

## CalSAWS CCB Agenda

<b>DATE</b>	MARCH 5, 2020
<b>TIME</b>	1:30 PM
<b>LOCATION</b>	North: Sutter Conference Room, South: Conference Room 331
<b>SUBJECT</b>	Change Control Board Meeting
<b>INVITEES</b>	Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management

### Meeting Purpose:

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

### 1. C-IV SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.02	CIV-103674	CA-207026	Migrate Stanislaus County IVR to Amazon Connect	Contact Center	370	C-IV M&O	Start Build	20.03.12
20.02	CIV-103675	CA-207026	Migrate Monterey County IVR to Amazon Connect	Contact Center	370	C-IV M&O	Start Build	20.03.19
20.02	CIV-105301	CA-211064	2020 Federal Poverty Levels for Medi-Cal	CalHEERS	63	C-IV M&O	Production Deployment	20.02.19
20.02	CIV-105302	CA-211066	Run Batch EDBC with 2020 FPL Values	CalHEERS	228	C-IV M&O	Start Build	20.03.07
20.02	CIV-106060	CA-212650	ABAWD Geographical Waiver and Discretionary Waiver Updates	Eligibility	668	Premise	Production Deployment	20.02.19
20.03	CIV-103676	CA-207026	Migrate Kings County IVR to Amazon Connect	Contact Center	370	C-IV M&O	Start Build	20.03.26
20.05	CIV-104042	CA-208265	ACL 19-42 Implement the Automation of CalWORKs Home Visiting Program (HVP)	Online	713	Premise	Start Build	
20.05	CIV-104367	CA-208988	ACWDL June 11, 2019; CFL NO. 18/19-26 Add Functionality for Housing Support Program (HSP)	Online	671	Premise	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.05	CIV-105720		Update Batch Sweeps Job Aid for 2020 MEDS Recon and Renewal Schedule SCR CIV-105719	Training	7	Premise	Start Build	
20.05	CIV-106191		Update Suspend logic for Tax Intercept Balancer	Fiscal	55	C-IV M&O	Start Build	
20.06	CIV-10791	CA-58123	Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual	CalHEERS	400	C-IV M&O	Start Build	
20.06	CIV-106264	CA-213283	Automated Regression Test - Execution and Maintenance - 20.05 Release Cycle	Automated Test	210	C-IV M&O	No	20.07.XX
20.07	CIV-100845	CA-201742	CF 296 - Changes in logic for Line 10 - Overdue Recertifications (CWD Caused) during the month	Reports	170	C-IV M&O	No	
20.07	CIV-104986	CA-210307	Deactivating Pre-ACA Aid Codes	CalHEERS	63	C-IV M&O	No	
20.07	CIV-105277	CA-210948	Auto assign task to the MC Worker for the IEVS NHR combo (CF and MC) only case	Batch/Interfaces	108	C-IV M&O	No	
20.07	CIV-106126		Imaging: Associate Doc Types to Views	Imaging	16	C-IV M&O	No	
20.07	CIV-106271	CA-213304	Automated Regression Test - Execution and Maintenance - 20.07 Release Cycle	Automated Test	210	C-IV M&O	No	20.09.XX

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.01	CIV-104373	CA-209006	Data Change: Update RE Due Date for SSI/SSP Households	Eligibility	288	C-IV M&O	No	20.02.13
20.01	CIV-105458	CA-211451	Automated Regression Test - Execution and Maintenance - 20.01 Release Cycle	Automated Test	340	C-IV M&O	Start Build	20.03.XX
20.03	CIV-789	CA-51700, CA-57298	ACL 14-12, CFL 13/14-35 Family Stabilization Program for CalWORKs (51903)	Online	1616	Premise	Start Build	
20.03	CIV-5165	CA-209381	Add Medi-Cal Negative Action Reason 'Worker Initiated-Skip CalHEERS'	CalHEERS	199	C-IV M&O	No	
20.03	CIV-9947	CA-205652	Change Recovery Account Cause Code editing logic	Fiscal	224	C-IV M&O	Start Build	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.03	CIV-11725	CA-203824, CA-211516	Add functionality to manage Conditionally Eligible status in MAGI Determinations	CalHEERS	266	C-IV M&O	No	
20.03	CIV-104383	CA-209033	ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Thresholds Tiers (IRTs)	Eligibility	562	C-IV M&O	Start Build	20.04.16
20.05	CIV-102191	CA-204569	ACL 19-40 CalWORKs Outcome and Accountability Review (Cal-OAR) Phase II	Batch/Interfaces	1106	Premise	Start Build	

