



California Statewide Automated Welfare System

## **Design Document**

CA-201036 CIV-100500 – Last Date of  
Payment for Extended Foster Care

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# 1 OVERVIEW

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## 1.1 Current Design

A Non-Minor Dependent (NMD) that meets the eligibility criteria for Foster Care (FC), Approved Relative Caregiver (ARC), or Kin-GAP (KG) benefits is eligible for extended benefits until an NMD is 21 years old. An NMD is eligible for benefits until the end of the month in which an NMD turns 21 years old.

## 1.2 Requests

Per ACL 18-15 effective the date of implementation, an NMD on FC, ARC or KG program is eligible to receive benefits until the day before an NMD turns 21 years old. C-IV will add two new daily tasks sweep batch jobs that will run when an NMD is approaching 21 years old. In addition, CalSAWS will add two new daily batch EDBC sweep jobs that will run when an NMD turns 21 years old for Foster Care program and two new monthly Batch jobs for KG program.

## 1.3 Overview of Recommendations

An NMD is eligible for benefits in Foster Care, ARC or Kin-GAP until the day before their 21<sup>st</sup> birthday.

A batch sweep will be added to create automated tasks for FC/ARC/KG cases with an NMD that is approaching 21 years old in C-IV. In CalSAWS for Foster Care program, there will be two new daily batch jobs to trigger Batch EDBC on the day prior to an NMD child's 21<sup>st</sup> birthday. For KG program there will be two new monthly batch jobs to prorate the benefit and to discontinue the program after an NMD child turned 21.

Existing Discontinuance NOAs for 21 years of age reason (FC and KG) will be updated to use the new fragments. New change NOA will be added in CalSAWS to generate when the FC/KG benefits change for the last month of child's 21<sup>st</sup> birthday.

## 1.4 Assumptions

1. In C-IV, based on the new task generated before the child turns 21, the user will act to run Online EDBC for the current month to prorate the benefit and come up month to discontinue the case.
2. Retroactive discontinuance or overpayments should not be applied.
3. C-IV and CalSAWS will use system's existing NOA header and footers for FC and KG NOAs.
4. All updated and new NOAs for this effort will generate via Online and Batch EDBC.
5. "Batch 10-day cutoff" is a predefined date in LRS. Every year LRS identifies the exact date for each calendar month to be considered "Batch 10-day cutoff" and that date is used for Batch processing to allow enough time for Batch processing and Central Print to adhere to the policy defined 10-day NOA cutoff.

## 2 RECOMMENDATIONS

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### 2.1 Eligibility To Stop Aid the Day Before an NMD Turns 21 Years Old (C-IV and LRS)

#### 2.2.1.1 Overview

An extended Foster Care payment for an NMD who turns 21 years old should stop no later than the day before an NMD's 21<sup>st</sup> birthday.

#### 2.2.1.2 Description of Changes

- Update the FC/KG EDBC, to prorate the benefits until the day before an NMD turns 21 years old after the implementation date of the SCR.
- Modify FC EDBC to have the implementation date 1<sup>st</sup> of the future month of the release date which is February 1<sup>st</sup>, 2020.
- Modify KG EDBC to have the implementation date 1<sup>st</sup> of the future future month of the release date which is March 1<sup>st</sup>, 2020 to follow 10-day NOA logic

**Example# 1:** FC Child turned 21 after implementation date January 27, 2020. An NMD turns 21 years old say on February 13, 2020. The FC EDBC for the benefit month of February 2020 will prorate benefits for February 1-12 and will discontinue the child from March 1<sup>st</sup>, 2020 onwards.

**Example# 2:** KG Child turned 21 after implementation date January 27, 2020. An NMD turns 21 years old say on February 13, 2020. The KG EDBC for the benefit month of February 2020 will not prorate benefits for February as this will cause overpayment and will discontinue the child from March 1, 2020 onwards.

**Technical Note:** ARC in C-IV is manual program and user need to prorate the benefits. ARC in LRS is embedded and part of the FC Program automation.

#### 2.2.1.3 Programs Impacted

Foster Care, Approved Relative Caregiver, Kin-GAP

### 2.3 Batch

#### 2.3.1 Add new Batch job to create tasks for FC or ARC child turning 21 years old (C-IV Only)

##### 2.3.1.1 Overview

An NMD that meets the eligibility criteria for FC or ARC benefits is eligible to Extended benefits until an NMD is 21 years old. As part of this SCR a new batch job will be created to generate a task for the current worker assigned to the FC or ARC program 30 days before the child turns 21 years old.

### 2.3.1.2 Description of Change

Add a new batch job to create a task when all the following conditions are met:

- o Program type is FC or ARC.
- o Program status is active as of the Batch Date.
- o Child status is active as of the Batch Date.
- o There is an active child placement as of the Batch Date.
- o Batch run date is 30 calendar days before child turns 21. If there is no batch run on the 30 days before child turned 21 then the batch job will create task on the next batch run date.

The new daily batch job will perform the below actions:

- o Create a task and assign to the currently assigned FC or ARC program worker with the task details specified below.

C-IV Task Details	FC or ARC Program
Trigger Condition	Trigger 30 calendar days before FC or ARC child turns 21 years old.
Automated Action Name	Foster Care/ARC: Non-Minor Dependent turning 21.
Automated Action Scenario	Batch has detected that a Foster Care or ARC Non-Minor Dependent will turn age 21 in the next 30 days.
Automated Action Program	FC, AR
Automated Action Source	Batch
Automated Action Run Date	Daily(Mon-Sat).
Automated Action Type	Create Task.
Automated Action Due Date	Default Due Date.
Task Initial Assignment	Current Program Worker.
Task Due Date	30 Calendar days.
Task Long Description	"[Foster Care / ARC} Program: {Child_Name} will turn 21 on {birth_date}. Please review eligibility."
Automated Action Status	Active

Task Type	FC or ARC NMD Turning 21
Task Sub-Type	N/A.
Task Priority	Medium
Task Expiration	No
Task Available Online	No
Task Available for Automation	Yes
Task Newly Assigned Indicator	5 Days

Developer Note: There will be one new task for both FC and ARC program. The Batch will pass parameter based on the program code to the Task Long Description.

### 2.3.1.3 Execution Frequency

System Business Days excluding Sundays and Holidays.

### 2.3.1.4 Key Scheduling Dependencies

N/A.

### 2.3.1.5 Counties Impacted

C-IV Counties only.

### 2.3.1.6 Data Volume/Performance

N/A.

### 2.3.1.7 Failure Procedure/Operational Instructions

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

## 2.3.2 Add new batch job to create tasks for KG child turns 21 years old (C-IV Only)

### 2.3.2.1 Overview

An NMD that meets the eligibility criteria for KG benefits is eligible to Extended Kin-GAP benefits until an NMD is 21 years old. As part of this SCR a new batch job will be created

to generate a task for the current worker assigned to the KG program 45 days prior to the child turning 21 years old.

### 2.3.2.2 Description of Change

Add a new batch job to create task when all the following conditions are met.

- Program type is KG.
- Program status is active as of the Batch Date.
- Child status is active as of the Batch Date.
- There is an active child placement as of Batch Date.
- Batch run date is 45 calendar days before child turns 21. If there is no batch run on the 45 days before child turns 21 then the batch job will create task on the next batch run date.

The new daily batch job will perform the below actions:

- Create a task and assign to the currently assigned KG program worker with the task details specified below:

C-IV Task Details	KG Program
Trigger Condition	Trigger 45 calendar days before KG child turns 21 years old.
Automated Action Name	Kin-GAP: Non-Minor Dependent turning 21.
Automated Action Scenario	Batch has detected that a Kin-GAP Non-Minor Dependent will turn age 21 in the next 45 days.
Automated Action Program	KG
Automated Action Source	Batch
Automated Action Run Date	Daily(Mon-Sat)
Task Initial Assignment	Current Program Worker.
Task Due Date	45 Calendar days.
Task Long Description	"Kin-GAP Program: {Child_Name} will turn 21 on {birth_date}. Please review eligibility."
Automated Action Status	Active
Task Type	KG NMD Turning 21
Task Sub-Type	N/A.
Task Priority	Medium



Task Expiration	No
Task Available Online	No
Task Available for Automation	Yes
Task Newly Assigned Indicator	5 Days

### 2.3.2.3 Execution Frequency

System Business Days excluding Sundays and Holidays.

### 2.3.2.4 Key Scheduling Dependencies

N/A.

### 2.3.2.5 Counties Impacted

C-IV Counties only.

### 2.3.2.6 Data Volume/Performance

N/A.

### 2.3.2.7 Failure Procedure/Operational Instructions

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

## 2.3.3 Update the existing Batch EDBC (PB00E50X) to Discontinue FC and KG programs when the child reaches 21 years old (CalSAWS only)

### 2.3.3.1 Overview

Batch EDBC do not deny or discontinue a program when the program type is Foster Care, Kin-GAP, or AAP.

### 2.3.3.2 Description of Change

Update Batch EDBC to no longer skip when the EDBC result of a child welfare program is in 'Denied' or 'Discontinued' and the FC or KG child reached 21 years old.

There is no change for the AAP program. Batch EDBC will continue skipping for AAP programs when the EDBC result is 'Denied' or 'Discontinued'.

### 2.3.3.3 Counties Impacted

This functionality will apply to all counties after migration.

## 2.3.4 Add new daily batch job to trigger Batch EDBC when FC child turns 21 to prorate the benefit (CalSAWS only)

### 2.3.4.1 Overview

A Non-Minor Dependent (NMD) that meets the eligibility criteria for FC or ARC benefits is eligible to Extended benefits until an NMD is 21 years old. As part of this SCR a new daily batch job will be created to trigger batch EDBC when an active FC or ARC child turns 21 or the child age is over 21.

**Technical Note:** The CalSAWS system stores ARC programs with the same program code as FC program.

### 2.3.4.2 Description of Change

1. Create a CTCR to add a new Batch EDBC Sweep code for the journal entry Category 942 (Batch Eligibility Sweep Codes).

Batch EDBC Skip reason	Description
New/Update	New
Category Id	942
Short Decode Name	Prorate NMD turned 21
Long Decode Name	Prorate NMD turned 21
Begin date	Default / System Min Date / 01-JAN-00 00:00:00
End date	Default / System High Date /31-DEC-99 00:00:00

2. Add a new daily batch job to trigger Batch EDBC when all the following conditions are met.
  - o Program type is Foster Care (FC). This condition will include the ARC program since FC or ARC program are in the same program type in CalSAWS – (FC).
  - o Program status is active as of the Batch Date.
  - o Child status is active as of the Batch Date.
  - o There is an active child placement as of the Batch Date.
  - o One calendar day after the child's 21<sup>st</sup> birthday is between the Last Success Batch Run Date and Batch Date.
  - o There is no EDBC run (EDBC that has Accepted and Saved status) on the current month.Run

Note –

If there are no transactions coming from the interface prompting an EDBC trigger prior to the 21<sup>st</sup> Birthday, this new batch job will trigger EDBC on this case as highlighted in below Example 1. But if the system receives a transaction prompting an EDBC trigger prior to this new batch sweep the existing process will take over as highlighted in Example 2 (Placement End date) or Example 3 (Rate/Placement change).

Example 1 (FC, ARC):

The child's birthday is on April 15, 2020. The new batch job will trigger Batch EDBC on the case on the night of April 14, 2020. EDBC will set the budget end date to April 14, 2020 (The day prior to the child's 21<sup>st</sup> Birthday). EDBC will discontinue the program effective May 1, 2020. On the next day the new 21 years old batch sweep will not select the case again because the current month is already prorated.

