date:**   **Policy Stop Date:**

**Address Line 1:**  **Address Line 2:**

**City:**  **State:**  **Zip:**

**MEDS OHC Code: \***  
- Select -  
Any Other Carriers  
Commercial Pharmacy Plans  
Dental Only Policies  
Institutionalization (Public Institution coverage)  
Kaiser  
Medical Parolee  
Medicare Part C Health Plan  
Medicare Part D Prescription Drug Coverage  
Military Benefits Comprehensive  
Multiple Plans Comprehensive  
Multiple Plans Non-Comprehensive  
PPO/PHP/HMO/EPO not otherwise specified  
Pay and Chase (applies to any carrier)  
Vision Plans

**Minimal Essential Coverage:**

**Expiration Reason:**

**Information**

**from a specific facility or a group of providers? (PHP/HMO/PPO):**

Figure 2.1 MEDS OHC Code Dropdown Mockup

#### 2.1.3 Description of Changes

Add the value “Any Other Carriers” to the MEDS OHC Code dropdown list in alphabetical order.

#### 2.1.4 Page Location

**Global Navigation:** Eligibility Case Info

**Local Navigation:** Customer Information



**Task Navigation:** Other Health Care List > Other Health Care Detail

## 2.2 Security Updates

N/A

## 2.3 Page Mapping

N/A

## 2.4 Page Usage/Data Volume Impacts

N/A

# 3 REQUIREMENTS

---

## 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
329	The CONTRACTOR shall migrate the value of "Any Other Carriers" in the MEDS OHC Code dropdown on the Other Health Care Detail page when All Other Health Coverage is selected as a Health Coverage Type.	N/A	Add the value "Any Other Carriers" to the MEDS OHC Code dropdown list.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207474 DDID 284

Add the Display Workload and Status Effective  
Date Filters to the Employment Services  
Workload Inventory Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Darren Goostree
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/26/2019	1.0	Initial	Darren Goostree
07/25/2019	1.1	Updated Cosmetic Page Updates section per Deliverable Comments.	Melissa Mendoza

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# 1 OVERVIEW

---

## 1.1 Current Design

The Employment Services Workload Inventory page displays the Employment Services workload for a single Worker. The user can specify whose workload to view by clicking the Select button in the result filters section at the top of the page.

## 1.2 Requests

Per DDID 284, add the Display Workload and Status Effective Date fields to the result filters section of the top of the page.

## 1.3 Overview of Recommendations

Add the Display Workload field to the result filters section of the page. Update the Search Results Summary section to display only those programs that were assigned to the specified worker on the date entered in this field.

Add the Status Effective Date field to the result filters section of the page. Update the Search Results Summary section to display the program information on the effective date entered in this field.

Make cosmetic updates to improve the overall appearance of the page.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

### 2.1 Employment Services Workload Inventory

#### 2.1.1 Overview

Add the Display Workload and Status Effective Date fields to the result filters section of the page. Update the page's search functionality to account for these additions.

Make cosmetic improvements to improve the overall appearance of the page.

#### 2.1.2 Employment Services Workload Inventory Mockup

### Employment Services Workload Inventory

**Worker ID:**  
36LS18ME04 Select

**Display Workload: \***  
 ✖

**Status Effective Date: \***  
 ✖

Results per Page: 100 Go

Search Results Summary
Results 1 - 2 of 2

Total Assignments

Cases	2
Program	2

Case Number	Name	Program	Program Status	Program Status Reason	Program Review Date	Activity Review Date	Benefit Program Status
ⓘ <a href="#">L000F87</a>	Benjamin, Luis	WT	Pending	Mandatory			Active
ⓘ <a href="#">L000C87</a>	Calderon, Kip	WT	Pending	Mandatory			Active

This [Type 1](#) page took 0.93 seconds to load.

Figure 2.1.2 – Employment Services Workload Inventory

#### 2.1.3 Description of Changes

- **Display Workload Field:** Add the Display Workload field to the Employment Services Workload Inventory page. The default value for this field is the current system date. This field is required.
- **Status Effective Date:** Add the Status Effective Date field to the Employment Services Workload Inventory page. The default value for this field is the first day of the current “come up” month. This field is required.