## 2. LRS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.02	CA-211064	CIV-105301	2020 Federal Poverty Levels for Medi-Cal	CalHEERS	88	LRS M&E	Production Deployment	20.02.19
20.02	CA-211066	CIV-105302	Run Batch EDBC with 2020 FPL Values	CalHEERS	243	LRS M&E	Start Build	20.03.06
20.02	CA-212650	CIV-106060	ABAWD Geographical Waiver and Discretionary Waiver Updates	Eligibility	887	Premise	Production Deployment	20.02.19
20.03	CA-213069		Load Updated Desk Aid 225 GR MSUDRP Instructions to Online Help	Training	5	LRS M&E	Start Build	
20.05	CA-205454		LRS only change: Remove DPSS-at-a-glance link from LRS Business Intelligence dashboard	Reports	23	LRS M&E	No	
20.05	CA-208265	CIV-104042	ACL 19-42 Implement the Automation of CalWORKs Home Visiting Program (HVP)	Online	824	Premise	Start Build	
20.05	CA-208988	CA-208109; CIV-104367	ACWDL June 11, 2019; CFL NO. 18/19-26 Add Functionality for Housing Support Program (HSP)	Online	778	Premise	Start Build	
20.05	CA-209367		Training: Update WBTs per SCR CA-205441	Training	10	LRS M&E	Start Build	
20.05	CA-213173		Create Online Help Pages for CA-50302 OCAT	Training	15	Premise	Start Build	
20.05	CA-213671		Training: Load Job Aids updated for CA-210318 to the LMS	Training	10	LRS M&E	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.06	CA-58123	CIV-10791	Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual	CalHEERS	980	LRS M&E	Start Build	
20.06	CA-213283	CIV-106264	Automated Regression Test - Execution and Maintenance - 20.05 Release Cycle	Automated Test	540	LRS M&E	No	20.07.XX
20.07	CA-201742	CIV-100845	CF 296 - Changes in logic for Line 10 - Overdue Recertifications (CWD Caused) during the month.	Reports	204	LRS M&E	No	
20.07	CA-210307	CIV-104986	Deactivating Pre-ACA Aid Codes	CalHEERS	72	LRS M&E	No	
20.07	CA-210948	CIV-105277	Auto assign task to the MC Worker for the IEVS NHR combo (CF and MC) only case	Batch/Interfaces	127	LRS M&E	No	
20.07	CA-213304	CIV-106271	Automated Regression Test - Execution and Maintenance - 20.07 Release Cycle	Automated Test	540	LRS M&E	No	20.09.XX

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.01	CA-209006	CIV-104373	Data Change: Update RE Due Date for SSI/SSP Households	Eligibility	340	LRS M&E	No	20.02.06
20.01	CA-211451	CIV-105458	Automated Regression Test - Execution and Maintenance - 20.01 Release Cycle	Automated Test	660	LRS M&E	Start Build	20.03.XX
20.03	CA-57298	CIV-789, CIV-10075	ACL 14-12, CFL 13/14-35 Family Stabilization Program for CalWORKs	Online	2143	Premise	Start Build	
20.03	CA-59071	CIV-105702	DDCR 3155: CalACES - MPP 42-763.711- Do not open or reopen Cal-Learn for a person with a CHSPE degree	Eligibility	552	LRS M&E	No	
20.03	CA-203824	CIV-11725, CIV-105337	Add Functionality to Manage Conditionally Eligible Status in MAGI Determinations	CalHEERS	291	LRS M&E	No	
20.03	CA-205652	CIV-9947	Change Recovery Account Cause Code editing logic	Fiscal	264	LRS M&E	Production Deployment	
20.03	CA-209033	CIV-104383	ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Thresholds Tiers (IRTs)	Eligibility	360	LRS M&E	Start Build	20.04.16
20.03	CA-209381	CIV-5165	Add Medi-Cal Negative Action Reason 'Worker Initiated-Skip CalHEERS'	CalHEERS	212	LRS M&E	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.05	CA-204569	CIV-102191	ACL 19-40 CalWORKs Outcome and Accountability Review (Cal-OAR) Phase II	Batch/Interfaces	1603	Premise	Start Build	