EDBC result: April month is prorated.

Example 2 (FC program): (the new 21 years old batch and the existing placement end batch (PB19E450) happen on the same period)

The child's birthday is on April 15, 2020. The Los Angeles County Department of Children and Family Services (DCFS) Interface receives a placement end date on April 14<sup>th</sup>, 2020. Existing placement end batch functionality will run Batch EDBC on the night of April 14, 2020. EDBC will prorate the current month based on the placement date. After that 7 days following the placement end date, an existing negative action Batch (PB19E471) will trigger negative action EDBC to discontinue the case effective on May 1, 2020.

EDBC result: April month is prorated (By a placement end batch). May month the program is discontinued (By an existing negative action batch). The new 21 years old batch will not select the case because there is no active placement on the case as of April 15, 2020

Example 3 (FC program): (Existing Placement end or rate change transaction (PB19E448) received before batch run date of this new daily batch job)

If the system receives a placement or rate change transaction before April 14<sup>th</sup>, 2020 the existing batch EDBC (Placement/Rate change transaction) process will continue to trigger EDBC for the month of April and May.

When the receiving transaction is a Placement End which has an end date before the child birthday, then The System will prorate the benefit on the month of April till the date the placement is end.

When the receiving transaction is a Rate Change transaction. The system will process the rate change and will prorate the benefit on the month of April till the day before the child turned 21.

EDBC result:

For Placement End, April month is prorated (By existing Placement transaction). May month the program is discontinued. The new 21 years old batch will not select the case since the April benefit month is already prorated.

For Rate Change, April month is prorated (By existing Rate Change transaction till the day before the child turned 21). May month the program is discontinued. The new 21 years old batch will not select the case since the April benefit month is already prorated.

The new daily batch job will perform below actions.

- Trigger Batch EDBC effective the current month that the child turns 21 years old. Even though the batch run date is after the Batch 10 days cutoff, the batch will trigger EDBC effective on the current month to prorate.
- Trigger Batch EDBC in 'All Program' mode.
- Trigger regular Batch EDBC rules.

Note: The new batch will be run as part of the DCFS Batch EDBC.

#### **2.3.4.3 Execution Frequency**

Daily except Sunday and Holidays. ii If there is no batch run on the one calendar day before child's 21<sup>st</sup> birthday then the batch job will trigger Batch EDBC on the next batch run date.

#### **2.3.4.4 Key Scheduling Dependencies**

This new job will run before the existing DCFS Batch EDBC job.

#### **2.3.4.5 Counties Impacted**

This job will be developed as a County Configurable batch job. C-IV counties can opt-in this daily batch job as part of CalSAWS migration.

#### **2.3.4.6 Data Volume/Performance**

N/A.

#### **2.3.4.7 Failure Procedure/Operational Instructions**

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

### **2.3.5 Add new daily batch job to trigger Batch EDBC effective the month after FC child turns 21 to discontinue (CalSAWS only)**

#### **2.3.5.1 Overview**

A Non-Minor Dependent (NMD) that meets the eligibility criteria for FC or ARC benefits is eligible to Extended benefits until an NMD is 21 years old. As part of this SCR a new daily batch job will be created to trigger batch EDBC when an active FC or ARC child turns 21 or the child age is over 21.

### 2.3.5.2 Description of Change

1. Create a CTCR to add a new Batch EDBC Sweep code for the journal entry Category 942 (Batch Eligibility Sweep Codes).

Batch EDBC Skip reason	Description
New/Update	New
Category Id	942
Short Decode Name	Disc NMD turned 21
Long Decode Name	Disc NMD turned 21
Begin date	Default / System Min Date / 01-JAN-00 00:00:00
End date	Default / System High Date /31-DEC-99 00:00:00

2. Add a new daily batch job to trigger Batch EDBC when all the following conditions are met.
  - o Program type is Foster Care (FC). This condition will include the ARC program since FC or ARC program are in the same program type in CalSAWS – (FC).
  - o Program status is active as of the following month (the month after the child turns 21).
  - o Child status is active as of the following month.
  - o There is an active child placement as of the Batch Date.
  - o One calendar day after the child's 21<sup>st</sup> birthday is between the Last Success Batch Run Date and Batch Date or child's age is over 21.

The new daily batch job will perform below actions.

- o Trigger Batch EDBC effective the following month.
- o Trigger Batch EDBC in 'All Program' mode.
- o Trigger regular Batch EDBC rules.

Note: The new batch will be run as part of the DCFS Batch EDBC.

### 2.3.5.3 Execution Frequency

Daily except Sunday and Holidays.

### 2.3.5.4 Key Scheduling Dependencies

This new job will run before the existing DCFS Batch EDBC processing batch job.

### **2.3.5.5 Counties Impacted**

This job will be developed as a County Configurable batch job. C-IV counties can opt-in this daily batch job as part of CalSAWS migration.

### **2.3.5.6 Data Volume/Performance**

N/A.

### **2.3.5.7 Failure Procedure/Operational Instructions**

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

## **2.3.6 Add new monthly batch job to trigger Batch EDBC when KG child turns 21 (CalSAWS only)**

### **2.3.6.1 Overview**

A Non-Minor Dependent (NMD) that meets the eligibility criteria for KG benefits is eligible to Extended benefits until an NMD is 21 years old. As part of this SCR a new monthly batch job will be created to trigger batch EDBC when an active KG child turns 21 or the child's age is over 21.

### **2.3.6.2 Description of Change**

Add a new monthly batch job to trigger Batch EDBC when all the following conditions are met.

- Program type is Kin-GAP (KG).
- Program status is active effective the month following the batch date.
- Child status is active effective the month following the batch date.
- Child's 21<sup>st</sup> birthday is the month following the Batch Date.

The new monthly batch job will perform the below actions:

- Trigger Batch EDBC effective for the month in which the child turns 21.
- Trigger Batch EDBC in 'All Program' mode.
- Trigger regular Batch EDBC rules.
- The batch will run with the new sub type code - 'Prorate NMD turned 21'.

Note: The new batch will be run as part of the DCFS Batch EDBC.

### **2.3.6.3 Execution Frequency**

3<sup>rd</sup> Business Day of the Month

#### **2.3.6.4 Key Scheduling Dependencies**

This new job will run before the existing DCFS Batch EDBC processing batch job.

#### **2.3.6.5 Counties Impacted**

This job will be developed as a County Configurable batch job. C-IV counties can opt-in this monthly batch job as part of CalSAWS migration.

#### **2.3.6.6 Data Volume/Performance**

N/A.

#### **2.3.6.7 Failure Procedure/Operational Instructions**

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

### **2.3.7 Add a new monthly batch job to Discontinue KG program when a child turns 21 (CalSAWS only)**

#### **2.3.7.1 Overview**

There is no Batch process to automatically discontinue KG children when the child's age is over 21.

#### **2.3.7.2 Description of Change**

Add a new monthly batch job to trigger Batch EDBC when all the following conditions are met:

- Program type is Kin-GAP (KG).
- Program status is active in the following month.
- Child status is active in the following month.
- Child's 21<sup>st</sup> birthday is in the current month or child's age is over 21.

The new monthly batch job will perform the below actions:

- Trigger Batch EDBC effective the following month.
- Trigger Batch EDBC in 'All Program' mode.
- Trigger regular Batch EDBC rules.
- The batch will run with the new sub type code - 'Disc NMD turned 21'.

Note: The new batch will be run as part of the DCFS Batch EDBC.

#### **2.3.7.3 Execution Frequency**

Monthly Batch 10 days cutoff.

#### 2.3.7.4 Key Scheduling Dependencies

The new job will run before the existing DCFS Batch EDBC processing batch job.

#### 2.3.7.5 Counties Impacted

This job will be developed as a County Configurable batch job. C-IV counties can opt-in this monthly batch job as part of CalSAWS migration.

#### 2.3.7.6 Data Volume/Performance

N/A.

#### 2.3.7.7 Failure Procedure/Operational Instructions

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

### 2.4 Correspondence

#### 2.4.1 Updates for FC Non-CCR Youth turns 21 Years of Age NOA (CalSAWS Only)

##### 2.4.1.1 Overview

Currently the 'NMD Age Rules' NOA Reason is to inform the Foster Care provider that the cash aid is being stopped for Non-CCR FC when a Foster Care child reaches age 21. The effective date currently populates on the NOA is the last effective placement date. With this SCR, the effective date of discontinuance will be populated as the day before the child's 21<sup>st</sup> birthday and the 'Youth turns 21 Years of Age' NOA reason will generate instead of the 'NMD Age Rules Reason'.

See Supporting Documents #1 for updated 'NMD Age Rules' FDD.

##### 2.4.1.2 Update Variable Population for Existing Action Fragment

Currently the NMB Age Rules NOA generates with the following Action Fragment:

Update the variable population to the following for the new 'Youth turns 21 Years of Age' Reason:

Variable Name	Population	Format
EFFECTIVE_DATE	This date will be populated as the day before the child's 21 <sup>st</sup> birthday when generated with the 'Youth turns 21 Years of Age' Reason.	Arial Font Size 10  Example: "07/19/2019"



	Example: if the FC/KG Child's birthday is on 7/20/2019 then the effective date on this NOA will be populated as 7/19/2019.	
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### 2.4.1.3 Update Reason Fragment for Child Turns 21

Existing 'NMD Age Rules' Reason for this NOA will be replaced by the 'Youth turns 21 Years of Age' Reason provided below:

**Existing Reason Fragment Text** (FC\_TN\_NMD\_AGE\_RULES\_T302):

'You no longer meet the age rules'

**Updated Reason Fragment Text** (FC\_TN\_YOUTH\_21YEARS\_AGE\_T313):

'The youth is turning 21 years of age on <BIRTHDAY>.'

### 2.4.1.4 Update Variable Population for 'Youth turns 21 Years of Age' Reason Fragment

Update the variable population to the following for the new 'Youth 21 Years of Age' Reason:

Variable Name	Population	Format
BIRTHDAY	This will populate with the Foster Care child's 21 <sup>st</sup> birthday.  Example: if the FC/KG Child's birthday is on 7/20/2019 then the effective date on this NOA will be populated as 7/20/2019.	Arial Font Size 10  Example: "07/20/2019"

## 2.4.2 Updates for FC CCR Youth turns 21 Years of Age NOA

### 2.4.2.1 Overview

Currently the 'Youth turns 21 Years of Age' NOA reason is to inform the Foster Care provider that the cash aid is being stopped and gets triggered for FC with CCR rates when a Foster Care child reaches age 21. With this SCR, Foster care payments for the month the child turns 21 will now be prorated. Since this existing NOA Action Fragment that generates for 'Youth turns 21 Years of Age' populates the monthly aid amount and not a prorated amount, a new action fragment will be created. This Recommendation will also add new reason verbiage to include the birth date and add a new Message to inform of MC eligibility.

### 2.4.2.2 Update the 'Youth turns 21 Years of Age' Action Fragment

Existing Action fragment in FC discontinuance NOA for the child turning 21 years of age will be replaced by the below new Action fragment. This new action fragment will be implemented in English and Spanish languages.

Fragment Name	Existing Action Text
C-IV: <b>ACTN_FC_KG_DISC</b> LRS: <b>FC_KG_TN_ACTION4</b>	Your case has been discontinued.  As of<Effective Date>, the county is Discontinuing your <Program Type> aid of \$<Monthly FC Rate> per month.  Here's why:

#### **New Action Fragment text:**

"Your case has been discontinued.

