

## CalSAWS CCB Agenda

|                 |   |
|-----------------|---|
| <b>DATE</b>     | OCTOBER 3, 2019   |
| <b>TIME</b>     | 1:30 PM   |
| <b>LOCATION</b> | North: Sutter Conference Room, South: Conference Room 331 |
| <b>SUBJECT</b>  | Change Control Board Meeting                              |
| <b>INVITEES</b> | CCB.Meeting.Attendees                                     |

### Meeting Purpose:

Approve pending System Change Requests (SCRs), scope modifications, and change orders as needed.

### 1. C-IV SCRs

| Release | SCR #      | X-REF SCR | DESIGN APPROVAL   | Team Responsible | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|------------|-----------|---|------------------|-------|----------------|-----------------------|------------------|
| 19.07   | CIV-103141 | CA-206317 | ACL 19-70 Foster Care, Kin-GAP COLA Rate Increase for Year 2019 - Batch EDBC                        | Eligibility      | 103   | C-IV M&O       | Production Deployment | 19.09.07         |
| 19.07   | CIV-103152 |           | Marin County request to use the automated E2Lite functionality                                      | Batch/Interfaces | 55    | C-IV M&O       | Production Deployment | 19.09.07         |
| 19.09   | CIV-103087 | CA-206223 | ACIN I-55-19 - 2020 State Minimum Wage  | Eligibility      | 75    | C-IV M&O       | No                    | 19.11.14         |
| 19.09   | CIV-104862 |           | Update office for Riverside county's Regional contact center Generic worker.                        | Online           | 15    | C-IV M&O       | Start Build           | 19.10.03         |
| 19.11   | CIV-12021  | CA-58588  | ACL 18-121 Changes to Income and Eligibility Verification System (IEVS) Management Report (DPA 482) | Reports          | 258   | C-IV M&O       | Start Build           |                  |
| 19.11   | CIV-100482 | CA-200840 | 2019/2020 Family Member Base Allocation Amount  | CalHEERS         | 44    | C-IV M&O       | Start Build           |                  |
| 19.11   | CIV-102209 | CA-204599 | ABAWD: Update MEDS Transactions for the 36-month rollover process                                   | Batch/Interfaces | 529   | Premise        | Production Deployment |                  |
| 19.11   | CIV-102308 | CA-49736  | Clean-up of MC Program Block for Individuals Active on CW   | CalHEERS         | 475   | C-IV M&O       | Production Deployment | 20.01.10         |

| Release | SCR #      | X-REF SCR               | DESIGN APPROVAL  | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|------------|-------------------------|--|------------------|-------|----------------|--------------------|------------------|
| 19.11   | CIV-103874 | CA-207950;<br>CH-139211 | CalHEERS eHIT: Young Adult Expansion - Age Reevaluation Updates  | CalHEERS         | 385   | Premise        | No                 | 20.01.10         |
| 19.11   | CIV-104217 | CA-208685               | ACL 19-50 - Increase Threshold For CalFresh Overissuances  | Fiscal           | 727   | C-IV M&O       | Start Build        |                  |
| 19.11   | CIV-104973 |                         | Update Reports Overview in Online Help for SCR CIV-104094  | Training         | 7     | C-IV M&O       | No                 |                  |
| 19.11   | CIV-104997 | CA-210328               | Automated Regression Test - Execution and Maintenance - 19.11 Release Cycle  | Automated Test   | 200   | C-IV M&O       | Start Build        | 20.01.XX         |
| 20.01   | CIV-541    | CA-204814               | Update WDTIP Outbound file writer to not allow LD02 transactions to be generated for WTW supportive services participation records | Batch/Interfaces | 228   | C-IV M&O       | No                 |                  |
| 20.01   | CIV-101430 | CA-201575               | CF - FTP INS Document, Income of FRE should be prorated  | Eligibility      | 210   | C-IV M&O       | No                 |                  |
| 20.01   | CIV-101987 |                         | Update SAR7 Sent Text Message for Tutorial   | Batch/Interfaces | 24    | C-IV M&O       | No                 |                  |
| 20.01   | CIV-102946 | CA-205982               | Update CW EDBC to Remove Stepsibling or Half-Sibling Excluded from CalWORKs in the CalFresh Budget                                 | Eligibility      | 66    | C-IV M&O       | No                 |                  |
| 20.01   | CIV-104268 | CA-209076               | Enhance Refused Verification functionality to send failed Admin Verif  | CalHEERS         | 136   | C-IV M&O       | No                 |                  |

| Release | SCR #      | X-REF SCR               | CONTENT REVISION   | Team Responsible      | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|------------|-------------------------|--|-----------------------|-------|----------------|--------------------|------------------|
| 19.09   | CIV-104168 | CA-208531               | Automated Regression Test - Execution and Maintenance - 19.09 Release Cycle        | Automated Test        | 200   | C-IV M&O       | Start Build        | 19.11.XX         |
| 19.09   | CIV-104415 | CA-209109;<br>CH-139211 | Add Full/Restricted Scope verbiage for Young Adult Expansion MAGI NOAs (CH-139211) | Client Correspondence | 298   | Premise        | Start Build        | 19.11.14         |
| 19.11   | CIV-104577 | CA-209407               | Update Issuance Thresholds for 2020 (CRFI 19-026)                                  | Fiscal                | 85    | C-IV M&O       | Start Build        |                  |

## 2. LRS SCRs

| Release | SCR #     | X-REF SCR                | DESIGN APPROVAL   | Team Responsible            | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|-----------|--------------------------|---|-----------------------------|-------|----------------|-----------------------|------------------|
| 19.07   | CA-206317 | CIV-103141               | ACL 19-70 Foster Care, Kin-GAP COLA Rate Increase for Year 2019 - Batch EDBC                        | Eligibility                 | 365   | LRS M&E        | Production Deployment | 19.09.07         |
| 19.07   | CA-208931 |                          | ACL 19-58 AAP COLA Rate Increase for Year 2019 - Batch EDBC   | Eligibility                 | 188   | LRS M&E        | Production Deployment | 19.09.07         |
| 19.09   | CA-206223 | CIV-103087               | ACIN I-55-19 - 2020 State Minimum Wage  | Eligibility                 | 30    | LRS M&E        | No                    | 19.11.14         |
| 19.09   | CA-210497 | CIV-104255               | Create CalSAWS Functional Presentation (CFP) for SCR CA-57971                                       | Batch/Production Operations | 6     | LRS M&E        | Start Build           |                  |
| 19.11   | CA-49736  | CIV-102308               | Clean-up of MC Program Block for Individuals Active on CW   | CalHEERS                    | 639   | LRS M&E        | Production Deployment | 20.01.10         |
| 19.11   | CA-58588  | CIV-12021                | ACL 18-121 Changes to Income and Eligibility Verification System (IEVS) Management Report (DPA 482) | Reports                     | 471   | LRS M&E        | Start Build           |                  |
| 19.11   | CA-200840 | CIV-100482               | 2019/2020 Family Member Base Allocation Amount  | CalHEERS                    | 56    | LRS M&E        | Start Build           |                  |
| 19.11   | CA-204599 | CIV-102209               | ABAWD: Update MEDS Transactions for the 36-month rollover process                                   | Batch/Interfaces            | 664   | Premise        | Production Deployment |                  |
| 19.11   | CA-207950 | CIV-103874;<br>CH-139211 | CalHEERS eHIT: Young Adult Expansion - Age Reevaluation Updates                                     | CalHEERS                    | 620   | Premise        | No                    | 20.01.10         |
| 19.11   | CA-208685 | CIV-104217               | ACL 19-50 - Increase Threshold For CalFresh Overissuances   | Fiscal                      | 1095  | LRS M&E        | Start Build           |                  |
| 19.11   | CA-210328 | CIV-104997               | Automated Regression Test - Execution and Maintenance - 19.11 Release Cycle                         | Automated Test              | 540   | LRS M&E        | Start Build           | 20.01.XX         |
| 20.01   | CA-49842  |                          | Change all outbound calls data file format to accommodate participant appointment date/time.        | Batch/Interfaces            | 492   | LRS M&E        | No                    |                  |
| 20.01   | CA-53824  | CIV-7285                 | DDCR 5042: Auto Reactivate Dormant/Expunged EBT Account   | Fiscal                      | 387   | C-IV M&O       | No                    |                  |
| 20.01   | CA-56969  | CIV-173                  | DDCR 5050: Update hierarchal priority order for recouping Benefit Reductions on Recovery Accounts   | Fiscal                      | 244   | C-IV M&O       | No                    |                  |
| 20.01   | CA-57044  |                          | Add IHSS and In-Kind Earned income to the IFDS (IFD115) Quarterly Outbound file (C-IV SIR #9156)    | Batch/Interfaces            | 133   | LRS M&E        | No                    |                  |

| Release | SCR #     | X-REF SCR     | DESIGN APPROVAL  | Team Responsible | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|-----------|---------------|--|------------------|-------|----------------|-----------------------|------------------|
| 20.01   | CA-200635 | Tracker-53893 | DDCR 3085: Add eData for the Income Amount End Date from a MAGI Referral or Determination Change                                   | CalHEERS         | 30    | Other          | No                    |                  |
| 20.01   | CA-201575 | CIV-101430    | CF - FTP INS Document, Income of FRE should be prorated  | Eligibility      | 252   | LRS M&E        | No                    |                  |
| 20.01   | CA-204814 | CIV-541       | Update WDTIP Outbound file writer to not allow LD02 transactions to be generated for WTW supportive services participation records | Batch/Interfaces | 309   | LRS M&E        | No                    |                  |
| 20.01   | CA-205982 | CIV-102946    | Update CW EDBC to Remove Stepsibling or Half-Sibling Excluded from CalWORKs in the CalFresh Budget                                 | Eligibility      | 76    | LRS M&E        | No                    |                  |
| 20.01   | CA-207089 |               | Update Converted LEADER Claims on LRS  | Fiscal           | 88    | LRS M&E        | Production Deployment |                  |
| 20.01   | CA-209076 | CIV-104268    | Enhance Refused Verification functionality to send failed Admin Verif  | CalHEERS         | 210   | LRS M&E        | No                    |                  |

| Release | SCR #     | X-REF SCR             | CONTENT REVISION   | Team Responsible      | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|-----------------------|--|-----------------------|-------|----------------|--------------------|------------------|
| 19.09   | CA-208531 | CIV-104168            | Automated Regression Test - Execution and Maintenance - 19.09 Release Cycle                  | Automated Test        | 300   | LRS M&E        | Start Build        | 19.11.XX         |
| 19.09   | CA-209109 | CIV-104415; CH-139211 | Add Full/Restricted Scope verbiage for Young Adult Expansion MAGI NOAs(CH-139211)            | Client Correspondence | 297   | Premise        | Start Build        | 19.11.14         |
| 19.11   | CA-50808  |                       | Child Welfare Program: BI: Vendor Dashboard report   | Reports               | 1616  | LRS M&E        | Start Build        |                  |
| 19.11   | CA-52219  |                       | Supervisor's Approval for Refunds  | Fiscal                | 875   | LRS M&E        | Start Build        |                  |
| 19.11   | CA-201021 | Tracker-54924         | DDCR:Update Targeted Low-Income search page to default 'Type' and 'Status' fields to "Blank" | CalHEERS              | 39    | LRS M&E        | No                 |                  |
| 19.11   | CA-209407 | CIV-104577            | Update Issuance Thresholds for 2020 (CRFI 19-026)  | Fiscal                | 100   | LRS M&E        | Start Build        |                  |

### 3. Informational Only: CalSAWS DDID SCRs

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-------|-----------|-----------------|------------------|-------|----------------|--------------------|------------------|
| None    |       |           |                 |                  |       |                |                    |                  |

| Release | SCR #     | X-REF SCR | CONTENT REVISION  | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|-----------|---|------------------|-------|----------------|--------------------|------------------|
| 19.11   | CA-207183 |           | DDID 2094 - Remove Negative Action Reasons for Foster Care  | Eligibility      | 42    | CalSAWS DD&I   | No                 |                  |
| 19.11   | CA-207369 |           | DDID 1191 - Update to the Sponsorship Detail page to include the "Did the sponsor sign an I-864?" question. | Online           | 29    | CalSAWS DD&I   | No                 |                  |
| 19.11   | CA-207408 |           | DDID 1011 - Rename the Values of the Worker Level Field on the Position Detail Page                         | Online           | 29    | CalSAWS DD&I   | No                 |                  |

The next CCB Meeting scheduled for **10/17/2019**.

### 4. CalSAWS Development Schedule

| Release # | Release Date (Mon) | CalSAWS (North & South) Production Deployment Date (Sun) | Notes                          | SCR Freeze (Fri) | Defect Freeze (Fri) | Hard Defect Freeze (Fri) | Build Approved (Wed) |
|-----------|--------------------|--|--------------------------------|------------------|---------------------|--------------------------|----------------------|
| 19.11     | 11/25/2019         | 11/24/2019   | Due to Thanksgiving 11/28/2019 | 9/27/2019        | 11/1/2019           | 11/8/2019                | 11/20/2019           |
| 20.01     | 1/27/2020          | 1/26/2020  | MLK 1/20                       | 11/29/2019       | 1/3/2020            | 1/10/2020                | 1/22/2020            |
| 20.02     | 2/10/2020          | 2/9/2020   | CalHEERS Release               | 11/8/2019        | 1/3/2020            | 1/10/2020                | 2/5/2020             |
| 20.03     | 3/23/2020          | 3/22/2020  |                                | 1/31/2020        | 2/28/2020           | 3/6/2020                 | 3/18/2020            |
| 20.05     | 5/18/2020          | 5/17/2020  | Due to Memorial Day 5/25/2020  | 3/27/2020        | 4/24/2020           | 5/1/2020                 | 5/13/2020            |
| 20.06     | 6/8/2020           | 6/7/2020   | CalHEERS Release               | 2/28/2020        | 4/3/2020            | 4/10/2020                | 6/3/2020             |
| 20.07     | 7/20/2020          | 7/19/2020  |                                | 5/22/2020        | 6/26/2020           | 7/3/2020                 | 7/15/2020            |
| 20.09     | 9/21/2020          | 9/20/2020  |                                | 7/24/2020        | 8/28/2020           | 9/4/2020                 | 9/16/2020            |

|       |                   |            |                                |                   |            |           |            |
|-------|-------------------|------------|--------------------------------|-------------------|------------|-----------|------------|
| 20.11 | <b>11/23/2020</b> | 11/22/2020 | Due to Thanksgiving 11/26/2020 | <b>9/25/2020</b>  | 10/30/2020 | 11/6/2020 | 11/18/2020 |
| 21.01 | <b>1/25/2021</b>  | 1/24/2021  | MLK 1/18                       | <b>11/27/2020</b> | 1/1/2021   | 1/8/2021  | 1/20/2021  |

| <b>Freeze Dates</b> |  |
|---------------------|--|
| SCR Freeze:         | Deadline for all SCR code to be delivered for baseline release                           |
| Defect Freeze:      | Deadline for all Defects to be delivered for baseline release                            |
| Hard Defect Freeze: | Deadline for all Defects (tied to baseline release) to be delivered for baseline release |
| Build Approved:     | Greenlight for baseline release  |

Updates:

1. Freeze dates updates to align with CH Integration schedule for 20.02 Release



# [CIV-103141] ACL 19-70 Foster Care, Kin-GAP COLA Rate Increase for Year 2019 - Batch EDBC

- Resolved: 09/06/2019 02:03 PM

|                      |                                  |                        |                              |                               |                            |
|----------------------|----------------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>               | Assignee:              | <b>Jagadeesh Dasu</b>        | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.07]</b>                   | Designer Contact:      | <b>Dan DeMille</b>           | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       | <b>19.09.07</b>                  | Expedite Changes:      | <b>Production Deployment</b> | Estimate:                     | <b>103</b>                 |
| Reporter:            | <b>Srinivasa Meenavalli</b>      | Regulation Reference:  | <b>ACL 19-70</b>             | Created:                      | <b>01/10/2019 10:30 AM</b> |
| Status:              | <b>In Production</b>             | Impact Analysis:       | <b>[N/A]</b>                 | Outreach Required:            | <b>Yes</b>                 |
| Consortium Contact:  | <b>Laura Ould</b>                | Training Impacted:     | <b>[N/A]</b>                 | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>                | Migration Impact:      | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:           | <b>[Foster Care/Kin GAP/AAP]</b> | Approved by Committee: |                              | Other Agency Cross Reference: | <b>CA-206317</b>           |

## Non-Committee

### Review:

**Expedite Approval:** Expedited Production Deployment approval received from Karen Rapponotti on 8/7/19.

**Current Design:** Currently C-IV and CalACES use the CNI rates of FY 2018-19 that are effective from July 1, 2018.

**Request:**

- As per the ACL 19-70, the new CNI rate increase for the FY 2019-20 will be implemented in C-IV and CalACES effective July 1, 2019.
- CalACES will update Foster Care and Kin-GAP COLA NOAs to add/update new reason message and regulations for FY 2019-20.

### \*ASSUMPTIONS\*

- 1) During DCFS COLA run, CCR Rate Change NOA will not be generated for EDBC that have the run reason COLA (CalACES only).
- 2) C-IV would continue to use existing Rate Change NOA during COLA run. If the benefits change due to this COLA a Change NOA with the Rate Change Reason will generate.
- 3) Under this SCR, there will be no impact / changes to Fiscal such as creating the issuances and then sending those issuances to the Auditor Controller in a separate COLA file.
- 4) In CalACES, Batch EDBC will not discontinue FC/KG Cases and will "exception out", but in C-IV, the Batch EDBC may discontinue FC/KG Cases.
- 5) Batch EDBC will have a run reason for every month of COLA run (i.e. July, Aug, Sept).(LRS Only)

## Recommendation:

### \*REQUIREMENTS\*

- 1) BATCH OPERATIONS : Run batch EDBC for active Foster Care (FC) and Kin-GAP (KG) programs starting with the month of 07/2019 through come-up month including past RE due date cases in both the systems.
  - a) In CalACES, Batch EDBC will run with the run reason "DCFS Annual COLA" and C-IV will not use any run reason
  - b) Batch EDBC records will have a run type code of 'Single Program' in both the systems
  - c) Batch EDBC will not be triggered on programs with a Non-standard rate in effect in the benefit month in both the systems
  - d) Batch EDBC will not run if there is an overridden aid code where a sub type code exists
  - e) In C-IV, Foster Care Programs will not run for the online pre-EDBC validation criteria. For these cases, a placement authority and at least one child placement must exist for the benefit month. Exclude any cases that meet the exception criteria below:
    - i. There is a Non-Related Legal Guardianship placement authority month with a Probate court established guardianship and the rate level is set to a value other than Schedule A, Schedule B, Age-Based or Basic
    - ii. There is a Non-Related Legal Guardianship placement authority with a Juvenile court established guardianship and the rate level is set to a value other than Schedule A, Schedule B, Age-Based, Basic, LOC 2, LOC 3, or LOC4
    - iii. There is an ISFC rate with no Approved or Licensed ISFC License for the duration of the rate within the placement and benefit month.

- iv. There is a STRTP rate with no Approved or Licensed STRTP License for the duration of the rate within the placement and benefit month.
- v. There is an FFA, FFA Treatment, FFA Intensive Programs, Multidimensional Treatment, or FFA Non-Treatment placement with a 'County or FFA ISFC' Standard State Rate and no ISFC State Program Number

Note: See 2)h for details on exception reporting for online pre-EDBC validation.

- f) In CalACES, batch EDBC will insert the below Journal entry for FC programs and C-IV will not specify any journal entry

Short Description: Batch EDBC ran for [month, year]

Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: Foster Care COLA

- g) In CalACES, batch EDBC will insert the below Journal entry for KG programs and C-IV will not specify any journal entry

Short Description: Batch EDBC ran for [month, year]

Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: Kin-Gap COLA

2) EXCEPTION LIST : Below are the case listing details for case exceptions (skipped, unprocessed, discontinued, etc.) in both systems with the standard columns after the batch.

- a) List of FC/KG programs with a Non Standard Rate. The case listing will be named "List of cases with Non Standard Rate - [Program Name]" and include the Standard List Columns with an additional "Rate" column to show the non-standard rate. Where [Program Name] input FosterCare or KinGAP.
- b) List of FC programs with overridden aid code where a sub type code exists. The case listing will be named "List of [Program Name] with Overridden Aid Code" and include the Standard List Columns with an additional "Sub Type Code" column to show the sub type code currently applied to the program. Where [Program Name] input FosterCare.
- c) List of FC/KG programs discontinued by the batch EDBC. The case listing will be named "List of cases Discontinued by the Batch EDBC" and include the Standard List Columns with an additional "Program" and "Discontinued Reason" columns.
- d) List of FC/KG programs which resulted in Read-Only EDBC. The case listing will be named "List of [Program Name] with Read-Only" and include the Standard List Columns with additional "Reason" and "EDBC Month" columns. Where [Program Name] input FosterCare or KinGAP.
- e) List of FC/KG unprocessed programs skipped in the COLA batch run with the skip reasons like Override, Manual EDBC, Read Only EDBC, No Worker Assigned etc. The case listing will be named "List of unprocessed programs skipped in the COLA batch run with skip reasons" and include the Standard List Columns with an additional "Program", "EDBC Month" and "Not Processed Reason" columns.
- f) List of FC/KG programs where the incomplete RE has a due date in the past. The case listing will be named "List of [Program Name] cases with RE Date in the past" and include the Standard List Columns with an additional "RE Due Date" column. Where [Program Name] input FosterCare or KinGAP.
- g) List of FC programs with THPP or THP+FC Facilities. The case listing will be named "List of FC programs with THPP or THP+FC" and include the Standard List Columns with an additional "CF Case #" column to show CalFresh (CF) cases having a CalFresh participant in common with FC or KG program.
- h) A list of FC programs that are excluded in batch due to pre-EDBC online validations. Please refer to Item requirements 1e) for the list of all pre-EDBC online validation details (C-IV Only). The case listing will be named "List of FC Programs skipped with pre-EDBC validations" and include the Standard List Columns with an additional "Reason" column.
- i) List of Active ARC Program Cases (C-IV Only). The case listing will be named "Active ARC cases" and include the Standard List Columns.



j) List of Cal-Fresh (CF) program Cases that have an active member in common with an active ARC case (C-IV Only). The case listing will be named "CF Cases in common with ARC" and include the Standard List Columns.

NOTE: Standard List Columns and the location of the lists on SharePoint is provided below:

- 1) Case Name
- 2) Case Number
- 3) County
- 4) Unit
- 5) Unit Name
- 6) Office Name
- 7) Worker ID
- 8) Worker Name
- 9) Facility Name

In CalACES, after the onetime batch run is completed in production, the case listing details will be posted at the location:

CalACES SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CA-206317

In C-IV, after the onetime batch run is completed in production, the case listing details will be posted at the location:

CalACES SharePoint > Web Portal -> System Changes -> SCR and SIR Lists -> 2019 -> SCR CIV-103141

3) BATCH OPERATIONS : For both CalACES and C-IV Systems:

- a) Run the DCR to insert into sys\_transact all FC / KG programs that are active for 07/2019 benefit month till come-up month.
- b) Run batch EDBC for the case population in a).
- c) CalACES only: Run a DCR to suppress Age Increase NOAs for KG.

**Outreach**

**Description:**

A list of affected cases will be posted to the CalACES Web Portal in the following location:

CalACES Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CIV-103141

**Migration Impact**

**Description:**

Joint design has been approved through the CW/CF Committee. LRS will implement this Change with SCR CA-206317 in a 19.07 priority release

**Migration Impact**

**Analysis:**

CWS Program

**Alternative**

Manual/Override EDBC

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 103**

|                       |    |                         |    |            |   |
|-----------------------|----|-------------------------|----|------------|---|
| Automated Test :      | 0  | Batch/Interfaces :      | 0  | CalHEERS : | 0 |
| CalHEERS Test :       | 0  | Client Correspondence : | 0  | DBA :      | 0 |
| DBA :                 | 0  | Eligibility :           | 79 | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :                | 0  | Online :   | 0 |
| Performance :         | 0  | Reports :               | 0  | Security : | 0 |
| System Test Support : | 24 | Tech Arch :             | 0  | Tech Ops : | 0 |
| Training :            | 0  |                         |    |            |   |



# [CIV-103152] Marin County request to use the automated E2Lite functionality

- Resolved: 09/04/2019 05:16 PM

|                      |                         |                        |                              |                               |                                |
|----------------------|-------------------------|------------------------|------------------------------|-------------------------------|--------------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b> | Assignee:              | <b>Ryan O'Mary</b>           | SPG Status:                   | <b>Approved</b>                |
| Fix Version/s:       | <b>[19.07]</b>          | Designer Contact:      | <b>Dana K. Petersen</b>      | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:       | <b>19.09.07</b>         | Expedite Changes:      | <b>Production Deployment</b> | Estimate:                     | <b>55</b>                      |
| Reporter:            | <b>Joel M. Acevedo</b>  | Regulation Reference:  |                              | Created:                      | <b>01/11/2019 09:14 AM</b>     |
| Status:              | <b>In Production</b>    | Impact Analysis:       | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                      |
| Consortium Contact:  | <b>Joel M. Acevedo</b>  | Training Impacted:     | <b>[N/A]</b>                 | Funding Source:               | <b>C-IV M&amp;O</b>            |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                    | Funding Source ID:            |                                |
| Committee:           |                         | Approved by Committee: |                              | Other Agency Cross Reference: |                                |

**Non-Committee Review:** Kristen Lawson Marin County Approved

**Expedite Approval:** Karen Rapponotti (Approved) - 07/04/2019

**Current Design:** Marin County currently processes their WPR State Sample manually from files they receive via the State's web-based Enterprise II Lite (E2Lite) system.

**Request:** The county internal system has crashed and they would like to use the C-IV System E2Lite processing

**Recommendation:** Enroll Marin County in C-IV's Automated E2Lite process and begin pulling the skeleton WPR Sample file from the county server, process the file, and return to the county based on the current E2Lite automated process.

1. Create a Change Order (CO) to turn on the following batch jobs:  
 Inbound: PI29E900 (FTP) and PI29E901 (reader)  
 Outbound:  
   3-month file: PO21E903 (writer) and PO21E905 (FTP)  
   6-month file: PO21E904 (writer) and PO21E906 (FTP)
2. Update the County Interface Matrix
3. Update the Interface Partner Agreement (IPA) document
4. Complete inbound and outbound file exchange with Marin County to test SFTP connection.

**Outreach Description:** This is a county specific process that will be included in the existing functionality to be migrated with the other counties that utilize the Automated E2Lite processing.