### 3. Informational Only: CalSAWS DDID SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
19.11	CA-212472		[Analytics] LRS DPSSTATS Scorecards	Batch Operations	10000	CalSAWS DD&I	Production Deployment	19.12.30
20.01	CA-212827		[Analytics] POC LRS BIP & LRS State Reports	Batch Operations	7500	CalSAWS DD&I	Production Deployment	20.02.07
20.02	CA-213566		Automation of Sandbox Usage Statistics Reporting for WSR	Training	60	CalSAWS DD&I	Production Deployment	20.02.28
20.03	CA-212659		[Analytics] LRS CalWORKS	Batch Operations	8500	CalSAWS DD&I	Start Build	20.03.30
20.03	CA-212678		[Analytics] LRS QA	Batch Operations	1500	CalSAWS DD&I	Start Build	20.03.30
20.05	CA-48397	CIV-5338	DDID 1967: DDCR 4087: Generate the CW 10 when EDBC fails for a Withdrawal Reason	Client Correspondence	206	CalSAWS DD&I	No	
20.05	CA-200450	CIV-711	DDID 1967: DDCR 4016: Apply New young child exemption to E2Lite	Eligibility	16	CalSAWS DD&I	No	
20.05	CA-200958	CIV-51921 DDCR-3071	DDID 1967: DDCR 3071: Add Validation to New / Reapplication Detail	Online	94	CalSAWS DD&I	No	
20.05	CA-201314	CIV-42667	DDID 1967: DDCR 3018: Add Validation to Customer Appointment when Worker is not Valid	Online	29	CalSAWS DD&I	No	
20.05	CA-201444	CIV-1175	DDID 1967: DDCR 4042: Allow Specific Households to be MCE Eligible	Eligibility	26	CalSAWS DD&I	No	
20.05	CA-201451	CIV-4177	DDID 1967: DDCR 4074: Increase Job Readiness hours to reflect California's Needy State	Eligibility	26	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.05	CA-201525	CA-48576, CIV-4676	DDID 1967: DDCR 5015, 5516: Update the manual EDBC process to allow run reasons to be used	Eligibility	188	CalSAWS DD&I	No	
20.05	CA-203636		DDID 1967: Medi-Cal Renewal Periods for MSP Households	CalHEERS	169	CalSAWS DD&I	No	
20.05	CA-207108		DDID 2302 - Updates to Standardized Bar Codes	Client Correspondence	202	CalSAWS DD&I	No	
20.05	CA-207116		DDID 2276: Update the fraud tracking functionality	Online	279	CalSAWS DD&I	No	
20.05	CA-207121		DDID 2080, 2081: Update WTW functionality	Online	524	CalSAWS DD&I	No	
20.05	CA-207139	CA-212361	DDID 2194 - Add Positive Pay Interface Functionality to CalSAWS for C-IV Migration Counties	Fiscal	332	CalSAWS DD&I	No	
20.05	CA-207153		DDID 2132 - Create New Standardized Receipt Form for Receipt Detail and Transaction Detail Page	Client Correspondence	121	CalSAWS DD&I	No	
20.05	CA-207191		DDID 2086: Add View History to Employment Service pages	Online	1419	CalSAWS DD&I	No	
20.05	CA-207208		DDID 2066 - Updates to Hunt v. Kizer functionality	CalHEERS	870	CalSAWS DD&I	No	
20.05	CA-207217		DDID 2057 - Update Display Name throughout the system	Online	626	CalSAWS DD&I	No	
20.05	CA-207218		DDID 2056: Add Date Signed and Comments fields to the Document Detail page	Client Correspondence	118	CalSAWS DD&I	No	
20.05	CA-207226		DDID 2048 - Display all of the EDBC reasons that prevents the user from running EDBC	Eligibility	1222	CalSAWS DD&I	No	
20.05	CA-207250	CIV-103307; CIV-103932; CIV-104086; CIV-103446	DDID 1787 - Migrate the C-IV County Specific Batch Jobs (Phase 2)	Batch/Interfaces	3919	CalSAWS DD&I	No	
20.05	CA-207288		DDID 1556 - Update the logic on the Special Investigation Referral page	Online	39	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.05	CA-207332		DDID 1389 - Generate CSF 101 from Valuable Request Detail Page	Client Correspondence	93	CalSAWS DD&I	No	
20.05	CA-207344	CA-212363	DDID 1360 - Add Direct Deposit Functionality to CalSAWS for C-IV Migration Counties	Fiscal	394	CalSAWS DD&I	No	
20.05	CA-207348	CA-212486	DDID 1327 - Migrate Valuable Categories from the C-IV Migration Counties into CalSAWS	Fiscal	33	CalSAWS DD&I	No	
20.05	CA-207357		DDID 1270 - Form Updates to Customer Activity Detail	Online	78	CalSAWS DD&I	No	
20.05	CA-207368		DDID 1198 - Update Generate Form button on Verification List page	Client Correspondence	112	CalSAWS DD&I	No	
20.05	CA-207384		DDID 1062, 1063, 1066, 1172, 1240 - Add CMSP Notices of Action	Client Correspondence	1328	CalSAWS DD&I	No	
20.05	CA-207444		DDID 525, DDID 2277: Update the Special Investigation pages	Online	58	CalSAWS DD&I	No	
20.05	CA-207463		DDID 374 - Enhancements to Homeless Assistance Functionality in CalSAWS	Fiscal	1253	CalSAWS DD&I	No	
20.05	CA-208250		DDID 713 - Update Automated Regression Test (ART) scripts to account for CalSAWS Migration R4 system modifications	Automated Test	540	CalSAWS DD&I	No	
20.05	CA-211834		DDID 1346 - Updates to IEVS Review Dispositions page	Batch/Interfaces	29	CalSAWS DD&I	No	
20.07	CA-207157		DDID 2128 - Migrate the Tax Intercept Jobs into CalSAWS	Fiscal	273	CalSAWS DD&I	No	
20.07	CA-212828		[Analytics] LRS CalFresh	Batch Operations		CalSAWS DD&I	Production Deployment	20.06.30
20.07	CA-213102		[Analytics] LRS CalFresh Meals	Batch Operations		CalSAWS DD&I	Production Deployment	20.06.30
20.07	CA-213103		[Analytics] LRS Managed Personnel	Batch Operations		CalSAWS DD&I	Production Deployment	20.06.30
20.07	CA-213105		[Analytics] LRS Payments	Batch Operations		CalSAWS DD&I	Production Deployment	20.06.30
20.07	CA-213106		[Analytics] LRS SSI/SSP	Batch Operations		CalSAWS DD&I	Production Deployment	20.06.30