As of <EFFECTIVE\_DATE>, the county is discontinuing your <PGM\_TYPE> aid.

Here's why: "

Note: This new Action Fragment will be used for both Foster Care and Kin-GAP when the program has failed for 'Youth turns 21 Years of Age'.

### 2.4.2.3 Update Variable Population for new Action Fragment

Update the variable population to the following for the new Action Fragment:

Variable Name	Population	Format
EFFECTIVE_DATE	Populates with the day before the child turns 21 years.  Example: If the birthday of the child is on 6/11/2019 then the effective Date will be populated as 6/10/2019.	Arial Font Size 10  Example: "06/10/2019"
PGM_TYPE	Populates with the Program Name.  Example: Foster Care pulled from CT-18	Arial Font Size 10  Example: "Foster Care"

#### 2.4.2.4 Add new Generation Conditions for New Action Fragment

Trigger this new Action fragment when EDBC Discontinues a FC program that was receiving a CCR rate and the child is over 21 years of age the month prior to the EDBC Benefit Month.

#### 2.4.2.5 Update FC CCR Youth turns 21 Years of Age Reason Fragment

The existing Reason fragment that generates on FC Discontinuance NOAs for CCR rates for the Youth turns 21 Years of Age will be updated as below. The updated fragment will be implemented in English and Spanish languages.

Fragment Name	Existing Action Text
C-IV: RSN_FC_KG_AGE_21 LRS: FC_TN_YOUTH_21YEARS_AGE_T313	The youth is at least 21 years of age.

##### Updated Reason Fragment text:

"The youth is turning 21 years of age on <BIRTHDAY>.

Because <PERS\_NAME> was eligible for <PGM\_TYPE>  
on the day before his/her 21st birthday, he/she may be  
eligible to Medi-Cal until the month of his/her 26th birthday  
as long he/she lives in California."

Note: This updated Reason Fragment will be used for both Foster Care and Kin-GAP when the program has failed for 'Youth turns 21 Years of Age'. The second paragraph is not included for KG. The second paragraph will be dynamic and only generated for FC.

#### 2.4.2.6 Update Variable Population for 'Youth turns 21 Years of Age' Reason Fragment

Update the variable population to the following for the new 'Youth 21 Years of Age' Reason:

Variable Name	Population	Format
BIRTHDAY	This will populate with the Foster Care child's 21 <sup>st</sup> birthday.  Example: if the FC/KG Child's birthday is on 7/20/2019 then the effective date on this NOA will be populated as 7/20/2019.	Arial Font Size 10  Example: "07/20/2019"

PERS_NAME	Populates with the name (first and last) of the child on Foster Care program.	Arial Font Size 10 Bold  Example: <b>"John Doe"</b>
PGM_TYPE	Populates with the Program Name.  Example: Foster Care pulled from CT-18	Arial Font Size 10  Example: "Foster Care"

#### 2.4.2.7 Update Generation Conditions for Updated Reason Fragment

Trigger this updated 'Youth turns 21 Years of Age' Reason fragment when EDBC Discontinues a FC program that was receiving a CCR rate and the child is over 21 years of age the month prior to the EDBC Benefit Month and the FC program fails for the reason of 'Age' (CT73\_81).

See Recommendation 2.4.4 for updates to C-IV for existing NOA Reason Fragments.

#### 2.4.2.8 Add Regulations for Updated Reason

The following regulations (provided with the system regulation standards) will be displayed on the NOA for CCR FC when the case is discontinued for the reason the 'Youth turns 21 Years of Age':

**LRS:** Rules: These rules apply; you may review them at your local welfare office: AB 403, WIC 11460, 11463, 11464, 11364, 11387, 18358; ACL 18-15

**C-IV:** AB 403; W&I Code Section 11460; W&I Code Section 11463; W&I Code Section 11464; W&I Code Section 11364; W&I Code Section 11387; W&I Code Section 18358; ACL 18-15

Note: The above Regulations are listed as they will appear in the database and not the NOA. Existing C-IV regulation logic that consolidates the regulations by type will still apply.

#### 2.4.2.9 Add New Message Fragment for 'Youth turns 21 Years of Age' Reason

A new Message fragment will be added in the system and will be used with the new 'Youth turns 21 Year of Age' NOA reason. This fragment informs the child about their Medi-Cal eligibility. This fragment will be implemented in English and Spanish languages.

**New Message Fragment text:**

**“Medi-Cal:** This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action.

**DO NOT THROW YOUR PLASTIC ID CARD AWAY.”**

Note: This new Message fragment will be used for both Foster Care and Kin-GAP when the program has failed for ‘Youth turns 21 Years of Age’.

**C-IV only:** The below Message fragment is generating on Foster Care Discontinuance NOAs. This message fragment in C-IV will be updated to be suppressed for Foster Care Discontinuance NOA when the case is discontinued, and the FC child is over 21 years of age as this language is provided in the new Message fragment.

**Existing Message Fragment Text (C-IV):**

**“Medi-Cal:** This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action.

**DO NOT THROW YOUR PLASTIC ID CARD AWAY.”**

#### **2.4.2.10 Update Generation Conditions for New Message Fragment**

Trigger this new Message fragment when EDBC Discontinues the FC program, and the child has reached 21 years of age.

### **2.4.3 Updates for KG CCR Youth turns 21 Years of Age NOA**

#### **2.4.3.1 Overview**

The ‘Youth turns 21 Years of Age’ NOA is to inform the Kin-GAP provider that the cash aid is being stopped for CCR rates when a Kin-GAP child reaches age 21. This NOA also informs the provider the amount of Monthly cash aid that is being stopped. With this SCR, Kin-GAP payments for the month the child turns 21 are prorated. Since this existing NOA Action Fragment that generates for ‘Youth turns 21 Years of Age’ populates the monthly aid amount and not a prorated amount, a new action fragment will be created. This Recommendation will also add new reason verbiage to include the birth date and add a new Message to inform of MC eligibility.

#### **2.4.3.2 Update the ‘Youth turns 21 Years of Age’ Action Fragment**

Existing Action fragment in KG discontinuance NOA for the child turning 21 years of age will be replaced by the below new Action fragment. This new action fragment will be implemented in English and Spanish languages.

Fragment Name	Existing Action Text
---------------	----------------------

C-IV: <b>ACTN_FC_KG_DISC</b> LRS: <b>FC_KG_TN_ACTION4</b>	Your case has been discontinued.  As of<Effective Date>, the county is Discontinuing your <Program Type> aid of \$<Monthly FC Rate> per month.  Here's why:
--	---

#### **New Action Fragment text:**

"Your case has been discontinued.

As of <EFFECTIVE\_DATE>, the county is discontinuing your <PGM\_TYPE> aid.

Here's why: "

Note: This new Action Fragment will be used for both Foster Care and Kin-GAP when the program has failed for 'Youth turns 21 Years of Age'.

#### **2.4.3.3 Update Variable Population for new Action Fragment**

Update the variable population to the following for the new Action Fragment:

Variable Name	Population	Format
EFFECTIVE_DATE	Populates with the day before the child turns 21 years.  Example: If the birthday of the child is on 6/11/2019 then the effective Date will be populated as 6/10/2019.	Arial Font Size 10  Example: "06/10/2019"
PGM_TYPE	Populates with the Program Name.  Example: Kin-GAP pulled from CT-18	Arial Font Size 10  Example: "Kin-GAP"

#### **2.4.3.4 Trigger Conditions for New Action Fragment**

Trigger this new Action fragment when EDBC Discontinues a KG program that was receiving a CCR rate and the child is over 21 years of age the month prior to the EDBC Benefit Month.

#### 2.4.3.5 Update KG CCR Youth turns 21 Years of Age Reason Fragment

The existing Reason fragment that generates for KG NOAs for CCR rates for CCR rates for the 'Youth turns 21 Years of Age' will be updated as below. The updated fragment will be implemented in English and Spanish languages.

Fragment Name	Existing Action Text
C-IV: <b>RSN_FC_KG_AGE_21</b> LRS: <b>KG_TN_YOUTH_21YRS_K019</b>	The youth is at least 21 years of age.

##### Updated Reason Fragment text:

"The youth is turning 21 years of age on <BIRTHDAY>."

Because <**PERS\_NAME**> was eligible for <PGM\_TYPE>  
on the day before his/her 21st birthday, he/she may be  
eligible to Medi-Cal until the month of his/her 26th birthday  
as long he/she lives in California."

Note: This updated Reason Fragment will be used for both Foster Care and Kin-GAP when the program has failed for 'Youth turns 21 Years of Age'. The second paragraph is not included for KG. The second paragraph will be dynamic and only generated for FC.

#### 2.4.3.6 Update Variable Population for 'Youth turns 21 Years of Age' Reason Fragment

Update the variable population to the following for the new 'Youth 21 Years of Age' Reason:

Variable Name	Population	Format
BIRTHDAY	This will populate with the Kin-GAP child's 21 <sup>st</sup> birthday.  Example: if the FC/KG Child's birthday is on 7/20/2019 then the effective date on this NOA will be populated as 7/20/2019.	Arial Font Size 10  Example: "07/20/2019"
PERS_NAME	Populates with the name (first and last) of the child on Kin-GAP program.	Arial Font Size 10 Bold  Example: "John Doe"
PGM_TYPE	Populates with the Program Name.	Arial Font Size 10

	Example: Kin-GAP pulled from CT-18	Example: "Kin-GAP"
--	------------------------------------	-----------------------

#### 2.4.3.7 Add Regulations for Updated Reason

The following regulations (provided with the system regulation standards) will be displayed on the NOA for CCR KG when the case is discontinued for the reason the 'Youth turns 21 Years of Age':

**LRS:** Rules: These rules apply; you may review them at your local welfare office: AB 403, WIC 11460, 11463, 11464, 11364, 11387, 18358; ACL 18-15

**C-IV:** AB 403; W&I Code Section 11460; W&I Code Section 11463; W&I Code Section 11464; W&I Code Section 11364; W&I Code Section 11387; W&I Code Section 18358; ACL 18-15

Note: The above Regulations are listed as they will appear in the database and not the NOA. Existing C-IV regulation logic that consolidates the regulations by type will still apply.

#### 2.4.3.8 Add New Message Fragment for 'Youth turns 21 Years of Age' Reason

A new Message fragment will be added in the system and will be used with the new 'Youth turns 21 Year of Age' NOA reason. This fragment informs the child about their Medi-Cal eligibility. This fragment will be implemented in English and Spanish languages.

##### **New Message Fragment text:**

**"Medi-Cal:** This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action.

**DO NOT THROW YOUR PLASTIC ID CARD AWAY."**

Note: This new Message fragment will be used for both Foster Care and Kin-GAP when the program has failed for 'Youth turns 21 Years of Age'.

### 2.4.4 Updates for FC/KG Non-CCR NOA Reasons for Status Reason 'Age' (C-IV only)

#### 2.4.4.1 Overview

C-IV currently has existing fragments regarding Age. These fragments require updates to work with the new 'Youth turns 21 Years of Age' reason.