**Migration Impact Description:** County will continue to manually process their E2Lite sample.

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **55**

|                       |   |                         |    |            |    |
|-----------------------|---|-------------------------|----|------------|----|
| Automated Test :      | 0 | Batch/Interfaces :      | 40 | CalHEERS : | 0  |
| CalHEERS Test :       | 0 | Client Correspondence : | 0  | DBA :      | 0  |
| DBA :                 | 0 | Eligibility :           | 0  | Fiscal :   | 0  |
| Imaging :             | 0 | IVR/CC :                | 0  | Online :   | 0  |
| Performance :         | 0 | Reports :               | 0  | Security : | 0  |
| System Test Support : | 5 | Tech Arch :             | 0  | Tech Ops : | 10 |
| Training :            | 0 |                         |    |            |    |

## [CIV-103087] ACIN I-55-19 - 2020 State Minimum Wage

|                      |                                 |                           |                           |                                  |                            |
|----------------------|---------------------------------|---------------------------|---------------------------|----------------------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>              | Assignee:                 | <b>Unassigned</b>         | SPG Status:                      | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.09]</b>                  | Designer Contact:         | <b>Thomas Lazio</b>       | Change Type (SCR):               | <b>New Policy</b>          |
| Minor Version:       | <b>19.11.14</b>                 | Expedite Changes:         | <b>No</b>                 | Estimate:                        | <b>75</b>                  |
| Reporter:            | <b>Sridhar Mullapudi</b>        | Regulation Reference:     | <b>ACIN I-55-19</b>       | Created:                         | <b>01/03/2019 04:04 PM</b> |
| Status:              | <b>Pending Approval</b>         | Impact Analysis:          | <b>[Business Process]</b> | Outreach Required:               | <b>Yes</b>                 |
| Consortium Contact:  | <b>Tyler Vaisau</b>             | Training Impacted:        | <b>[N/A]</b>              | Funding Source:                  | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>               | Migration Impact:         | <b>No</b>                 | Funding Source ID:               |                            |
| Committee:           | <b>[CalWORKs/<br/>CalFresh]</b> | Approved by<br>Committee: | <b>09/11/2019</b>         | Other Agency Cross<br>Reference: | <b>CA-206223</b>           |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

SCR CA-100438 updated the statewide minimum wage to \$12, as of 01/01/2019

#### Request:

Per Senate Bill 3 (2016), Chapter 4, California minimum wage will increase annually for all industries, until 2022.

ACIN I-55-19 reminds counties the California Labor Code is increasing the minimum wage for all industries to \$13 per hour effective on and after January 1, 2020.

#### Recommendation:

1) Apply a CTCR to update the State Minimum Wage (CT 335 - MW) to \$13 by inserting a new record effective 01/01/2020. The current High-Dated record will be end-dated effective 12/31/2019.

Note: The WEX/CS Worksheet Detail page calculation will use the effective minimum wage listed in CT 335 (MW) -see SCR CIV-104499/CA-209307.

2) Run a data change for all Active employment status records on the Employment Detail page (within Employment Status) with an Hourly Wage of less than \$13 and an end-date after 12/31/2019. Exclude any records with an Hourly Wage of exactly \$0.00 or \$7.25 (Federal Minimum Wage).

a) For the employment status records with a begin date prior to 01/01/2020, and an End Date on or after 01/01/2020, set the End Date to 12/31/2019. Create a new record with the following values:

Status: Active

Status Reason: Employed

Hourly Wage: \$13

Hours/Week: pull hours from the previous record

Begin Date: 01/01/2020

End Date: High Dated if previously high dated, or end dated to previous end date

Note: Per CRPC #2078, the lower minimum wage amount should be utilized, unless the client provides evidence to the county that they are being paid at the adjusted amount for small businesses, in which case the real value should be used.

b) Additional testing will be performed on the ETL (Extract, Transform, Load) process as this data change will be applied through data warehouse ETL.

3) Generate a list of all active CalFresh cases with an active unaided person with reason 'Ineligible CF Student' that meets all of the following criteria for 01/2020 benefit month

a) has an active self-employment record

b) has wage less than federal minimum wage

Note: This list should be generated before the data change is applied

This list will be posted at:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CIV-103087

### Outreach

#### Description:

A list of affected cases will be posted to the CalSAWs Web Portal in the following location:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CIV-103087

**Migration Impact Description:** Joint design has been approved through the CW/CF Committee. LRS will implement this Change with SCR CA-206223 in a 19.09 priority release.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** Override EDBC Results

**Operational Impact Estimate:**

75

|                       |    |                         |    |            |   |
|-----------------------|----|-------------------------|----|------------|---|
| Automated Test :      | 0  | Batch/Interfaces :      | 0  | CalHEERS : | 0 |
| CalHEERS Test :       | 0  | Client Correspondence : | 0  | DBA :      | 0 |
| DBA :                 | 0  | Eligibility :           | 40 | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :                | 0  | Online :   | 0 |
| Performance :         | 0  | Reports :               | 25 | Security : | 0 |
| System Test Support : | 10 | Tech Arch :             | 0  | Tech Ops : | 0 |
| Training :            | 0  |                         |    |            |   |



**[CIV-104862] Update office for Riverside county's Regional contact center Generic worker.**

|                      |                            |                        |                             |                               |                            |
|----------------------|----------------------------|------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Online</b>              | Assignee:              | <b>Pramisha Chintapalli</b> | SPG Status:                   | <b>Select a value</b>      |
| Fix Version/s:       | <b>[19.09]</b>             | Designer Contact:      | <b>Srividhya Sivakumar</b>  | Change Type (SCR):            | <b>Data Change</b>         |
| Minor Version:       | <b>19.10.03</b>            | Expedite Changes:      | <b>Start Build</b>          | Estimate:                     | <b>15</b>                  |
| Reporter:            | <b>Srividhya Sivakumar</b> | Regulation Reference:  |                             | Created:                      | <b>08/15/2019 11:16 AM</b> |
| Status:              | <b>In Assembly Test</b>    | Impact Analysis:       | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Srividhya Sivakumar</b> | Training Impacted:     | <b>[N/A]</b>                | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>          | Migration Impact:      |                             | Funding Source ID:            |                            |
| Committee:           |                            | Approved by Committee: |                             | Other Agency Cross Reference: | <b>NA</b>                  |

**Non-Committee**

**Review:**

**Expedite Approval:** Michael Wu - Approved - 9/19/2019

**Current Design:** The Riverside county's regional contact center workers are currently linked to office 87. Navigate to Staff Assignment Detail page and verify that worker '33AS18ET00' has staff assigned high dated and verify that worker '33LS87ET00' is end dated.

**Request:** The Riverside county's regional contact center workers are linked to office 18.

**Recommendation:** Create a DCR to update worker's office information.

**Outreach Description:** Riverside County's Regional Contact Center was moved and reassigned to a new office . Generic worker id should be changed to conform with the new office.

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** 15

|                       |   |                         |   |            |    |
|-----------------------|---|-------------------------|---|------------|----|
| Automated Test :      | 0 | Batch/Interfaces :      | 0 | CalHEERS : | 0  |
| CalHEERS Test :       | 0 | Client Correspondence : | 0 | DBA :      | 0  |
| DBA :                 | 0 | Eligibility :           | 0 | Fiscal :   | 0  |
| Imaging :             | 0 | IVR/CC :                | 0 | Online :   | 10 |
| Performance :         | 0 | Reports :               | 0 | Security : | 0  |
| System Test Support : | 5 | Tech Arch :             | 0 | Tech Ops : | 0  |
| Training :            | 0 |                         |   |            |    |

# [CIV-12021] ACL 18-121 Changes to Income and Eligibility Verification System (IEVS) Management Report (DPA 482)

|                      |                               |                        |                         |                               |                            |
|----------------------|-------------------------------|------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Reports</b>                | Assignee:              | <b>Madhuri Salunkhe</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>                | Designer Contact:      | <b>Farhat Ulain</b>     | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       |                               | Expedite Changes:      | <b>Start Build</b>      | Estimate:                     | <b>258</b>                 |
| Reporter:            | <b>Joel M. Acevedo</b>        | Regulation Reference:  | <b>ACL 18-121</b>       | Created:                      | <b>12/29/2017 02:26 PM</b> |
| Status:              | <b>In Development</b>         | Impact Analysis:       | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Joel M. Acevedo</b>        | Training Impacted:     | <b>[N/A]</b>            | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>             | Migration Impact:      | <b>No</b>               | Funding Source ID:            |                            |
| Committee:           | <b>[State/Fiscal Reports]</b> | Approved by Committee: | <b>08/14/2019</b>       | Other Agency Cross Reference: | <b>CA-58588</b>            |

**Non-Committee Review:**

**Expedite Approval:** Expedited Approval Provided by JoAnne Osborn on 8/15/2019

**Current Design:** The quarterly DPA 482 report contains statistical information on the results of county Income and Eligibility Verification System (IEVS) Wage Match processing. Information provided includes the number of abstracts received and processed, the number of cases and dollar amounts of client-caused CalWORKs overpayments and CalFresh overissuances, and the number of referrals made to Special Investigative Units (SIU).

The CDSS Welfare Fraud Bureau and the Data Systems and Survey Design Bureau (DSSDB) in conjunction with County Welfare Departments (CWDs), participated in a workgroup to redesign and restructure the DPA 482 report. These changes, as documented in ACL 18-121, have been made in an effort to improve and simplify data reporting to align with all other required response documents for other IEVS matches.

**Request:** Modify the automated DPA 482 report to comply with the instructions in ACL 18-121.

LRS Only: Combine the DPA 482 state report and the backup report into a single DPA 482 report template.

- Recommendation:**
1. Update the DPA 482 Report per the instructions in ACL 18-121.
    - a. Update the automated DPA 482 template to closely match the updated state report template.
    - b. LRS Only - Rename the "DPA 482 Report" to be "DPA 482"
    - c. LRS Only - Combine the "DPA 482" and the "DPA 482 Backup Report" into a single DPA 482 report template.
    - d. LRS Only - Deactivate the "DPA 482 Backup Report"

Please reference the attached detailed design document for design specifics including the DPA 482 report layout and underlying processing criteria for each line.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the State/Fiscal Reports Committee. LRS will implement this change with SCR CA-58588 in the 19.11 release.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

Manually ad-hoc the needed information.

**Description:**

**Operational Impact:**

**Estimate:** 258

|                  |   |                         |     |            |   |
|------------------|---|-------------------------|-----|------------|---|
| Automated Test : | 0 | Batch/Interfaces :      | 0   | CalHEERS : | 0 |
| CalHEERS Test :  | 0 | Client Correspondence : | 0   | DBA :      | 0 |
| DBA :            | 0 | Eligibility :           | 0   | Fiscal :   | 0 |
| Imaging :        | 0 | IVR/CC :                | 0   | Online :   | 0 |
| Performance :    | 0 | Reports :               | 198 | Security : | 0 |

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|                       |    |             |   |            |   |
|-----------------------|----|-------------|---|------------|---|
| System Test Support : | 60 | Tech Arch : | 0 | Tech Ops : | 0 |
| Training :            | 0  |             |   |            |   |

## [CIV-100482] 2019/2020 Family Member Base Allocation Amount

|                      |                        |                        |                      |                               |                            |
|----------------------|------------------------|------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>CalHEERS</b>        | Assignee:              | <b>Krishna Akula</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>         | Designer Contact:      | <b>Tisha Mutreja</b> | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       |                        | Expedite Changes:      | <b>Start Build</b>   | Estimate:                     | <b>44</b>                  |
| Reporter:            | <b>Renee Gustafson</b> | Regulation Reference:  | <b>ACWDL 19-19</b>   | Created:                      | <b>02/14/2018 06:18 PM</b> |
| Status:              | <b>Approved</b>        | Impact Analysis:       | <b>[N/A]</b>         | Outreach Required:            | <b>Yes</b>                 |
| Consortium Contact:  | <b>Maureen Votta</b>   | Training Impacted:     | <b>[N/A]</b>         | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>      | Migration Impact:      | <b>No</b>            | Funding Source ID:            |                            |
| Committee:           | <b>[Medi-Cal/CMSP]</b> | Approved by Committee: | <b>09/03/2019</b>    | Other Agency Cross Reference: | <b>CA-200840</b>           |

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti 9/11/2019

**Current Design:** The Family Member Base Allocation (FMBA) amount is used to determine how much the Long Term Care (LTC) beneficiary may allocate to family members.

Currently, C-IV maintains the limit for FMBA amount at 2017-2018 values which is \$2,058.00.

**Request:** With ACWDL 19-19, effective July 1, 2019 through June 30, 2020, the FMBA amount for a family member living with the community spouse of a beneficiary with LTC status is \$2,114.00

Update C-IV with the 2019-2020 FMBA amount for individuals in LTC status.

#### Recommendation:

1. Update the code table value for MC LTC Family Member Base Allocation effective July 1, 2019 where FMBA limit with catgry\_id as "335" and code\_num\_identif as "82" will be updated to \$2,114.00.
2. Generate a list of cases active on LTC with family members in addition to a spouse in the home July 01, 2019, or later which has Share of Cost greater than zero on the LTC budget, and the FMBA amount used in the budget is the previous year's amount (\$2,058.00).  
List Name: Active LTC with previous FMBA value  
The listing will consist of below columns -
  - Case Name
  - Case Number
  - County
  - Unit
  - Unit Name
  - Office Name
  - Worker
  - Benefit Month

#### Outreach

**Description:** Provide the Counties with a list of cases active on LTC with family members in addition to a spouse in the home July 01, 2019, or later which has Share of Cost greater than zero on the LTC budget, and the FMBA amount used in the budget is the previous year's amount (\$2,058.00).

List will be posted at following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2019>CIV-100482

#### Migration Impact

**Description:** Joint design has been approved through the Medi-Cal/CMSP Committee. LRS will implement this change with SCR CA-200840 in the 19.11 release.

#### Migration Impact

**Analysis:** Override

#### Alternative Procedure Description:

#### Operational Impact:

**Estimate:** 44



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|                       |    |                         |   |            |    |
|-----------------------|----|-------------------------|---|------------|----|
| Automated Test :      | 0  | Batch/Interfaces :      | 0 | CalHEERS : | 22 |
| CalHEERS Test :       | 22 | Client Correspondence : | 0 | DBA :      | 0  |
| DBA :                 | 0  | Eligibility :           | 0 | Fiscal :   | 0  |
| Imaging :             | 0  | IVR/CC :                | 0 | Online :   | 0  |
| Performance :         | 0  | Reports :               | 0 | Security : | 0  |
| System Test Support : | 0  | Tech Arch :             | 0 | Tech Ops : | 0  |
| Training :            | 0  |                         |   |            |    |

## [CIV-102209] ABAWD: Update MEDS Transactions for the 36-month rollover process

|                      |                         |                        |                                |                               |                            |
|----------------------|-------------------------|------------------------|--------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b> | Assignee:              | <b>Javier Robles</b>           | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>Steve Hancock</b>           | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       |                         | Expedite Changes:      | <b>Production Deployment</b>   | Estimate:                     | <b>529</b>                 |
| Reporter:            | <b>Dana K. Petersen</b> | Regulation Reference:  | <b>ACL 18-08 and ACL 18-94</b> | Created:                      | <b>09/10/2018 01:59 PM</b> |
| Status:              | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>                   | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Tyler Vaisau</b>     | Training Impacted:     | <b>[N/A]</b>                   | Funding Source:               | <b>Premise</b>             |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                      | Funding Source ID:            | <b>ABAWD</b>               |
| Committee:           | <b>[MEDS]</b>           | Approved by Committee: |                                | Other Agency Cross Reference: | <b>CA-204599</b>           |

### Non-Committee

#### Review:

**Expedite Approval:** Expedited Deployment approval provided by Karen Rapponotti on 8/19/2019

**Current Design:** There isn't a process to re-establish a person's ABAWD clock in MEDS after the 36-month calendar ends in December 2019.

**Request:** Create a new 3 year process to establish a new 36-month ABAWD Time Clock in MEDS for each ABAWD carrying forward into the new statewide fixed 36-Month ABAWD calendar.

**Recommendation:**

- 1) Update C-IV to exclude ABAWD information between the final MEDS Renewal date within the current 36-month ABAWD Period, and prior to the First calendar day of the next 36-month ABAWD Period.
- 2) Update C-IV to trigger the FX 20 job for all ABAWDS who have an ABAWD Clock carrying forward into the new 36-Month ABAWD Period
- 3) Update the Individual ABAWD Effective Date logic for the FX 20, FR 20, and FX 60 Transactions
- 4) Update the Batch ABAWD Determination Sweep Job to include the 'CalFresh' Medical Condition Category.

For detailed design, see attached design document 'SCR\_CA-204599\_CIV-102209\_Design\_Document.docx'.

### Outreach

#### Description:

**Migration Impact Description:** Joint design has been approved through the MEDS Committee. LRS system will implement this change with SCR CA-204599 in the 19.11 release.

#### Migration Impact

##### Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 529

|                       |    |                         |     |            |   |
|-----------------------|----|-------------------------|-----|------------|---|
| Automated Test :      | 0  | Batch/Interfaces :      | 382 | CalHEERS : | 0 |
| CalHEERS Test :       | 0  | Client Correspondence : | 0   | DBA :      | 0 |
| DBA :                 | 0  | Eligibility :           | 0   | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :                | 0   | Online :   | 0 |
| Performance :         | 0  | Reports :               | 0   | Security : | 0 |
| System Test Support : | 92 | Tech Arch :             | 0   | Tech Ops : | 0 |
| Training :            | 0  |                         |     |            |   |

## [CIV-102308] Clean-up of MC Program Block for Individuals Active on CW

|                      |                        |                        |                              |                               |                            |
|----------------------|------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>CalHEERS</b>        | Assignee:              | <b>Krishna Akula</b>         | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>         | Designer Contact:      | <b>Howard Suksanti</b>       | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       | <b>20.01.10</b>        | Expedite Changes:      | <b>Production Deployment</b> | Estimate:                     | <b>475</b>                 |
| Reporter:            | <b>Elisa Miller</b>    | Regulation Reference:  |                              | Created:                      | <b>09/21/2018 06:19 PM</b> |
| Status:              | <b>In Development</b>  | Impact Analysis:       | <b>[Business Process]</b>    | Outreach Required:            | <b>Yes</b>                 |
| Consortium Contact:  | <b>Elisa Miller</b>    | Training Impacted:     |                              | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>      | Migration Impact:      | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:           | <b>[Medi-Cal/CMSP]</b> | Approved by Committee: | <b>08/27/2019</b>            | Other Agency Cross Reference: | <b>CA-49736</b>            |

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti approved Aug 16, 2019

#### Current Design:

Medi-Cal EDBC rules will discontinue an individual from Non-MAGI Medi-Cal who is also active in another cash-based Medi-Cal program when Medi-Cal EDBC is run in Full Medi-Cal Hierarchy mode; however, Medi-Cal EDBC rules will only discontinue an individual from MAGI Medi-Cal who is also active on cash-based Medi-Cal through the CalWORKs program when running in MAGI-only mode. This incorrectly allows the individual to remain active in both MAGI Medi-Cal and another cash-based Medi-Cal program (other than CalWORKs).

When an individual is active on CalWORKs, The System communicates to CalHEERS that the individual is already a beneficiary of Medi-Cal in Medi-Cal Eligibility Data System (MEDS) which provides Minimal Essential Coverage (MEC) by sending 'MEDS-MEC' Administrative (Admin) Verification = 'Yes' in an Eligibility Determination Request (EDR); however, when an individual is a beneficiary on any other cash-based Medi-Cal (other than CalWORKs), The System does not send 'MEDS-MEC' Admin Verification = Yes in the EDR so CalHEERS may determine the individual MAGI Medi-Cal Eligible. This allows an individual to be active on both a cash-based Medi-Cal program (other than CalWORKs) and MAGI Medi-Cal.

When an individual is discontinued from the CalWORKs program, The System auto-tests the individual for Medi-Cal to provide continuity of medical coverage. Often, these individuals are active in Medi-Cal and then will subsequently have their CalWORKs termination rescinded, at which time the worker should run Medi-Cal EDBC to discontinue the Medi-Cal program for 'Gets CalWORKs'. When Medi-Cal EDBC is not run together with the CalWORKs rescind, the individual remains active on both CalWORKs and Medi-Cal.

Not all workers are permitted to run Medi-Cal EDBC with CalWORKs EDBC and sometimes the Medi-Cal program is on another case, so the individual remains active on both CalWORKs and Medi-Cal.

#### Request:

- Medi-Cal EDBC rules shall determine an individual ineligible to Medi-Cal when an individual is also active in any cash-based Medi-Cal regardless of EDBC mode (Full Medi-Cal Hierarchy and MAGI-only).
- The System should inform CalHEERS that an individual is receiving MEDS-MEC in an EDR when the individual is active in any cash-based Medi-Cal.
- Run an on-going batch to discontinue the Medi-Cal for individuals who are in both Medi-Cal and CalWORKs as long as the most recently authorized EDBC was for CalWORKs.
- Add new Batch EDBC Sweep job that will trigger EDBC when the System receives a DERs that is associated to an EDR that initiated by the Duplicate Medi-Cal Clean-up batch (LRS only).
- Update the existing Find DER for EDBC Sweep job (PB00E120) to include DERs that is associated to an EDR that initiated by the Duplicate Medi-Cal Clean-up batch (C-IV only).
- Provide a one-time list to the workers for the rest of the population active in both cash-based Medi-Cal and Medi-Cal after the Duplicate Medi-Cal Clean-up batch is run the first time; the workers can use the existing Duplicate Aid Report to follow up after the initial batch run and list clean up.

#### Recommendation:

- Update Medi-Cal EDBC MAGI-only mode rules to close an individual when they are active in any cash-based Medi-Cal.
- Update eHIT to send MEDS-MEC Admin Verification = Yes when an individual is active in any cash-based Medi-Cal.

- Create a Duplicate Non-MAGI Medi-Cal Clean-Up Batch EDBC sweep to identify individuals active on both CalWORKs and Non-MAGI Medi-Cal. The batch will run prior to Batch 10-day cutoff and will only pick up individuals where the last Accepted and Saved EDBC was for CalWORKs.
- Create a Duplicate MAGI Medi-Cal Clean-Up Batch MAGI sweep to identify individuals active on both CalWORKs and MAGI Medi-Cal. The batch will run prior to Batch 10-day cutoff and will only pick up individuals where the last Accepted and Saved EDBC was for CalWORKs.
- Add a new Batch EDR Run Reason code for “Duplicate Medi-Cal Clean-up”.
- LRS only: Add a new Batch MAGI EDBC Sweep job that will trigger EDBC when LRS receives a DER associated to an EDR initiated by the Batch EDR Run Reason “Duplicate Medi-Cal Clean-up.”
- C-IV only: Update the existing Find DER for EDBC Sweep job to include DERs associated to an EDR initiated by the Batch EDR Run Reason “Duplicate Medi-Cal Clean-up.”
- Provide a one-time list to the workers of individuals active in both cash-based Medi-Cal and Medi-Cal after the Duplicate Medi-Cal Clean-up batch is run the first time.

Please refer to more details in the Design document.

**Outreach  
Description:**

A one-time list provided to the counties of individuals active in both cash-based Medi-Cal and Medi-Cal after the Duplicate Medi-Cal Clean-up batch is run the first time.

**Migration Impact  
Description:**

Joint design has been approved through the Medi-Cal/CMSPP Committee. LRS will implement this Change with SCR CA-49736 in a 19.11 priority release.

**Migration Impact  
Analysis:**

**Alternative  
Procedure**

Worker would manually complete negative action of Medi-Cal program block.

**Description:**

**Operational Impact:  
Estimate:**

**475**

|                       |     |                         |    |            |     |
|-----------------------|-----|-------------------------|----|------------|-----|
| Automated Test :      | 30  | Batch/Interfaces :      | 76 | CalHEERS : | 197 |
| CalHEERS Test :       | 172 | Client Correspondence : | 0  | DBA :      | 0   |
| DBA :                 | 0   | Eligibility :           | 0  | Fiscal :   | 0   |
| Imaging :             | 0   | IVR/CC :                | 0  | Online :   | 0   |
| Performance :         | 0   | Reports :               | 0  | Security : | 0   |
| System Test Support : | 0   | Tech Arch :             | 0  | Tech Ops : | 0   |
| Training :            | 0   |                         |    |            |     |

## [CIV-103874] CalHEERS eHIT: Young Adult Expansion - Age Reevaluation Updates

|                      |                         |                        |                                    |                               |                             |
|----------------------|-------------------------|------------------------|------------------------------------|-------------------------------|-----------------------------|
| Team Responsible:    | <b>CalHEERS</b>         | Assignee:              | <b>Naga Chinduluru</b>             | SPG Status:                   | <b>Approved</b>             |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>Steve Hancock</b>               | Change Type (SCR):            | <b>New Policy</b>           |
| Minor Version:       | <b>20.01.10</b>         | Expedite Changes:      | <b>No</b>                          | Estimate:                     | <b>385</b>                  |
| Reporter:            | <b>Renee Gustafson</b>  | Regulation Reference:  | <b>W&amp;IC Section 14007.8(b)</b> | Created:                      | <b>04/12/2019 12:58 PM</b>  |
| Status:              | <b>Pending Approval</b> | Impact Analysis:       | <b>[N/A]</b>                       | Outreach Required:            | <b>No</b>                   |
| Consortium Contact:  | <b>Elisa Miller</b>     | Training Impacted:     |                                    | Funding Source:               | <b>Premise</b>              |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                          | Funding Source ID:            | <b>CO-103</b>               |
| Committee:           | <b>[Medi-Cal/CMSP]</b>  | Approved by Committee: | <b>08/27/2019</b>                  | Other Agency Cross Reference: | <b>CA-207950; CH-139211</b> |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** The System runs Batch MAGI for MAGI Medi-Cal recipients turning ages 1, 6, and 19. LRS runs Batch MAGI for MAGI Medi-Cal recipients turning age 65. There is no automated Medi-Cal reevaluation process for individuals turning age 26.

In C-IV, Batch EDR Run Reason Codes are used to track the reason C-IV initiated an Eligibility Determination Request (EDR) and several C-IV reports reference the Batch EDR Run Reason Code; LRS does not use Batch EDR Run Reason Codes. In LRS, the reason the system initiated an EDR is identified by the batch job number that created the EDR. This is currently a gap between LRS and C-IV.

The following Age batches are impacted by this SCR:

- Age 19: Both LRS and C-IV determine the individuals to evaluate for MAGI Medi-Cal by the following criteria:
- Currently a Medi-Cal Recipient
  - Active on a Medi-Cal Program
  - Turns 19-years old any day from the 2nd day of the current month through the first day of the next month.
  - Active on a MAGI Medi-Cal aid code:
    - LRS evaluates all individuals active on any MAGI Medi-Cal aid code
    - C-IV evaluates the specific MAGI Medi-Cal aid codes as per the original SB75 Aid Code Crosswalk
  - Once the target population is identified, the following takes place:
    - The System processes Batch MAGI and sends an EDR for the selected programs to CalHEERS.
    - CalHEERS processes the EDRs and then returns to The System a Determination of Eligibility Response (DER) with the individual eligible to the new age-appropriate aid code.
    - The System then processes the DER in Batch EDBC to move the individual to the new age-appropriate aid code.

Age 21:

- LRS processes a subset of Non-MAGI Medi-Cal aid codes for Non-MAGI Medi-Cal recipients turning age 21 any day from the 2nd day of the current month through the first day of the next month through Batch EDBC.
- C-IV has the same batch as LRS, but the batch was removed from the C-IV batch schedule with the release of the Affordable Care Act (ACA) and was never added back to the C-IV batch schedule to run.

Age 26:

- There are no existing batches to process individuals turning age 26.

**Request:**

- Due to Young Adult Expansion, add a new age change batch for turning age 26 to reevaluate adults for the correct scope of Medi-Cal after aging out of the Young Adult Expansion population.
- Update the Age 21 batch to run for all Non-MAGI Medi-Cal aid codes.
- For C-IV only, add the Age 21 batch EDBC sweep back to the batch schedule
- Update the Age 19 batch to run for a specific set of MAGI Medi-Cal aid codes.
- Add the Batch EDR Run Reason Code functionality to LRS.
- Update LRS reports to utilize the Batch EDR Run Reason Codes as a Reporting Indicator attribute.