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-207643		DDID 1784 - Text Messaging	Tech Arch	480	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.03	CA-58624	CIV-397	DDID 1967: ACL 08-11 Exempt Retirement Plan Property Dropdown	Eligibility	80	CalSAWS DD&I	No	
20.03	CA-201483	CIV-7296	DDID 1967: DDCR 5035: Update EDBC Summary page for Address Validation	Eligibility	157	CalSAWS DD&I	No	
20.03	CA-207235		DDID 1172, 1240, 1859 - Migrate CMSP Functionality	CalHEERS	1655	CalSAWS DD&I	No	
20.03	CA-207494		DDID 85 - Update Batch that removes WTW Program Worker at Sanction status to be configurable	Batch/Interfaces	26	CalSAWS DD&I	No	
20.03	CA-212539	CA-207256	DDID 1730 - Update Recovery Account Forms - Online Help pages	Training	10	CalSAWS DD&I	Start Build	

The next CCB Meeting scheduled for **03/19/2020**.

#### 4. CalACES Development Schedule

Release #	Release Date (Mon)	CalACES (North & South) Production Deployment Date (Sun)	Notes	SCR Freeze (Fri)	Defect Freeze (Fri)	Hard Defect Freeze (Fri)	Build Approved (Wed)
20.01	1/27/2020	1/26/2020	MLK 1/20	11/27/2019	1/3/2020	1/10/2020	1/22/2020
20.02	2/17/2020	2/9/2020	CalHEERS Release	11/8/2019	1/3/2020	1/10/2020	2/12/2020
20.03	3/23/2020	3/22/2020		1/31/2020	2/28/2020	3/6/2020	3/18/2020
20.05	5/18/2020	5/17/2020	Due to Memorial Day 5/25/2020	3/27/2020	4/24/2020	5/1/2020	5/13/2020
20.06	6/29/2020	6/7/2020	CalHEERS Release	4/17/2020	6/5/2020	6/10/2020	6/3/2020
20.07	7/20/2020	7/19/2020		5/22/2020	6/26/2020	7/3/2020	7/15/2020