#### 2.4.4.2 Update Existing 'Age' Fragments for FC and KG (C-IV only)

Update Rules for Non-CCR rates for FC and KG when the program failure status reason is 'Age' (CT-73, Code-81) as below

- When the FC/KG Child's age is over 21, generate **RSN\_FC\_KG\_AGE\_21** fragment.
- When the FC/KG Child's age is over 18, generate the existing reason fragments based on the program
  - For FC **RSN\_AGE\_CHILD\_IN\_FC** fragment will be generated
  - For KG **RSN\_KG\_FAILURE\_DUE\_TO\_AGE** fragment will be generated.

#### 2.4.5 Add new Prorated FC/KG NOA Reason

##### 2.4.5.1 Overview

Foster Care (FC) and Kin-GAP (KG) programs will be discontinued effective the 21<sup>st</sup> birthday of the child on the program. Last month of the aid is prorated and will be less than the monthly cash aid. Providers are required to be informed of the change in benefits due to the program discontinuance. A new NOA reason will be added to inform the FC and KG providers about the change in benefits due to the child turning 21 years old. This new reason will be added in English and Spanish language only.

##### 2.4.5.2 Add new Prorated FC/KG Reason

A new NOA reason will be added to the system to inform the providers the change in benefits due to child turning 21 years.

See Supporting Documents #4 for NOA FDD.

##### **New Reason Fragment text:**

"The cash aid payment for your <MONTH\_YEAR> aid is only for part of the month. It is from the beginning of the month through the day before <PERS\_NAME> turns 21 years of age."

##### 2.4.5.3 Add Variable Population for new Prorated FC/KG Reason

Update the variable population to the following for the new Prorated FC/KG Reason:

Variable Name	Population	Format
PERS_NAME	Populates with the name (first and last) of the child on Foster Care/Kin-GAP program.	Arial Font Size 10  Example: "John Doe"
MONTH_YEAR	Month in which the child turns 21 years age.	Arial Font Size 10

	Example: Child birthday is on 15th May 2019 then it would display as 05/2019.	Example: "05/2019"
--	---	--------------------

#### 2.4.5.4 Add Generation for new Prorated FC/KG Reason

Trigger when the EDBC is run for the month the child is turning 21 and benefits change.

#### 2.4.5.5 Add new Prorated FC/KG Action

A new NOA action will be added to the system to inform the providers the change in benefits due to child turning 21 years.

See Supporting Documents #5 for Action Fragment FDD.

#### LRS Action Fragment for new Reason:

"As of <EFFECTIVE\_DATE>, the county is Changing your <PGM\_TYPE> aid from <PRIOR\_BENEFIT\_AMT> to <NEW\_BENEFIT\_AMT>. This aid is for: <PERS\_NAME>

Here's why:"

#### 2.4.5.6 Add Variable Population for new Prorated FC/KG Action

Update the variable population to the following for the new Prorated FC/KG Action:

Variable Name	Population	Format
EFFECTIVE_DATE	Populates with day before the child's 21 <sup>st</sup> birthday.	Arial Font Size 10  Example: "John Doe"
NEW_BENEFIT_AMT	Authorized amount in the current edbc.	Arial Font Size 10  Example: "\$100.00"
PERS_NAME	Name of the child on FC/KG Case.  Example: Child birthday is on 15th May 2019 then it would display as 05/2019.	Arial Font Size 10  Example: "John Doe"
PGM_TYPE	Program name either "Foster Care" or "Kin-GAP"	Arial Font Size 10  Example: "Foster Care"







PRIOR_BENEFIT_AMOUNT	Authorized amount in the last EDBC. This will be the prior EDBC from the same month, or if there is no EDBC in the same month the latest run and saved EDBC from the prior month.	Arial Font Size 10  Example: "\$100.00"
----------------------	---	--


### 2.4.5.7 Add Regulation for new Prorated FC/KG Reason

The following regulation will be displayed on the NOA for Foster Care and Kin-GAP when the new Prorated FC/KG Reason generates on an NOA.

**New Regulation:** ACL 18-15

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	NMD Age Rules NOA FDD	 NOA_T302T_6244_SPD.docx
2	NOA	Youth is at least 21 Years of Age NOA for CCR and Non-CCR Rate changes.	 FC 21 Years FDD.docx
3	NOA	New Action Fragment FDD for Foster Care and Kin-Gap	 FC KG Disc Action FDD.docx
4	NOA	New Change NOA SPD for FC and KG	 NOA_FC_KG_Change_21_Years_Age_SPD
5	NOA	New Action Fragment FDD for FC/KG Benefits change due to 21 years age	 FC_KG_Change_ACTION_Age_21_FDD.docx
6	NOA	FC/KG Discontinuance Message fragment	 NOA_FC_KG_Disc_Foster_Message_FDD
7	NOA	FC/KG Discontinuance NOA Example for child turning 21	 FC-KG-Disc-NOA-Example-21 Years.pdf

8	NOA	Youth is at least 21 Years of Age NOA for KG.	 KG 21 Years FDD.docx
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## 4 REQUIREMENTS

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### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.15	The LRS shall determine the effective start and end date of eligibility and the Redetermination, Recertification, and/or Annual Agreement period for all individuals for all applicable programs.	The system will grant Extended Foster Care benefits to an NMD until the day before an NMD turns 21 years old.
3.1.15. d	Batch interface with other systems (according to COUNTY-specified criteria).	Based on the County specified criteria Monthly batch job is performed.

## 5 MIGRATION IMPACTS

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At migration C-IV Counties can choose to opt-in to use the new auto trigger EDBC Batch jobs instead of a Task Sweep Batch job. The Task Sweep Batch job will be turned off when the County selected to opt-in.

Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
1	Foster Care/ AAP/ ARC/ Kin-GAP	<b>C-IV:</b> New daily task sweep batch jobs for an NMD turns 21 years old <b>LRS:</b> No Task	The Task Management implementation is different in both systems. During migration a common solution for all tasks will be implemented in CalACES	High	No

## 6 OUTREACH

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### 6.1 Active NMD 21 years old or older

A list of cases where an NMD child is active on a FC/ARC/KG case and 21 years old or older will be provided with the Standard List Columns for each program.

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 SCR implemented in production, the case listing details will be posted at the below location:

CalACES SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2019  
> SCR 201036

In C-IV after the SCR implemented in production, the case listing details will be posted at the below location:

CalACES SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2019  
> SCR 100500



California Statewide Automated Welfare System

## **Design Document**

CA-58934 | CIV-66

Aligning Status Begin Date of Associated  
Programs With Primary Cash Aid Programs or  
EDBC Run Date, whichever is later

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/18/2019	1.0	Initial Draft	Tom Lazio
10/04/2019	1.1	<ul style="list-style-type: none"> <li>Updated retroactive to retro-month in Sections 1.1 and 1.2</li> <li>Added bullet point # 5 to Section 1.4 Assumptions.</li> </ul>	Tom Lazio
10/09/2019	1.2	<ul style="list-style-type: none"> <li>Minor updates to Sections 1.1, 1.2 and 1.3 based on analysts feedback.</li> </ul>	Tom Lazio
10/16/2019	1.3	Added updates to sections 1 and 2 based on Build team feedback	Tom Lazio
11/08/2019	2.0	Added clarification to examples used in Section 2.1.2 based on Committee feedback	Tom Lazio



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## 1 OVERVIEW

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This SCR will accommodate the need when running a retro-month or come-up month EDBC to align the auto-generated 'Pending' associated programs (Cal-Learn, Welfare To Work (WTW)), General Relief Opportunities for Work (GROW) and Refugee Employment Program (REP)) status begin dates and program person's Begin Date of Aid (BDA) with the benefit month begin dates and BDA of the primary cash aid programs (CalWORKs (CW), General Assistance/General Relief (GA/GR) and Refugee Cash Assistance (RCA)) or the primary cash aid program's EDBC run date, whichever is later.

This SCR will also update the "Program Detail History" block on the "Program History" detail page to display 'Begin Date' and 'End Date' for associated programs Cal-Learn, WTW and REP, similar to the GROW "Program Detail History" block.

### 1.1 Current Design

**CalSAWS Only:** When EDBC for a CW or RCA program is run, authorized and the program is active, if work eligible individuals exist in the household, a 'Pending' WTW or REP program is auto-created. A 'Pending' GROW program is auto-created for the work eligible individual when a GA/GR EDBC is run on a pending GR program and the user clicks "Apply Program Actions" button from the GA/GR EDBC Summary page. The work eligible individual is added to the WTW, REP or GROW associated program with a status of 'Pending' and a status reason of 'Mandatory'. The EDBC logic currently assigns the 1<sup>st</sup> of the benefit month as the status begin date for the associated program and the application date of main cash program as the BDA for the associated program person.

The "Program Detail History" block of the REP History detail page displays 'Begin Month' and 'End Month'.

**CalSAWS and C-IV:** When EDBC for a CW program is run, authorized (CalSAWS)/Accepted-Saved (C-IV) and the program is active, if an eligible individual who is under 19, pregnant or parenting, not completed high school or equivalent exists in the household, a 'Pending' (CalSAWS) or 'Active' (C-IV) Cal-Learn program is auto-created. The eligible individual is added to the Cal-Learn program with a status of 'Pending' and a status reason of 'Mandatory'. The EDBC logic currently assigns the 1<sup>st</sup> of the benefit month as the status begin date for the Cal-Learn program and the BDA for the Cal-Learn program person.

The "Program Detail History" block of the Cal-Learn and WTW History detail page displays 'Begin Month' and 'End Month'.

## 1.2 Requests

**CalSAWS Only:** When auto-generating the WTW, REP or GROW associated program through batch process or online for a retro-month or come-up month EDBC, align the status begin dates of the WTW, GROW and REP associated programs with the benefit month begin dates of the CW, GA/GR and RCA primary cash aid programs or the primary cash aid program's EDBC run date, whichever is later. Also, align the BDA of the associated program person with the BDA of the primary cash program person, date the registrant became mandatory (if previously exempt) or the primary cash aid program's EDBC run date, whichever is later.

Display 'Begin Date' and 'End Date' instead of 'Begin Month' and 'End Month' in the "Program Detail History" block of the "Program History" detail page for associated program REP, similar to the GROW "Program Detail History" block.

**CalSAWS and C-IV:** When auto-generating the Cal-Learn associated program through batch process or online for a retro-month or come-up month EDBC, align the status begin date of the Cal-Learn associated program with the benefit month begin date of the CW primary cash aid program or the primary cash aid program's EDBC run date, whichever is later. Also, align the BDA of the associated program person with the BDA of the primary cash program person, date the individual became mandatory (if previously ineligible) or the primary cash aid program's EDBC run date, whichever is later.

Display 'Begin Date' and 'End Date' instead of 'Begin Month' and 'End Month' in the "Program Detail History" block of the "Program History" detail page for associated programs WTW and Cal-Learn, similar to the GROW "Program Detail History" block.

## 1.3 Overview of Recommendations

**CalSAWS Only:** Update EDBC logic for auto creation of the 'Pending' WTW, GROW and REP associated programs, to align the status begin date with the primary cash aid program's (i.e. CW for WTW/REP, RCA for REP and GA/GR for GROW) benefit month begin date or the EDBC run date, whichever is the later. Also, update the EDBC logic to align the Begin Date of Aid (BDA) of the associated program person with the BDA of primary cash aid program person's BDA, date the registrant became mandatory (if previously exempt) or the EDBC Run Date, whichever is later.