**Recommendation:**

1. LRS only: Add Batch EDR Run Reason Functionality

- a. Create the Batch EDR Run Reasons Category in LRS. This includes populating this category with the same Batch EDR Run Reasons that currently reside in C-IV.
  - b. Create the Batch EDR Run Reason Code columns in the CH\_TRANSACT and CH\_TRANSACT\_INFO tables to store the Batch EDR Run Reason Codes as the batches are processed.
  - c. Update the existing data in the CH\_TRANSACT\_INFO and CH\_TRANSACT tables with the Batch EDR Run Reason Code with what the code would have been at the time of the original running of the batch.
  - d. Modify Batch MAGI jobs to populate the Batch EDR Run Reason Code in the CH\_TRANSACT and CH\_TRANSACT\_INFO tables.
2. C-IV only: Remove the reference to 'SB75' in the Age 19/SB75 Re-evaluation Batch EDR Run Reason description.
  3. Add a new Age 26 batch to process individuals turning age 26 in all MAGI and Non-MAGI Medi-Cal aid codes. This change will update all other batches that are required for Age 26 to be implemented fully.
  4. Update the existing Age 21 batch process to include all Non-MAGI Medi-Cal aid codes. Activate the C-IV Age 21 batch to start running with the new changes.
  5. Update the existing Age 19 batch MAGI sweep job to reevaluate individuals active in specific MAGI Medi-Cal aid codes.
  6. LRS only: Update reports to use the Batch EDR Run Reason Code along with the Reporting Indicator attribute.

See attached CA-207950 CIV-103874 CalHEERS eHIT Young Adult Expansion Age Reevaluation Updates.docx for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSF Committee. LRS system will implement this change with SCR CA-207950 in a 19.11 priority release.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Worker can set a task and run EDBC manually when a person's age changes to 19, 21 or 26.

**Operational Impact:**

**Estimate:**

**385**

|                       |    |                         |     |            |     |
|-----------------------|----|-------------------------|-----|------------|-----|
| Automated Test :      | 0  | Batch/Interfaces :      | 103 | CalHEERS : | 193 |
| CalHEERS Test :       | 89 | Client Correspondence : | 0   | DBA :      | 0   |
| DBA :                 | 0  | Eligibility :           | 0   | Fiscal :   | 0   |
| Imaging :             | 0  | IVR/CC :                | 0   | Online :   | 0   |
| Performance :         | 0  | Reports :               | 0   | Security : | 0   |
| System Test Support : | 0  | Tech Arch :             | 0   | Tech Ops : | 0   |
| Training :            | 0  |                         |     |            |     |

## [CIV-104217] ACL 19-50 - Increase Threshold For CalFresh Overissuances

|                      |   |                           |                    |                                  |                            |
|----------------------|---|---------------------------|--------------------|----------------------------------|----------------------------|
| Team Responsible:    | <b>Fiscal</b>                                   | Assignee:                 | <b>Eric Wu</b>     | SPG Status:                      | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>                                  | Designer Contact:         | <b>Eric Wu</b>     | Change Type (SCR):               | <b>New Policy</b>          |
| Minor Version:       |   | Expedite Changes:         | <b>Start Build</b> | Estimate:                        | <b>727</b>                 |
| Reporter:            | <b>Sheryl E. Eppler</b>                         | Regulation Reference:     | <b>ACL 19-50</b>   | Created:                         | <b>05/30/2019 10:30 AM</b> |
| Status:              | <b>In Development</b>                           | Impact Analysis:          | <b>[N/A]</b>       | Outreach Required:               | <b>Yes</b>                 |
| Consortium Contact:  | <b>Sheryl E. Eppler</b>                         | Training Impacted:        | <b>[N/A]</b>       | Funding Source:                  | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>                               | Migration Impact:         | <b>No</b>          | Funding Source ID:               |                            |
| Committee:           | <b>[Collections, State/<br/>Fiscal Reports]</b> | Approved by<br>Committee: | <b>09/04/2019</b>  | Other Agency Cross<br>Reference: | <b>CA-208685</b>           |

### Non-Committee

#### Review:

**Expedite Approval:** JoAnne Osborn - Approved - 05/31/2019

#### Current Design:

For Admin Error CalFresh Recovery Accounts \$35 or less, whether the Responsible Party is currently receiving CalFresh aid or not, the system establishes a claim but does not demand collection.

For Admin Error CalFresh Recovery Accounts over \$35 but \$125 or less, if the Responsible Party is no longer receiving CalFresh aid, the system establishes a claim but does not demand collection.

The FNS 209 report only excludes Recovery Accounts with a pending status and no posted transaction for the quarter and Recovery Accounts created and made void in the same quarter with a zero balance.

The Outstanding Collection Balance Report Provides a listing of all recovery accounts with outstanding balances and the account status of not closed, void, terminated, and transferred out.

#### Request:

Update the system to not establish a claim, by setting the recovery account status to pending while over issued months are calculated then update the pending status to 'discharged', when at discovery on or after June 1, 2019 the total amount of CalFresh benefits over issued to the closed CF case is \$400 or less due to an AE or IHE error (and is not a result of IPV or was not found in a QC review).

As a claim was not established for the over issued amount, as indicted by the account status of discharged, update the system to not allow transactions to be posted to a discharged account and take no collection actions for repayment.

Introduce a new recovery account status 'Discharged' and update the system to find CalFresh Recovery Accounts with a discovered date on or after June 1, 2019 with Original Balance \$400 or less caused by Admin Error (AE) or Inadvertent Household Error (IHE), not a result of IPV or QC findings, and there is no active CalFresh program under the same case for the month of discovery of the Recovery Account, update the Status of the Recovery Account to 'Discharged' and Status Reason to 'Policy Threshold Limit'.

Update the FNS 209 to exclude Recovery Accounts that have a status of 'Discharged'.

Update the Outstanding Collection Balance Report to exclude Recovery Accounts in 'Discharged' status.

#### Recommendation:

- 1) Introduce a new drop-down field 'QC Findings' on the Recovery Account Detail page to track a CalFresh recovery account is established by QC findings. When over issued benefits and the associated recovery account are the result of QC findings, set this field to 'Yes'.
- 2) Introduce a new recovery account status 'Discharged' on Recovery Account Detail Page.
- 3) Add validation on Recovery Account Detail page to prevent a CalFresh recovery account from becoming active if the account is under the policy threshold and meets the criteria for a discharge.
- 4) Add validation on Recovery Account Detail page to prevent a CalFresh recovery account from becoming discharged when it is the result of QC findings.
- 5) Disable activation function on Recovery Account Detail page when account status is 'Discharged'.
- 6) Update the Uncollectable Recovery Account Batch to update the CalFresh Recovery Accounts based on the conditions below:
  - a. When original balance is \$35 or less and the cause code is 'CalFresh - Admin Caused (prior to 3/2000)' or 'CalFresh - Admin Caused (after 3/2000)', regardless the case status, update status to 'Discharged' and status reason to 'CF - Under \$35 - AE'.
  - b. When Discovery Date is before June 1st, 2019, original balance is over \$35 and \$125 or less, cause code is 'CalFresh - Admin Caused (prior to 3/2000)' or 'CalFresh - Admin Caused (after 3/2000)', and there is no

- active CalFresh program on the Discovery Date under the same case of the Recovery Account, update status to 'Discharged' and status reason to 'CF - \$125 or Less – AE'.
- c. When Discovery Date is on or after June 1st, 2019, original balance is \$400 or less, cause code is 'CalFresh - Admin Caused (prior to 3/2000)', 'CalFresh - Admin Caused (after 3/2000)' or 'CalFresh - IHE (Customer Caused)', and the account is not a result of QC findings, and there is no active CalFresh program on the Discovery Date under the same case of the recovery account, update status to 'Discharged' and status reason to 'Policy Threshold Limit'.
- 7) Update Overpayment Adjustment Logic to exclude recovery accounts with status 'Discharged' when suggesting a benefit reduction.
- 8) Update Grant Expungement Reader to not apply any expungements to the discharged recovery accounts.
- 9) Provide a list to the Counties of CalFresh recovery accounts (Admin Error or IHE) discovered on or after 6/1/2019 with an original over issued amount of \$400 or less and the account status is not currently voided, and the CF program is not 'Active' for the month of discovery of the Recovery Account. This list may be reviewed to determine which accounts should be made void as the account meets the criteria for discharge (not established) or if the account should be established as the Overissuance is from a QC review or referral for IPV.
- 10) Update the FNS 209 report logic to not report any Recovery Accounts with a status of 'Discharged'.
- 11) Update the Outstanding Collection Balance Report to exclude Recovery Accounts with a status of 'Discharged'.

**Outreach  
Description:**

Provide a list to the Counties of CalFresh recovery accounts (Admin Error or IHE) discovered on or after 6/1/2019 with an original over issued amount of \$400 or less and the account status is not currently voided, and the CF program is not 'Active' for the date of discovery of the Recovery Account. This list may be reviewed to determine which accounts should be made void as the account meets the criteria for discharge (not established) or if the account should be established as the Overissuance is from a QC review or referral for IPV.

**Migration Impact  
Description:**

Joint design has been approved through the Collections and State/Fiscal Reports Committee. LRS will implement this change with SCR CA-208685 in the 19.11 release.

**Migration Impact  
Analysis:**

**Alternative  
Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 727

|                       |     |                         |     |            |     |
|-----------------------|-----|-------------------------|-----|------------|-----|
| Automated Test :      | 0   | Batch/Interfaces :      | 0   | CalHEERS : | 0   |
| CalHEERS Test :       | 0   | Client Correspondence : | 0   | DBA :      | 0   |
| DBA :                 | 0   | Eligibility :           | 0   | Fiscal :   | 443 |
| Imaging :             | 0   | IVR/CC :                | 0   | Online :   | 0   |
| Performance :         | 0   | Reports :               | 126 | Security : | 0   |
| System Test Support : | 158 | Tech Arch :             | 0   | Tech Ops : | 0   |
| Training :            | 0   |                         |     |            |     |



## [CIV-104973] Update Reports Overview in Online Help for SCR CIV-104094

|                      |                           |                        |                        |                               |                            |
|----------------------|---------------------------|------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Training</b>           | Assignee:              | <b>Cristina Garcia</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>            | Designer Contact:      | <b>Lisa Nesci</b>      | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       |                           | Expedite Changes:      | <b>No</b>              | Estimate:                     | <b>7</b>                   |
| Reporter:            | <b>Lisa Nesci</b>         | Regulation Reference:  | <b>CFL 18-19-79</b>    | Created:                      | <b>08/28/2019 04:38 PM</b> |
| Status:              | <b>Design in Progress</b> | Impact Analysis:       | <b>[Training]</b>      | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Joyce Oshiro</b>       | Training Impacted:     | <b>[Online Help]</b>   | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>         | Migration Impact:      | <b>No</b>              | Funding Source ID:            |                            |
| Committee:           |                           | Approved by Committee: |                        | Other Agency Cross Reference: |                            |

**Non-Committee Review:** Joyce Oshiro 08/28/2019 - approve

**Expedite Approval:**

**Current Design:** The Reports Overview in Online Help lists reports available in the C-IV System.

**Request:** SCR CIV-104094 removes one report and adds two new reports.

**Recommendation:**

1. Update the Description of the TEMP 2035 Report in the Reports Overview in Online Help to include: This report is no longer generated.
2. Add the following reports to the Reports Overview in Online Help:
  - b. Add Report 'TEMP 2035 EBT THEFT - Skimming'
  - c. Add Report 'TEMP 2313 EBT THEFT- Scam'

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 7

|                       |   |                         |   |            |   |
|-----------------------|---|-------------------------|---|------------|---|
| Automated Test :      | 0 | Batch/Interfaces :      | 0 | CalHEERS : | 0 |
| CalHEERS Test :       | 0 | Client Correspondence : | 0 | DBA :      | 0 |
| DBA :                 | 0 | Eligibility :           | 0 | Fiscal :   | 0 |
| Imaging :             | 0 | IVR/CC :                | 0 | Online :   | 0 |
| Performance :         | 0 | Reports :               | 0 | Security : | 0 |
| System Test Support : | 2 | Tech Arch :             | 0 | Tech Ops : | 0 |
| Training :            | 5 |                         |   |            |   |

## [CIV-104997] Automated Regression Test - Execution and Maintenance - 19.11 Release Cycle

|                      |                         |                        |                         |                               |                                |
|----------------------|-------------------------|------------------------|-------------------------|-------------------------------|--------------------------------|
| Team Responsible:    | <b>Automated Test</b>   | Assignee:              | <b>William Baretzky</b> | SPG Status:                   | <b>Approved</b>                |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>William Baretzky</b> | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:       | <b>20.01.XX</b>         | Expedite Changes:      | <b>Start Build</b>      | Estimate:                     | <b>200</b>                     |
| Reporter:            | <b>William Baretzky</b> | Regulation Reference:  |                         | Created:                      | <b>08/30/2019 08:05 AM</b>     |
| Status:              | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                      |
| Consortium Contact:  | <b>Sharon Teramura</b>  | Training Impacted:     | <b>[N/A]</b>            | Funding Source:               | <b>C-IV M&amp;O</b>            |
| Project Phase (SCR): | <b>Assembly Test</b>    | Migration Impact:      | <b>Yes</b>              | Funding Source ID:            |                                |
| Committee:           | <b>[Other]</b>          | Approved by Committee: |                         | Other Agency Cross Reference: | <b>CA-210328</b>               |

**Non-Committee Review:** Approved by Karen Rapponotti on 8/30/2019

**Expedite Approval:** Karen Rapponotti 8/30/2019

**Current Design:** A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

- Recommendation:**
1. Execute the major release automated regression suite against the 19.11 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 19.11 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 19.11 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

### Outreach

#### Description:

**Migration Impact Description:** Per DDID #713, A complete set of regression scripts leveraging existing C-IV and LRS scripts is to be utilized for CalSAWS.

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** Execute all regression testing manually for major and minor version releases.

**Operational Impact:**  
**Estimate:** **200**

|                       |     |                         |   |            |   |
|-----------------------|-----|-------------------------|---|------------|---|
| Automated Test :      | 200 | Batch/Interfaces :      | 0 | CalHEERS : | 0 |
| CalHEERS Test :       | 0   | Client Correspondence : | 0 | DBA :      | 0 |
| DBA :                 | 0   | Eligibility :           | 0 | Fiscal :   | 0 |
| Imaging :             | 0   | IVR/CC :                | 0 | Online :   | 0 |
| Performance :         | 0   | Reports :               | 0 | Security : | 0 |
| System Test Support : | 0   | Tech Arch :             | 0 | Tech Ops : | 0 |
| Training :            | 0   |                         |   |            |   |

**[CIV-541] Update WDTIP Outbound file writer to not allow LD02 transactions to be generated for WTW supportive services participation records**

|                      |                            |                        |                          |                               |                            |
|----------------------|----------------------------|------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b>    | Assignee:              | <b>Sidhant Garg</b>      | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>             | Designer Contact:      | <b>Sowmya Coppisetty</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                            | Expedite Changes:      | <b>No</b>                | Estimate:                     | <b>228</b>                 |
| Reporter:            | <b>Srividhya Sivakumar</b> | Regulation Reference:  |                          | Created:                      | <b>12/29/2017 02:23 PM</b> |
| Status:              | <b>Pending Approval</b>    | Impact Analysis:       | <b>[N/A]</b>             | Outreach Required:            | <b>Yes</b>                 |
| Consortium Contact:  | <b>Joel M. Acevedo</b>     | Training Impacted:     |                          | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>          | Migration Impact:      | <b>No</b>                | Funding Source ID:            |                            |
| Committee:           | <b>[Time Limits]</b>       | Approved by Committee: | <b>09/16/2019</b>        | Other Agency Cross Reference: | <b>CA-204814</b>           |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** LD02 and LD06 Transactions are being generated and sent to WDTIP for WTW time clock month when only LD06 transaction is required to be generated .

**Request:**

1. Update the WDTIP Outbound file to allow only LD06 transactions to be generated and populated for WTW Time clock month.
2. Send one-time Clean up file to WDTIP to delete historical records for the LD02 transactions that were sent in the WDTIP Outbound file for the WTW Supportive Services.

Note: Provide a detailed list of the historical LD02 transaction records sent for WTW time clock month  
The following columns will be included in the file-

- 1.County number
- 2.Office Number
- 3.Case Worker ID
- 4.Case Name
- 5.Case Number
- 6.Program Code
7. WTW Program – Last Worker ID
8. WTW Program – Participant Name
9. WTW Program – Applicant CIN Number
10. WTW Program- Transaction month
11. WTW Program- Last Date of Aid

**Recommendation:**

- 1.Update the WDTIP Outbound file to allow only LD06 transactions to be generated and populated for WTW Time clock month.
2. Send one-time Clean up file to WDTIP to delete historical records for the LD02 transactions that were sent in the WDTIP Outbound file for the WTW Supportive Services.

**Outreach Description:** A detailed case list of all the WTW program persons will be provided for which LD02 transactions were generated in the WDTIP outbound file prior to this SCR for Retention Services (WTW) time limit program participation records

**Migration Impact Description:** Joint design has been approved through the Time Limits Committee. CalSAWS will implement this change with SCR CA-204814 in the 20.01 release.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A

**Operational Impact:**  
**Estimate:** **228**

|                  |   |                         |     |            |   |
|------------------|---|-------------------------|-----|------------|---|
| Automated Test : | 0 | Batch/Interfaces :      | 175 | CalHEERS : | 0 |
| CalHEERS Test :  | 0 | Client Correspondence : | 0   | DBA :      | 0 |

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|                       |    |               |   |            |   |
|-----------------------|----|---------------|---|------------|---|
| DBA :                 | 0  | Eligibility : | 0 | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :      | 0 | Online :   | 0 |
| Performance :         | 0  | Reports :     | 0 | Security : | 0 |
| System Test Support : | 53 | Tech Arch :   | 0 | Tech Ops : | 0 |
| Training :            | 0  |               |   |            |   |

**[CIV-101430] CF - FTP INS Document, Income of FRE should be prorated**

|                      |                                 |                           |                           |                                  |                            |
|----------------------|---------------------------------|---------------------------|---------------------------|----------------------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>              | Assignee:                 | <b>Unassigned</b>         | SPG Status:                      | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>                  | Designer Contact:         | <b>Thomas Lazio</b>       | Change Type (SCR):               | <b>Policy Re-Design</b>    |
| Minor Version:       |                                 | Expedite Changes:         | <b>No</b>                 | Estimate:                        | <b>210</b>                 |
| Reporter:            | <b>Tyler Vaisau</b>             | Regulation Reference:     | <b>63-503.442</b>         | Created:                         | <b>06/04/2018 04:37 PM</b> |
| Status:              | <b>Pending Approval</b>         | Impact Analysis:          | <b>[Business Process]</b> | Outreach Required:               | <b>No</b>                  |
| Consortium Contact:  | <b>Tyler Vaisau</b>             | Training Impacted:        | <b>[N/A]</b>              | Funding Source:                  | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>               | Migration Impact:         | <b>No</b>                 | Funding Source ID:               |                            |
| Committee:           | <b>[CalWORKs/<br/>CalFresh]</b> | Approved by<br>Committee: | <b>09/11/2019</b>         | Other Agency Cross<br>Reference: | <b>CA-201575</b>           |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** Currently for FRE non-citizens with role reason of 'FTP - INS Document' all of their income is counted against the eligible household in the CF EDBC. Also, the entire SSI Only, SSP Only (CalSAWS Only) and SSI/SSP unearned income amounts received from Other Program Assistance (OPA) by a FRE non-citizen with a role reason eligible for income proration are counted against the eligible household members.

**Request:** In a CalFresh household of eligible citizens and FRE non-citizen with role reason of 'FTP-INS Document', income of the excluded non-citizen should be prorated. Also, SSI Only, SSP Only (CalSAWS Only) and SSI/SSP unearned incomes from OPA need to be prorated in the same way it does for income for a FRE non-citizen with a role reason eligible for income proration.

**Recommendation:** Update CF EDBC logic to prorate income of non-citizen in household with role FRE and role reason FTP - INS Document.

Update CF EDBC logic to prorate SSI Only, SSP Only (CalSAWS Only) and SSI/SSP unearned incomes received from OPA by a non-citizen in household with a role of FRE and a role reason eligible for income proration.

Generate list of CF cases based on the following criteria:

- Case has 'Active' program person with role of FRE and role reason of 'FTP-INS Document'.
- Case had an active income record for the program person with role of FRE and role reason of 'FTP-INS Document' any time since January 2019.
- Case had a CF program with a status of 'Active' any time since January 2019.

The lists will include the following list columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID
- Current CF Program Status

These lists will be posted at:  
 CalSAWS: CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CA-201575  
 C-IV: CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV-101430

**Outreach**

**Description:**  
**Migration Impact Description:** Joint design has been approved through the CW/CF Committee. LRS will implement this Change with SCR CA-201575 in the 19.11 release.

**Migration Impact Analysis:**

**Alternative Procedure**

Overwrite EDBC

**Description:**

**Operational Impact:**

**Estimate:**

**210**

|                       |    |                         |     |            |   |
|-----------------------|----|-------------------------|-----|------------|---|
| Automated Test :      | 0  | Batch/Interfaces :      | 0   | CalHEERS : | 0 |
| CalHEERS Test :       | 0  | Client Correspondence : | 0   | DBA :      | 0 |
| DBA :                 | 0  | Eligibility :           | 162 | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :                | 0   | Online :   | 0 |
| Performance :         | 0  | Reports :               | 0   | Security : | 0 |
| System Test Support : | 48 | Tech Arch :             | 0   | Tech Ops : | 0 |
| Training :            | 0  |                         |     |            |   |

## [CIV-101987] Update SAR7 Sent Text Message for Tutorial

|                      |                                   |                        |                      |                               |                            |
|----------------------|-----------------------------------|------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b>           | Assignee:              | <b>Unassigned</b>    | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>                    | Designer Contact:      | <b>Steve Hancock</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                                   | Expedite Changes:      | <b>No</b>            | Estimate:                     | <b>24</b>                  |
| Reporter:            | <b>Danielle Benoit</b>            | Regulation Reference:  |                      | Created:                      | <b>08/14/2018 02:47 PM</b> |
| Status:              | <b>Pending Approval</b>           | Impact Analysis:       | <b>[Other]</b>       | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Darcy Alexander</b>            | Training Impacted:     | <b>[N/A]</b>         | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>                 | Migration Impact:      | <b>No</b>            | Funding Source ID:            |                            |
| Committee:           | <b>[IVR &amp; Contact Center]</b> | Approved by Committee: | <b>08/20/2018</b>    | Other Agency Cross Reference: |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

A "SAR 7 Sent" text message was created with SCR 100050. This SCR contains a link to a SAR 7 tutorial that is available on C4Yourself.com

The current 'SAR 7 Sent' text message states the following:

English:

Your SAR 7 has been sent. It's due by the 5th of this month. C4Yourself.com/S7

Spanish:

Su SAR 7 ha sido enviado. Esta previsto para el 5 de este mes. C4Yourself.com/S7

#### Request:

Update text message to inform customers what the link is for.

#### Recommendation:

1. Change the message text for the 'SAR 7 Sent' message text for the following:

a. Text Notification Messages Category (Category ID = 2806)

b. SAR 7 Sent (ID = 78546)

i. English (REFER\_TABLE\_1\_DESCR):

1. Change text to: Your SAR7 has been sent. It's due by the 5th of this month. Visit C4Yourself.com/s7 for instructions.

ii. Spanish (REFER\_TABLE\_2\_DESCR)

1. Change text to: Su SAR7 ha sido enviado. Esta previsto para el 5 de este mes. Visita C4Yourself.com/s7 para obtener instrucciones.

### Outreach

#### Description:

#### Migration Impact

#### Description:

The Self-Service Portal is currently not in scope for migration as it is assumed that the approach for the YBN and C4Yourself Portals will be addressed prior to migration.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

Estimate: **24**

|                       |    |                         |    |            |   |
|-----------------------|----|-------------------------|----|------------|---|
| Automated Test :      | 0  | Batch/Interfaces :      | 14 | CalHEERS : | 0 |
| CalHEERS Test :       | 0  | Client Correspondence : | 0  | DBA :      | 0 |
| DBA :                 | 0  | Eligibility :           | 0  | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :                | 0  | Online :   | 0 |
| Performance :         | 0  | Reports :               | 0  | Security : | 0 |
| System Test Support : | 10 | Tech Arch :             | 0  | Tech Ops : | 0 |
| Training :            | 0  |                         |    |            |   |



## [CIV-102946] Update CW EDBC to Remove Stepsibling or Half-Sibling Excluded from CalWORKs in the CalFresh Budget

|                      |                             |                        |                           |                               |                            |
|----------------------|-----------------------------|------------------------|---------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>          | Assignee:              | <b>Unassigned</b>         | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>              | Designer Contact:      | <b>Thomas Lazio</b>       | Change Type (SCR):            | <b>Policy Re-Design</b>    |
| Minor Version:       |                             | Expedite Changes:      | <b>No</b>                 | Estimate:                     | <b>66</b>                  |
| Reporter:            | <b>Jason M. Francis</b>     | Regulation Reference:  | <b>ACL 18-82</b>          | Created:                      | <b>12/11/2018 03:53 PM</b> |
| Status:              | <b>Pending Approval</b>     | Impact Analysis:       | <b>[Business Process]</b> | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Tyler Vaisau</b>         | Training Impacted:     | <b>[N/A]</b>              | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>           | Migration Impact:      | <b>No</b>                 | Funding Source ID:            |                            |
| Committee:           | <b>[CalWORKs/ CalFresh]</b> | Approved by Committee: | <b>09/15/2019</b>         | Other Agency Cross Reference: | <b>CA-205982</b>           |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

On a CW/CF case, a sanctioned penalty is applied in the CW grant amount counted as unearned income by the CF program when one of the members in the CW program is in non-compliance. When SCR CA-200785/ CIV-100390 updated CW and RCA EDBC to allow an option to exclude child support payments as income for a stepsibling or half-sibling with the role reason of 'Optional Child-Receives Child Support', it did not exclude that 'optional child' from being considered a sanctioned person assessed a penalty in the CW grant amount counted in the CF EDBC.

#### Request:

For a CW/CF case, non-members that are stepsiblings or half-siblings with the role reason of 'Optional Child - Receives Child Support' that are excluded in the CW program should also be excluded in the CW grant counted as unearned income in the CF budget.

#### Recommendation:

Update the CF EDBC rule that determines sanctioned persons assessed penalties in the CW grant amount considered as unearned income in the CF program to exclude CW persons with the role reason of 'Optional Child -Receives Child Support'.

Generate list of active CW/CF cases based on the following criteria:

- Case has an active CW non-member with role of 'MMO' and role reason of 'Optional Child -Receives Child Support' who is also a member on the CF program.

The lists will include the following Standard List Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

These lists will be posted at:

CalSAWS: CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CA-205982

C-IV: CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CIV-102946

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the CW/CF Committee. LRS will implement this Change with SCR CA-205982 in the 19.11 release.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

Overwrite EDBC

66



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|                       |    |                         |    |            |   |
|-----------------------|----|-------------------------|----|------------|---|
| Automated Test :      | 0  | Batch/Interfaces :      | 0  | CalHEERS : | 0 |
| CalHEERS Test :       | 0  | Client Correspondence : | 0  | DBA :      | 0 |
| DBA :                 | 0  | Eligibility :           | 52 | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :                | 0  | Online :   | 0 |
| Performance :         | 0  | Reports :               | 0  | Security : | 0 |
| System Test Support : | 14 | Tech Arch :             | 0  | Tech Ops : | 0 |
| Training :            | 0  |                         |    |            |   |

## [CIV-104268] Enhance Refused Verification functionality to send failed Admin Verif

|                      |                         |                        |                      |                               |                            |
|----------------------|-------------------------|------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>CalHEERS</b>         | Assignee:              | <b>Unassigned</b>    | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>          | Designer Contact:      | <b>Tisha Mutreja</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>No</b>            | Estimate:                     | <b>136</b>                 |
| Reporter:            | <b>Tisha Mutreja</b>    | Regulation Reference:  |                      | Created:                      | <b>06/05/2019 04:28 PM</b> |
| Status:              | <b>Pending Approval</b> | Impact Analysis:       | <b>[N/A]</b>         | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Elisa Miller</b>     | Training Impacted:     | <b>[N/A]</b>         | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>            | Funding Source ID:            |                            |
| Committee:           | <b>[Medi-Cal/CMSP]</b>  | Approved by Committee: | <b>09/03/2019</b>    | Other Agency Cross Reference: | <b>CA-209076</b>           |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, C-IV sends Nothing to CalHEERS as Admin Verification for a record with 'Refused' status in a benefit month whereas CalSAWS sends 'No' as Admin Verification in same scenario for all the Types in the EDR as displayed in the screenshot below.