- **Employment Services Workload Inventory Search Logic:** Update the page's search logic to account for the additions of the two new fields as follows:
  - The Search Results Summary section will display only those programs that were assigned to the Worker on the date entered in the Display Workload field.  
For example, with the current system date in the Display Workload field (the default behavior), the page will not display any programs the Worker was assigned to if the end date of that assignment is in the past, or the begin date of that assignment is in the future.
  - The Program Status and Program Status Reason fields will display their values effective as of the date entered in the Status Effective Date.  
For example, if a program is Pending effective 03/01/2019, and Active effective 04/01/2019, searching with the value 03/01/2019 in the Status Effective Date field will display the status Pending for the program.
- **Cosmetic Page Updates:** Make cosmetic page updates as follows (see mockup above):
  - Expand the width of the results table so that it fills the width of the page.
  - Move the column sort arrows beneath the results table's header row.
  - Hide the vertical scroll bar in the results table. Vertical scrolling can still be accomplished by using the page's scroll bar on the right edge of the browser window, when appropriate.

#### 2.1.4 Page Location

**Global: Empl. Services**

**Local: Workload Inventory**

**Task: Workload Inventory**

#### 2.1.5 Security Updates

N/A

#### 2.1.6 Page Mapping

Add page mapping for the Display Workload and Status Effective Date fields.

#### 2.1.7 Page Usage/Data Volume Impacts

N/A

### 3 REQUIREMENTS

---

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
284	The CONTRACTOR shall migrate the "Display Workload" field and "Status Effective Date" field on the Employment Services Workload Inventory page.	N/A	Display Workload and Status Effective Date fields added to the Employment Services Workload inventory page.



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207475 DDID 275

Relabel " the "Document List" page and task navigation to "Distributed Documents Search" and the local navigation to Distributed Documents.

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Darren Goostree
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/25/2019	1.0	Original	Melissa Mendoza
07/18/2019	1.1	Added Child Care and Client Correspondence references.	Melissa Mendoza
07/24/2019	1.2	Added 2.1.1d and 2.1.1e Mock ups for Child Care and Client Correspondence per Deliverable comments.	Melissa Mendoza
07/25/2019	1.3	Added section titles for 2.1.1b, 2.1.1c, 2.1.1d and 2.1.1e	Melissa Mendoza

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# 1 OVERVIEW

---

The Document List page is used for searching for case and resource documents. It is not a list page but a search page.

## 1.1 Current Design

The page, Task Navigation and Local Navigation in the system is called Document List.

## 1.2 Requests

Relabel the "Document List" page to "Distributed Documents Search", the local navigation to Distributed Documents and the Task Navigation to Distributed Documents Search.

## 1.3 Overview of Recommendations

Relabel the "Document List" page to "Distributed Documents Search", the local navigation to "Distributed Documents" and the Task Navigation to "Distributed Documents Search".

Update the Page Mapping to use the new page title.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

Relabel " the "Document List" page to "Distributed Documents Search", the local navigation from "Document List" to "Distributed Documents" and the Task Navigation from "Documents" to "Distributed Documents Search".

### 2.1 Distributed Document Search

#### 2.1.1 Distributed Document Search Task Navigation Mockup

The mockup shows a sidebar on the left with the following items: "Distributed Documents" (highlighted), "Distributed Documents Search", and "MAGI Images Summary". The main content area is titled "Distributed Documents Search" and includes a red asterisk legend: "\*- Indicates required fields". At the top right of the main area is a "Search" button. Below this is a "Search By:" section with a "Case" dropdown and a "Go" button. The search criteria are arranged in two rows. The first row contains: "Case Number: \*" with an empty text input; "From: \*" with a date input containing "03/01/2019" and a calendar icon; "To: \*" with a date input containing "06/03/2019" and a calendar icon; and "Language:" with a dropdown menu. The second row contains: "Document Name:" with an empty text input; "Document Number:" with an empty text input; and "Program:" with a dropdown menu. At the bottom right of the search area is a "Results per Page:" dropdown set to "25" and a "Search" button. A dark blue banner at the bottom of the page displays the message: "This Type 1 page took 0.54 seconds to load."

Figure 2.1.1 Distributed Documents Search Task Navigation Mockup

## 2.1.1b Distributed Documents Search with Eligibility Local Navigation Mockup

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
<b>Distrib</b>	Workload Inventory	<b>Documents Search</b>							
*- Indicat	Case Summary								
	Customer Information	<b>Search</b>							
<b>Search By</b>	Reporting								
Case	<b>Distributed Documents</b>								
<b>Case Num</b>	Customer Schedule	18		<b>To: *</b>	03/25/2019		<b>Language:</b>	<input type="text"/>	
<b>Document</b>	Courtesy Month	<b>Document Number:</b>	<input type="text"/>	<b>Program:</b>	<input type="text"/>				
								Results per Page: 25	<b>Search</b>

This Type\_1 page took 1.84 seconds to load.