Update the "Program Detail History" block of the "Program History" detail page to display "Begin Date" and "End Date" for the following programs:

- REP

**CalSAWS and C-IV:** Update EDBC logic for auto creation of the 'Pending' (CalSAWS) or 'Active' (C-IV) Cal-Learn program, to align the status begin date with the primary CW program's benefit month begin date or the EDBC run date, whichever is the later. Also, update the EDBC logic to align the Begin Date of Aid (BDA) of the associated program person with the BDA of primary cash aid program person's BDA, date the individual became mandatory (if previously ineligible) or the EDBC Run Date, whichever is later.

Update the "Program Detail History" block of the "Program History" detail page to display "Begin Date" and "End Date" for the following programs:

- WTW
- Cal-Learn

## 1.4 Assumptions

- Logic for creating and activating WTW/REP/Cal-Learn/GROW program will not be changed.
- An 'Active' or 'Pending' WTW/REP/Cal-Learn/GROW program does not already exist for the program person.
- In CalSAWS, the EDBC authorization can be later than the EDBC Run Date.
- This SCR change will only apply to new EDBCs and will not apply to previously saved EDBCs.
- Historical records for the employment programs will show status begin date as of the first of the month and will not be changed with this SCR.

## 2 RECOMMENDATIONS

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### 2.1 Update EDBC Status Begin Date Logic for Auto Generated WTW, REP, GROW and Cal-Learn Associated Programs

#### 2.1.1 Overview

**CalSAWS Only:** Update EDBC logic used for the auto creation of the 'Pending' associated programs WTW, REP and GROW to align the status begin date of the associated program and the status begin date of the Work Registration for WTW and REP with the benefit month begin date of the primary cash aid program or the EDBC Run Date, whichever is later. Also, update the EDBC logic to align the BDA of the 'Pending' associated program's 'Mandatory' program person with the BDA of primary cash aid program person's BDA, date the registrant became mandatory (if previously exempt) or the EDBC Run Date, whichever is later.

**CalSAWS and C-IV:** Update EDBC logic used for the auto creation of the 'Pending' (CalSAWS) or 'Active' (C-IV) Cal-Learn associated program to align the status begin date of the Cal-Learn associated program with the benefit month begin date of the CW program or the EDBC Run Date, whichever is later. Also, update the EDBC logic to align the BDA of the 'Pending' (CalSAWS) or 'Active' (C-IV) Cal-Learn's 'Mandatory' program person with the BDA of the CW program person's BDA, date the individual became mandatory (if previously ineligible) or the EDBC Run Date, whichever is later.

## 2.1.2 Description of Changes

1. **CalSAWS Only:** Update EDBC logic used for the auto creation of the 'Pending' associated programs WTW, REP and GROW to align the status begin date of the associated program and the status begin date of the Work Registration for WTW and REP with the benefit month begin date of the primary cash aid program or the primary cash aid program's EDBC Run Date, whichever is later.

Update the EDBC logic to align the BDA of the 'Pending' associated program's 'Mandatory' program person with the BDA of primary cash aid program person's BDA, date the registrant became mandatory (if previously exempt) or the primary cash aid program's EDBC Run Date, whichever is later.

**EXAMPLE 1:** Parent and a child applied for CW on 08/14/2019 with BDA of 08/14/2019 and CW EDBC was run and authorized on 09/02/2019 which made the household active with both parent and child as 'Members' and the parent is work eligible. When EDBC is saved/authorized, the 'Pending' WTW program will be auto created for the 'Mandatory' parent with the following values aligned with the CW EDBC Run Date:

EXAMPLE 1: WTW Program Begins On = 09/02/2019 and Administrative Role Begin Date = 09/02/2019

### Welfare to Work Detail

\*- Indicates required fields

**Date: \***  
11/01/2019

**Program Information**

<b>Status: *</b> Pending	<b>Status Reason:</b> Mandatory	<b>Source: *</b> Other
<b>Program Begins on: *</b> 09/02/2019		
<b>CalWORKs Status:</b> Active		
<b>Automatically Reassign When Activated:</b> No		

**Administrative Roles**

Name	Administrative Role	Begin Date	End Date
Tony Markum	Primary Applicant/Recipient	09/02/2019	

Buttons: View History, Edit, Close

**Figure 2.1.2.1 – Program Begins On Date and Administrative Role Begin Date – Program Detail Page**

EXAMPLE 1: WTW Status Begin Date = 09/02/2019

### WTW Status Detail

\*- Indicates required fields

**Status: \***  
Pending

**Status Reason:**  
Mandatory

**Begin Date: \***  
09/02/2019

**End Date:**

Buttons: Close

**Figure 2.1.2.2- Begin Date -Program Status Detail Page**

EXAMPLE 1: WTW Program Person Program Begins On= 09/02/2019

**Welfare to Work Person Detail**

\*- Indicates required fields

**Recipient Information**

**Name: \***  
Tony Markum

**Application Detail**

**Program Begins on: \***  
09/02/2019

Close

Figure 2.1.2.3 –Program Begins On Date – Program Person Detail Page

EXAMPLE 1: WTW 'Mandatory' Person Work Registration Begin Date = 09/02/2019

**Work Registration Detail**

\*- Indicates required fields

**Name: \***  
Tony Markum

**Type: \***  
WTW

**Status: \***  
Mandatory

**Begin Date: \***  
09/02/2019

**End Date:**

**Expected End Date:**

Last Updated On 09/24/2019 3:58:54 PM By: [249617](#)

Edit Close

Figure 2.1.2.4 – Work Registration Begin Date – Work Registration Detail Page

EXAMPLE 1: WTW Program Detail History Begin Date = 09/02/2019

### Welfare to Work History

Close

Program Application History				
App #	App Date	Application Type	Action	Action Date
1	09/02/2019	Non-Managed		

Program Detail History				
App #	Status	Status Reason	Begin Date	End Date
1	Pending	Mandatory	09/02/2019	

Program Re-Evaluation History				
Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason

Worker History		
Worker ID	Begin Month	End Month

Close

Figure 2.1.2.5– Program Detail History Begin Date – Program History Page

EXAMPLE 1: WTW Person Application History BDA = 09/02/2019 and Program Person Detail History Begin Month = 09/2019

### Welfare to Work Person History

Close

Name	SSN	DOB
Tony Markum	223-45-6794	05/06/1982

Person Application History				
App#	Application Date	Beginning Date of Aid	Action	Action Date
1	09/02/2019	09/02/2019		

Person Detail History						
App#	Role	Role Reason	Status	Status Reason	Begin Month	End Month
1	MEM		Pending	Mandatory	09/2019	

Close

This Type 1 page took 0.22 seconds to load.

Figure 2.1.2.6 – Person Application History BDA and Person Detail History Begin Month – Program Person History Page



**EXAMPLE 2:** A person applied for RCA on 09/17/2019 with BDA of 10/01/2019 and RCA EDBC was run and authorized on 09/17/2019 which made the person active as a 'Member' and the person is work eligible. When EDBC is saved/authorized, the 'Pending' REP program will be auto created for 'Mandatory' person with the following values aligned with the RCA BDA:

EXAMPLE 2: REP Program Begins On = 10/01/2019 and Administrative Role Begin Date = 10/01/2019

REP Detail

\*- Indicates required fields

View HistoryEditClose

Date: \*

11/01/2019

Program Information

Status: \*

Pending

Status Reason:

Mandatory

Source: \*

Other

Program Begins on: \*

10/01/2019

Benefit Program:

RCA

Benefit Program Status:

Active

DOE:

08/01/2019

Administrative Roles

Name

Diego Sanchez

Administrative Role

Primary Applicant/Recipient

Begin Date

10/01/2019

End Date

Figure 2.1.2.7– Program Begins On Date and Administrative Role Begin Date – Program Detail Page

EXAMPLE 2: REP Status Begin Date = 10/01/2019

REP Status Detail

\*- Indicates required fields

Close

Status: \*

Pending

Status Reason:

Mandatory

Begin Date: \*

10/01/2019

End Date:

Designated Program:

Figure 2.1.2.8- Begin Date -Program Status Detail Page

EXAMPLE 2: REP Program Person Program Begins On= 10/01/2019

**REP Person Detail**

\*- Indicates required fields

**Recipient Information**

**Name: \***  
Diego Sanchez

**Application Detail**

**Program Begins on: \***  
10/01/2019

Close

Close

Figure 2.1.2.9 –Program Begins On Date – Program Person Detail Page

EXAMPLE 2: REP 'Mandatory' Person Work Registration Begin Date = 10/01/2019

**Work Registration Detail**

\*- Indicates required fields

**Name: \***  
Diego Sanchez

**Type: \***  
REP

**Status: \***  
Mandatory

**Begin Date: \***  
10/01/2019

**End Date:**

**Expected End Date:**

Save and Return Cancel

Last Updated On 09/17/2019 10:03:38 AM By: [249617](#)

Save and Return Cancel

Figure 2.1.2.10 – Work Registration Begin Date – Work Registration Detail Page

EXAMPLE 2: REP Program Detail History Begin Date = 10/01/2019

### REP History

Close

Program Application History				
App #	App Date	Application Type	Action	Action Date
1	09/17/2019	Non-Managed		

Program Detail History				
App #	Status	Status Reason	Begin Date	End Date
1	Pending	Mandatory	10/01/2019	

Program Re-Evaluation History				
Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason

Worker History		
Worker ID	Begin Month	End Month

Close

Figure 2.1.2.11 – Program Detail History Begin Date – Program History Page

EXAMPLE 2: REP Person Application History BDA = 10/01/2019 and Program Person Detail History Begin Month = 10/2019

### REP Person History

Close

Name	SSN	DOB
Diego Sanchez		03/15/1996

Person Application History				
App#	Application Date	Beginning Date of Aid	Action	Action Date
1	09/17/2019	10/01/2019		

Person Detail History						
App#	Role	Role Reason	Status	Status Reason	Begin Month	End Month
1	MEM		Pending	Mandatory	10/2019	

Close

Figure 2.1.2.12 – Person Application History BDA and Person Detail History Begin Month – Program Person History Page

**EXAMPLE 3:** A person applied for GA/GR on 08/14/2019 with BDA of 08/14/2019 and the GA/GR EDBC to create the GROW program was run on 09/11/2019. When the user clicks the “Apply Program Actions” button under the ‘Auto Program Actions’ block of the GA/GR EDBC Summary Detail Page, the ‘Pending’ GROW program will be auto created for the ‘Mandatory’ person with the following values aligned with the GA/GR EDBC Run Date:

EXAMPLE 3: GROW Administrative Role Begin Date = 09/11/2019 and Program Persons Status Begin Date = 09/11/2019

### GROW Detail

\* - Indicates required fields

[View History](#)
[Edit](#)
[Close](#)

**Date: \***  
10/01/2019

Program Information		
<b>Status: *</b> Pending	<b>Status Reason:</b> Mandatory	
<b>Application Date: *</b> 08/14/2019	<b>Orientation Date:</b>	<b>Orientation Status:</b>
<b>GR Status:</b> Pending		

Administrative Roles			
Name	Administrative Role	Begin Date	End Date
Bobby Lawrence	Primary Applicant/Recipient	09/11/2019	

Program Persons					
Name	Role	Role Reason	Status	Status Reason	Status Begin Date
<a href="#">Bobby Lawrence</a>	MEM		Pending	Mandatory	09/11/2019

Secondary Assignment	
Worker	

**Figure 2.1.2.13 – Program Begins On Date and Administrative Role Begin Date – Program Detail Page**

EXAMPLE 3: GROW Status Begin Date = 09/11/2019

**GROW Status Detail**

\* - Indicates required fields Close

**Status: \***  
Pending

**Begin Date: \***  
09/11/2019

**End Date:**

Figure 2.1.2.14- Begin Date -Program Status Detail Page

EXAMPLE 3: GROW Program Person BDA = 09/11/2019

**GROW Person Detail**

\* - Indicates required fields Close

**Recipient Information**

**Name: \***  
Bobby Lawrence

**Application Detail**

**Application Date: \***  
08/14/2019

**Beginning Date Of Aid: \***  
09/11/2019

Figure 2.1.2.15 – BDA– Program Person Detail Page

EXAMPLE 3: GROW Program Detail History Begin Date = 09/11/2019

### GROW History

Close

GR Program Application History				
App #	App Date	Application Type	Action	Action Date
1	<a href="#">08/14/2019</a>	New Application	Pended	09/11/2019

GROW Program Detail History				
GR App #	Status	Status Reason	Begin Date	End Date
1	Pending	Mandatory	09/11/2019	

Worker History		
Worker ID	Begin Month	End Month
<a href="#">19AS01010Q</a>	09/2019	

Close

Figure 2.1.2.16 – Program Detail History Begin Date – Program History Page

EXAMPLE 3: GROW Person Application History BDA = 09/11/2019 and Program Person Detail History Begin Month = 09/2019

### GROW Person History

Close

Name	SSN	DOB
Bobby Lawrence	678-90-5678	06/06/1977

Person Application History				
App#	Application Date	Beginning Date of Aid	Action	Action Date
1	08/14/2019	09/11/2019		

Person Detail History						
App#	Role	Role Reason	Status	Status Reason	Begin Month	End Month
1	MEM		Pending	Mandatory	09/2019	

Close

This [Type 1](#) page took 0.35 seconds to load.