If 'Refused' is the only selected verification in a benefit month, CalSAWS will send 'No' to CalHEERS whereas C-IV sends Nothing. Although if 'Refused' is one of the verification records along with other Verification statuses in a benefit month, 'Refused' is not considered to be sent as failed Admin Verification to CalHEERS.

Also on Citizenship Page when the Verified status is either "Not Applicable, Pending or Refused", 'Medi-Cal Reasonable Opportunity Period' (ROP) section shows up to be filled in by the Worker with Due Date and if Expired is 'Yes' Admin Verif is sent as 'No' making them fail ROP. Although if the status is 'Verified', the ROP section is hidden and ignored for EDR.

#### Request:

The Systems to send Admin-Verified 'No' when at least one record exists in a benefit month with one of the record as 'Refused' status.

The Systems to not display ROP section when the Citizenship Status on Citizenship Status Detail page is 'Not Applicable' or 'Refused'.

#### Recommendation:

1. Update eHIT to send Admin-Verified 'No' for Refused records in a benefit month even if multiple other status exists in the same month.
2. Update Citizenship Status Detail page to hide Medi-Cal ROP section when 'Not Applicable' or 'Refused' is selected in the Verified drop down.
3. Update eHIT to only send failed Admin-Verified when 'Pending' status is selected with Expired as 'Yes' in Medi-Cal ROP section or the Verified status is 'Refused'.

Please refer to the details in the design draft attached.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the Medi-Cal/CMSP Committee. LRS will implement this Change with SCR CA-209076 in the 20.01 release.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

Send a Negative Action or Non-Compliance.

#### Operational Impact:

Estimate: **136**

|                  |    |                         |   |            |    |
|------------------|----|-------------------------|---|------------|----|
| Automated Test : | 24 | Batch/Interfaces :      | 0 | CalHEERS : | 50 |
| CalHEERS Test :  | 62 | Client Correspondence : | 0 | DBA :      | 0  |

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|                       |   |               |   |            |   |
|-----------------------|---|---------------|---|------------|---|
| DBA :                 | 0 | Eligibility : | 0 | Fiscal :   | 0 |
| Imaging :             | 0 | IVR/CC :      | 0 | Online :   | 0 |
| Performance :         | 0 | Reports :     | 0 | Security : | 0 |
| System Test Support : | 0 | Tech Arch :   | 0 | Tech Ops : | 0 |
| Training :            | 0 |               |   |            |   |

End SCRs

# [CIV-104168] Automated Regression Test - Execution and Maintenance - 19.09 Release Cycle

|                      |                         |                        |                         |                               |                                |
|----------------------|-------------------------|------------------------|-------------------------|-------------------------------|--------------------------------|
| Team Responsible:    | <b>Automated Test</b>   | Assignee:              | <b>William Baretsky</b> | SPG Status:                   | <b>Approved</b>                |
| Fix Version/s:       | <b>[19.09]</b>          | Designer Contact:      | <b>William Baretsky</b> | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:       | <b>19.11.XX</b>         | Expedite Changes:      | <b>Start Build</b>      | Estimate:                     | <b>200</b>                     |
| Reporter:            | <b>William Baretsky</b> | Regulation Reference:  |                         | Created:                      | <b>05/20/2019 04:40 PM</b>     |
| Status:              | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                      |
| Consortium Contact:  | <b>Sharon Teramura</b>  | Training Impacted:     | <b>[N/A]</b>            | Funding Source:               | <b>C-IV M&amp;O</b>            |
| Project Phase (SCR): | <b>Assembly Test</b>    | Migration Impact:      | <b>Yes</b>              | Funding Source ID:            |                                |
| Committee:           | <b>[Other]</b>          | Approved by Committee: |                         | Other Agency Cross Reference: | <b>CA-208531</b>               |

**Non-Committee Review:** Approved by Michele Peterson on 5/28/2019

**Expedite Approval:** Karen Rapponotti 5/21/2019

**Current Design:** A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

- Recommendation:**
1. Execute the major release automated regression suite against the 19.09 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 19.09 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 19.09 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact Description:** Per DDID #713, A complete set of regression scripts leveraging existing C-IV and LRS scripts is to be utilized for CalSAWS.

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** Execute all regression testing manually for major and minor version releases.

**Operational Impact:**  
**Estimate:** **200**

|                       |     |                         |   |            |   |
|-----------------------|-----|-------------------------|---|------------|---|
| Automated Test :      | 200 | Batch/Interfaces :      | 0 | CalHEERS : | 0 |
| CalHEERS Test :       | 0   | Client Correspondence : | 0 | DBA :      | 0 |
| DBA :                 | 0   | Eligibility :           | 0 | Fiscal :   | 0 |
| Imaging :             | 0   | IVR/CC :                | 0 | Online :   | 0 |
| Performance :         | 0   | Reports :               | 0 | Security : | 0 |
| System Test Support : | 0   | Tech Arch :             | 0 | Tech Ops : | 0 |
| Training :            | 0   |                         |   |            |   |

**Content Revision Status-1:** Pending CCB

**Content Revision  
Description-1:**

1. Recommendation Change: None
2. Estimate Change:  
Before: Automated Test: 200  
After: Automated Test: 280
3. Release Change: None
4. Funding Source Change: None

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:

## [CIV-104415] Add Full/Restricted Scope verbiage for Young Adult Expansion MAGI NOAs (CH-139211)

|                      |                              |                        |                                   |                               |                             |
|----------------------|------------------------------|------------------------|-----------------------------------|-------------------------------|-----------------------------|
| Team Responsible:    | <b>Client Correspondence</b> | Assignee:              | <b>Sureshnaidu Mullaguri</b>      | SPG Status:                   | <b>Approved</b>             |
| Fix Version/s:       | <b>[19.09]</b>               | Designer Contact:      | <b>Nithya Chereddy</b>            | Change Type (SCR):            | <b>New Policy</b>           |
| Minor Version:       | <b>19.11.14</b>              | Expedite Changes:      | <b>Start Build</b>                | Estimate:                     | <b>298</b>                  |
| Reporter:            | <b>Nithya Chereddy</b>       | Regulation Reference:  | <b>W&amp;C Section 14007.8(b)</b> | Created:                      | <b>06/24/2019 01:23 PM</b>  |
| Status:              | <b>In Assembly Test</b>      | Impact Analysis:       | <b>[Forms/NOA Translations]</b>   | Outreach Required:            | <b>No</b>                   |
| Consortium Contact:  | <b>Elisa Miller</b>          | Training Impacted:     | <b>[N/A]</b>                      | Funding Source:               | <b>Premise</b>              |
| Project Phase (SCR): | <b>Production</b>            | Migration Impact:      | <b>No</b>                         | Funding Source ID:            | <b>CO-103</b>               |
| Committee:           | <b>[Correspondence]</b>      | Approved by Committee: | <b>2019-08-12 00:00:00.0</b>      | Other Agency Cross Reference: | <b>CA-209109; CH-139211</b> |

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 8/14/2019

**Current Design:** The system currently does not have the appropriate verbiage to populate on MAGI NOAs once Young Adult Expansion is effective.

**Request:** Add new MAGI NOA verbiage for full scope/restricted Scope NOAs with respect to Young Adult Expansion.

**Recommendation:** Create MAGI full scope/restricted scope fragments with Young Adult Expansion appropriate verbiage.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the Correspondence Committee. LRS will implement this Change with SCR CA-209109 in the 19.09 priority release

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 298

|                       |     |                         |     |            |   |
|-----------------------|-----|-------------------------|-----|------------|---|
| Automated Test :      | 0   | Batch/Interfaces :      | 0   | CalHEERS : | 0 |
| CalHEERS Test :       | 106 | Client Correspondence : | 192 | DBA :      | 0 |
| DBA :                 | 0   | Eligibility :           | 0   | Fiscal :   | 0 |
| Imaging :             | 0   | IVR/CC :                | 0   | Online :   | 0 |
| Performance :         | 0   | Reports :               | 0   | Security : | 0 |
| System Test Support : | 0   | Tech Arch :             | 0   | Tech Ops : | 0 |
| Training :            | 0   |                         |     |            |   |

### Content Revision

**Status-1:** Pending CCB

### Content Revision

#### Description-1:

1. Recommendation Change:  
Cosmetic updates to a C-IV Specific recommendation in the "Overview of Recommendations" section.

#### Before:

3. CIV - Suppress the MSG\_MAGI\_INFORMATION\_MESSAGE on the NOA if the new Restricted-Scope Retro Approval or Restricted-Scope Approval are generated, as the new fragments has the MAGI information message verbiage.

#### After:

3. Populate the updated MAGI information message verbiage when the new Retro restricted scope approval message or Restricted scope approval message are populated on the NOA.

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



**[CIV-104577] Update Issuance Thresholds for 2020 (CRFI 19-026)**

|                      |                         |                        |                                  |                               |                            |
|----------------------|-------------------------|------------------------|----------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Fiscal</b>           | Assignee:              | <b>Jacob Betz</b>                | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>Sidhant Garg</b>              | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>Start Build</b>               | Estimate:                     | <b>85</b>                  |
| Reporter:            | <b>Sheryl E. Eppler</b> | Regulation Reference:  |                                  | Created:                      | <b>07/11/2019 03:01 PM</b> |
| Status:              | <b>In Assembly Test</b> | Impact Analysis:       | <b>[N/A]</b>                     | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Sheryl E. Eppler</b> | Training Impacted:     | <b>[N/A]</b>                     | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>Yes</b>                       | Funding Source ID:            |                            |
| Committee:           | <b>[Fiscal]</b>         | Approved by Committee: | <b>2019-08-20<br/>00:00:00.0</b> | Other Agency Cross Reference: | <b>CA-209407</b>           |

**Non-Committee Review:** Reviewed by affected Counties - approvals in comments field - 08/15/2019

**Expedite Approval:** Emergency approval to start build from JoAnne Osborn on 8/21/2019

**Current Design:** Issuance thresholds are established to determine the amount of benefits or service payments that can be approved by an Eligibility worker without requiring a supervisor override.

**Request:** Counties have been requested to review their existing Issuance Thresholds for Adoption Assistance Program (AAP), Approved Relative Caregiver (ARC), CalFresh (CF), Cal-Learn (CL), CAPI, CalWORKs (CW), CalFresh Employment and Training (CFET), Child Care (CC), Diversion (DV), Foster Care (FC), General Assistance/General Relief (GA/GR), General Relief Opportunities for Work (GROW), Homeless Assistance Temp (HT), Homeless Assistance Perm (HP), Kin-GAP (KG), Nutritional Benefits (NB), Refugee Cash Assistance (RCA), Refugee Employment Program (REP) and Welfare to Work (WtW) to determine if any changes are appropriate. The last changes were made by SCR # CIV-100503 in Release 19.01.

**Recommendation:** Affected Counties: Alpine, Butte, Calaveras, El Dorado, Glenn, Humboldt, Imperial, Los Angeles, Madera, Marin, Mendocino, Merced, Monterey, Riverside, San Bernardino, Shasta, Siskiyou, Stanislaus, Sutter, Yuba

- 1) Update the following issuance thresholds for Alpine County (02):
  - a) General Assistance (Managed): GM - From: \$200 to: \$1,000
- 2) Update the following issuance thresholds for Butte County (04):
  - a) Foster Care: FC - From: \$30,000 to: \$50,000
- 3) Update the following issuance thresholds for Calaveras County (05):
  - a) AAP: AP - From: \$12,000 to: \$15,000
  - b) Foster Care: FC - From: \$12,000 to: \$15,000
  - c) HA-Temp: HT - From: \$1,000 to: \$2,000
  - d) HA-Perm: HP - From: \$4,000 to: \$5,000
- 4) Update the following issuance thresholds for El Dorado County (09):
  - a) Foster Care: FC - From: \$12,500 to: \$15,000
  - b) HA-Temp: HT - From: \$1,280 to: \$2,000
  - c) HA-Perm: HP - From: \$2,500 to: \$3,000
  - d) Welfare-to-Work: WTW - From: \$1,500 to: \$5,000
- 5) Update the following issuance thresholds for Glenn County (11):
  - a) General Assistance (Managed): GM - From: \$297 to: \$500
  - b) HA-Perm: HP - From: \$2,000 to: \$2,500
- 6) Update the following issuance thresholds for Humboldt County (12):
  - a) Nutritional Benefit: NB - From: \$2,500 to: \$1,000
  - b) Welfare-to-Work: WTW - From: \$999 to: \$1,500
- 7) Update the following issuance thresholds for Imperial County (13):
  - a) Cal-Learn: CL - From: \$99,999 to: \$2,000
  - b) Welfare-to-Work: WTW - From: \$3,500 to: \$5,000

- 8) Update the following issuance thresholds for Los Angeles County (19):
  - a) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: Cal-Learn - Update Max Quantity to zero.
  - b) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: REP - Update Max Quantity to zero.
  - c) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: Welfare-to-Work - Update Max Quantity to zero.
  - d) Supportive Services - Need Category: County Specific Program / Need Type: Educational Support Payment / Program: CalWORKs - Update Max Quantity to zero.
  - e) Supportive Services - Need Category: County Specific Program / Need Type: Educational Support Payment / Program: RCA - Update Max Quantity to zero.
  - f) Supportive Services - Need Category: Ancillary-Education / Need Type: Family Reunification Moving Assistance / Program: Welfare-to-Work - Update Max Quantity to zero.
- 9) Update the following issuance thresholds for Madera County (20):
  - a) Cal-Learn: CL - From: \$1 to: \$550
  - b) HA-Temp: HT - From: \$1 to: \$2,000
  - c) HA-Perm: HP - From: \$1,000 to: \$2,000
- 10) Update the following issuance thresholds for Marin County (21):
  - a) CalFresh: CF - From: \$5,000 to: \$3,000
  - b) HA-Temp: HT - From: \$1,100 to: \$2,000
  - c) HA-Perm: HP - From: \$1,000 to: \$2,000
  - d) Nutritional Benefits: NB - From: \$5,000 to: \$3,000
- 11) Update the following issuance thresholds for Mendocino County (23):
  - a) AAP: AP - From: \$13,500 to: \$15,500
  - b) ARC: AR - From: \$10,000 to: \$5,000
  - c) Foster Care: FC - From: \$13,500 to: \$15,500
  - d) General Assistance (Managed): GM - From: \$600 to: \$2,000
- 12) Update the following issuance thresholds for Merced County (24):
  - a) AAP: AP - From: \$10,500 to: \$15,000
  - b) ARC: AR - From: \$10,500 to: \$15,000
  - c) CalFresh: CF - From: \$2,000 to: \$2,500
  - d) CalWORKs: CW - From: \$2,000 to: \$2,500
  - e) Foster Care: FC - From: \$12,036 to: \$15,000
  - f) Kin-GAP: KG - From: \$3,500 to: \$15,000
- 13) Update the following issuance thresholds for Monterey County (27):
  - a) ARC: AR - From: \$10,200 to: \$5,000
  - b) Kin-GAP: KG - From: \$1,700 to: \$5,000
- 14) Update the following issuance thresholds for Riverside County (33):
  - a) Kin-GAP: KG - From: \$8,000 to: \$9,000
- 15) Update the following issuance thresholds for San Bernardino County (36):
  - a) CAPI: CP - From: \$2,337 to: \$2,389
- 16) Update the following issuance thresholds for Shasta County (45):
  - a) ARC: AR - From: \$7,000 to: \$8,000
  - b) CalWORKs: CW - From: \$2,000 to: \$2,500
  - c) General Assistance (Managed): GM - From: \$500 to: \$700
- 17) Update the following issuance thresholds for Siskiyou County (47):
  - a) Welfare-to-Work: WTW - From: \$2,500 to: \$5,000
- 18) Update the following issuance thresholds for Stanislaus County (50):
  - a) CFET: FT - From: \$0 to: \$500
  - b) General Assistance (Managed): GM - From: \$500 to: \$604

19) Update the following issuance thresholds for Sutter County (51):

a) RCA: RC - From: \$600 to: \$1,000

20) Update the following issuance thresholds for Yuba County (58):

a) AAP: AP - From: \$13,000 to: \$13,600

b) ARC: AR - From: \$13,000 to: \$13,600

c) Foster Care: FC - From: \$13,000 to: \$13,600

Developer Note: All changes to Issuance Thresholds will be done to codes table category 562.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

These values will need to persist post-migration but are not expected to exist in LRS as they are county-specific. This SCR has been associated with the existing DDCR SCR for updating Issuance Thresholds, CA-201453.

**Migration Impact**

**Analysis:**

Not Accounted for in SOR

**Alternative**

**Procedure**

**Description:**

Add the "Authorize Issuance Amount Exceptions" security group to a user who must authorize issuances above the current threshold amount.

**Operational Impact:**

**Estimate:**

**85**

|                       |    |                         |   |            |    |
|-----------------------|----|-------------------------|---|------------|----|
| Automated Test :      | 25 | Batch/Interfaces :      | 0 | CalHEERS : | 0  |
| CalHEERS Test :       | 0  | Client Correspondence : | 0 | DBA :      | 0  |
| DBA :                 | 0  | Eligibility :           | 0 | Fiscal :   | 55 |
| Imaging :             | 0  | IVR/CC :                | 0 | Online :   | 0  |
| Performance :         | 0  | Reports :               | 0 | Security : | 0  |
| System Test Support : | 5  | Tech Arch :             | 0 | Tech Ops : | 0  |
| Training :            | 0  |                         |   |            |    |

**Content Revision**

**Status-1:**

Pending CCB

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before:

14) Update the following issuance thresholds for Riverside County (33):

a) Kin-GAP: KG - From: \$8,000 to: \$9,000

After:

14) Update the following issuance thresholds for Riverside County (33):

a) Kin-GAP: KG - From: \$8,000 to: \$9,000

b) Homeless Assistance-Temp : HT - From: \$1,300 to: \$1,360

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**End Content Revisions**



# [CA-206317] ACL 19-70 Foster Care, Kin-GAP COLA Rate Increase for Year 2019 - Batch EDBC

- Resolved: 09/06/2019 09:11 AM

|                      |                                  |                        |                                |                               |                            |
|----------------------|----------------------------------|------------------------|--------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>               | Assignee:              | <b>Ramakrishna Kuchibhotla</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.07]</b>                   | Designer Contact:      | <b>Dan DeMille</b>             | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       | <b>19.09.07</b>                  | Expedite Changes:      | <b>Production Deployment</b>   | Estimate:                     | <b>365</b>                 |
| Reporter:            | <b>Srinivasa Meenavalli</b>      | Regulation Reference:  | <b>ACL 19-70</b>               | Created:                      | <b>01/10/2019 10:27 AM</b> |
| Status:              | <b>In Production</b>             | Impact Analysis:       | <b>[N/A]</b>                   | Outreach Required:            | <b>Yes</b>                 |
| Consortium Contact:  | <b>Maria Zelaya</b>              | Training Impacted:     | <b>[N/A]</b>                   | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>                | Migration Impact:      | <b>No</b>                      | Funding Source ID:            |                            |
| Committee:           | <b>[Foster Care/Kin GAP/AAP]</b> | Approved by Committee: |                                | Other Agency Cross Reference: | <b>CIV-103141</b>          |

## Non-Committee

**Review:**  
**Expedite Approval:** Expedited Production Deployment approval received from Karen Rapponotti on 8/7/19.  
**Current Design:** Currently C-IV and CalACES use the CNI rates of FY 2018-19 that are effective from July 1, 2018.  
**Request:** As per the ACL 19-70, the new CNI rate increase for the FY 2019-20 will be implemented in C-IV and CalACES effective July 1, 2019. CalACES will update Foster Care and Kin-GAP COLA NOAs to add/update new reason message and regulations for FY 2019-20.

### \*ASSUMPTIONS\*

- 1) During DCFS COLA run, CCR Rate Change NOA will not be generated for EDBC that have the run reason COLA (CalACES only).
- 2) C-IV would continue to use existing Rate Change NOA during COLA run. If the benefits change due to this COLA a Change NOA with the Rate Change Reason will generate.
- 3) Under this SCR, there will be no impact / changes to Fiscal such as creating the issuances and then sending those issuances to the Auditor Controller in a separate COLA file.
- 4) In CalACES, Batch EDBC will not discontinue FC/KG Cases and will "exception out", but in C-IV, the Batch EDBC may discontinue FC/KG Cases.
- 5) Batch EDBC will have a run reason for every month of COLA run (i.e. July, Aug, Sept).(LRS Only)

## Recommendation:

### \*REQUIREMENTS\*

- 1) BATCH OPERATIONS : Run batch EDBC for active Foster Care (FC) and Kin-GAP (KG) programs starting with the month of 07/2019 through come-up month including past RE due date cases in both the systems.
  - a) In CalACES, Batch EDBC will run with the run reason "DCFS Annual COLA" and C-IV will not use any run reason
  - b) Batch EDBC records will have a run type code of 'Single Program' in both the systems
  - c) Batch EDBC will not be triggered on programs with a Non-standard rate in effect in the benefit month in both the systems
  - d) Batch EDBC will not run if there is an overridden aid code where a sub type code exists
  - e) In C-IV, Foster Care Programs will not run for the online pre-EDBC validation criteria. For these cases, a placement authority and at least one child placement must exist for the benefit month. Exclude any cases that meet the exception criteria below:
    - i. There is a Non-Related Legal Guardianship placement authority month with a Probate court established guardianship and the rate level is set to a value other than Schedule A, Schedule B, Age-Based or Basic
    - ii. There is a Non-Related Legal Guardianship placement authority with a Juvenile court established guardianship and the rate level is set to a value other than Schedule A, Schedule B, Age-Based, Basic, LOC 2, LOC 3, or LOC4
    - iii. There is an ISFC rate with no Approved or Licensed ISFC License for the duration of the rate within the placement and benefit month.

- iv. There is a STRTP rate with no Approved or Licensed STRTP License for the duration of the rate within the placement and benefit month.
- v. There is an FFA, FFA Treatment, FFA Intensive Programs, Multidimensional Treatment, or FFA Non-Treatment placement with a 'County or FFA ISFC' Standard State Rate and no ISFC State Program Number

Note: See 2)h for details on exception reporting for online pre-EDBC validation.

- f) In CalACES, batch EDBC will insert the below Journal entry for FC programs and C-IV will not specify any journal entry

Short Description: Batch EDBC ran for [month, year]

Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: Foster Care COLA

- g) In CalACES, batch EDBC will insert the below Journal entry for KG programs and C-IV will not specify any journal entry

Short Description: Batch EDBC ran for [month, year]

Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: Kin-Gap COLA

2) EXCEPTION LIST : Below are the case listing details for case exceptions (skipped, unprocessed, discontinued, etc.) in both systems with the standard columns after the batch.

- a) List of FC/KG programs with a Non Standard Rate. The case listing will be named "List of cases with Non Standard Rate - [Program Name]" and include the Standard List Columns with an additional "Rate" column to show the non-standard rate. Where [Program Name] input FosterCare or KinGAP.
- b) List of FC programs with overridden aid code where a sub type code exists. The case listing will be named "List of [Program Name] with Overridden Aid Code" and include the Standard List Columns with an additional "Sub Type Code" column to show the sub type code currently applied to the program. Where [Program Name] input FosterCare.
- c) List of FC/KG programs discontinued by the batch EDBC. The case listing will be named "List of cases Discontinued by the Batch EDBC" and include the Standard List Columns with an additional "Program" and "Discontinued Reason" columns.
- d) List of FC/KG programs which resulted in Read-Only EDBC. The case listing will be named "List of [Program Name] with Read-Only" and include the Standard List Columns with additional "Reason" and "EDBC Month" columns. Where [Program Name] input FosterCare or KinGAP.
- e) List of FC/KG unprocessed programs skipped in the COLA batch run with the skip reasons like Override, Manual EDBC, Read Only EDBC, No Worker Assigned etc. The case listing will be named "List of unprocessed programs skipped in the COLA batch run with skip reasons" and include the Standard List Columns with an additional "Program", "EDBC Month" and "Not Processed Reason" columns.
- f) List of FC/KG programs where the incomplete RE has a due date in the past. The case listing will be named "List of [Program Name] cases with RE Date in the past" and include the Standard List Columns with an additional "RE Due Date" column. Where [Program Name] input FosterCare or KinGAP.
- g) List of FC programs with THPP or THP+FC Facilities. The case listing will be named "List of FC programs with THPP or THP+FC" and include the Standard List Columns with an additional "CF Case #" column to show CalFresh (CF) cases having a CalFresh participant in common with FC or KG program.
- h) A list of FC programs that are excluded in batch due to pre-EDBC online validations. Please refer to Item requirements 1e) for the list of all pre-EDBC online validation details (C-IV Only). The case listing will be named "List of FC Programs skipped with pre-EDBC validations" and include the Standard List Columns with an additional "Reason" column.
- i) List of Active ARC Program Cases (C-IV Only). The case listing will be named "Active ARC cases" and include the Standard List Columns.

j) List of Cal-Fresh (CF) program Cases that have an active member in common with an active ARC case (C-IV Only). The case listing will be named "CF Cases in common with ARC" and include the Standard List Columns.

NOTE: Standard List Columns and the location of the lists on SharePoint is provided below:

- 1) Case Name
- 2) Case Number
- 3) County
- 4) Unit
- 5) Unit Name
- 6) Office Name
- 7) Worker ID
- 8) Worker Name
- 9) Facility Name

In CalACES, after the onetime batch run is completed in production, the case listing details will be posted at the location:

CalACES SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR 206317

In C-IV, after the onetime batch run is completed in production, the case listing details will be posted at the location:

CalACES SharePoint > Web Portal -> System Changes -> SCR and SIR Lists -> 2019 -> SCR 103141

3) BATCH OPERATIONS : For both CalACES and C-IV Systems:

- a) Run the DCR to insert into sys\_transact all FC / KG programs that are active for 07/2019 benefit month till come-up month.
- b) Run batch EDBC for the case population in a).
- c) CalACES only: Run a DCR to suppress Age Increase NOAs for KG.