20.09	<b>9/21/2020</b>	9/20/2020		<b>7/24/2020</b>	8/28/2020	9/4/2020	9/16/2020
20.11	<b>11/23/2020</b>	11/22/2020	Due to Thanksgiving 11/26/2020	<b>9/25/2020</b>	10/30/2020	11/6/2020	11/18/2020
21.01	<b>1/25/2021</b>	1/24/2021	MLK 1/18	<b>11/27/2020</b>	1/1/2021	1/8/2021	1/20/2021

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

# [CIV-103674] Migrate Stanislaus County IVR to Amazon Connect

- Resolved: 02/20/2020 03:13 PM

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Michael T. Wright</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.02]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.03.12</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>370</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>03/20/2019 10:26 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Contact Center Management]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-207026</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J Rapponotti on 09/06/2019

**Current Design:** Currently the Stanislaus County IVR is on the Cisco UCCE Platform

**Request:** Move the currently IVR functionality from the Cisco platform to the Amazon Connect platform.

**Recommendation:**

- 1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
- 2) Recreate all IVR Web Service interactions using AWS Lambda.
- 3) Update Useful links in CCP with Stanislaus county specific links.

### Outreach

**Description:** Train Contact Center staff on differences between Amazon Connect and Cisco UCCE.

### Migration Impact

**Description:** Contact Center/Call Log functionality is currently not in scope for migration and therefore this SCR will need to be re-evaluated once direction for this functionality has been defined.

### Migration Impact

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

### Description:

### Operational Impact:

**Estimate:** **370**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	260
Online :	10	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	100
Tech Arch :	0	Tech Ops :	0	Training :	0

# [CIV-103675] Migrate Monterey County IVR to Amazon Connect

- Resolved: 02/25/2020 02:00 PM

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Michael T. Wright</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.02]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.03.19</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>370</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>03/20/2019 10:28 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Contact Center Management]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-207026</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J Rapponotti on 09/06/2019

**Current Design:** Currently the Monterey County IVR is on the Cisco UCCE Platform

**Request:** Move the currently IVR functionality from the Cisco platform to the Amazon Connect platform.

**Recommendation:**

- 1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
- 2) Recreate all IVR Web Service interactions using AWS Lambda.
- 3) Update Useful links in CCP with Monterey specific links.

### Outreach

**Description:** Train Contact Center staff on differences between Amazon Connect and Cisco UCCE.

### Migration Impact

**Description:** Contact Center/Call Log functionality is currently not in scope for migration and therefore this SCR will need to be re-evaluated once direction for this functionality has been defined.

### Migration Impact

**Analysis:** None

### Alternative

### Procedure

### Description:

### Operational Impact:

**Estimate:** **370**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	260
Online :	10	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	100
Tech Arch :	0	Tech Ops :	0	Training :	0

# [CIV-105301] 2020 Federal Poverty Levels for Medi-Cal

- Resolved: 02/18/2020 11:24 AM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Krishna Akula</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.02]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.02.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>63</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:	<b>ACWDL 20-03</b>	Created:	<b>10/09/2019 06:19 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>02/05/2020</b>	Other Agency Cross Reference:	<b>CA-211064</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti - 1/31/2020

### Current Design:

1. C-IV maintains Medi-Cal Federal Poverty Level (FPL) tables in accordance to ACWDL 19-06.

Three of these tables are used for FPL lookups for the following groups:

- MSP without RSDI: Applicants and recipients of Medicare Savings Programs (MSP), Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), Qualified Individual-1 (QI-1), who do not receive Title II Retirement, Survivors, and Disability Insurance (RSDI) income.
- MSP with RSDI: Applicants and recipients of MSP, QMB, SLMB, QI-1, who receive Title II RSDI income.
- Other Medi-Cal FPL Groups: All other Medi-Cal recipients who receive benefits based on a calculation involving the FPL.

These tables are using values which were implemented with the 2019 FPL Cost of Living Adjustment (COLA) under CIV-100478 per ACWDL 19-06. These values are implemented in the system effective to high date (on-going).

Technical Note: Code Table stores values only up to family unit size 10. For every additional member in the family, additional amount is added.