**Figure 2.1.2.17 – Person Application History BDA and Person Detail History Begin Month – Program Person History Page**

2. **CalSAWS and C-IV:** Update EDBC logic used for the auto creation of the 'Pending' (CalSAWS) or 'Active' (C-IV) Cal-Learn program to align the status begin date of the Cal-Learn program with the benefit month begin date of the CW program or the CW EDBC Run Date, whichever is later.

Update the EDBC logic to align the BDA of the 'Pending' (CalSAWS) or 'Active' (C-IV) Cal-Learn's 'Mandatory' program person with the BDA of the CW program person's BDA, date the individual became mandatory (if previously ineligible) or the EDBC Run Date, whichever is later.

**EXAMPLE 1:** A teen parent and a child applied for CW on 08/14/2019 with BDA of 08/14/2019 and CW EDBC was run and authorized on 09/05/2019 which made the household active with both the teen parent and child as 'Members' and the teen parent has not graduated high school. When EDBC is saved/authorized, the 'Pending' Cal-Learn program will be auto created for the 'Mandatory' teen parent with the following values aligned with the CW EDBC Run Date:

EXAMPLE 1: Cal-Learn Program Begins On = 09/05/2019 and Administrative Role Begin Date = 09/05/2019

### Cal-Learn Detail

\*- Indicates required fields
[View History](#)
[Edit](#)
[Close](#)

**Date: \***  
11/01/2019

#### Program Information

<b>Status: *</b> Pending	<b>Status Reason:</b> Mandatory	<b>Source: *</b> Other
<b>Program Begins on: *</b> 09/05/2019		
<b>Automatically Reassign When Activated:</b> No		

#### Administrative Roles

Name	Administrative Role	Begin Date	End Date
Tammy Smith	Primary Applicant/Recipient	09/05/2019	

**Figure 2.1.2.18 – Program Begins On Date and Administrative Role Begin Date – Program Detail Page**

EXAMPLE 1: Cal-Learn Status Begin Month (Date) = 09/05/2019

**Cal-Learn Status Detail**

\* - Indicates required fields Close

<b>Status: *</b> Pending	<b>Status Reason:</b> Mandatory
<b>Begin Month: *</b> 09/05/2019	<b>End Month:</b>

**Figure 2.1.2.19- Begin Date -Program Status Detail Page**

EXAMPLE 1: Cal-Learn Program Person Program Begins On= 09/05/2019

**Cal-Learn Person Detail**

\* - Indicates required fields Close

**Recipient Information**

**Name: \***  
Tammy Smith

**Application Detail**

**Program Begins on: \***  
09/05/2019

**Figure 2.1.2.20 –Program Begins On Date – Program Person Detail Page**



EXAMPLE 1: Cal-Learn Program Detail History Begin Date = 09/05/2019

### Cal-Learn History

Close

Program Application History				
App #	App Date	Application Type	Action	Action Date
1	08/14/2019	Non-Managed		

Program Detail History				
App #	Status	Status Reason	Begin Date	End Date
1	Pending	Mandatory	09/05/2019	

Program Re-Evaluation History				
Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason

Worker History		
Worker ID	Begin Month	End Month

Close

Figure 2.1.2.21– Program Detail History Begin Date – Program History Page

EXAMPLE 1: Cal-Learn Person Application History BDA = 09/05/2019 and Program Person Detail History Begin Month = 09/2019

### Cal-Learn Person History

Close

Name	SSN	DOB
Tammy Smith	678-45-3487	06/04/2002

#### Person Application History

App#	Application Date	Beginning Date of Aid	Action	Action Date
1	08/14/2019	09/05/2019		

#### Person Detail History

App#	Role	Role Reason	Status	Status Reason	Begin Month	End Month
1	MEM		Pending	Mandatory	09/2019	

Close

**Figure 2.1.2.22 – Person Application History BDA and Person Detail History Begin Month – Program Person History Page**

**EXAMPLE 2:** A teen parent and a child applied for CW on 09/06/2019 with BDA of 10/01/2019 and CW EDBC was run and authorized on 09/06/2019 which made the household active with both the teen parent and child as 'Members' and the teen parent has not graduated high school. When EDBC is saved/authorized, the 'Pending' Cal-Learn program will be auto created for the 'Mandatory' teen parent with the following values aligned with the CW EDBC Run Date:

EXAMPLE 2: Cal-Learn Program Begins On = 10/01/2019 and Administrative Role Begin Date = 10/01/2019

### Cal-Learn Detail

\*- Indicates required fields

View History

Edit

Close

Date: \*  
11/01/2019

#### Program Information

Status: *	Status Reason:	Source: *
Pending	Mandatory	Other
Program Begins on: *		
10/01/2019		
Automatically Reassign When Activated:		
No		

#### Administrative Roles

Name	Administrative Role	Begin Date	End Date
Danielle Lewis	Primary Applicant/Recipient	10/01/2019	

**Figure 2.1.2.23– Program Begins On Date and Administrative Role Begin Date – Program Detail Page**

EXAMPLE 2: Cal-Learn Status Month (Date) = 10/01/2019

### Cal-Learn Status Detail

\*- Indicates required fields

Close

Status: *	Status Reason:
Pending	Mandatory
Begin Month: *	End Month:
10/01/2019	

**Figure 2.1.2.24- Begin Date -Program Status Detail Page**

EXAMPLE 2: Cal-Learn Program Person Program Begins On= 10/01/2019

### Cal-Learn Person Detail

\*- Indicates required fields

Close

#### Recipient Information

**Name: \***  
Danielle Lewis

#### Application Detail

**Program Begins on: \***  
10/01/2019

Close

Figure 2.1.2.25 –Program Begins On Date – Program Person Detail Page

EXAMPLE 2: Cal-Learn Program Detail History Begin Date = 10/01/2019

### Cal-Learn History

Close

#### Program Application History

App #	App Date	Application Type	Action	Action Date
1	09/06/2019	Non-Managed		

#### Program Detail History

App #	Status	Status Reason	Begin Date	End Date
1	Pending	Mandatory	10/01/2019	

#### Program Re-Evaluation History

Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason
-------------	-----------	----------------	-----------------	-------------------

#### Worker History

Worker ID	Begin Month	End Month
-----------	-------------	-----------

Close

Figure 2.1.2.26 – Program Detail History Begin Date – Program History Page

EXAMPLE 2: Cal-Learn Person Application History BDA = 10/01/2019 and Program Person Detail History Begin Month = 10/2019

### Cal-Learn Person History

Close

Name	SSN	DOB
Danielle Lewis	567-09-3456	07/10/2002

#### Person Application History

App#	Application Date	Beginning Date of Aid	Action	Action Date
1	09/06/2019	10/01/2019		

#### Person Detail History

App#	Role	Role Reason	Status	Status Reason	Begin Month	End Month
1	MEM		Pending	Mandatory	10/2019	

Close

Figure 2.1.2.27 – Person Application History BDA and Person Detail History Begin Month – Program Person History Page

### 2.1.3 Programs Impacted

WTW, Cal-Learn, REP, GROW

### 2.1.4 Performance Impacts

N/A

## 2.2 Program History Detail Page

### 2.2.1 Overview

The Program History Detail Page is currently used to view application history and program detail history of the selected program.

This change will update the “Program Detail History” block of the WTW, REP and Cal-Learn Program History Pages to allow the user to view the status begin and end dates.

### 2.2.2 Program History Detail Page Mockup

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
<b>Welfare to Work History</b>									
<div>Close</div>									
<b>Program Application History</b>									
App #	App Date	Application Type	Action	Action Date					
1	09/02/2019	Non-Managed							
<b>Program Detail History</b>									
App #	Status	Status Reason	Begin Month	End Month					
1	Active	Enrolled	09/2019						
1	Pending	Mandatory	08/2019	09/2019					
<b>Program Re-Evaluation History</b>									
Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason					
<b>Worker History</b>									
Worker ID	Begin Month	End Month							
<a href="#">19AS01010Q</a>	09/2019								
<div>Close</div>									
This Type 1 page took 0.59 seconds to load.									

Figure 2.2.2.1 – Program Detail History Block on Program History Page-  
Before SCR Change

Welfare to Work History

Close

Program Application History				
App #	App Date	Application Type	Action	Action Date
1	09/02/2019	Non-Managed		

Program Detail History				
App #	Status	Status Reason	Begin Date	End Date
1	Active	Enrolled	09/16/2019	
1	Pending	Mandatory	08/01/2019	09/15/2019

Program Re-Evaluation History				
Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason

Worker History		
Worker ID	Begin Month	End Month
<a href="#">19AS01010Q</a>	09/2019	

Close

This [Type 1](#) page took 0.32 seconds to load.