A list of affected cases will be posted to the CalACES Web Portal in the following location:

CalACES Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CA-206317

Joint design has been approved through the CW/CF Committee. C-IV system will implement this Change with SCR CIV-103141 in the 19.07 priority release

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**365**

Manual/Override EDBC

|                       |    |                         |     |            |    |
|-----------------------|----|-------------------------|-----|------------|----|
| Automated Test :      | 0  | Batch/Interfaces :      | 0   | CalHEERS : | 0  |
| CalHEERS Test :       | 0  | Client Correspondence : | 0   | DBA :      | 0  |
| Design :              | 0  | Eligibility :           | 197 | Fiscal :   | 48 |
| Imaging :             | 0  | IVR/CC :                | 0   | Online :   | 0  |
| Performance :         | 0  | Reports :               | 0   | Security : | 0  |
| System Test Support : | 90 | Tech Arch :             | 0   | Tech Ops : | 0  |
| Training :            | 0  |                         |     |            |    |





# [CA-208931] ACL 19-58 AAP COLA Rate Increase for Year 2019 - Batch EDBC

- Resolved: 09/05/2019 05:29 PM

|                      |                                  |                        |                                |                               |                            |
|----------------------|----------------------------------|------------------------|--------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>               | Assignee:              | <b>Ramakrishna Kuchibhotla</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.07]</b>                   | Designer Contact:      | <b>Dan DeMille</b>             | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       | <b>19.09.07</b>                  | Expedite Changes:      | <b>Production Deployment</b>   | Estimate:                     | <b>188</b>                 |
| Reporter:            | <b>Yolanda DelValle</b>          | Regulation Reference:  | <b>ACL 19-58</b>               | Created:                      | <b>06/13/2019 12:05 PM</b> |
| Status:              | <b>In Production</b>             | Impact Analysis:       | <b>[N/A]</b>                   | Outreach Required:            | <b>Yes</b>                 |
| Consortium Contact:  | <b>Maria Zelaya</b>              | Training Impacted:     | <b>[N/A]</b>                   | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>                | Migration Impact:      | <b>No</b>                      | Funding Source ID:            |                            |
| Committee:           | <b>[Foster Care/Kin GAP/AAP]</b> | Approved by Committee: |                                | Other Agency Cross Reference: |                            |

## Non-Committee

**Review:**

**Expedite Approval:** Expedited Production Deployment approval received from Karen Rapponotti on 8/7/19.

**Current Design:** Currently CalACES uses FY 2018-19 CNI rates effective July 1, 2018.

**Request:** As per ACL 19-58, the new CNI rate increase for the FY 2019-20 will be implemented in CalACES for the AAP Program effective July 1, 2019.

CalACES will include a generic program specific CNI NOA to update ACL reference and regulations for FY 2019-20.

### \*ASSUMPTIONS\*

- 1) Under this SCR, there will be no impact /change to Fiscal such as creating the issuances and then sending those issuances to the Auditor Controller in a separate COLA file.
- 2) Batch EDBC will not discontinue AAP Cases and will be "excepted" out
- 3) Batch EDBC will have a run reason for every month of COLA run (i.e. July, Aug, Sept).

## Recommendation:

### \*OVERVIEW\*

- 1) This SCR addresses the details required for the One-Time batch EDBC
- 2) The main SCR for the Adoption Assistance Program (AAP) CNI COLA Rate table updates can be found in CA-208921.

### \*REQUIREMENTS\*

- 1) BATCH OPERATIONS : Run batch EDBC for active AAP programs starting with the month of 07/2019 through come-up month including past RE due date cases.

- a) Batch EDBC will run with the run reason "DCFS Annual COLA"
- b) Batch EDBC records will have a run type code of 'Single Program'
- c) Batch EDBC will not be triggered on programs with a Non-standard rate in effect in the benefit month
- d) Batch EDBC will insert the below Journal entry for AAP programs.

Short Description: Batch EDBC ran for [month, year]

Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: AAP COLA

- 2) EXCEPTION LIST : Below are the case listing details for case exceptions (skipped, unprocessed, discontinued, etc) with the standard columns after the batch.

- a) List of AAP unprocessed programs skipped in the COLA batch run. The case listing will be named "List of Unprocessed Programs Skipped" and include the Standard List Columns with an additional "EDBC Run Month" column, to show the unprocessed month and "Not Processed Reason Desc" column, with the skip reasons (e.g., Override, Manual EDBC, Read Only EDBC, No Worker Assigned etc.).

- b) List of AAP Programs with a Non Standard Rate. The case listing will be named "List of cases with Non-Standard Rate" and include the Standard List Columns with an additional "Rate" column to show the non-standard rate.
- c) List of AAP Programs discontinued by the batch EDBC process. The case listing will be named "List of cases Discontinued by Batch EDBC" and include the Standard List Columns with an additional "EDBC Run Month" column and "Discontinued Reason".
- d) List of AAP programs where the incomplete RE has a due date in the past. The case listing will be named "List of cases With Incomplete RE" and include the Standard List Columns with an additional "RE Due Date" column.

NOTE: Standard List Columns and the location of the lists on SharePoint is provided below:

- 1) Case Name
- 2) Case Number
- 3) County
- 4) Unit
- 5) Unit Name
- 6) Office Name
- 7) Worker ID
- 8) Worker Name
- 9) Facility Name

After the onetime batch run is completed in Production, the case listing details will be posted at the location:

CalACES Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR 208931

3) BATCH OPERATIONS : For CalACES Systems:

- a) Run the DCR to insert into sys\_transact all AAP programs that are active for 07/2019 benefit month till come-up month.
- b) Run batch EDBC for the case population in a).
- c) Run DCR to suppress AAP2

**Outreach**

**Description:**

A list of affected cases will be posted to the CalACES Web Portal in the following location:  
CalACES Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CA-208931

**Migration Impact**

**Description:**

This functionality applies only to L.A. County and does not impact the other counties.

**Migration Impact**

**Analysis:**

**Alternative**

Manual/Overridden EDBC


**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 188**

|                       |    |                         |     |            |   |
|-----------------------|----|-------------------------|-----|------------|---|
| Automated Test :      | 0  | Batch/Interfaces :      | 0   | CalHEERS : | 0 |
| CalHEERS Test :       | 0  | Client Correspondence : | 0   | DBA :      | 0 |
| Design :              | 0  | Eligibility :           | 125 | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :                | 0   | Online :   | 0 |
| Performance :         | 0  | Reports :               | 0   | Security : | 0 |
| System Test Support : | 48 | Tech Arch :             | 0   | Tech Ops : | 0 |
| Training :            | 0  |                         |     |            |   |

 **[CA-206223] ACIN I-55-19 - 2020 State Minimum Wage**

|                      |                                 |                           |                     |                                  |                            |
|----------------------|---------------------------------|---------------------------|---------------------|----------------------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>              | Assignee:                 | <b>Unassigned</b>   | SPG Status:                      | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.09]</b>                  | Designer Contact:         | <b>Thomas Lazio</b> | Change Type (SCR):               | <b>New Policy</b>          |
| Minor Version:       | <b>19.11.14</b>                 | Expedite Changes:         | <b>No</b>           | Estimate:                        | <b>30</b>                  |
| Reporter:            | <b>Sridhar Mullapudi</b>        | Regulation Reference:     | <b>ACIN I-55-19</b> | Created:                         | <b>01/03/2019 04:26 PM</b> |
| Status:              | <b>Pending Approval</b>         | Impact Analysis:          | <b>[N/A]</b>        | Outreach Required:               | <b>Yes</b>                 |
| Consortium Contact:  | <b>Benjamin Fimbres</b>         | Training Impacted:        | <b>[N/A]</b>        | Funding Source:                  | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>               | Migration Impact:         | <b>No</b>           | Funding Source ID:               |                            |
| Committee:           | <b>[CalWORKs/<br/>CalFresh]</b> | Approved by<br>Committee: | <b>09/11/2019</b>   | Other Agency Cross<br>Reference: | <b>CIV-103087</b>          |

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

SCR CA-58696 updated the statewide minimum wage to \$12, as of 01/01/2019

**Request:**

Per Senate Bill 3 (2016), Chapter 4, California minimum wage will increase annually for all industries, until 2022.

ACIN I-55-19 reminds counties the California Labor Code is increasing the minimum wage for all industries to \$13 per hour effective on and after January 1, 2020.

**Recommendation:**

1) Apply a CTCR to update the State Minimum Wage (CT 335 - MW) to \$13 by inserting a new record effective 01/01/2020. The current High-Dated record will be end-dated effective 12/31/2019.

Note: The WEX/CS Worksheet Detail page calculation will use the effective minimum wage listed in CT 335 (MW) -see SCR CIV-104499/CA-209307.

2) Generate a list of all active CalFresh cases with an active unaided person with reason 'Ineligible CF Student' that meets all of the following criteria for 01/2020 benefit month

- a) has an active self-employment record
- b) has wage less than federal minimum wage

This list will be posted at:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CA-206223

**Outreach**

**Description:**

A list of affected cases will be posted to the CalSAWs Web Portal in the following location:  
CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CA-206223

**Migration Impact**

**Description:**

Joint design has been approved through the CW/CF Committee. C-IV will implement this Change with SCR CIV-103087 in a 19.09 priority release.

**Migration Impact**

**Analysis:**

No Impact

**Alternative**

**Procedure**

**Description:**

Override EDBC Results

**Operational Impact:**

**Estimate:**

**30**

|                       |   |                         |    |            |   |
|-----------------------|---|-------------------------|----|------------|---|
| Automated Test :      | 0 | Batch/Interfaces :      | 0  | CalHEERS : | 0 |
| CalHEERS Test :       | 0 | Client Correspondence : | 0  | DBA :      | 0 |
| Design :              | 0 | Eligibility :           | 20 | Fiscal :   | 0 |
| Imaging :             | 0 | IVR/CC :                | 0  | Online :   | 0 |
| Performance :         | 0 | Reports :               | 0  | Security : | 0 |
| System Test Support : | 5 | Tech Arch :             | 0  | Tech Ops : | 0 |
| Training :            | 0 |                         |    |            |   |



# [CA-210497] Create CalSAWS Functional Presentation (CFP) for SCR CA-57971

- Resolved: 09/13/2019 02:02 PM

|                      |                                    |                        |                    |                               |                            |
|----------------------|------------------------------------|------------------------|--------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Batch/Production Operations</b> | Assignee:              | <b>Karan Arora</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.09]</b>                     | Designer Contact:      | <b>Karan Arora</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                                    | Expedite Changes:      | <b>Start Build</b> | Estimate:                     | <b>6</b>                   |
| Reporter:            | <b>Maria Saenz</b>                 | Regulation Reference:  |                    | Created:                      | <b>09/11/2019 03:12 PM</b> |
| Status:              | <b>In Production</b>               | Impact Analysis:       | <b>[Training]</b>  | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Ana Cruz</b>                    | Training Impacted:     | <b>[CFP/WBT]</b>   | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Training</b>                    | Migration Impact:      | <b>No</b>          | Funding Source ID:            |                            |
| Committee:           |                                    | Approved by Committee: |                    | Other Agency Cross Reference: | <b>CIV-104255</b>          |

## Non-Committee

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 9/13/2019

**Current Design:** CFPs demonstrate new functionality in the LRS.

**Request:** There is no LRS CFP addressing/discussing ABAWD specific pages and functionality.

**Recommendation:** Create a CFP for SCR CA-57971.

Note: Use the -046-WBT-ELD-Eligibility CalFresh-04 WBT, which includes an ABAWD Overview"lesson, to create the CFP.

## Outreach

**Description:**

**Migration Impact Description:** No migration impact as this is specific to the CalSAWS Functional Presentations (CFPs) process.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None.

**Operational Impact:**

|                       |          |                         |   |            |   |
|-----------------------|----------|-------------------------|---|------------|---|
| <b>Estimate:</b>      | <b>6</b> |                         |   |            |   |
| Automated Test :      | 0        | Batch/Interfaces :      | 0 | CalHEERS : | 0 |
| CalHEERS Test :       | 0        | Client Correspondence : | 0 | DBA :      | 0 |
| Design :              | 0        | Eligibility :           | 0 | Fiscal :   | 0 |
| Imaging :             | 0        | IVR/CC :                | 0 | Online :   | 0 |
| Performance :         | 0        | Reports :               | 0 | Security : | 0 |
| System Test Support : | 0        | Tech Arch :             | 0 | Tech Ops : | 0 |
| Training :            | 1        |                         |   |            |   |



## [CA-49736] Clean-up of MC Program Block for Individuals Active on CW

|                      |                        |                        |                              |                               |                            |
|----------------------|------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>CalHEERS</b>        | Assignee:              | <b>Appalaraju Indala</b>     | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>         | Designer Contact:      | <b>Dana K. Petersen</b>      | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       | <b>20.01.10</b>        | Expedite Changes:      | <b>Production Deployment</b> | Estimate:                     | <b>639</b>                 |
| Reporter:            | <b>Ted Anderson</b>    | Regulation Reference:  |                              | Created:                      | <b>01/19/2018 11:45 AM</b> |
| Status:              | <b>In Development</b>  | Impact Analysis:       | <b>[Business Process]</b>    | Outreach Required:            | <b>Yes</b>                 |
| Consortium Contact:  | <b>Carlos Camarena</b> | Training Impacted:     | <b>[N/A]</b>                 | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>      | Migration Impact:      | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:           | <b>[Medi-Cal/CMSP]</b> | Approved by Committee: | <b>08/27/2019</b>            | Other Agency Cross Reference: | <b>CIV-102308</b>          |

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti approved Aug 16, 2019

#### Current Design:

Medi-Cal EDBC rules will discontinue an individual from Non-MAGI Medi-Cal who is also active in another cash-based Medi-Cal program when Medi-Cal EDBC is run in Full Medi-Cal Hierarchy mode; however, Medi-Cal EDBC rules will only discontinue an individual from MAGI Medi-Cal who is also active on cash-based Medi-Cal through the CalWORKs program when running in MAGI-only mode. This incorrectly allows the individual to remain active in both MAGI Medi-Cal and another cash-based Medi-Cal program (other than CalWORKs).

When an individual is active on CalWORKs, The System communicates to CalHEERS that the individual is already a beneficiary of Medi-Cal in Medi-Cal Eligibility Data System (MEDS) which provides Minimal Essential Coverage (MEC) by sending 'MEDS-MEC' Administrative (Admin) Verification = 'Yes' in an Eligibility Determination Request (EDR); however, when an individual is a beneficiary on any other cash-based Medi-Cal (other than CalWORKs), The System does not send 'MEDS-MEC' Admin Verification = Yes in the EDR so CalHEERS may determine the individual MAGI Medi-Cal Eligible. This allows an individual to be active on both a cash-based Medi-Cal program (other than CalWORKs) and MAGI Medi-Cal.

When an individual is discontinued from the CalWORKs program, The System auto-tests the individual for Medi-Cal to provide continuity of medical coverage. Often, these individuals are active in Medi-Cal and then will subsequently have their CalWORKs termination rescinded, at which time the worker should run Medi-Cal EDBC to discontinue the Medi-Cal program for 'Gets CalWORKs'. When Medi-Cal EDBC is not run together with the CalWORKs rescind, the individual remains active on both CalWORKs and Medi-Cal.

Not all workers are permitted to run Medi-Cal EDBC with CalWORKs EDBC and sometimes the Medi-Cal program is on another case, so the individual remains active on both CalWORKs and Medi-Cal.

#### Request:

- Medi-Cal EDBC rules shall determine an individual ineligible to Medi-Cal when an individual is also active in any cash-based Medi-Cal regardless of EDBC mode (Full Medi-Cal Hierarchy and MAGI-only).
- The System should inform CalHEERS that an individual is receiving MEDS-MEC in an EDR when the individual is active in any cash-based Medi-Cal.
- Run an on-going batch to discontinue the Medi-Cal for individuals who are in both Medi-Cal and CalWORKs as long as the most recently authorized EDBC was for CalWORKs.
- Add new Batch EDBC Sweep job that will trigger EDBC when the System receives a DERs that is associated to an EDR that initiated by the Duplicate Medi-Cal Clean-up batch (LRS only).
- Update the existing Find DER for EDBC Sweep job (PB00E120) to include DERs that is associated to an EDR that initiated by the Duplicate Medi-Cal Clean-up batch (C-IV only).
- Provide a one-time list to the workers for the rest of the population active in both cash-based Medi-Cal and Medi-Cal after the Duplicate Medi-Cal Clean-up batch is run the first time; the workers can use the existing Duplicate Aid Report to follow up after the initial batch run and list clean up.

#### Recommendation:

- Update Medi-Cal EDBC MAGI-only mode rules to close an individual when they are active in any cash-based Medi-Cal.
- Update eHIT to send MEDS-MEC Admin Verification = Yes when an individual is active in any cash-based Medi-Cal.

- Create a Duplicate Non-MAGI Medi-Cal Clean-Up Batch EDBC sweep to identify individuals active on both CalWORKs and Non-MAGI Medi-Cal. The batch will run prior to Batch 10-day cutoff and will only pick up individuals where the last Accepted and Saved EDBC was for CalWORKs.
- Create a Duplicate MAGI Medi-Cal Clean-Up Batch MAGI sweep to identify individuals active on both CalWORKs and MAGI Medi-Cal. The batch will run prior to Batch 10-day cutoff and will only pick up individuals where the last Accepted and Saved EDBC was for CalWORKs.
- Add a new Batch EDR Run Reason code for “Duplicate Medi-Cal Clean-up”.
- LRS only: Add a new Batch MAGI EDBC Sweep job that will trigger EDBC when LRS receives a DER associated to an EDR initiated by the Batch EDR Run Reason “Duplicate Medi-Cal Clean-up.”
- C-IV only: Update the existing Find DER for EDBC Sweep job to include DERs associated to an EDR initiated by the Batch EDR Run Reason “Duplicate Medi-Cal Clean-up.”
- Provide a one-time list to the workers of individuals active in both cash-based Medi-Cal and Medi-Cal after the Duplicate Medi-Cal Clean-up batch is run the first time.

Please refer to more details in the Design document.

**Outreach  
Description:**

A one-time list provided to the counties of individuals active in both cash-based Medi-Cal and Medi-Cal after the Duplicate Medi-Cal Clean-up batch is run the first time.

**Migration Impact  
Description:**

Joint design has been approved through the Medi-Cal/CMSPP Committee. C-IV system will implement this change with SCR CIV-102308 in a 19.11 priority release.

**Migration Impact  
Analysis:**

**Alternative  
Procedure**

Worker would manually complete negative action of Medi-Cal program block.

**Description:**

**Operational Impact:**

**Estimate: 639**

|                       |     |                         |    |            |     |
|-----------------------|-----|-------------------------|----|------------|-----|
| Automated Test :      | 40  | Batch/Interfaces :      | 83 | CalHEERS : | 265 |
| CalHEERS Test :       | 196 | Client Correspondence : | 0  | DBA :      | 0   |
| Design :              | 0   | Eligibility :           | 0  | Fiscal :   | 0   |
| Imaging :             | 0   | IVR/CC :                | 0  | Online :   | 0   |
| Performance :         | 0   | Reports :               | 0  | Security : | 0   |
| System Test Support : | 0   | Tech Arch :             | 0  | Tech Ops : | 0   |
| Training :            | 0   |                         |    |            |     |



# [CA-58588] ACL 18-121 Changes to Income and Eligibility Verification System (IEVS) Management Report (DPA 482)

|                      |                               |                        |                           |                               |                            |
|----------------------|-------------------------------|------------------------|---------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Reports</b>                | Assignee:              | <b>Sreevardhan Nasini</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>                | Designer Contact:      | <b>Farhat Ulain</b>       | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       |                               | Expedite Changes:      | <b>Start Build</b>        | Estimate:                     | <b>471</b>                 |
| Reporter:            | <b>Ted Anderson</b>           | Regulation Reference:  | <b>ACL 18-121</b>         | Created:                      | <b>01/19/2018 11:43 AM</b> |
| Status:              | <b>In Development</b>         | Impact Analysis:       | <b>[N/A]</b>              | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Lisa Chea</b>              | Training Impacted:     | <b>[N/A]</b>              | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>             | Migration Impact:      | <b>No</b>                 | Funding Source ID:            |                            |
| Committee:           | <b>[State/Fiscal Reports]</b> | Approved by Committee: | <b>08/14/2019</b>         | Other Agency Cross Reference: | <b>CIV-12021</b>           |

**Non-Committee Review:**

**Expedite Approval:** Expedited Approval Provided by JoAnne Osborn on 8/15/2019

**Current Design:** The quarterly DPA 482 report contains statistical information on the results of county Income and Eligibility Verification System (IEVS) Wage Match processing. Information provided includes the number of abstracts received and processed, the number of cases and dollar amounts of client-caused CalWORKs overpayments and CalFresh overissuances, and the number of referrals made to Special Investigative Units (SIU).

The CDSS Welfare Fraud Bureau and the Data Systems and Survey Design Bureau (DSSDB) in conjunction with County Welfare Departments (CWDs), participated in a workgroup to redesign and restructure the DPA 482 report. These changes, as documented in ACL 18-121, have been made in an effort to improve and simplify data reporting to align with all other required response documents for other IEVS matches.

**Request:** Modify the automated DPA 482 report to comply with the instructions in ACL 18-121.

LRS Only: Combine the DPA 482 state report and the backup report into a single DPA 482 report template.

- Recommendation:**
1. Update the DPA 482 Report per the instructions in ACL 18-121.
    - a. Update the automated DPA 482 template to closely match the updated state report template.
    - b. LRS Only - Rename the "DPA 482 Report" to be "DPA 482"
    - c. LRS Only - Combine the "DPA 482" and the "DPA 482 Backup Report" into a single DPA 482 report template.
    - d. LRS Only - Deactivate the "DPA 482 Backup Report"

Please reference the attached detailed design document for design specifics including the DPA 482 report layout and underlying processing criteria for each line.

**Outreach**

**Description:**

**Migration Impact Description:** Joint design has been approved through the State/Fiscal Reports Committee. C-IV will implement this change with SCR CIV-12021 in the 19.11 release.

**Migration Impact Analysis:**

**Alternative Procedure Description:** Manually ad-hoc the needed information.

**Operational Impact:**

**Estimate:** 471

|                  |   |                         |     |            |   |
|------------------|---|-------------------------|-----|------------|---|
| Automated Test : | 0 | Batch/Interfaces :      | 0   | CalHEERS : | 0 |
| CalHEERS Test :  | 0 | Client Correspondence : | 0   | DBA :      | 0 |
| Design :         | 0 | Eligibility :           | 0   | Fiscal :   | 0 |
| Imaging :        | 0 | IVR/CC :                | 0   | Online :   | 0 |
| Performance :    | 0 | Reports :               | 305 | Security : | 0 |

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|                       |     |             |   |            |   |
|-----------------------|-----|-------------|---|------------|---|
| System Test Support : | 121 | Tech Arch : | 0 | Tech Ops : | 0 |
| Training :            | 0   |             |   |            |   |



 **[CA-200840] 2019/2020 Family Member Base Allocation Amount**

|                      |                             |                        |                      |                               |                            |
|----------------------|-----------------------------|------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>CalHEERS</b>             | Assignee:              | <b>Kevin Ha</b>      | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>              | Designer Contact:      | <b>Tisha Mutreja</b> | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       |                             | Expedite Changes:      | <b>Start Build</b>   | Estimate:                     | <b>56</b>                  |
| Reporter:            | <b>Renee Gustafson</b>      | Regulation Reference:  | <b>ACWDL 19-19</b>   | Created:                      | <b>02/14/2018 10:10 AM</b> |
| Status:              | <b>Development Complete</b> | Impact Analysis:       | <b>[N/A]</b>         | Outreach Required:            | <b>Yes</b>                 |
| Consortium Contact:  | <b>Carlos Camarena</b>      | Training Impacted:     | <b>[N/A]</b>         | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>           | Migration Impact:      | <b>No</b>            | Funding Source ID:            |                            |
| Committee:           | <b>[Medi-Cal/CMSP]</b>      | Approved by Committee: | <b>09/03/2019</b>    | Other Agency Cross Reference: | <b>CIV-100482</b>          |

**Non-Committee**

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti 9/11/2019

**Current Design:** The Family Member Base Allocation (FMBA) amount is used to determine how much the Long Term Care (LTC) beneficiary may allocate to family members.

Currently, CalSAWS maintains the limit for FMBA amount at 2017-2018 values which is \$2,058.00.

**Request:** With ACWDL 19-19, effective July 1, 2019 through June 30, 2020, the FMBA amount for a family member living with the community spouse of a beneficiary with LTC status is \$2,114.00

Update CalSAWS with the 2019-2020 FMBA amount for individuals in LTC status.

**Recommendation:**

1. Update the code table value for MC LTC Family Member Base Allocation effective July 1, 2019 where FMBA limit with catgry\_id as "335" and code\_num\_identif as "82" will be updated to \$2,114.00.
2. Generate a list of cases active on LTC with family members in addition to a spouse in the home July 01, 2019, or later which has Share of Cost greater than zero on the LTC budget, and the FMBA amount used in the budget is the previous year's amount (\$2,058.00).  
List Name: Active LTC with previous FMBA value  
The listing will consist of below columns -
  - Case Name
  - Case Number
  - County
  - Unit
  - Unit Name
  - Office Name
  - Worker
  - Benefit Month

**Outreach**

**Description:** Provide the Counties with a list of cases active on LTC with family members in addition to a spouse in the home July 01, 2019, or later which has Share of Cost greater than zero on the LTC budget, and the FMBA amount used in the budget is the previous year's amount (\$2,058.00).

List will be posted at following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2019>CA-200840

**Migration Impact**

**Description:** Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV system will implement this change with SCR CIV-100482 in the 19.11 release.

**Migration Impact**

**Analysis:** Override

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 56

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|                       |    |                         |   |            |    |
|-----------------------|----|-------------------------|---|------------|----|
| Automated Test :      | 0  | Batch/Interfaces :      | 0 | CalHEERS : | 29 |
| CalHEERS Test :       | 22 | Client Correspondence : | 0 | DBA :      | 0  |
| Design :              | 0  | Eligibility :           | 0 | Fiscal :   | 0  |
| Imaging :             | 0  | IVR/CC :                | 0 | Online :   | 0  |
| Performance :         | 0  | Reports :               | 0 | Security : | 0  |
| System Test Support : | 0  | Tech Arch :             | 0 | Tech Ops : | 0  |
| Training :            | 0  |                         |   |            |    |



# [CA-204599] ABAWD: Update MEDS Transactions for the 36-month rollover process

|                      |                         |                        |                                |                               |                            |
|----------------------|-------------------------|------------------------|--------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b> | Assignee:              | <b>Balakumar Murthy</b>        | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>Dana K. Petersen</b>        | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:       |                         | Expedite Changes:      | <b>Production Deployment</b>   | Estimate:                     | <b>664</b>                 |
| Reporter:            | <b>Dana K. Petersen</b> | Regulation Reference:  | <b>ACL 18-08 and ACL 18-94</b> | Created:                      | <b>09/10/2018 02:02 PM</b> |
| Status:              | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>                   | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Ken Ford</b>         | Training Impacted:     | <b>[N/A]</b>                   | Funding Source:               | <b>Premise</b>             |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                      | Funding Source ID:            | <b>ABAWD</b>               |
| Committee:           | <b>[MEDS]</b>           | Approved by Committee: |                                | Other Agency Cross Reference: | <b>CIV-102209</b>          |

### Non-Committee

#### Review:

**Expedite Approval:** Expedited Deployment approval provided by Karen Rapponotti on 8/19/2019

**Current Design:** There isn't a process to re-establish a person's ABAWD clock in MEDS after the 36-month calendar ends in December 2019.

**Request:** Create a new 3 year process to establish a new 36-month ABAWD Time Clock in MEDS for each ABAWD carrying forward into the new statewide fixed 36-Month ABAWD calendar.

#### Recommendation:

- 1) Update CalSAWS to exclude ABAWD information between the final MEDS Renewal date within the current 36-month ABAWD Period, and prior to the First calendar day of the next 36-month ABAWD Period.
- 2) Update CalSAWS to trigger the FX 20 job for all ABAWDS who have an ABAWD Clock carrying forward into the new 36-Month ABAWD Period
- 3) Update the Individual ABAWD Effective Date logic for the FX 20, FR 20, and FX 60 Transactions
- 4) Update the Batch ABAWD Determination Sweep Job to include the 'CalFresh' Medical Condition Category.