2. Customer's Social Security Administration (SSA) income is updated every year based on the new SSA income increase rate effective the month of January of that particular year. FPL-related budgets also use this updated SSA income, but the new SSA income increase rate is not effective until the month of April for FPL budgets so the system uses a 'Backout Multiplier' to account for the difference. The Backout Multiplier holds the current year's SSA income increase rate value. When handling FPL budgets, the system takes the current SSA income amount and divides it with the Backout Multiplier (CT335\_A2\_SSA\_INCOME\_INCREASE\_MULTIPLIER) which results in the SSA income amount being equal to the previous SSA income amount for FPL-related budgets. With CIV-100451, the Backout Multiplier was high-dated to continue for all of 2020.

### Request:

1. ACWDL 20-03 contains the 2020 FPL COLA values. The system needs to be updated with the new values.
2. With the release of ACWDL 20-03, the 'Backout Multiplier' is no longer needed effective 04/01/2020.

### Recommendation:

1. Update the following existing FPL values in the system to the new values in ACWDL 20-03:
  - a. FPL values for MSP without RSDI
    - i. End-Date the existing 2019 values to 12/31/2019
    - ii. Insert the new values effective 01/01/2020 to high-date
      - 100% FPL for QMB w/out SSA (CT351-52)
      - 120% FPL for SLMB w/out SSA (CT351-54)
      - 135% FPL for QI1 w/out SSA (CT351-56)
  - b. MSP with RSDI
    - i. End-Date the existing 2019 values to 02/29/2020
    - ii. Insert the new values effective 03/01/2020 to high-date
      - 100% FPL for QMB w/ SSA (CT351-53)
      - 120% FPL for SLMB w/ SSA (CT351-55)
      - 135% FPL for QI1 w/ SSA (CT351-57)

- c. Other Medi-Cal FPL Groups
  - i. End-Date the existing 2019 values to 03/31/2020
  - ii. Insert the new values effective 04/01/2020 to high-date
    - 100% FPL (CT351-01)
    - 120% FPL (CT351-02)
    - 133% FPL (CT351-04)
    - 135% FPL (CT351-05)
    - 138% FPL (CT351-67)
    - 150% FPL (CT351-59)
    - 160% FPL (CT351-50)
    - 185% FPL (CT351-07)
    - 200% FPL (CT351-08)
    - 250% FPL (CT351-09)

- d. CMSP Value
  - i. End Date the existing 2019 values to 12/31/2019
  - ii. Insert the new values effective 01/01/2020 to high-date
    - 300% FPL (CT351-75)

Technical Note: 300%FPL is not a part of the ACWDL but calculated as thrice the 100% FPL value from the ACWDL.

2. Update the 'Backout Multiplier' values (CT335\_A5 and CT335\_A6) to '3' (March) since the 2020 FPL limits are being added to the system.

**Outreach**

**Description:**

**Migration Impact Description:**

Joint design has been approved through the Medi-Cal/CMSP Committee. LRS/CalSAWS will implement this Change with CA-211064 in the 20.02.19 release.

**Migration Impact Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 63**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	43	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	20
Tech Arch :	0	Tech Ops :	0	Training :	0

## [CIV-105302] Run Batch EDBC with 2020 FPL Values

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Naga Chinduluru</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.02]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.03.07</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>228</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:	<b>ACWDL 20-03</b>	Created:	<b>10/09/2019 06:29 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>02/05/2020</b>	Other Agency Cross Reference:	<b>CA-211066</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti - 02/06/2020

**Current Design:** C-IV recently updated the 2020 Federal Poverty Level (FPL) values based on ACWDL 20-03 with CA-211064/ CIV-105301.  
Any Medi-Cal EDBC run prior to the update used the 2019 FPL values per ACWDL 19-06.

**Request:** 1.Run Batch EDBC for Medi-Cal cases in accordance with ACWDL 20-03 so that the new FPL values are correctly applied. The effective date of the 2020 FPL values vary as follows:

- Effective retroactively to January 01, 2020
  - oApplicants and recipients in Medicare Savings Programs (MSP): Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), Qualified Individual 1 (QI-1) who do not receive Title II - Retirement, Survivors and Disability Insurance (RSDI) income
- Effective retroactively to March 01, 2020
  - oApplicants and recipients in MSP (QMB, SLMB, QI-1) who are receiving Title II - RSDI income
- Effective April 01, 2020
  - oApplicants in an active, non-MAGI program not included in the groups above

2.Provide lists of cases to the county when a case or person is discontinued from Medi-Cal, a Medi-Cal EDBC is Read-Only or when a case is not processed through Batch EDBC either from being skipped or because a MAGI Determination was requested on the case, but Medi-Cal EDBC has never been run against any MAGI Determination.