**Figure 2.2.2.2 – Program Detail History Block on Program History Page-  
After SCR Change**

### 2.2.3 Description of Changes

**CalSAWS Only** Update the “Program Detail History” block of the “Program History” detail page to display the complete begin date and end date (not the month) and rename the labels from “Begin Month” and “End Month” to “Begin Date” and “End Date” for the following program:

- REP

**CalSAWS and C-IV:** Update the “Program Detail History” block of the “Program History” detail page to display the complete begin date and end date (not the month) and rename the labels from “Begin Month” and “End Month” to “Begin Date” and “End Date” for the following programs:

- WTW
- Cal-Learn

#### 2.2.4 Page Location

- Global: Eligibility
- Local: Case Summary
- Task: Case Summary

#### 2.2.5 Security Updates

##### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
N/A		

##### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
N/A		

#### 2.2.6 Page Mapping

N/A

#### 2.2.7 Page Usage/Data Volume Impacts

N/A



### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.28.2.13	<p>The LRS shall collect and track work participation program component and Cal-Learn program component information by participant or work participation program component(s), for the following:</p> <ul style="list-style-type: none"><li>a. Participant name;</li><li>b. Work participation program component;</li><li>c. Cal-Learn program component;</li><li>d. Priority sequence and dependency;</li><li>e. Proposed and actual start and stop dates;</li><li>f. Basis of referral;</li><li>g. Hours of participation;</li><li>h. Service Provider(s);</li><li>i. Activity status;</li><li>j. Activity status update dates;</li><li>k. Good cause information; and</li><li>l. Sanction information.</li></ul>	<p>This SCR addresses the capture and display of the accurate program begin dates and program person's BDA for the WTW, REP, GROW and Cal-Learn programs.</p>



California Statewide Automated Welfare System

## **Design Document**

CA -209381 | CIV-5165

Add Medi-Cal Negative Action Reason 'Worker  
Initiated-Skip CalHEERS'

Version 1.0

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Antony Lerner
	Reviewed By	Renee Gustafson, Derek Goering, Maksim Volf, Prashant Goel, Akira Moriguchi, William Baretsky, Chris Larson, Bala Murthy, Geetha Ramalingam, Parul Dhawan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/21/2019	1.0	Design Draft	Antony Lerner
09/30/2019	1.0	Version sent to committee for feedback	Antony Lerner
10/11/2019	1.0	Final version for Committee vote	Antony Lerner

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# 1 OVERVIEW

---

The purpose of this document is to define an enhancement to The Systems to allow a County Eligibility Worker (CEW) to close a Medi-Cal program that is linked to a CalHEERS case without communicating to CalHEERS.

This SCR adds negative action reason "Worker Initiated-Skip CalHEERS" to the Negative Action Detail page for the Medi-Cal program only. The negative action will be a program-level negative action and apply to all open persons at the same time. The Worker can Run EDBC without requesting a Negative Action MAGI Determination and close the Medi-Cal program in The Systems. The negative action will have security-driven validation to limit use only to specified users.

## 1.1 Current Design

When a Medi-Cal program is linked to a CalHEERS case, The Systems require a negative action MAGI Determination for all negative action reasons except 'Inter-County Transfer'. However, there are instances when requesting a negative action MAGI Determination results in an error returned from CalHEERS.

For Example:

If the case is closed on the CalHEERS portal, the error returned from CalHEERS may read:

"CalHEERS cannot process the EDR. CalHEERS case is closed."

This leaves the Worker with no way to close the Medi-Cal program in The Systems without an EDBC Override or incorrectly using 'Inter-County Transfer' Negative Action reason to bypass the requirement to request a negative action MAGI Determination.

## 1.2 Requests

1. Add a negative action reason, "Worker Initiated-Skip CalHEERS" to the Medi-Cal program that will deny or discontinue open persons and close the program without requesting a negative action MAGI Determination.

**Note:** "Worker Initiated-Skip CalHEERS" is to be used as last resort option to close the Medi-Cal program, only when all available options to communicate with CalHEERS through The Systems are exhausted.

2. Add security-driven validation to limit the use of this new negative action reason to only specified users.

### 1.3 Overview of Recommendations

1. Update the Negative Action Detail page as follows:
  - a. Display the program-level only negative action reason, "Worker Initiated-Skip CalHEERS" in the Negative Action Reason drop-down available for the Medi-Cal program only.
  - b. Add security-driven validation to limit the use of "Worker Initiated-Skip CalHEERS" to only specified users.
  - c. Add a validation to prevent running Negative Action EDBC with "Worker Initiated-Skip CalHEERS" when the case is not linked to a CalHEERS case.
  - d. Update existing page validation "Please Request MAGI with the applicable Negative Action reason prior to running a Negative Action EDBC" trigger conditions to not include negative action reason "Worker Initiated-Skip CalHEERS."
2. Update Medi-Cal EDBC rules to close all open persons and the Medi-Cal program for the "Worker Initiated-Skip CalHEERS" Closure Reason while taking into consideration the 10-day rule.

### 1.4 Assumptions

1. Automated Notices of Action will not generate when a Medi-Cal Program is discontinued or denied with reason of "Worker Initiated-Skip CalHEERS ". The Worker can generate manual NOA if appropriate.
2. It is at the discretion of the Worker to reconcile case status with CalHEERS.
3. There are no updates to MEDS batches.

## 2 RECOMMENDATIONS

---

### 2.1 Negative Action Detail page

#### 2.1.1 Overview

1. Update the Negative Action Detail page as follows:
  - a. Display the program-level only negative action reason "Worker Initiated-Skip CalHEERS" in the Negative Action Reason drop-down available for the Medi-Cal program only.
  - b. Add security-driven validation to limit the use of "Worker Initiated-Skip CalHEERS" to only specified users.
  - c. Add a validation to prevent running Negative Action EDBC with "Worker Initiated-Skip CalHEERS" when the case is not linked to a CalHEERS case.
  - d. Update existing page validation "Please Request MAGI with the applicable Negative Action reason prior to running a Negative Action EDBC" trigger conditions to exclude negative action reason "Worker Initiated-Skip CalHEERS."

## 2.1.2 Description of Changes

1. Display the negative action reason "Worker Initiated-Skip CalHEERS" in the Negative Action Reason drop-down box as shown on Figure 2.1.2.1 when all are true:
  - a. The program is Medi-Cal.
  - b. All open persons in the Medi-Cal program are selected.

### Negative Action Detail

\* - Indicates required fields

Benefit Month: \*  
11/2019

**Medi-Cal** ☒ Run EDBC for this program

<input checked="" type="checkbox"/>	Person	SSN	Date of Birth
<input checked="" type="checkbox"/>	Dacota Lerner	545-43-2426	08/01/1978
<input checked="" type="checkbox"/>	Americana Lerner	626-04-3456	08/09/2005
<input checked="" type="checkbox"/>	Montana Lerner	545-43-2424	08/15/1977

**Negative Action Reason:**

Deceased  
Deemed Child - Fam ReApp  
Didn't Sign SOF  
Does Not Live in County (CMSP)  
Does Not Meet Minor Consent Requirements  
Duplicate Application  
Edwards v. Kizer (38) - Determined Ineligible for Medi-Cal Only  
Edwards v. Kizer (38) - Failure to Cooperate, Medi-Cal Only  
Failed to Complete Determination  
Failed to Complete Redetermination  
Failed to verify LTC  
Gets SSI  
Incomplete MAGI Application  
Inter-County Transfer  
Mental health  
Minor Consent  
Moved Out of County (CMSP)  
Non-Payment of Premium  
On Aid Another Case  
Requested Disc. (CMSP) - Add Person  
Requested Disc. (CMSP) - Reapply with Budget Change  
Requested Disc. (CMSP) - Verbal  
Requested Disc. - Written  
Requested Exclusion  
SSA/SSI Denied within 12 Months  
Stop Aid for Optional Member  
TMC Report Incomplete  
TMC Report Not Recvd  
**Worker Initiated-Skip CalHEERS**  
Whereabouts Unknown

Run EDBC

**Figure 2.1.2.1** – Negative Action Reason drop-down with new negative action reason available for user selection

2. Add security-driven validation to limit the use of "Worker Initiated-Skip CalHEERS" to only specified users when the "Run EDBC" button is clicked as shown in Figure 2.1.2.2
  - a. **Validation Condition:** When all are true:
    1. Negative action reason "Worker Initiated-Skip CalHEERS" selected from Negative Action Reason drop-down.
    2. The Worker has insufficient security privileges (does not have MCNegativeActionSkipMAGI security right).
  - b. **Validation Trigger:** "Run EDBC" button is clicked.
  - c. **Validation Message:** "This Negative Action Reason requires additional security privileges. Please contact your Supervisor."

Note: The page validation is a hard stop validation.

### Negative Action Detail

\*- Indicates required fields

Run EDBC

- Run EDBC for this program - This Negative Action Reason requires additional security privileges. Please contact your Supervisor.

Benefit Month: \*  
11/2019

Medi-Cal	Run EDBC for this program								
<input checked="" type="checkbox"/> Person <table> <thead> <tr> <th>SSN</th> <th>Date of Birth</th> </tr> </thead> <tbody> <tr> <td>Dacota Lerner 545-43-2426</td> <td>08/01/1978</td> </tr> <tr> <td>Americana Lerner 626-04-3456</td> <td>08/09/2005</td> </tr> <tr> <td>Montana Lerner 545-43-2424</td> <td>08/15/1977</td> </tr> </tbody> </table>	SSN	Date of Birth	Dacota Lerner 545-43-2426	08/01/1978	Americana Lerner 626-04-3456	08/09/2005	Montana Lerner 545-43-2424	08/15/1977	<input checked="" type="checkbox"/> Run EDBC for this program
SSN	Date of Birth								
Dacota Lerner 545-43-2426	08/01/1978								
Americana Lerner 626-04-3456	08/09/2005								
Montana Lerner 545-43-2424	08/15/1977								

Negative Action Reason:  
Worker Initiated-Skip CalHEERS

Run Reason:

Run EDBC

**Figure 2.1.2.2** – Security-driven validation to use "Worker Initiated-Skip CalHEERS" when "Run EDBC" button is clicked



3. Add new validation to prevent running Negative Action EDBC when the case is not linked to a CalHEERS case and "Run EDBC" button is clicked as shown in Figure 2.1.2.3
  - a. **Validation Condition:** When all are true:
    1. Negative action reason "Worker Initiated-Skip CalHEERS" selected from Negative Action Reason drop-down.
    2. The Worker has sufficient security privileges (has MCNegativeActionSkipMAGI security right).
    3. The case that contains the Medi-Cal program is not linked to a CalHEERS case.
  - b. **Validation Trigger:** "Run EDBC" button is clicked.
  - c. **Validation Message:** "This Negative Action Reason is only allowed for CalHEERS-linked cases."

Note: The page validation is a hard stop validation.

**Negative Action Detail**

\*- Indicates required fields

[Run EDBC for this program](#) - This Negative Action Reason is only allowed for CalHEERS-linked cases.

Benefit Month: \*  
11/2019

Medi-Cal	Run EDBC for this program		
<input checked="" type="checkbox"/> Person	SSN	Date of Birth	
<input checked="" type="checkbox"/> Dakota Lerner	545-43-2426	08/01/1978	
<input checked="" type="checkbox"/> Americana Lerner	626-04-3456	08/09/2005	
<input checked="" type="checkbox"/> Montana Lerner	545-43-2424	08/15/1977	

Negative Action Reason:  
Worker Initiated-Skip CalHEERS

Run Reason:  
[Dropdown]

**Figure 2.1.2.3** – Validation to prevent Run EDBC when case is not linked to a CalHEERS case

4. Update existing page validation "Please Request MAGI with the applicable Negative Action reason prior to running a Negative Action EDBC" trigger condition to exclude negative action reason "Worker Initiated-Skip CalHEERS."

### 2.1.3 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Negative Action > Negative Action Detail

## 2.1.4 Security Updates

### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
MCNegativeActionSkipMAGI	Allows Negative Action EDBC on case linked to CalHEERS without requiring a Negative Action MAGI Determination	MC Negative Action Skip MAGI

### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
MC Negative Action Skip MAGI	Allows Negative Action EDBC on case linked to CalHEERS without requiring a Negative Action MAGI Determination	None

**Note:** This Security Group will not be added to any Security Role; It is at the County's discretion to assign the Security Group to appropriate Staff.