For detailed design, see attached design document 'SCR\_CA-204599\_CIV-102209\_Design\_Document.docx'.

### Outreach

#### Description:

**Migration Impact Description:** Joint design has been approved through the MEDS Committee. C-IV system will implement this change with SCR CIV-102209 in the 19.11 release.

#### Migration Impact

#### Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** **664**

|                       |     |                         |     |            |   |
|-----------------------|-----|-------------------------|-----|------------|---|
| Automated Test :      | 0   | Batch/Interfaces :      | 382 | CalHEERS : | 0 |
| CalHEERS Test :       | 0   | Client Correspondence : | 0   | DBA :      | 0 |
| Design :              | 55  | Eligibility :           | 0   | Fiscal :   | 0 |
| Imaging :             | 0   | IVR/CC :                | 0   | Online :   | 0 |
| Performance :         | 0   | Reports :               | 0   | Security : | 0 |
| System Test Support : | 172 | Tech Arch :             | 0   | Tech Ops : | 0 |
| Training :            | 0   |                         |     |            |   |



## [CA-207950] CalHEERS eHIT: Young Adult Expansion - Age Reevaluation Updates

|                      |                         |                        |                                    |                               |                              |
|----------------------|-------------------------|------------------------|------------------------------------|-------------------------------|------------------------------|
| Team Responsible:    | <b>CalHEERS</b>         | Assignee:              | <b>Lucas Galleguillos</b>          | SPG Status:                   | <b>Approved</b>              |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>Steve Hancock</b>               | Change Type (SCR):            | <b>New Policy</b>            |
| Minor Version:       | <b>20.01.10</b>         | Expedite Changes:      | <b>No</b>                          | Estimate:                     | <b>620</b>                   |
| Reporter:            | <b>Renee Gustafson</b>  | Regulation Reference:  | <b>W&amp;IC Section 14007.8(b)</b> | Created:                      | <b>04/12/2019 01:01 PM</b>   |
| Status:              | <b>Pending Approval</b> | Impact Analysis:       | <b>[N/A]</b>                       | Outreach Required:            | <b>No</b>                    |
| Consortium Contact:  | <b>Carlos Camarena</b>  | Training Impacted:     |                                    | Funding Source:               | <b>Premise</b>               |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                          | Funding Source ID:            | <b>CalHEERS</b>              |
| Committee:           | <b>[Medi-Cal/CMSP]</b>  | Approved by Committee: | <b>08/27/2019</b>                  | Other Agency Cross Reference: | <b>CIV-103874; CH-139211</b> |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The System runs Batch MAGI for MAGI Medi-Cal recipients turning ages 1, 6, and 19. LRS runs Batch MAGI for MAGI Medi-Cal recipients turning age 65. There is no automated Medi-Cal reevaluation process for individuals turning age 26.

In C-IV, Batch EDR Run Reason Codes are used to track the reason C-IV initiated an Eligibility Determination Request (EDR) and several C-IV reports reference the Batch EDR Run Reason Code; LRS does not use Batch EDR Run Reason Codes. In LRS, the reason the system initiated an EDR is identified by the batch job number that created the EDR. This is currently a gap between LRS and C-IV.

The following Age batches are impacted by this SCR:

Age 19: Both LRS and C-IV determine the individuals to evaluate for MAGI Medi-Cal by the following criteria:

- Currently a Medi-Cal Recipient
- Active on a Medi-Cal Program
- Turns 19-years old any day from the 2nd day of the current month through the first day of the next month.
- Active on a MAGI Medi-Cal aid code:
  - LRS evaluates all individuals active on any MAGI Medi-Cal aid code
  - C-IV evaluates the specific MAGI Medi-Cal aid codes as per the original SB75 Aid Code Crosswalk
- Once the target population is identified, the following takes place:
  - The System processes Batch MAGI and sends an EDR for the selected programs to CalHEERS.
  - CalHEERS processes the EDRs and then returns to The System a Determination of Eligibility Response (DER) with the individual eligible to the new age-appropriate aid code.
  - The System then processes the DER in Batch EDBC to move the individual to the new age-appropriate aid code.

Age 21:

- LRS processes a subset of Non-MAGI Medi-Cal aid codes for Non-MAGI Medi-Cal recipients turning age 21 any day from the 2nd day of the current month through the first day of the next month through Batch EDBC.
- C-IV has the same batch as LRS, but the batch was removed from the C-IV batch schedule with the release of the Affordable Care Act (ACA) and was never added back to the C-IV batch schedule to run.

Age 26:

- There are no existing batches to process individuals turning age 26.

#### Request:

- Due to Young Adult Expansion, add a new age change batch for turning age 26 to reevaluate adults for the correct scope of Medi-Cal after aging out of the Young Adult Expansion population.
- Update the Age 21 batch to run for all Non-MAGI Medi-Cal aid codes.
- For C-IV only, add the Age 21 batch EDBC sweep back to the batch schedule
- Update the Age 19 batch to run for a specific set of MAGI Medi-Cal aid codes.
- Add the Batch EDR Run Reason Code functionality to LRS.
- Update LRS reports to utilize the Batch EDR Run Reason Codes as a Reporting Indicator attribute.

#### Recommendation:

1. LRS only: Add Batch EDR Run Reason Functionality

- a. Create the Batch EDR Run Reasons Category in LRS. This includes populating this category with the same Batch EDR Run Reasons that currently reside in C-IV.
  - b. Create the Batch EDR Run Reason Code columns in the CH\_TRANSACT and CH\_TRANSACT\_INFO tables to store the Batch EDR Run Reason Codes as the batches are processed.
  - c. Update the existing data in the CH\_TRANSACT\_INFO and CH\_TRANSACT tables with the Batch EDR Run Reason Code with what the code would have been at the time of the original running of the batch.
  - d. Modify Batch MAGI jobs to populate the Batch EDR Run Reason Code in the CH\_TRANSACT and CH\_TRANSACT\_INFO tables.
2. C-IV only: Remove the reference to 'SB75' in the Age 19/SB75 Re-evaluation Batch EDR Run Reason description.
  3. Add a new Age 26 batch to process individuals turning age 26 in all MAGI and Non-MAGI Medi-Cal aid codes. This change will update all other batches that are required for Age 26 to be implemented fully.
  4. Update the existing Age 21 batch process to include all Non-MAGI Medi-Cal aid codes. Activate the C-IV Age 21 batch to start running with the new changes.
  5. Update the existing Age 19 batch MAGI sweep job to reevaluate individuals active in specific MAGI Medi-Cal aid codes.
  6. LRS only: Update reports to use the Batch EDR Run Reason Code along with the Reporting Indicator attribute.

See attached CA-207950 CIV-103874 CalHEERS eHIT Young Adult Expansion Age Reevaluation Updates.docx for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design was approved through the Medi-Cal/CMSF Committee. C-IV will implement this change with CIV-103874 in a 19.11 priority release.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Worker can set a task and run EDBC manually when a person's age changes to 19, 21 or 26.

**Operational Impact:**

**Estimate:**

**620**

|                       |     |                         |     |            |     |
|-----------------------|-----|-------------------------|-----|------------|-----|
| Automated Test :      | 0   | Batch/Interfaces :      | 103 | CalHEERS : | 263 |
| CalHEERS Test :       | 144 | Client Correspondence : | 0   | DBA :      | 0   |
| Design :              | 0   | Eligibility :           | 0   | Fiscal :   | 0   |
| Imaging :             | 0   | IVR/CC :                | 0   | Online :   | 0   |
| Performance :         | 0   | Reports :               | 110 | Security : | 0   |
| System Test Support : | 0   | Tech Arch :             | 0   | Tech Ops : | 0   |
| Training :            | 0   |                         |     |            |     |



## [CA-208685] ACL 19-50 - Increase Threshold For CalFresh Overissuances

|                      |   |                           |                         |                                  |                            |
|----------------------|---|---------------------------|-------------------------|----------------------------------|----------------------------|
| Team Responsible:    | <b>Fiscal</b>                                   | Assignee:                 | <b>Naresh Barsagade</b> | SPG Status:                      | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>                                  | Designer Contact:         | <b>Eric Wu</b>          | Change Type (SCR):               | <b>New Policy</b>          |
| Minor Version:       |   | Expedite Changes:         | <b>Start Build</b>      | Estimate:                        | <b>1095</b>                |
| Reporter:            | <b>Sheryl E. Eppler</b>                         | Regulation Reference:     | <b>ACL 19-50</b>        | Created:                         | <b>05/30/2019 10:32 AM</b> |
| Status:              | <b>In Development</b>                           | Impact Analysis:          | <b>[N/A]</b>            | Outreach Required:               | <b>Yes</b>                 |
| Consortium Contact:  | <b>Sheryl E. Eppler</b>                         | Training Impacted:        |                         | Funding Source:                  | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>                               | Migration Impact:         | <b>No</b>               | Funding Source ID:               |                            |
| Committee:           | <b>[Collections, State/<br/>Fiscal Reports]</b> | Approved by<br>Committee: | <b>09/04/2019</b>       | Other Agency Cross<br>Reference: | <b>CIV-104217</b>          |

### Non-Committee

#### Review:

**Expedite Approval:** JoAnne Osborne - Approved - 05/31/2019

#### Current Design:

For Admin Error CalFresh Recovery Accounts \$35 or less, whether the Responsible Party is currently receiving CalFresh aid or not, the system establishes a claim but does not demand collection.  
For Admin Error CalFresh Recovery Accounts over \$35 but \$125 or less, if the Responsible Party is no longer receiving CalFresh aid, the system establishes a claim but does not demand collection.

The FNS 209 report only excludes Recovery Accounts with a pending status and no posted transaction for the quarter and Recovery Accounts created and made void in the same quarter with a zero balance.

The Outstanding Collection Balance Report Provides a listing of all recovery accounts with outstanding balances and the account status of not closed, void, terminated, and transferred out.

#### Request:

Update the system to not establish a claim, by setting the recovery account status to pending while over issued months are calculated then update the pending status to 'discharged', when at discovery on or after June 1, 2019 the total amount of CalFresh benefits over issued to the closed CF case is \$400 or less due to an AE or IHE error (and is not a result of IPV or was not found in a QC review).

As a claim was not established for the over issued amount, as indicted by the account status of discharged, update the system to not allow transactions to be posted to a discharged account and take no collection actions for repayment.

Introduce a new recovery account status 'Discharged' and update the system to find CalFresh Recovery Accounts with a discovered date on or after June 1, 2019 with Original Balance \$400 or less caused by Admin Error (AE) or Inadvertent Household Error (IHE), not a result of IPV or QC findings, and there is no active CalFresh program under the same case for the month of discovery of the Recovery Account, update the Status of the Recovery Account to 'Discharged' and Status Reason to 'Policy Threshold Limit'.

Update the FNS 209 to exclude Recovery Accounts that have a status of 'Discharged'.

Update the Outstanding Collection Balance Report to exclude Recovery Accounts in 'Discharged' status.

#### Recommendation:

- 1) Introduce a new drop-down field 'QC Findings' on the Recovery Account Detail page to track a CalFresh recovery account is established by QC findings. When over issued benefits and the associated recovery account are the result of QC findings, set this field to 'Yes'.
- 2) Introduce a new recovery account status 'Discharged' on Recovery Account Detail Page.
- 3) Add validation on Recovery Account Detail page to prevent a CalFresh recovery account from becoming active if the account is under the policy threshold and meets the criteria for a discharge.
- 4) Add validation on Recovery Account Detail page to prevent a CalFresh recovery account from becoming discharged when it is the result of QC findings.
- 5) Disable activation function on Recovery Account Detail page when account status is 'Discharged'.
- 6) Update the Uncollectable Recovery Account Batch to update the CalFresh Recovery Accounts based on the conditions below:
  - a. When original balance is \$35 or less and the cause code is 'CalFresh - Admin Caused (prior to 3/2000)' or 'CalFresh - Admin Caused (after 3/2000)', regardless the case status, update status to 'Discharged' and status reason to 'CF - Under \$35 - AE'.
  - b. When Discovery Date is before June 1st, 2019, original balance is over \$35 and \$125 or less, cause code is 'CalFresh - Admin Caused (prior to 3/2000)' or 'CalFresh - Admin Caused (after 3/2000)', and there is no

- active CalFresh program on the Discovery Date under the same case of the Recovery Account, update status to 'Discharged' and status reason to 'CF - \$125 or Less – AE'.
- c. When Discovery Date is on or after June 1st, 2019, original balance is \$400 or less, cause code is 'CalFresh - Admin Caused (prior to 3/2000)', 'CalFresh - Admin Caused (after 3/2000)' or 'CalFresh - IHE (Customer Caused)', and the account is not a result of QC findings, and there is no active CalFresh program on the Discovery Date under the same case of the recovery account, update status to 'Discharged' and status reason to 'Policy Threshold Limit'.
- 7) Update Overpayment Adjustment Logic to exclude recovery accounts with status 'Discharged' when suggesting a benefit reduction.
- 8) Update Grant Expungement Reader to not apply any expungements to the discharged recovery accounts.
- 9) Provide a list to the Counties of CalFresh recovery accounts (Admin Error or IHE) discovered on or after 6/1/2019 with an original over issued amount of \$400 or less and the account status is not currently voided, and the CF program is not 'Active' for the month of discovery of the Recovery Account. This list may be reviewed to determine which accounts should be made void as the account meets the criteria for discharge (not established) or if the account should be established as the Overissuance is from a QC review or referral for IPV.
- 10) Update the FNS 209 report logic to not report any Recovery Accounts with a status of 'Discharged'.
- 11) Update the Outstanding Collection Balance Report to exclude Recovery Accounts with a status of 'Discharged'.

**Outreach  
Description:**

Provide a list to the Counties of CalFresh recovery accounts (Admin Error or IHE) discovered on or after 6/1/2019 with an original over issued amount of \$400 or less and the account status is not currently voided, and the CF program is not 'Active' for the date of discovery of the Recovery Account. This list may be reviewed to determine which accounts should be made void as the account meets the criteria for discharge (not established) or if the account should be established as the Overissuance is from a QC review or referral for IPV.

**Migration Impact  
Description:**

Joint design has been approved through the Collections and State/Fiscal Reports Committee. C-IV will implement this change change with SCR CIV-104217 in the 19.11 release.

**Migration Impact  
Analysis:**

**Alternative  
Procedure**

N/A

**Description:**

**Operational Impact:**

**Estimate:**

1095

|                       |     |                         |     |            |     |
|-----------------------|-----|-------------------------|-----|------------|-----|
| Automated Test :      | 0   | Batch/Interfaces :      | 0   | CalHEERS : | 0   |
| CalHEERS Test :       | 0   | Client Correspondence : | 0   | DBA :      | 0   |
| Design :              | 0   | Eligibility :           | 0   | Fiscal :   | 595 |
| Imaging :             | 0   | IVR/CC :                | 0   | Online :   | 0   |
| Performance :         | 0   | Reports :               | 126 | Security : | 0   |
| System Test Support : | 274 | Tech Arch :             | 0   | Tech Ops : | 0   |
| Training :            | 0   |                         |     |            |     |



# [CA-210328] Automated Regression Test - Execution and Maintenance - 19.11 Release Cycle

|                      |                         |                        |                         |                               |                                |
|----------------------|-------------------------|------------------------|-------------------------|-------------------------------|--------------------------------|
| Team Responsible:    | <b>Automated Test</b>   | Assignee:              | <b>William Baretzky</b> | SPG Status:                   | <b>Approved</b>                |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>William Baretzky</b> | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:       | <b>20.01.XX</b>         | Expedite Changes:      | <b>Start Build</b>      | Estimate:                     | <b>540</b>                     |
| Reporter:            | <b>William Baretzky</b> | Regulation Reference:  |                         | Created:                      | <b>08/30/2019 08:05 AM</b>     |
| Status:              | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                      |
| Consortium Contact:  | <b>Sharon Teramura</b>  | Training Impacted:     | <b>[N/A]</b>            | Funding Source:               | <b>LRS M&amp;E</b>             |
| Project Phase (SCR): | <b>Assembly Test</b>    | Migration Impact:      | <b>Yes</b>              | Funding Source ID:            |                                |
| Committee:           | <b>[Other]</b>          | Approved by Committee: |                         | Other Agency Cross Reference: | <b>CIV-104997</b>              |

**Non-Committee Review:** Approved by Karen Rapponotti on 8/30/2019

**Expedite Approval:** Karen Rapponotti 8/30/2019

**Current Design:** A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

- Recommendation:**
1. Execute the major release automated regression suite against the 19.11 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 19.11 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 19.11 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

## Outreach

### Description:

**Migration Impact Description:** Per DDID #713, A complete set of regression scripts leveraging existing C-IV and LRS scripts is to be utilized for CalSAWS.

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** Execute all regression testing manually for major and minor version releases.

**Operational Impact:**  
**Estimate:** **540**

|                       |     |                         |   |            |   |
|-----------------------|-----|-------------------------|---|------------|---|
| Automated Test :      | 540 | Batch/Interfaces :      | 0 | CalHEERS : | 0 |
| CalHEERS Test :       | 0   | Client Correspondence : | 0 | DBA :      | 0 |
| Design :              | 0   | Eligibility :           | 0 | Fiscal :   | 0 |
| Imaging :             | 0   | IVR/CC :                | 0 | Online :   | 0 |
| Performance :         | 0   | Reports :               | 0 | Security : | 0 |
| System Test Support : | 0   | Tech Arch :             | 0 | Tech Ops : | 0 |
| Training :            | 0   |                         |   |            |   |





**[CA-49842] Change all outbound calls data file format to accommodate participant appointment date/time.**

|                      |                                   |                        |                          |                               |                            |
|----------------------|-----------------------------------|------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b>           | Assignee:              | <b>Balakumar Murthy</b>  | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>                    | Designer Contact:      | <b>Sowmya Coppisetty</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                                   | Expedite Changes:      | <b>No</b>                | Estimate:                     | <b>492</b>                 |
| Reporter:            | <b>Pravin Patil [X]</b>           | Regulation Reference:  |                          | Created:                      | <b>01/19/2018 11:45 AM</b> |
| Status:              | <b>Pending Approval</b>           | Impact Analysis:       | <b>[N/A]</b>             | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Darcy Alexander</b>            | Training Impacted:     | <b>[N/A]</b>             | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>                 | Migration Impact:      | <b>No</b>                | Funding Source ID:            |                            |
| Committee:           | <b>[IVR &amp; Contact Center]</b> | Approved by Committee: | <b>10/24/2018</b>        | Other Agency Cross Reference: |                            |

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

The record layout for every campaign follows the below template and any change in the layout specific to campaign is captured in the Account Number field.

- [Phone Number], [Message Number], [First Name], [Last Name], [Account Number], [Appt Date]

The Account Number field in the record layout for

GROW or GEARS campaigns is as follows -

- [Appointment Date] [Language][Location] [EW File Number] [Case Number] [Person ID].

For Non-GROW or GEARS campaigns is as follows-

- [Appointment Date] [Language][Location] [EW File Number] [Case Number] [Cycle].

**Request:**

Update the record layout and Account Number field layout in the Outbound Call Outbound writer to a single format for all campaigns.

**Recommendation:**

Update the Outbound call Interface Outbound writer's file layout –

1. Remove App date from the record layout for all campaigns
2. Update the Account number field layout to - [Language (2), Case Number (7), Appt Date (8), Appt Time (4), District (3), EW File (4)].

**Outreach**

**Description:**

**Migration Impact**

**Description:**

This functionality applies only to L.A. County and does not impact the other counties.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**492**

|                       |     |                         |     |            |   |
|-----------------------|-----|-------------------------|-----|------------|---|
| Automated Test :      | 0   | Batch/Interfaces :      | 352 | CalHEERS : | 0 |
| CalHEERS Test :       | 0   | Client Correspondence : | 0   | DBA :      | 0 |
| Design :              | 0   | Eligibility :           | 0   | Fiscal :   | 0 |
| Imaging :             | 0   | IVR/CC :                | 0   | Online :   | 0 |
| Performance :         | 0   | Reports :               | 0   | Security : | 0 |
| System Test Support : | 140 | Tech Arch :             | 0   | Tech Ops : | 0 |
| Training :            | 0   |                         |     |            |   |



# [CA-53824] DDCR 5042: Auto Reactivate Dormant/Expunged EBT Account

|                      |                         |                        |                     |                               |                            |
|----------------------|-------------------------|------------------------|---------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Fiscal</b>           | Assignee:              | <b>Sidhant Garg</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:       | <b>[20.01]</b>          | Designer Contact:      | <b>Sidhant Garg</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>No</b>           | Estimate:                     | <b>387</b>                 |
| Reporter:            | <b>Charlie Au</b>       | Regulation Reference:  |                     | Created:                      | <b>01/19/2018 11:42 AM</b> |
| Status:              | <b>Pending Approval</b> | Impact Analysis:       | <b>[N/A]</b>        | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Sheryl E. Eppler</b> | Training Impacted:     | <b>[N/A]</b>        | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Migration</b>        | Migration Impact:      | <b>No</b>           | Funding Source ID:            |                            |
| Committee:           | <b>[Fiscal]</b>         | Approved by Committee: |                     | Other Agency Cross Reference: | <b>CIV-7285</b>            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

A dormant or expunged EBT (Electronic Benefit Transfer) account must be reactivated prior to new benefits being posted and made available to the customer. The CalFresh and Cash portions of the EBT Account can be reactivated separately via the EBT Account Detail page. Once an EBT Account Type of Cash has been reactivated, any expunged benefits (with the exception of ARC, LIHEAP and General Assistance benefits) will be reactivated as well.

#### Request:

Workers who run EDBC and rush the benefits may not be aware of the dormant or expunged status of the customer's associated EBT account. Reactivating the account is a manual process that can be automated.

#### Recommendation:

1. Update the EDBC Summary Page to initiate a Host-to-Host call to automatically Reactivate the Cash and/or CalFresh account types.
2. Update the EBT Account List page to add a case lock set/check when a worker clicks the Add or Add Manual button on the EBT Account List page.
3. Modify the EBT Demographics Writer batch job to send a Reactivation request to the EBT Vendor via the Demographics interface to reactivate the latest EBT account on the case.
4. Modify the EBT Demographics Reader batch job to check for successful or unsuccessful reactivation requests.

### Outreach

#### Description:

#### Migration Impact

#### Description:

C-IV implemented this change with CCM-7285 in the 17.07 release. This SCR will align LRS with C-IV and resolve DDCR 5042.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**387**

|                       |    |                         |   |            |     |
|-----------------------|----|-------------------------|---|------------|-----|
| Automated Test :      | 0  | Batch/Interfaces :      | 0 | CalHEERS : | 0   |
| CalHEERS Test :       | 0  | Client Correspondence : | 0 | DBA :      | 0   |
| Design :              | 0  | Eligibility :           | 0 | Fiscal :   | 267 |
| Imaging :             | 0  | IVR/CC :                | 0 | Online :   | 0   |
| Performance :         | 0  | Reports :               | 0 | Security : | 0   |
| System Test Support : | 80 | Tech Arch :             | 0 | Tech Ops : | 0   |
| Training :            | 0  |                         |   |            |     |



## [CA-56969] DDCR 5050: Update hierarchal priority order for recouping Benefit Reductions on Recovery Accounts

|                      |                         |                        |                     |                               |                            |
|----------------------|-------------------------|------------------------|---------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Fiscal</b>           | Assignee:              | <b>Sidhant Garg</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:       | <b>[20.01]</b>          | Designer Contact:      | <b>Sidhant Garg</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>No</b>           | Estimate:                     | <b>244</b>                 |
| Reporter:            | <b>Charlie Au</b>       | Regulation Reference:  |                     | Created:                      | <b>01/19/2018 11:42 AM</b> |
| Status:              | <b>Pending Approval</b> | Impact Analysis:       | <b>[N/A]</b>        | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Sheryl E. Eppler</b> | Training Impacted:     | <b>[N/A]</b>        | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR): | <b>Migration</b>        | Migration Impact:      | <b>No</b>           | Funding Source ID:            |                            |
| Committee:           | <b>[Collections]</b>    | Approved by Committee: |                     | Other Agency Cross Reference: | <b>CIV-173</b>             |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The system currently collects according to the following hierarchy:

##### 1. Court Ordered restitution Cause Codes:

- Cash - IPV (Court)
- CalFresh - IPV (Court)

##### 2. Client Caused Cause Codes:

- Cash - IPV (ADH)
- Cash - IPV (Waiver)
- Cash - Potential IPV
- Cash - Customer Cause
- Cash - Late SAR7
- Cash - Late QR7
- CalFresh - IPV (ADH)
- CalFresh - IPV (Waiver)
- CalFresh- Potential IPV
- CalFresh - IHE

##### 3. Admin Caused Cause Codes:

- Cash - Admin Caused
- CalFresh - Admin Caused (prior to 3/2000)
- CalFresh- Admin Caused (after 3/2000)

\* If more than one Recovery Account exists within a level of the hierarchy - the oldest Discovery Date is adjusted first.

\*\* The exception to the rule is that once the system starts recoupment on a Recovery Account, it pays that Recovery Account off in full before re-prioritizing to determine which would be the next Recovery Account to begin recoupment on (according to that hierarchy mentioned above)

#### Request:

When a customer is convicted of Welfare Fraud, usually they are court ordered to make payments on their resulting Recovery Account as part of their probation. If the system is posting Benefit Reductions to a different Recovery Account (not the Court Ordered Recovery Account), the customer may not be meeting the terms of their probation (i.e. their payments are not being posted to the Court Ordered Recovery Account).

Update LRS system to implement the hierarchical priority order for recouping Benefit Reductions on Recovery Accounts and align the changes with functionality implemented in CIV with SCR 173 in 17.09 release.

#### Recommendation:

Update the benefit recoupment logic to suggest a benefit reduction towards the 'Cash - IPV (Court)' or 'CalFresh - IPV (Court)' Recovery Accounts for an ongoing benefit reduction when the following criteria are met:

- A court ordered restitution Recovery Account (Cause Code set to 'Cash - IPV (Court)' or 'CalFresh - IPV (Court)') is Active in the system.
- The system is currently suggesting benefit reductions on an existing Recovery Account.
- The existing Recovery Account that is benefit reduced is not a 'CalFresh - Admin Caused (after

3/2000)' Recovery Account.

