



California Statewide Automated Welfare System

## **Design Document**

CA-210926

Add EDBC Validation to Force Completion of  
Customer Report

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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DRAFT

## Table of Contents

1	Overview .....	4
	1.1 Current Design .....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations .....	4
	1.4 Assumptions.....	4
2	Recommendations .....	5
	2.1 Eligibility Rules Updates .....	5
	2.1.1 Overview.....	5
	2.1.2 Description of Changes.....	5
	2.1.3 Programs Impacted .....	6
	2.1.4 Performance Impacts .....	6
3	Supporting Documents .....	7
4	Requirements.....	7
	4.1 Project Requirements.....	7
5	Outreach.....	7
6	Appendix.....	7

# 1 OVERVIEW

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This SCR is part of an ongoing effort to reduce quality control (QC) errors. The previous SCR in this effort, **CA-52723 CIV-100710 Customer Reporting Updates**, made changes to EDBC validations in CalSAWS Only. The following excerpts are from that previous SCR:

- Add a validation to prevent the user from accepting the EDBC when the benefit processing range begin month (for multi-month EDBC) or benefit month (for manual EDBC) is after the month following the current SAR7, RE, QR7, GR AA due month, where status of the packet is 'Reviewed- Ready to Run EDBC'.
- Add a validation to be displayed on running EDBC when benefit processing range end month (for multi-month EDBC) or benefit month (for manual EDBC) is either same or prior to the current SAR7, RE, QR7, GR AA due month, where status of the packet is 'Reviewed- Ready to Run EDBC' and the month following the current packet due month is available to run.

This SCR will add a new EDBC validation that will prevent a user from authorizing new benefits in a new period unless the Customer Report has been set to 'Reviewed – Ready to Run EDBC'. This new validation will work in conjunction with the prior two validations to help users correctly process period reports and reduce QC errors.

## 1.1 Current Design

A user is able to authorize benefits for a new period even when the Customer Report has not be set to 'Reviewed – Ready to Run EDBC'. This causes skipped issuances.

## 1.2 Requests

Add a new EDBC validation that will prevent a user from authorizing new benefits in a new period unless the Customer Report has been set to 'Reviewed – Ready to Run EDBC'. This will help prevent unnecessary skipped issuances and reduce QC errors.

## 1.3 Overview of Recommendations

1. Add a new EDBC validation that will prevent a user from authorizing new benefits in a new period unless the Customer Report has been set to 'Reviewed – Ready to Run EDBC'.

## 1.4 Assumptions

## 2 RECOMMENDATIONS

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### 2.1 Eligibility Rules Updates

#### 2.1.1 Overview

1. Add a new EDBC validation that will prevent a user from authorizing new benefits that include the first month of a new period unless the Customer Report has been set to 'Reviewed – Ready to Run EDBC'.

#### 2.1.2 Description of Changes

1. **CalSAWS Only:** Add a new validation upon clicking 'Accept' button on the [Program] EDBC Summary and [Program] EDBC (Manual) page to be displayed when the following conditions are met:
  - a. The program is
    - i. CalWORKs (CW)
    - ii. Refugee Cash Assistance (RCA)
    - iii. CalFresh (CF)
    - iv. General Assistance and General Relief (GA/GR)
    - v. Cash Assistance Program for Immigrants (CAPI)
    - vi. Transitional Nutrition Benefit (TNB)
  - b. The EDBC is not closing the program or marking it as ineligible.
  - c. The status of the current SAR7, QR7, RE, GR AA, TNB4 customer report is not 'Completed – EDBC Accepted', 'Reviewed- Ready to Run EDBC', or 'Not Applicable' for the given program.  
Note: RCA does not have an RE customer report, but does have a SAR7 customer report.
  - d. The benefit month processing range includes any month (for multi-month EDBCs) or the benefit month (for manual EDBC or Negative action) is any month following the current SAR7, RE, QR7, GR AA, TNB due month

The text will be in a red font and prevent EDBC from being accepted and will reference the 'Cancel' button on the page. The validation message text will be "[Customer Report Type] due [Customer Report Due Date, Month/Year] must be marked Reviewed - Ready to Run EDBC."

Example 1: CF Program with current SAR due month of 12/2019. SAR 7 customer report is in 'Received' status. User runs EDBC only for 02/2020 month, which does not result in the closure of CF program. New validation will be given when user tries to accept the 02/2020 EDBC: "SAR 7 due 12/2019 must be marked Reviewed - Ready to Run EDBC."

Example 2: CF Program with current RE due month of 12/2019. RE customer report is in 'Received' status. User runs EDBC for 12/2019 - 01/2020 months, which does not result in the closure of CF program. New validation will be given when user tries to accept either 12/2019 or 01/2020 EDBC: "RE due 12/2019 must be marked Reviewed - Ready to Run EDBC."

### **2.1.3 Programs Impacted**

CW, CF, GA, RCA, CAPI, TNB

### **2.1.4 Performance Impacts**

No performance impact.

### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment

### 4 REQUIREMENTS

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#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.21	The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes.	New validation to help ensure correct EDBC determinations.

### 5 OUTREACH

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### 6 APPENDIX

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