## 2.1.5 Page Mapping

No changes

## 2.1.6 Page Usage/Data Volume Impacts

No changes

## 2.2 Medi-Cal EDBC Rules

### 2.2.1 Overview

Update Medi-Cal EDBC rules to close all open persons and the Medi-Cal program for the "Worker Initiated-Skip CalHEERS" Closure Reason while taking into consideration the 10-day rule.

### 2.2.2 Description of Changes

1. Create a Negative Action Reason (CT\_73) named, "Worker Initiated-Skip CalHEERS" with the following settings:
  - a. Notice of Action: No NOA required
  - b. Medi-Cal Priority: This reason should be the reason that closes the Program/Person.
  - c. MEDS Disc reason: 99
  - d. MEDS Deny reason: R
  - e. Program-Level closure: Yes
  - f. Person-Level closure: No
  - g. Program: Medi-Cal
  - h. Available for override: No
  - i. Available for MAGI Negative action: No

**Technical Note:** The existing MEDS batch jobs send the Termination reason (Data Element 0185) to MEDS based on the code MEDS Disc reason or the Denial reason (Data Element 3029) based on the MEDS Deny reason in the code table for the closure. Therefore, the existing MEDS batch jobs will send either Termination reason '99' or Denial reason 'R' based on the new Negative Action Reason settings added to the code table in Recommendation 2.2.2.1.

#### MEDS Code Descriptions

99 – Other; R – Other

2. Update Medi-Cal EDBC Rules to Deny/Discontinue all Medi-Cal program person(s) and close the Medi-Cal program when Negative Action Medi-Cal EDBC is run with "Worker Initiated-Skip CalHEERS" negative action reason. This applies to Full Medi-Cal Hierarchy and MAGI-only mode and takes into consideration the 10-day rule.

### 2.2.3 Programs Impacted

Medi-Cal

#### **2.2.4 Performance Impacts**

No change.

## 2.3 Automated Regression Test

### 2.3.1 Overview

Create new automated test scripts to verify the new Negative Action reason.

### 2.3.2 Description of Change

1. Create a case with a Medi-Cal program with a Pending applicant. Run Negative Action and verify the following validation message.
  - a. "This Negative Action Reason is only allowed for CalHEERS-linked cases."
2. Request MAGI and Run EDBC to activate the person. Add another person to the case and leave them Pending. Run Negative Action and verify that the persons are Discontinued and Denied.

## 3 REQUIREMENTS

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### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.13	The LRS shall adhere to adverse action rules for all programs.	Negative action reason "Worker Initiated-Skip CalHEERS" added for the Medi-Cal program only. It will apply to all open persons at the same time and close the Medi-Cal program without requesting Negative Action MAGI; 10-day rule apply.



California Statewide Automated Welfare System

## **Design Document**

CA-210031 | CIV-104861

Additional ABAWD Updates

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jason Francis
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/25/19	1.0	Initial	Jason Francis
10/18/19	1.1	Added clarification of system behavior based on the ABAWD Regain Eligibility section of the CalFresh Detail page	Jason Francis

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# 1 OVERVIEW

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SCR CA-57971/CIV-7215 (19.09) added new functionality to assist case workers in managing their ABAWD cases by determining ABAWD status, creating ABAWD time limit records, and closing persons who no longer meet CalFresh eligibility.

## 1.1 Current Design

1. The ABAWD batch job runs when the system detects an update to data collection records that may change the person's current ABAWD status. When this batch job runs, it cannot determine whether or not a non-exempt ABAWD is meeting work requirements.
2. CF EDBC sets the Work Requirement based on the latest Time Limit record for the current or prior month.
3. An ABAWD is not subject to work requirements in a prorated benefit month.
4. The EDBC status reason '3 Countable ABAWD Months Used' is determined when an ABAWD has their 3<sup>rd</sup> (or greater) countable month in the prior benefit month.
5. In CalSAWS only, a person's ABAWD status is not determined if they have an Ineligible program status.

## 1.2 Requests

1. If the ABAWD job runs and determines a person as a non-exempt ABAWD, no work requirement is determined. Without the user running CF EDBC or manually setting a Time Limit record, the ABAWD Sync job will default that person as not meeting the work requirement. The ABAWD batch job needs to determine the work requirement.
2. For user running the come-up month for CF, a time limit record may not have been created yet. This could result in the EDBC assuming the Work Requirement has not been met.
3. An ABAWD should be discontinued in a prorated month if they have reapplied but did not meet the requirements for regaining eligibility.
4. After an ABAWD has used their three countable months, they should be discontinued with the status reason '3 Countable ABAWD Months Used', even if they were exempt or unaided in the prior benefit month.
5. A person with an Ineligible status is still considered open and should have an ABAWD status

## 1.3 Overview of Recommendations

1. Update the ABAWD batch job to set the Work Requirement based on the latest time limit record for the current 36-month ABAWD calendar.
2. Update CF EDBC to set ABAWD Work Requirement based on Latest Time Limit Record
3. Update CF EDBC to set a person's status reason to reason '3 Countable ABAWD Months Used' if reapplying and not meeting the conditions for regaining eligibility.

4. Update CF EDBC to set the status reason of '3 Countable ABAWD Months Used' when there is a break in the work requirement after the 3<sup>rd</sup> countable month.
5. Update CF EDBC (CalSAWS only) to determine an ABAWD status for a person with an Ineligible program status.

## 1.4 Assumptions

1. If an ABAWD does not meet the conditions for regaining eligibility, case worker is responsible for sending the DFA 377.1A denial notice. CDSS will provide denial NOA language at a later time.

## 2 RECOMMENDATIONS

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### 2.1 Update the ABAWD Batch Job to set the Work Requirement to Met or Not Met

#### 2.1.1 Overview

The daily ABAWD determination batch job identifies all CalFresh cases that should be reevaluated for ABAWD due to data changes that may result in a change to the recipient's current ABAWD status. If a person is determined to be a non-exempt, non-prorated ABAWD, no Work Requirement value is set. The ABAWD Time Limit Sync Job will generate a Time Limit record of 'Did not meet work requirement' as it assumes a missing work requirement value should be considered as 'Not Met'.

#### 2.1.2 Description of Changes

1. Update the daily ABAWD determination batch job to set the Work Requirement on the ABAWD Status for a non-exempt, non-prorated ABAWD.
  - a. Set to 'Geographically Waived' if the case county is considered geographical waived from the ABAWD work requirement (per Category 2620)
  - b. Set to 'Met' if the latest Time Limit record for the current or either of the two prior months in the current 36-month ABAWD time period is 'Met work requirement'
  - c. Else set to 'Not Met'

#### 2.1.3 Programs Impacted

CalFresh

#### **2.1.4 Performance Impacts**

None

### **2.2 Update CF EDBC to set ABAWD Work Requirement based on Latest Time Limit Record**

#### **2.2.1 Overview**

When running CF EDBC, the Work Requirement will be set to 'Met' if a Time Limit month (or the two prior if the current doesn't exist) is 'Met work requirement'. If there is no Time Limit month in the current or prior two months, the Work Requirement is set to 'Not Met'

#### **2.2.2 Description of Changes**

1. If the person has a status of ABAWD, is not prorated, and a time limit month exists for the current 36-month period:
  - a. Set to 'Geographically Waived' if the case county is considered geographical waived from the ABAWD work requirement (per Category 2620)
  - b. Set to 'Met' if the latest Time Limit record for the current or either of the two prior months in the current 36-month ABAWD time period is 'Met work requirement'
  - c. Else set to 'Not Met'

#### **2.2.3 Programs Impacted**

CalFresh

#### **2.2.4 Performance Impacts**

None

### **2.3 Update CF EDBC to Deny in Prorated Month When Not Meeting Requirements to Regain Eligibility**

#### **2.3.1 Overview**

When an ABAWD is attempting to regain eligibility after 3 countable months exist within the same ABAWD calendar, they must answer the following question in the 'ABAWD Regain Eligibility' section of the CalFresh Detail page:

"Did the person(s) listed below complete 80 hours of employment or other qualifying work activities within 30 consecutive calendar days prior to their application date?"

Although the answer to this question determines whether they can later qualify for three consecutive months of aid, if they do not meet the conditions for regaining eligibility, they should be denied aid. However, if they are also applying partway through a benefit month, they will not be denied as they are considered exempt for that prorated month.

### **2.3.2 Description of Changes**

2. Update CalFresh EDBC to apply the status reason '3 Countable ABAWD Months Used' to a person when all of the following exists:
  - a. The most recent person application event in terms of the effective date, which is not a "Changed" event, as of the benefit month is of type "Pended" or "Denial Rescinded"
  - b. Person is determined to be a non-exempt ABAWD
  - c. Person is not residing in geographically waived area
  - d. Person does not have a 15% Exemption ABAWD time limit record for the current benefit month
  - e. Person has 3 countable ABAWD months prior to the application's Beginning Date of Aid (BDA), and within the same 36-month ABAWD calendar as the BDA.
  - f. The person has not met the work requirement for meeting eligibility for an application, per the ABAWD Regain Eligibility section of the CalFresh Detail page.

### **2.3.3 Programs Impacted**

CalFresh

### **2.3.4 Performance Impacts**

None

## **2.4 Update CF EDBC to apply the '3 Countable ABAWD Months Used' in the first non-exempt ABAWD month after three Countable Months**

### **2.4.1 Overview**

When an ABAWD person has three or more Countable Months in their ABAWD Time Limit, EDBC will discontinue them with status reason '3 Countable ABAWD Months Used' when EDBC is run for the following month and they are subject to the work requirement. However, if that person is a non-ABAWD or exempt ABAWD in the month following their third countable month, EDBC will discontinue them with status reason 'Did Not Meet ABAWD Work Rules after Regaining Elig'. This can be confusing as the ABAWD person has not yet attempted to regain eligibility.

## 2.4.2 Description of Changes

1. Update the CF EDBC logic to assign a status reason of '3 Countable ABAWD Months Used' to an ABAWD who has three or more Countable Months in their ABAWD time limit for the current 36-month period, unless any of the following is true:
  - a. Person has an ABAWD exemption
  - b. Person is residing in geographically waived area
  - c. Person has a 15% Exemption ABAWD time limit record for the current benefit month
  - d. A response has been provided on the ABAWD Regain Eligibility section of the CalFresh Detail page
    - i. If the ABAWD has not met the conditions for regaining eligibility, they will be denied for '3 Countable ABAWD Months Used', per section 2.3 above
    - ii. If the ABAWD had previously met the conditions for regaining eligibility, and now no longer meet and has no exemption, they will be closed for 'Did Not Meet ABAWD Work Rules after Regaining Elig', per existing design in SCR CA-57971/CIV-7215

## 2.4.3 Programs Impacted

CalFresh

## 2.4.4 Performance Impacts

None

## 2.5 Update CF EDBC to set ABAWD Status for Ineligible Program Person Status (CalSAWS Only)

### 2.5.1 Overview

When an EDBC determines a person should be closed from a program, they are given a 'Denied' or 'Discontinued' program person status. However, if that benefit month has already been issued, that person will have an 'Ineligible' program person status because they cannot be closed in a month in which they've already received a benefit. In this case, the ABAWD Status is left blank.

### 2.5.2 Description of Changes

1. Update CF EDBC such that when a person is determined to have an 'Ineligible' status, set that person's ABAWD Status existing rules.  
Note: This matches current C-IV functionality.

### **2.5.3 Programs Impacted**

CalFresh

### **2.5.4 Performance Impacts**

None

### 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.	The CF EDBC and ABAWD batch job determine eligibility