Note: The System will follow the current design for all other scenarios.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

C-IV implemented this change with CCM-173 in the 17.09 release. This SCR will align LRS with C-IV and resolve DDCR 5050.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**244**

|                       |    |                         |   |            |     |
|-----------------------|----|-------------------------|---|------------|-----|
| Automated Test :      | 0  | Batch/Interfaces :      | 0 | CalHEERS : | 0   |
| CalHEERS Test :       | 0  | Client Correspondence : | 0 | DBA :      | 0   |
| Design :              | 0  | Eligibility :           | 0 | Fiscal :   | 168 |
| Imaging :             | 0  | IVR/CC :                | 0 | Online :   | 0   |
| Performance :         | 0  | Reports :               | 0 | Security : | 0   |
| System Test Support : | 50 | Tech Arch :             | 0 | Tech Ops : | 0   |
| Training :            | 0  |                         |   |            |     |



**[CA-57044] Add IHSS and In-Kind Earned income to the IFDS (IFD115) Quarterly Outbound file (C-IV SIR #9156)**

|   |                         |                         |                                   |                               |                            |
|---|-------------------------|-------------------------|-----------------------------------|-------------------------------|----------------------------|
| Team Responsible:   | <b>Batch/Interfaces</b> | Assignee:               | <b>Karthikeyan Krishnamoorthy</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:  | <b>[20.01]</b>          | Designer Contact:       | <b>Michael Barillas</b>           | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:  |                         | Expedite Changes:       | <b>No</b>                         | Estimate:                     | <b>133</b>                 |
| Reporter:   | <b>Ken Ford</b>         | Regulation Reference:   |                                   | Created:                      | <b>01/19/2018 11:44 AM</b> |
| Status:   | <b>Pending Approval</b> | Impact Analysis:        | <b>[N/A]</b>                      | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:   | <b>Ken Ford</b>         | Training Impacted:      | <b>[N/A]</b>                      | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):  | <b>Production</b>       | Migration Impact:       | <b>No</b>                         | Funding Source ID:            |                            |
| Committee:  | <b>[IEVS]</b>           | Approved by Committee:  | <b>09/03/2019</b>                 | Other Agency Cross Reference: |                            |
| <b>Non-Committee Review:</b>  |                         |                         |                                   |                               |                            |
| <b>Expedite Approval:</b>   |                         |                         |                                   |                               |                            |
| <b>Current Design:</b>  |                         |                         |                                   |                               |                            |
| LRS does not include In Home Supportive Services (IHSS) income and In-Kind Earned Income on the IFDS (IFD115) Quarterly Outbound Quarterly Interface File.                        |                         |                         |                                   |                               |                            |
| CIV currently has these income categories implemented as SIR#9156 Release 17.09.  |                         |                         |                                   |                               |                            |
| <b>Request:</b>   |                         |                         |                                   |                               |                            |
| Add In-Home Supportive Services (IHSS) income and In-Kind Earned Income to the IFDS (IFD115) Quarterly Outbound Interface File.   |                         |                         |                                   |                               |                            |
| <b>Recommendation:</b>  |                         |                         |                                   |                               |                            |
| Update the IEVS IFDS Outbound Interface and IFD Validator Interface case gross income value to include the In-Home Supportive Services (IHSS) income and 'In Kind' earned Income. |                         |                         |                                   |                               |                            |
| <b>Outreach Description:</b>  |                         |                         |                                   |                               |                            |
| <b>Migration Impact Description:</b>  |                         |                         |                                   |                               |                            |
| Per DDID #1787 in the SOW, the C-IV County specific batch jobs as of July 2018 will be migrated into the new system.  |                         |                         |                                   |                               |                            |
| <b>Migration Impact Analysis:</b>   |                         |                         |                                   |                               |                            |
| <b>Alternative Procedure Description:</b>   |                         |                         |                                   |                               |                            |
| N/A   |                         |                         |                                   |                               |                            |
| <b>Operational Impact:</b>  |                         |                         |                                   |                               |                            |
| <b>Estimate:</b>  |                         |                         |                                   |                               |                            |
| <b>133</b>  |                         |                         |                                   |                               |                            |
| Automated Test :  | 0                       | Batch/Interfaces :      | 88                                | CalHEERS :                    | 0                          |
| CalHEERS Test :   | 0                       | Client Correspondence : | 0                                 | DBA :                         | 0                          |
| Design :  | 0                       | Eligibility :           | 0                                 | Fiscal :                      | 0                          |
| Imaging :   | 0                       | IVR/CC :                | 0                                 | Online :                      | 0                          |
| Performance :   | 0                       | Reports :               | 0                                 | Security :                    | 0                          |
| System Test Support :   | 35                      | Tech Arch :             | 0                                 | Tech Ops :                    | 0                          |
| Training :  | 0                       |                         |                                   |                               |                            |



## [CA-200635] DDCR 3085: Add eData for the Income Amount End Date from a MAGI Referral or Determination Change

|                      |                          |                        |                        |                               |                            |
|----------------------|--------------------------|------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>CalHEERS</b>          | Assignee:              | <b>Kevin Ha</b>        | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>           | Designer Contact:      | <b>Renee Gustafson</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                          | Expedite Changes:      | <b>No</b>              | Estimate:                     | <b>30</b>                  |
| Reporter:            | <b>Michael Green [X]</b> | Regulation Reference:  |                        | Created:                      | <b>02/05/2018 01:36 PM</b> |
| Status:              | <b>Pending Approval</b>  | Impact Analysis:       | <b>[N/A]</b>           | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Maureen Votta</b>     | Training Impacted:     | <b>[N/A]</b>           | Funding Source:               | <b>Other</b>               |
| Project Phase (SCR): | <b>Migration</b>         | Migration Impact:      | <b>No</b>              | Funding Source ID:            | <b>C-IV Royalty</b>        |
| Committee:           | <b>[Medi-Cal/CMSP]</b>   | Approved by Committee: |                        | Other Agency Cross Reference: | <b>Tracker-53893</b>       |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The eData for income effective dates on a MAGI Referral or Determination Change displays on the Income Amount Detail page for the Begin Date only.

#### Request:

With CalHEERS sending multiple income amounts with different Begin and End Dates, it will help the worker to see the eData value for the Income End Date field in addition to the Begin Date.

#### Recommendation:

Add eData support for the End Date field on the Income Amount Detail page for CalHEERS-specific Referral or Determination Change data.

### Outreach

#### Description:

#### Migration Impact

#### Description:

C-IV implemented this change with Tracker-53893 in the 15.09 release. This SCR will align LRS with C-IV and resolve DDCR 3085.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

Review the MAGI Determination (DER) for income information.

#### Operational Impact:

#### Estimate:

**30**

|                       |   |                         |   |            |    |
|-----------------------|---|-------------------------|---|------------|----|
| Automated Test :      | 0 | Batch/Interfaces :      | 0 | CalHEERS : | 20 |
| CalHEERS Test :       | 5 | Client Correspondence : | 0 | DBA :      | 0  |
| Design :              | 0 | Eligibility :           | 0 | Fiscal :   | 0  |
| Imaging :             | 0 | IVR/CC :                | 0 | Online :   | 0  |
| Performance :         | 0 | Reports :               | 0 | Security : | 0  |
| System Test Support : | 0 | Tech Arch :             | 0 | Tech Ops : | 0  |
| Training :            | 0 |                         |   |            |    |



## [CA-201575] CF - FTP INS Document, Income of FRE should be prorated

|                      |                                 |                           |                           |                                  |                            |
|----------------------|---------------------------------|---------------------------|---------------------------|----------------------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>              | Assignee:                 | <b>Unassigned</b>         | SPG Status:                      | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>                  | Designer Contact:         | <b>Thomas Lazio</b>       | Change Type (SCR):               | <b>Policy Re-Design</b>    |
| Minor Version:       |                                 | Expedite Changes:         | <b>No</b>                 | Estimate:                        | <b>252</b>                 |
| Reporter:            | <b>Michelle Smith [X]</b>       | Regulation Reference:     | <b>63-503.442</b>         | Created:                         | <b>03/16/2018 10:47 AM</b> |
| Status:              | <b>Pending Approval</b>         | Impact Analysis:          | <b>[Business Process]</b> | Outreach Required:               | <b>No</b>                  |
| Consortium Contact:  | <b>Benjamin Fimbres</b>         | Training Impacted:        |                           | Funding Source:                  | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>               | Migration Impact:         | <b>No</b>                 | Funding Source ID:               |                            |
| Committee:           | <b>[CalWORKs/<br/>CalFresh]</b> | Approved by<br>Committee: | <b>09/11/2019</b>         | Other Agency Cross<br>Reference: | <b>CIV-101430</b>          |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently for FRE non-citizens with role reason of 'FTP - INS Document' all of their income is counted against the eligible household in the CF EDBC. Also, the entire SSI Only, SSP Only (CalSAWS Only) and SSI/SSP unearned income amounts received from Other Program Assistance (OPA) by a FRE non-citizen with a role reason eligible for income proration are counted against the eligible household members.

#### Request:

In a CalFresh household of eligible citizens and FRE non-citizen with role reason of 'FTP-INS Document', income of the excluded non-citizen should be prorated. Also, SSI Only, SSP Only (CalSAWS Only) and SSI/SSP unearned incomes from OPA need to be prorated in the same way it does for income for a FRE non-citizen with a role reason eligible for income proration.

#### Recommendation:

Update CF EDBC logic to prorate income of non-citizen in household with role FRE and role reason FTP - INS Document.

Update CF EDBC logic to prorate SSI Only, SSP Only (CalSAWS Only) and SSI/SSP unearned incomes received from OPA by a non-citizen in household with a role of FRE and a role reason eligible for income proration.

Generate list of CF cases based on the following criteria:

- Case has 'Active' program person with role of FRE and role reason of 'FTP-INS Document'.
- Case had an active income record for the program person with role of FRE and role reason of 'FTP-INS Document' any time since January 2019.
- Case had a CF program with a status of 'Active' any time since January 2019.

The lists will include the following list columns:

Case Name  
Case Number  
County  
Unit  
Unit Name  
Office Name  
Worker ID  
Current CF Program Status

These lists will be posted at:

CalSAWS: CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CA-201575

C-IV: CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV- 101430

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the CW/CF Committee. C-IV will implement this Change with SCR CIV-101430 in the 19.11 release.

#### Migration Impact

#### Analysis:

**Alternative Procedure**

Overwrite EDBC

**Description:**

**Operational Impact:**

**Estimate:**

**252**

|                       |    |                         |     |            |   |
|-----------------------|----|-------------------------|-----|------------|---|
| Automated Test :      | 0  | Batch/Interfaces :      | 0   | CalHEERS : | 0 |
| CalHEERS Test :       | 0  | Client Correspondence : | 0   | DBA :      | 0 |
| Design :              | 0  | Eligibility :           | 162 | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :                | 0   | Online :   | 0 |
| Performance :         | 0  | Reports :               | 0   | Security : | 0 |
| System Test Support : | 65 | Tech Arch :             | 0   | Tech Ops : | 0 |
| Training :            | 0  |                         |     |            |   |





# [CA-204814] Update WDTIP Outbound file writer to not allow LD02 transactions to be generated for WTW supportive services participation records

|                      |                         |                        |                          |                               |                            |
|----------------------|-------------------------|------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b> | Assignee:              | <b>Sidhant Garg</b>      | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>          | Designer Contact:      | <b>Sowmya Coppisetty</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>No</b>                | Estimate:                     | <b>309</b>                 |
| Reporter:            | <b>Xochitl Avila</b>    | Regulation Reference:  |                          | Created:                      | <b>09/20/2018 03:22 PM</b> |
| Status:              | <b>Pending Approval</b> | Impact Analysis:       | <b>[N/A]</b>             | Outreach Required:            | <b>Yes</b>                 |
| Consortium Contact:  | <b>Lien Phan</b>        | Training Impacted:     |                          | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                | Funding Source ID:            |                            |
| Committee:           | <b>[Time Limits]</b>    | Approved by Committee: | <b>09/16/2019</b>        | Other Agency Cross Reference: | <b>CIV-541</b>             |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:**

LD02 and LD06 Transactions are being generated and sent to WDTIP for WTW time clock month when only LD06 transaction is required to be generated .

**Request:**

1. Update the WDTIP Outbound file to allow only LD06 transactions to be generated and populated for WTW Time clock month.
2. Send one-time Clean up file to WDTIP to delete historical records for the LD02 transactions that were sent in the WDTIP Outbound file for the WTW Supportive Services.

Note: Provide a list of the historical LD02 transaction records sent for WTW time clock month.

The following columns will be included in the file-

- 1.County number
- 2.Office Number
- 3.Case Worker ID
- 4.Case Name
- 5.Case Number
- 6.Program Code
7. WTW Program – Last Worker ID
8. WTW Program – Participant Name
9. WTW Program – Applicant CIN Number
10. WTW Program- Transaction month
11. WTW Program- Last Date of Aid

**Recommendation:**

- 1.Update the WDTIP Outbound file to allow only LD06 transactions to be generated and populated for WTW Time clock month.
2. Send one-time Clean up file to WDTIP to delete historical records for the LD02 transactions that were sent in the WDTIP Outbound file for the WTW Supportive Services.

**Outreach**

**Description:**

A detailed case list of all the WTW program persons will be provided for which LD02 transactions were generated in the WDTIP outbound file prior to this SCR for Retention Services (WTW) time limit program participation records

**Migration Impact**

**Description:**

Joint design has been approved through the Time Limits Committee. C-IV will implement this change with SCR CIV-541 in the 20.01 release.

**Migration Impact**

**Analysis:**

No Impact

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**309**

|                  |    |                         |     |            |   |
|------------------|----|-------------------------|-----|------------|---|
| Automated Test : | 0  | Batch/Interfaces :      | 199 | CalHEERS : | 0 |
| CalHEERS Test :  | 0  | Client Correspondence : | 0   | DBA :      | 0 |
| Design :         | 30 | Eligibility :           | 0   | Fiscal :   | 0 |

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|                       |    |             |   |            |   |
|-----------------------|----|-------------|---|------------|---|
| Imaging :             | 0  | IVR/CC :    | 0 | Online :   | 0 |
| Performance :         | 0  | Reports :   | 0 | Security : | 0 |
| System Test Support : | 80 | Tech Arch : | 0 | Tech Ops : | 0 |
| Training :            | 0  |             |   |            |   |



## [CA-205982] Update CW EDBC to Remove Stepsibling or Half-Sibling Excluded from CalWORKs in the CalFresh Budget

|                      |                                 |                           |                           |                                  |                            |
|----------------------|---------------------------------|---------------------------|---------------------------|----------------------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>              | Assignee:                 | <b>Unassigned</b>         | SPG Status:                      | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>                  | Designer Contact:         | <b>Thomas Lazio</b>       | Change Type (SCR):               | <b>Policy Re-Design</b>    |
| Minor Version:       |                                 | Expedite Changes:         | <b>No</b>                 | Estimate:                        | <b>76</b>                  |
| Reporter:            | <b>Jason M. Francis</b>         | Regulation Reference:     | <b>ACL 18-82</b>          | Created:                         | <b>12/11/2018 03:57 PM</b> |
| Status:              | <b>Pending Approval</b>         | Impact Analysis:          | <b>[Business Process]</b> | Outreach Required:               | <b>No</b>                  |
| Consortium Contact:  | <b>Maria Zelaya</b>             | Training Impacted:        |                           | Funding Source:                  | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>               | Migration Impact:         | <b>No</b>                 | Funding Source ID:               |                            |
| Committee:           | <b>[CalWORKs/<br/>CalFresh]</b> | Approved by<br>Committee: | <b>09/15/2019</b>         | Other Agency Cross<br>Reference: | <b>CIV-102946</b>          |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

On a CW/CF case, a sanctioned penalty is applied in the CW grant amount counted as unearned income by the CF program when one of the members in the CW program is in non-compliance. When SCR CA-200785/ CIV-100390 updated CW and RCA EDBC to allow an option to exclude child support payments as income for a stepsibling or half-sibling with the role reason of 'Optional Child-Receives Child Support', it did not exclude that 'optional child' from being considered a sanctioned person assessed a penalty in the CW grant amount counted in the CF EDBC.

#### Request:

For a CW/CF case, non-members that are stepsiblings or half-siblings with the role reason of 'Optional Child - Receives Child Support' that are excluded in the CW program should also be excluded in the CW grant counted as unearned income in the CF budget.

#### Recommendation:

Update the CF EDBC rule that determines sanctioned persons assessed penalties in the CW grant amount considered as unearned income in the CF program to exclude CW persons with the role reason of 'Optional Child -Receives Child Support'.

Generate list of active CW/CF cases based on the following criteria:

- Case has an active CW non-member with role of 'MMO' and role reason of 'Optional Child -Receives Child Support' who is also a member on the CF program.

The lists will include the following Standard List Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

These lists will be posted at:

CalSAWS: CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CA-205982

C-IV: CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2019 > SCR CIV-102946

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the CW/CF Committee. C-IV will implement this Change with SCR CIV-102946 in the 19.11 release.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

Overwrite EDBC

76

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|                       |    |                         |    |            |   |
|-----------------------|----|-------------------------|----|------------|---|
| Automated Test :      | 0  | Batch/Interfaces :      | 0  | CalHEERS : | 0 |
| CalHEERS Test :       | 0  | Client Correspondence : | 0  | DBA :      | 0 |
| Design :              | 0  | Eligibility :           | 52 | Fiscal :   | 0 |
| Imaging :             | 0  | IVR/CC :                | 0  | Online :   | 0 |
| Performance :         | 0  | Reports :               | 0  | Security : | 0 |
| System Test Support : | 19 | Tech Arch :             | 0  | Tech Ops : | 0 |
| Training :            | 0  |                         |    |            |   |

 **[CA-207089] Update Converted LEADER Claims on LRS**

|                      |                         |                        |                              |                               |                            |
|----------------------|-------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Fiscal</b>           | Assignee:              | <b>Sidhant Garg</b>          | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>          | Designer Contact:      | <b>Sidhant Garg</b>          | Change Type (SCR):            | <b>Data Change</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>Production Deployment</b> | Estimate:                     | <b>88</b>                  |
| Reporter:            | <b>Myra Aldana</b>      | Regulation Reference:  |                              | Created:                      | <b>03/14/2019 10:50 AM</b> |
| Status:              | <b>Pending Approval</b> | Impact Analysis:       | <b>[Data Impact]</b>         | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Gloria Williams</b>  | Training Impacted:     | <b>[N/A]</b>                 | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:           | <b>[Fiscal]</b>         | Approved by Committee: |                              | Other Agency Cross Reference: |                            |

**Non-Committee Review:** Approved by Region 6. Confirmation email is attached.

**Expedite Approval:** Section Director Approved Expedited - Prod Deployment on 7/16/2019

**Current Design:** During conversion of LRS, LEADER overpayment/overissuance claims that contained a balance were converted. This included the claims that were terminated, voided or closed. The CA812 and FNS 209 reports have been impacted by these converted claims continuing to show a balance even though the claim status was terminated, voided or closed.

**Request:**

- 1) Update the converted LEADER claims that have a recovery account status of terminated, voided or close to a zero balance.
- 2) Provide a listing of the recovery accounts where the balance was reduced to \$0 before and after the SCR is implemented.

**Recommendation:**

- 1) Find all converted LEADER Claims/recovery accounts that are currently in 'Terminated' Status and have current balance more than \$0, then mark them as "TERMINATED" with a reason of "WRITE-OFF". Follow existing logic to insert a transaction to zero down the claim balance.
- 2) Find all converted LEADER Claims/recovery accounts that are currently in 'Void' Status and have current balance more than \$0, then mark them as "Void" with a reason of "WRITE-OFF". Follow existing logic to insert a transaction to zero down the claim balance.
- 3) Find all converted LEADER Claims/recovery accounts that are currently in 'Closed' Status and have current balance more than \$0, then follow the existing logic to insert a transaction to zero down the claim balance.

**Outreach**

**Description:** System/County specific data change.

**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A

**Operational Impact:**  
**Estimate:** **88**

|                  |   |                         |   |            |    |
|------------------|---|-------------------------|---|------------|----|
| Automated Test : | 0 | Batch/Interfaces :      | 0 | CalHEERS : | 0  |
| CalHEERS Test :  | 0 | Client Correspondence : | 0 | DBA :      | 0  |
| Design :         | 0 | Eligibility :           | 0 | Fiscal :   | 55 |
| Imaging :        | 0 | IVR/CC :                | 0 | Online :   | 0  |
| Performance :    | 0 | Reports :               | 0 | Security : | 0  |

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|                       |    |             |   |            |   |
|-----------------------|----|-------------|---|------------|---|
| System Test Support : | 23 | Tech Arch : | 0 | Tech Ops : | 0 |
| Training :            | 0  |             |   |            |   |



# [CA-209076] Enhance Refused Verification functionality to send failed Admin Verif

|                      |                         |                        |                      |                               |                            |
|----------------------|-------------------------|------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>CalHEERS</b>         | Assignee:              | <b>Unassigned</b>    | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[20.01]</b>          | Designer Contact:      | <b>Tisha Mutreja</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>No</b>            | Estimate:                     | <b>210</b>                 |
| Reporter:            | <b>Tisha Mutreja</b>    | Regulation Reference:  |                      | Created:                      | <b>06/21/2019 10:34 AM</b> |
| Status:              | <b>Pending Approval</b> | Impact Analysis:       | <b>[N/A]</b>         | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Victor Nunez</b>     | Training Impacted:     | <b>[N/A]</b>         | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>            | Funding Source ID:            |                            |
| Committee:           | <b>[Medi-Cal/CMSP]</b>  | Approved by Committee: | <b>09/03/2019</b>    | Other Agency Cross Reference: | <b>CIV-104268</b>          |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, C-IV sends Nothing to CalHEERS as Admin Verification for a record with 'Refused' status in a benefit month whereas CalSAWS sends 'No' as Admin Verification in same scenario for all the Types in the EDR as displayed in the screenshot below.

If 'Refused' is the only selected verification in a benefit month, CalSAWS will send 'No' to CalHEERS whereas C-IV sends Nothing. Although if 'Refused' is one of the verification records along with other Verification statuses in a benefit month, 'Refused' is not considered to be sent as failed Admin Verification to CalHEERS.

Also on Citizenship Page when the Verified status is either "Not Applicable, Pending or Refused", 'Medi-Cal Reasonable Opportunity Period' (ROP) section shows up to be filled in by the Worker with Due Date and if Expired is 'Yes' Admin Verif is sent as 'No' making them fail ROP. Although if the status is 'Verified', the ROP section is hidden and ignored for EDR.

#### Request:

The Systems to send Admin-Verified 'No' when at least one record exists in a benefit month with one of the record as 'Refused' status.

The Systems to not display ROP section when the Citizenship Status on Citizenship Status Detail page is 'Not Applicable' or 'Refused'.

#### Recommendation:

1. Update eHIT to send Admin-Verified 'No' for Refused records in a benefit month even if multiple other status exists in the same month.
2. Update Citizenship Status Detail page to hide Medi-Cal ROP section when 'Not Applicable' or 'Refused' is selected in the Verified drop down.
3. Update eHIT to only send failed Admin-Verified when 'Pending' status is selected with Expired as 'Yes' in Medi-Cal ROP section or the Verified status is 'Refused'.

Please refer to the details in the design draft attached.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this Change with SCR CIV-104268 in the 20.01 release.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

Send a Negative Action or Non-Compliance.

#### Operational Impact:

#### Estimate:

**210**

|                  |    |                         |   |            |     |
|------------------|----|-------------------------|---|------------|-----|
| Automated Test : | 24 | Batch/Interfaces :      | 0 | CalHEERS : | 101 |
| CalHEERS Test :  | 65 | Client Correspondence : | 0 | DBA :      | 0   |

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|                       |   |               |   |            |   |
|-----------------------|---|---------------|---|------------|---|
| Design :              | 0 | Eligibility : | 0 | Fiscal :   | 0 |
| Imaging :             | 0 | IVR/CC :      | 0 | Online :   | 0 |
| Performance :         | 0 | Reports :     | 0 | Security : | 0 |
| System Test Support : | 0 | Tech Arch :   | 0 | Tech Ops : | 0 |
| Training :            | 0 |               |   |            |   |



End SCRs



# [CA-208531] Automated Regression Test - Execution and Maintenance - 19.09 Release Cycle

|                      |                         |                        |                         |                               |                                |
|----------------------|-------------------------|------------------------|-------------------------|-------------------------------|--------------------------------|
| Team Responsible:    | <b>Automated Test</b>   | Assignee:              | <b>William Baretzky</b> | SPG Status:                   | <b>Approved</b>                |
| Fix Version/s:       | <b>[19.09]</b>          | Designer Contact:      | <b>William Baretzky</b> | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:       | <b>19.11.XX</b>         | Expedite Changes:      | <b>Start Build</b>      | Estimate:                     | <b>300</b>                     |
| Reporter:            | <b>William Baretzky</b> | Regulation Reference:  |                         | Created:                      | <b>05/20/2019 04:46 PM</b>     |
| Status:              | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                      |
| Consortium Contact:  | <b>Sharon Teramura</b>  | Training Impacted:     | <b>[N/A]</b>            | Funding Source:               | <b>LRS M&amp;E</b>             |
| Project Phase (SCR): | <b>Assembly Test</b>    | Migration Impact:      | <b>Yes</b>              | Funding Source ID:            |                                |
| Committee:           | <b>[Other]</b>          | Approved by Committee: |                         | Other Agency Cross Reference: | <b>CIV-104168</b>              |

**Non-Committee Review:** Approved by Michele Peterson on 5/28/2019

**Expedite Approval:** Karen Rapponotti 5/21/2019

**Current Design:** A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

- Recommendation:**
1. Execute the major release automated regression suite against the 19.09 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 19.09 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 19.09 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact Description:** Per DDID #713, A complete set of regression scripts leveraging existing C-IV and LRS scripts is to be utilized for CalSAWS.

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** Execute all regression testing manually for major and minor version releases.

**Operational Impact:**  
**Estimate:** **300**

|                       |     |                         |   |            |   |
|-----------------------|-----|-------------------------|---|------------|---|
| Automated Test :      | 300 | Batch/Interfaces :      | 0 | CalHEERS : | 0 |
| CalHEERS Test :       | 0   | Client Correspondence : | 0 | DBA :      | 0 |
| Design :              | 0   | Eligibility :           | 0 | Fiscal :   | 0 |
| Imaging :             | 0   | IVR/CC :                | 0 | Online :   | 0 |
| Performance :         | 0   | Reports :               | 0 | Security : | 0 |
| System Test Support : | 0   | Tech Arch :             | 0 | Tech Ops : | 0 |
| Training :            | 0   |                         |   |            |   |

**Content Revision Status-1:** Pending CCB

**Content Revision  
Description-1:**

1. Recommendation Change: None
2. Estimate Change:  
Before: Automated Test: 300  
After: Automated Test: 420
3. Release Change: None
4. Funding Source Change: None

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:



# [CA-209109] Add Full/Restricted Scope verbiage for Young Adult Expansion MAGI NOAs(CH-139211)

|                      |  |                        |                                    |                               |                              |
|----------------------|--|------------------------|------------------------------------|-------------------------------|------------------------------|
| Team Responsible:    | <b>Client Correspondence</b>           | Assignee:              | <b>Vikas Jetalpuria</b>            | SPG Status:                   | <b>Approved</b>              |
| Fix Version/s:       | <b>[19.09]</b>                         | Designer Contact:      | <b>Nithya Chereddy</b>             | Change Type (SCR):            | <b>New Policy</b>            |
| Minor Version:       | <b>19.11.14</b>                        | Expedite Changes:      | <b>Start Build</b>                 | Estimate:                     | <b>297</b>                   |
| Reporter:            | <b>Nithya Chereddy</b>                 | Regulation Reference:  | <b>W&amp;IC Section 14007.8(b)</b> | Created:                      | <b>06/24/2019 01:21 PM</b>   |
| Status:              | <b>Development Complete</b>            | Impact Analysis:       | <b>[Forms/NOA Translations]</b>    | Outreach Required:            | <b>No</b>                    |
| Consortium Contact:  | <b>Maria Arceo</b>                     | Training Impacted:     |                                    | Funding Source:               | <b>Premise</b>               |
| Project Phase (SCR): | <b>Production</b>                      | Migration Impact:      | <b>No</b>                          | Funding Source ID:            |                              |
| Committee:           | <b>[Correspondence, Medi-Cal/CMSP]</b> | Approved by Committee: | <b>2019-08-12 00:00:00.0</b>       | Other Agency Cross Reference: | <b>CIV-104415; CH-139211</b> |

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 08/14/2019

**Current Design:** The system currently does not have the appropriate verbiage to populate on MAGI NOAs once Young Adult Expansion is effective.

**Request:** Add new MAGI NOA verbiage for full scope/restricted Scope NOAs with respect to Young Adult Expansion.

**Recommendation:** Create MAGI full scope/restricted scope fragments with Young Adult Expansion appropriate verbiage.

## Outreach

### Description:

### Migration Impact

### Description:

Joint design has been approved through the Correspondence Committee. C-IV will implement this change with SCR CIV-104415 in a 19.09 priority release.