Figure 2.1.1b Distributed Documents Search with Eligibility Local Navigation Mockup

## 2.1.1c Distributed Documents Search with Empl. Services Local Navigation Mockup

Case Info	Eligibility	<b>Empl. Services</b>	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
<b>Distributed Documents</b>		Workload Inventory							
*- Indicates required		Case Summary							
		Activities	<a href="#">Search</a>						
<b>Search By:</b> Case <input type="text"/> <a href="#">Go</a>		Supportive Services							
<b>Case Number: *</b> <input type="text"/>		<b>Distributed Documents</b>							
<b>Document Name:</b> <input type="text"/>		Verification	<b>To: *</b> <input type="text" value="03/25/2019"/>		<b>Language:</b> <input type="text"/>				
		Appraisal	<b>Program:</b> <input type="text"/>						
		Evaluation			Results per Page: <input type="text" value="25"/> <a href="#">Search</a>				

This Type\_1 page took 0.66 seconds to load.

Figure 2.1.1c Distributed Documents Search with Empl. Services Local Navigation Mockup

## 2.1.1d Distributed Documents Search with Child Care Local Navigation Mockup

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
<b>Distributed Documenten</b>			Case Summary						
*- Indicates required fields			APP						
			Reporting	<a href="#">Search</a>					
<b>Search By:</b>			Wait List						
Case <input type="text"/> <a href="#">Go</a>			<b>Distributed Documents</b>						
<b>Case Number: *</b>	<b>From: *</b>	<b>To: *</b>	Verification	04/01/2	25/2019	<input type="text"/>	<b>Language:</b>		
<input type="text"/>	<input type="text"/>	<input type="text"/>					<input type="text"/>		
<b>Document Name:</b>	<b>Document Number:</b>	<b>Program:</b>							
<input type="text"/>	<input type="text"/>	<input type="text"/>							
									Results per Page: 25 <a href="#">Search</a>

Figure 2.1.1d Distributed Documents Search with Child Care Local Navigation Mockup

## 2.1.1e Distributed Documents Search with Client Corresp. Local Navigation Mockup

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
<b>Distributed Documents Search</b>								Templates	
*- Indicates required fields								<b>Distributed Documents</b>	
								Barcodes	
<b>Search By:</b>									
Case <input type="text"/> <a href="#">Go</a>									
<b>Case Number: *</b>	<b>From: *</b>	<b>To: *</b>	<b>Language:</b>						
<input type="text"/>	04/01/2019	07/25/2019	<input type="text"/>						
<b>Document Name:</b>	<b>Document Number:</b>	<b>Program:</b>							
<input type="text"/>	<input type="text"/>	<input type="text"/>							
									Results per Page: 25 <a href="#">Search</a>
This Type_1 page took 0.63 seconds to load.									

Figure 2.1.1e Distributed Documents Search with Client Corresp. Local Navigation Mockup



### 2.1.2 Description of Changes

- 1) Relabel the "Document List" page to "Distributed Documents Search".
- 2) Update the Page mapping to use the new Distributed Documents Search page title.
- 3) Update the Task navigation from Documents to Distributed Documents Search throughout the system.
- 4) Update the Local navigation for the Eligibility dropdown from Document List to Distributed Documents.
- 5) Update the Local navigation for Empl. Services from Document List to Distributed Documents.
- 6) Update the Local navigation for Child Care from Document List to Distributed Documents.
- 7) Update the Local navigation for Client Corresp. From Document List to Distributed Documents.

### 2.1.3 Page Location

**Global Navigation:** Eligibility

**Local Navigation:** Distributed Documents

**Task Navigation:** Distributed Documents Search

**Global Navigation:** Empl. Services

**Local Navigation:** Distributed Documents

**Task Navigation:** Distributed Documents Search

**Global Navigation:** Child Care

**Local Navigation:** Distributed Documents

**Task Navigation:** Distributed Documents Search

**Global Navigation:** Client Corresp.

**Local Navigation:** Distributed Documents

**Task Navigation:** Distributed Documents Search

### 2.1.4 Security Updates

N/A

### 2.1.5 Page Mapping

Update the Page Mapping to use the new name Distributed Documents Search page.

## 2.1.6 Page Usage/Data Volume Impacts

N/A

### 3 REQUIREMENTS

---

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
275	The CONTRACTOR shall relabel the "Document List" page to "Distributed Documents Search" and the local navigation.	N/A	Relabel " the "Document List" page to "Distributed Documents Search". Update the Task navigation to Distributed Documents Search Update the Local navigation for the Eligibility, Empl. Services, Child Care and Client Corresp. dropdown from Document List to Distributed Documents.