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

### Operational Impact:

**Estimate:** **297**

|                       |     |                         |     |            |   |
|-----------------------|-----|-------------------------|-----|------------|---|
| Automated Test :      | 0   | Batch/Interfaces :      | 0   | CalHEERS : | 0 |
| CalHEERS Test :       | 119 | Client Correspondence : | 178 | DBA :      | 0 |
| Design :              | 0   | Eligibility :           | 0   | Fiscal :   | 0 |
| Imaging :             | 0   | IVR/CC :                | 0   | Online :   | 0 |
| Performance :         | 0   | Reports :               | 0   | Security : | 0 |
| System Test Support : | 0   | Tech Arch :             | 0   | Tech Ops : | 0 |
| Training :            | 0   |                         |     |            |   |

## Content Revision

**Status-1:** Pending CCB

## Content Revision

### Description-1:

1. Recommendation Change:  
Cosmetic updates to a C-IV Specific recommendation in the "Overview of Recommendations" section.

### Before:

3. CIV - Suppress the MSG\_MAGI\_INFORMATION\_MESSAGE on the NOA if the new Restricted-Scope Retro Approval or Restricted-Scope Approval are generated, as the new fragments has the MAGI information message verbiage.

### After:

3. Populate the updated MAGI information message verbiage when the new Retro restricted scope approval message or Restricted scope approval message are populated on the NOA.

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



## [CA-50808] Child Welfare Program: BI: Vendor Dashboard report

|                      |                             |                        |                              |                               |                            |
|----------------------|-----------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Reports</b>              | Assignee:              | <b>Sumanta Mukhopadhyay</b>  | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>              | Designer Contact:      | <b>Vallari Bathala</b>       | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                             | Expedite Changes:      | <b>Start Build</b>           | Estimate:                     | <b>1616</b>                |
| Reporter:            | <b>Ted Anderson</b>         | Regulation Reference:  |                              | Created:                      | <b>01/19/2018 11:44 AM</b> |
| Status:              | <b>In Development</b>       | Impact Analysis:       | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Maria Zelaya</b>         | Training Impacted:     | <b>[N/A]</b>                 | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>           | Migration Impact:      | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:           | <b>[Management Reports]</b> | Approved by Committee: | <b>2019-08-06 00:00:00.0</b> | Other Agency Cross Reference: |                            |

### Non-Committee

#### Review:

**Expedite Approval:** Expedited Approval Provided by Karen J. Rapponotti on 8/6/2019

#### Current Design:

Updates to Child Welfare Services / Case Management System (CWS/CMS) vendors are sent to LRS via the CWS/CMS interface. Datamart is an Oracle database which extracts Foster Care data from the LRS system. An LRS batch job runs nightly and identifies and stores any discrepancies between the vendor related information in both systems. The Task Management Business Intelligence (BI) dashboard and Daily Skipped Issuance Report, are used to help identify the vendor record(s) requiring corrective action. When discrepancies are detected, changes may have to be made in the CWS/CMS System or LRS system.

#### Request:

Task Management BI dashboard is driven by case number, not CWS/CMS vendor number. The Daily Skipped Issuance Report is used as a workaround to identify any vendor records which require corrections in either system. However, the report is limited to skipped issuances and does not capture the population of vendors with missing/mismatched vendor information.

#### Recommendation:

- Develop a new vendor BI dashboard page which provides information on vendor information discrepancy between the CWS/CMS and LRS system. The dashboard must:
  - a. Include the vendor counts by Placement Types
  - b. Include vendor counts without Vendor ID's
  - c. Identify the vendor Exception Reasons
    - i. The Exception Reasons identifies the discrepancies between CWS/CMS and LRS
  - d. Include vendor counts by Exception Reasons
  - e. Include number of Exception Reasons for each month
  - f. Include case lists which provide vendor information and the specific 'Exception Reasons'
  - g. Include a count of all vendor exceptions which are resolved
  - h. Include vendor counts for a specified range of months
  - i. Include a full list of all 'Vendors', 'Vendor Types', 'Programs', 'Placement Types' and 'Exception Reasons'
  - j. Create a new security role to restrict access to the Vendor dashboard
- Create new reporting table to retain the outgoing exception list when processing the DCFS Inbound files from DataMart/DCFS for a period of 90 days.
- Update the Inbound readers for FC, KG and AAP programs to process the inbound files received from DCFS data mart and parse the exception data to the new reporting table.

### Outreach

#### Description:

#### Migration Impact

#### Description:

C-IV feedback has been addressed and the design has been approved through the Management Reports Committee. The C-IV counties will be adopting this functionality as part of migration.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

None this feature was not previously available

#### Operational Impact:

N/A

|                       |             |                         |     |            |   |
|-----------------------|-------------|-------------------------|-----|------------|---|
| <b>Estimate:</b>      | <b>1616</b> |                         |     |            |   |
| Automated Test :      | 0           | Batch/Interfaces :      | 250 | CalHEERS : | 0 |
| CalHEERS Test :       | 0           | Client Correspondence : | 0   | DBA :      | 1 |
| Design :              | 0           | Eligibility :           | 0   | Fiscal :   | 0 |
| Imaging :             | 0           | IVR/CC :                | 0   | Online :   | 0 |
| Performance :         | 0           | Reports :               | 900 | Security : | 0 |
| System Test Support : | 460         | Tech Arch :             | 0   | Tech Ops : | 5 |
| Training :            | 0           |                         |     |            |   |

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** .1. Recommendation Change:  
 Before: CA 50808 Child Welfare Program BI Vendor Dashboard Report.docx  
 After: CA 50808 Child Welfare Program BI Vendor Dashboard Report - Content Revision.docx

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:** 2.2.2 Widget Details, 1.3 Overview of Recommendations, 2.1.4 Placement Vendor Exception Report – Vendor Transaction Exception Reasons Page Layout, 2.1.4.1 Prompt Detail, 2.1.4.2.2 # of Vendors without IDs, 2.1.4.2.3 # of Exception Reasons Resolved and 2.2.1 Prompt Detail Change:  
 Before: CA 50808 Child Welfare Program BI Vendor Dashboard Report - Content Revision.docx  
 After: CA 50808 Child Welfare Program BI Vendor Dashboard Report - Content Revision 2.docx

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**



## [CA-52219] Supervisor's Approval for Refunds

|                      |                         |                        |                              |                               |                            |
|----------------------|-------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Fiscal</b>           | Assignee:              | <b>John Besa</b>             | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>Ishrath Khan</b>          | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>Start Build</b>           | Estimate:                     | <b>875</b>                 |
| Reporter:            | <b>Elton Wong [X]</b>   | Regulation Reference:  |                              | Created:                      | <b>01/19/2018 11:44 AM</b> |
| Status:              | <b>In Assembly Test</b> | Impact Analysis:       | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Gloria Williams</b>  | Training Impacted:     | <b>[N/A]</b>                 | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:           | <b>[Collections]</b>    | Approved by Committee: | <b>2019-08-14 00:00:00.0</b> | Other Agency Cross Reference: |                            |

**Non-Committee Review:** Collections Committee - Approved

**Expedite Approval:** Expedited approval from Karen to start build (attached)

**Current Design:** The Recovery Account Payment Refund process allows the user to complete and save the Refund request via the Transaction Detail; Transaction Transfer/ Refund page without a Supervisor approval and create an issuance for the refund through the issuance batch process that generates the warrants overnight. Additionally, the Transaction Detail page allows a user to access and complete a payment Transfer or payment Refund request via the Transfer/Refund command button without having any security restrictions for each type of request on the Transaction Detail page.

**Request:** To avoid violation of County Fiscal internal control requirements of protecting, misappropriation of County assets and preventing fraud, request is hereby made to modify the Recovery Account Transfer/Refund process to

- Add Supervisor Approval/Disapproval functionality.
- Separate the Transfer/Refund command button into two buttons with separate security rights for the Transfer and Refund process.

**Recommendation:**

- Modify the online Recovery Account Transfer/Refund process to include two separate command buttons for Transfer and Refund transactions. On the Transaction Detail page, remove the Transfer/Refund command button and add the following two new command buttons.
  - Transfer
  - Refund
- Add two new pages namely 'Transaction Transfer Detail' and 'Transaction Refund Detail'. The 'Transaction Refund Detail' will allow for Supervisor Authorization or Rejection of the Recovery Account Refund transactions.
- Update the Transaction Transfer/Refund page to enable Supervisor Approval for Refund transactions if the request for Approval of a transfer/refund transaction is rejected, no transaction will be posted to the Recovery Accounts.
- Update the existing Security group 'Transaction Transfer' to delete existing security rights associated to it (TransactionTransfer/RefundEdit & TransactionTransfer/RefundView) and add new Security rights for the Transfer button:
  - TransactionTransferEdit
  - TransactionTransferView
- Add the following new Security Groups for the "Refund" button
  - TransactionRefundEdit
  - TransactionRefundView
  - TransactionRefundApprove
  - TransactionRefundDeputyApprove
  - TransactionRefundDisapprove
- Add the following new Security Rights for the "Refund" button
  - TransactionRefundEdit
  - TransactionRefundView
  - TransactionRefundApprove
  - TransactionRefundDeputyApprove
  - TransactionRefundDisapprove
- Update Online Help and page mapping to account for changes being made to the online pages.



8. Create a Task for Supervisor or Deputy when a Refund has been initiated by the Worker or approved by a Supervisor respectively. Create a task for the worker when the refund request initiated by the worker is disapproved by a Supervisor or Deputy.

**Outreach**

**Description:**

**Migration Impact**

C-IV will adopt LRS' functionality for Recovery Account Transfers and Refunds.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

N/A

**Estimate:**

875

|                       |     |                         |   |            |     |
|-----------------------|-----|-------------------------|---|------------|-----|
| Automated Test :      | 0   | Batch/Interfaces :      | 0 | CalHEERS : | 0   |
| CalHEERS Test :       | 0   | Client Correspondence : | 0 | DBA :      | 0   |
| Design :              | 0   | Eligibility :           | 0 | Fiscal :   | 568 |
| Imaging :             | 0   | IVR/CC :                | 0 | Online :   | 0   |
| Performance :         | 0   | Reports :               | 0 | Security : | 0   |
| System Test Support : | 227 | Tech Arch :             | 0 | Tech Ops : | 0   |
| Training :            | 0   |                         |   |            |     |

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

1. Recommendation Change: Updated SCR Recommendations.

**Description-1:**

Before:

1. Recommendation 2.2.3.
  - a. If the refund status of the related transaction is in "Awaiting Approval (L1)" or "Awaiting Approval (L2)" or "Approved" and 'Refund' button will be hidden on the Transaction Detail page.
2. Recommendation 2.3.3
  - 3) Add the following validation when the 'Transfer amount' is greater than the 'Transaction Amount': Transfer Amount - Transfer amount cannot be greater than the Transaction amount.
- 3.Recommendation 2.3.5 - Security updates: Added Security right "TransactiontransferView" : This right grants view access to the "Transaction Transfer" page on click of the "Transfer" button on Transaction Detail page.
- 4.Recommendation 2.4.2 -
  - a. Task type: Supervisor Authorization – Awaiting Approval (L1)  
Task Long Description: Supervisor Authorization – Awaiting Approval (L1)
  - b. Task Type :Deputy Authorization – Approved  
Task Long Description : Deputy Authorization – Approved
  - c. Task Type: Disapproved  
Task Long Description : Disapproved
5. Recommendation: 2.4.6 - Added the validation:  
Payee – Select Payee.  
Transaction Type – Select Transaction Type.  
Amount – Enter the Amount

After:

1. Recommendation 2.2.3
  - a. If the refund status of the related transaction is in "Awaiting Approval (L1)" or "Awaiting Approval (L2)" or "Approved" , the 'Transfer' button and 'Refund' button will be hidden on the Transaction Detail page.
2. Recommendation 2.3.3

3) Add the following validation when the 'Transfer amount' is greater than the 'Unused Amount': Transfer Amount - Transfer amount cannot be greater than the Unused amount.

4) Add a validation to stop the worker from saving a Transfer when a pending refund request exists.

a. A pending refund request for this transaction already exists. A transfer transaction cannot be created.

3. Recommendation 2.3.5 - Security updates: Removed Security right "TransactiontransferView" as it is not used anymore.

4. Recommendation 2.4.2 -

a. Task type: Supervisor Authorization – Transaction Refund

Task Long Description: Supervisor Authorization – Transaction Refund

b. Task Type :Deputy Authorization –Transaction Refund

Task Long Description : Deputy Authorization – Transaction Refund

c. Task Type: Transaction Refund Disapproved

Task Long Description : Transaction Refund Disapproved

5. Recommendation: 2.4.6 - Updated the validation :

< Payee > - "Field is required. Please enter a value".

< Transaction Type > - "Field is required. Please enter a value".

< Amount - "Field is required. Please enter a value".

CA-52219 Supervisor's Approval for Refunds\_Content Revision.docx - Updates highlighted in yellow

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



## [CA-201021] DDCR:Update Targeted Low-Income search page to default 'Type' and 'Status' fields to “Blank”

|                      |                         |                        |                            |                               |                            |
|----------------------|-------------------------|------------------------|----------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>CalHEERS</b>         | Assignee:              | <b>Lucas Galleguillos</b>  | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>Antony Lerner</b>       | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>No</b>                  | Estimate:                     | <b>39</b>                  |
| Reporter:            | <b>Steven Tri</b>       | Regulation Reference:  |                            | Created:                      | <b>02/23/2018 10:02 AM</b> |
| Status:              | <b>In Assembly Test</b> | Impact Analysis:       | <b>[N/A]</b>               | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Carlos Camarena</b>  | Training Impacted:     | <b>[N/A]</b>               | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                  | Funding Source ID:            |                            |
| Committee:           | <b>[Medi-Cal/CMSP]</b>  | Approved by Committee: | <b>2019-07-31 00:00:00</b> | Other Agency Cross Reference: | <b>Tracker-54924</b>       |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** The LRS Targeted Low-Income Search Page defaults the 'Type' and 'Status' fields to "All" when the page loads. LRS does not have any Targeted Low-Income records. There are a large number of Targeted Low-Income records in C-IV counties.

**Request:** Update the LRS Targeted Low-Income Search page to default the 'Type' and 'Status' drop-down lists to "Blank" in order to prepare for a large number of records when C-IV migrates and merges with LRS as one system. Remove the option "All" from both the 'Type' and 'Status' drop-down lists to decrease the search volume and improve the search performance.

**Recommendation:** Update the Targeted Low-Income Search page to default the 'Type' and 'Status' to "Blank" on page load. All fields on page will default to "Blank" on page load. Search will not take place on page load. The search will only happen when the Worker makes selection and clicks the Search button. Remove the option "All" from both the 'Type' and 'Status' drop-down lists.

### Outreach

**Description:**  
**Migration Impact Description:** The Targeted Low-Income Search page will default 'Type' and 'Status' fields to "Blank" when the page loads. There will be no records in the search results until the worker performs a Search. C-IV will inherit the same changes post migration. C-IV has Status option of "Not Found" and LRS does not. However, there are no C-IV records with Status "Not Found" so LRS will not be updated to include Status "Not Found." In addition, C-IV will inherit LRS Statuses "Incomplete" and "Suppressed" post migration that are not currently in C-IV.

### Migration Impact

**Analysis:**  
**Alternative Procedure Description:** None

**Operational Impact:**  
**Estimate:** **39**

|                       |    |                         |   |            |    |
|-----------------------|----|-------------------------|---|------------|----|
| Automated Test :      | 0  | Batch/Interfaces :      | 0 | CalHEERS : | 28 |
| CalHEERS Test :       | 11 | Client Correspondence : | 0 | DBA :      | 0  |
| Design :              | 0  | Eligibility :           | 0 | Fiscal :   | 0  |
| Imaging :             | 0  | IVR/CC :                | 0 | Online :   | 0  |
| Performance :         | 0  | Reports :               | 0 | Security : | 0  |
| System Test Support : | 0  | Tech Arch :             | 0 | Tech Ops : | 0  |
| Training :            | 0  |                         |   |            |    |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: Updated Design Document to add validation to prevent Search from taking place when no search criteria is entered by the Worker and Search button is clicked as shown on Figure 2.1.2.4. Changes are highlighted in yellow in attached content revision 1 design.

Before: No validation to prevent Search from taking place when Worker enters no search criteria and Search button is clicked.  
After: The Search will only happen when the Worker selects a value for at least one field and clicks the Search button.

2. ETC Change: None

CalHEERS ETC 1:

Before: 28

After: 36

CalHEERS Test ETC-1:

Before: 11

After: 12

**Content Revision  
Status-2:  
Content Revision  
Description-2:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision  
Status-3:  
Content Revision  
Description-3:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision  
Status-4:  
Content Revision  
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

 **[CA-209407] Update Issuance Thresholds for 2020 (CRFI 19-026)**

|                      |                         |                        |                                  |                               |                            |
|----------------------|-------------------------|------------------------|----------------------------------|-------------------------------|----------------------------|
| Team Responsible:    | <b>Fiscal</b>           | Assignee:              | <b>Lalitha Valamarthi</b>        | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:       | <b>[19.11]</b>          | Designer Contact:      | <b>Sidhant Garg</b>              | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:      | <b>Start Build</b>               | Estimate:                     | <b>100</b>                 |
| Reporter:            | <b>Sheryl E. Eppler</b> | Regulation Reference:  |                                  | Created:                      | <b>07/11/2019 03:18 PM</b> |
| Status:              | <b>In Assembly Test</b> | Impact Analysis:       | <b>[N/A]</b>                     | Outreach Required:            | <b>No</b>                  |
| Consortium Contact:  | <b>Sheryl E. Eppler</b> | Training Impacted:     | <b>[N/A]</b>                     | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR): | <b>Production</b>       | Migration Impact:      | <b>No</b>                        | Funding Source ID:            |                            |
| Committee:           | <b>[Fiscal]</b>         | Approved by Committee: | <b>2019-08-20<br/>00:00:00.0</b> | Other Agency Cross Reference: | <b>CIV-104577</b>          |

**Non-Committee Review:** Reviewed by affected Counties - approvals in comments field - 08/15/2019

**Expedite Approval:** Emergency approval to start build from JoAnne Osborn on 8/21/2019

**Current Design:** Issuance thresholds are established to determine the amount of benefits or service payments that can be approved by an Eligibility worker without requiring a supervisor override.

**Request:** Counties have been requested to review their existing Issuance Thresholds for Adoption Assistance Program (AAP), Approved Relative Caregiver (ARC), CalFresh (CF), Cal-Learn (CL), CAPI, CalWORKs (CW), CalFresh Employment and Training (CFET), Child Care (CC), Diversion (DV), Foster Care (FC), General Assistance/General Relief (GA/GR), General Relief Opportunities for Work (GROW), Homeless Assistance Temp (HT), Homeless Assistance Perm (HP), Kin-GAP (KG), Nutritional Benefits (NB), Refugee Cash Assistance (RCA), Refugee Employment Program (REP) and Welfare to Work (WtW) to determine if any changes are appropriate. The last changes were made by SCR # CIV-100503 in Release 19.01.

**Recommendation:** Affected Counties: Alpine, Butte, Calaveras, El Dorado, Glenn, Humboldt, Imperial, Los Angeles, Madera, Marin, Mendocino, Merced, Monterey, Riverside, San Bernardino, Shasta, Siskiyou, Stanislaus, Sutter, Yuba

- 1) Update the following issuance thresholds for Alpine County (02):
  - a) General Assistance (Managed): GM - From: \$200 to: \$1,000
- 2) Update the following issuance thresholds for Butte County (04):
  - a) Foster Care: FC - From: \$30,000 to: \$50,000
- 3) Update the following issuance thresholds for Calaveras County (05):
  - a) AAP: AP - From: \$12,000 to: \$15,000
  - b) Foster Care: FC - From: \$12,000 to: \$15,000
  - c) HA-Temp: HT - From: \$1,000 to: \$2,000
  - d) HA-Perm: HP - From: \$4,000 to: \$5,000
- 4) Update the following issuance thresholds for El Dorado County (09):
  - a) Foster Care: FC - From: \$12,500 to: \$15,000
  - b) HA-Temp: HT - From: \$1,280 to: \$2,000
  - c) HA-Perm: HP - From: \$2,500 to: \$3,000
  - d) Welfare-to-Work: WTW - From: \$1,500 to: \$5,000
- 5) Update the following issuance thresholds for Glenn County (11):
  - a) General Assistance (Managed): GM - From: \$297 to: \$500
  - b) HA-Perm: HP - From: \$2,000 to: \$2,500
- 6) Update the following issuance thresholds for Humboldt County (12):
  - a) Nutritional Benefit: NB - From: \$2,500 to: \$1,000
  - b) Welfare-to-Work: WTW - From: \$999 to: \$1,500
- 7) Update the following issuance thresholds for Imperial County (13):
  - a) Cal-Learn: CL - From: \$99,999 to: \$2,000
  - b) Welfare-to-Work: WTW - From: \$3,500 to: \$5,000

- 8) Update the following issuance thresholds for Los Angeles County (19):
  - a) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: Cal-Learn - Update Max Quantity to zero.
  - b) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: REP - Update Max Quantity to zero.
  - c) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: Welfare-to-Work - Update Max Quantity to zero.
  - d) Supportive Services - Need Category: County Specific Program / Need Type: Educational Support Payment / Program: CalWORKs - Update Max Quantity to zero.
  - e) Supportive Services - Need Category: County Specific Program / Need Type: Educational Support Payment / Program: RCA - Update Max Quantity to zero.
  - f) Supportive Services - Need Category: Ancillary-Education / Need Type: Family Reunification Moving Assistance / Program: Welfare-to-Work - Update Max Quantity to zero.
- 9) Update the following issuance thresholds for Madera County (20):
  - a) Cal-Learn: CL - From: \$1 to: \$550
  - b) HA-Temp: HT - From: \$1 to: \$2,000
  - c) HA-Perm: HP - From: \$1,000 to: \$2,000
- 10) Update the following issuance thresholds for Marin County (21):
  - a) CalFresh: CF - From: \$5,000 to: \$3,000
  - b) HA-Temp: HT - From: \$1,100 to: \$2,000
  - c) HA-Perm: HP - From: \$1,000 to: \$2,000
  - d) Nutritional Benefits: NB - From: \$5,000 to: \$3,000
- 11) Update the following issuance thresholds for Mendocino County (23):
  - a) AAP: AP - From: \$13,500 to: \$15,500
  - b) ARC: AR - From: \$10,000 to: \$5,000
  - c) Foster Care: FC - From: \$13,500 to: \$15,500
  - d) General Assistance (Managed): GM - From: \$600 to: \$2,000
- 12) Update the following issuance thresholds for Merced County (24):
  - a) AAP: AP - From: \$10,500 to: \$15,000
  - b) ARC: AR - From: \$10,500 to: \$15,000
  - c) CalFresh: CF - From: \$2,000 to: \$2,500
  - d) CalWORKs: CW - From: \$2,000 to: \$2,500
  - e) Foster Care: FC - From: \$12,036 to: \$15,000
  - f) Kin-GAP: KG - From: \$3,500 to: \$15,000
- 13) Update the following issuance thresholds for Monterey County (27):
  - a) ARC: AR - From: \$10,200 to: \$5,000
  - b) Kin-GAP: KG - From: \$1,700 to: \$5,000
- 14) Update the following issuance thresholds for Riverside County (33):
  - a) Kin-GAP: KG - From: \$8,000 to: \$9,000
- 15) Update the following issuance thresholds for San Bernardino County (36):
  - a) CAPI: CP - From: \$2,337 to: \$2,389
- 16) Update the following issuance thresholds for Shasta County (45):
  - a) ARC: AR - From: \$7,000 to: \$8,000
  - b) CalWORKs: CW - From: \$2,000 to: \$2,500
  - c) General Assistance (Managed): GM - From: \$500 to: \$700
- 17) Update the following issuance thresholds for Siskiyou County (47):
  - a) Welfare-to-Work: WTW - From: \$2,500 to: \$5,000
- 18) Update the following issuance thresholds for Stanislaus County (50):
  - a) CFET: FT - From: \$0 to: \$500
  - b) General Assistance (Managed): GM - From: \$500 to: \$604

19) Update the following issuance thresholds for Sutter County (51):

a) RCA: RC - From: \$600 to: \$1,000

20) Update the following issuance thresholds for Yuba County (58):

a) AAP: AP - From: \$13,000 to: \$13,600

b) ARC: AR - From: \$13,000 to: \$13,600

c) Foster Care: FC - From: \$13,000 to: \$13,600

Developer Note: All changes to Issuance Thresholds will be done to codes table category 562.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

System/County specific data change. These threshold values are specific to counties and will not impact other C-IV Counties threshold values.

**Migration Impact**

**Analysis:**

No Impact

**Alternative**

**Procedure**

**Description:**

Add the "Authorize Issuance Amount Exceptions" security group to a user who must authorize issuances above the current threshold amount.

**Operational Impact:**

**Estimate:**

100

|                       |    |                         |   |            |    |
|-----------------------|----|-------------------------|---|------------|----|
| Automated Test :      | 0  | Batch/Interfaces :      | 0 | CalHEERS : | 0  |
| CalHEERS Test :       | 0  | Client Correspondence : | 0 | DBA :      | 0  |
| Design :              | 0  | Eligibility :           | 0 | Fiscal :   | 55 |
| Imaging :             | 0  | IVR/CC :                | 0 | Online :   | 0  |
| Performance :         | 0  | Reports :               | 0 | Security : | 0  |
| System Test Support : | 35 | Tech Arch :             | 0 | Tech Ops : | 0  |
| Training :            | 0  |                         |   |            |    |

**Content Revision**

**Status-1:**

Pending CCB

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before:

8) Update the following issuance thresholds for Los Angeles County (19):

a) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: Cal-Learn - Update Max Quantity to zero.

b) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: REP - Update Max Quantity to zero.

c) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: Welfare-to-Work - Update Max Quantity to zero.

d) Supportive Services - Need Category: County Specific Program / Need Type: Educational Support Payment / Program: CalWORKs - Update Max Quantity to zero.

e) Supportive Services - Need Category: County Specific Program / Need Type: Educational Support Payment / Program: RCA - Update Max Quantity to zero.

f) Supportive Services - Need Category: Ancillary-Education / Need Type: Family Reunification Moving Assistance / Program: Welfare-to-Work - Update Max Quantity to zero.

After:

8) Update the following issuance thresholds for Los Angeles County (19):

a) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: Cal-Learn - Update Max Quantity to zero, Max Dollar to zero and Period to "Once".

b) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: REP - Update Max Quantity to zero, Max Dollar to zero and Period to "Once".

c) Supportive Services - Need Category: Transportation / Need Type: Bus Token / Program: Welfare-to-Work - Update Max Quantity to zero, Max Dollar to zero and Period to "Once".

d) Supportive Services - Need Category: County Specific Program / Need Type: Educational Support Payment / Program: CalWORKs - Update Max Quantity to zero.

e) Supportive Services - Need Category: County Specific Program / Need Type: Educational Support Payment / Program: RCA - Update Max Quantity to zero.

f) Supportive Services - Need Category: Ancillary-Education / Need Type: Family Reunification Moving Assistance / Program: Welfare-to-Work - Update Max Quantity to zero and Period to "Once".  
If the user tries to issue any of the above mentioned services (Payment requests/Valuable requests), the following validation will be thrown since the Max Quantity and Max Dollar have been updated to zero.  
"Maximum period amount has been reached."

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



**End Content Revisions**