3. No NOAs will be put on Hold. NOAs will be sent out via the EDBC batch after they are generated.

#### Recommendation:

Please refer to the attached design document for details on the listed recommendations.

#### Summarized Recommendations:

1. Identify Medi-Cal cases for which Batch EDBC must run for 2020 benefit months according to the guidelines in ACWDL 20-03 to apply the updated 2020 FPL values. Insert identified Medi-Cal cases into SYS\_TRANSACT for Batch EDBC processing.
2. Operationally execute Batch EDBC. Batch EDBC will run only for the cases identified.
3. Updates to NOA logic to prevent the NOAs from being put on hold for this and future FPL COLAs.
4. Generate lists to aid the counties after Batch EDBC completes.

Operation Costs (based on an approximate 60,000 NOAs for 4 months): Total Print Cost for 39 Counties funded by the Project: \$5,424

See attached 'SCR CIV-105302 Operation Cost All Counties One Time.xls' with the breakdown for each county and specific cost on printing, envelopes, and stuffing.

#### Outreach Description:

Memorandum Webcast  
County Lists

Lists will be posted at below location:  
CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2020> CIV-105302

**Migration Impact Description:** Joint design has been approved through the Medi-Cal/CMSP Committee. LRS/CalSAWS will implement this Change with CA-211066 in the 20.03.06 release.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** None

**Operational Impact:** Operation Costs (based on an approximate 60,000 NOAs for 4 months): Total Print Cost for 39 Counties funded by the Project: \$5,424  
See attached 'SCR CIV-105302 Operation Cost All Counties One Time.xls' with the breakdown for each county and specific cost on printing, envelopes, and stuffing.

**Estimate: 228**

Automated Test :	0	Batch/Interfaces :	14	Batch Operations :	0
CalHEERS :	127	CalHEERS Test :	53	Client Correspondence :	34
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CIV-106060] ABAWD Geographical Waiver and Discretionary Waiver Updates

- Resolved: 02/19/2020 06:37 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Caroline Bui</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.02]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.02.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>668</b>
Reporter:	<b>Caroline Bui</b>	Regulation Reference:	<b>ACL 20-XX</b>	Created:	<b>01/06/2020 12:48 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	<b>CO-091</b>
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	<b>CA-212650</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Committee:		Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti and Jo Anne Osborn on 1/22/2020

**Current Design:** Under current SNAP regulations, all ABAWDs subject to the time limit are eligible to no more than three full months of CalFresh benefits in a 36-month period, unless they are exempt from the time limit or are satisfying the ABAWD work requirement. Federal discretionary exemptions are only available to individuals at risk of losing federal SNAP benefits due to the ABAWD time limit. These exemptions are manually applied in the Time Limit records. Marin is the only C-IV county subject to the ABAWD work requirement.

**Request:** Per ACL 20-XX, changes to time limit waiver criteria are effective April 1, 2020. In addition, the new rule limits carry over of unused discretionary exemptions, previously known as "percentage exemptions" or "15 percent exemptions." Changes to discretionary exemptions are effective October 1, 2020.

- Recommendation:**
1. Update the Counties with ABAWD Geographical Waiver as of April 2020.
  2. Run the ABAWD Batch job for the April 2020 and May 2020 Effective Months to remove the geographical waiver exemption for affected counties.
  3. Update the Countable Month NOA job to not generate for the April 2020 or May 2020 effective months. This will prevent the CF 377.11B (CalFresh Countable Month Letter) from being generated for those months.
  4. Suppress the ABAWD Discontinuance Sweep Job
  5. Update the Time Limit Sync Job to Apply a Discretionary Exemption for non-exempt ABAWDs in the April 2020 and May 2020 effective months.
  6. Add the CF 377.11C (updated in C-IV), CF 377.11D, and CF 377.11E forms to the Template Repository.
  7. Provide a list of cases with a CalFresh person who was determined to be non-exempt ABAWDs and are subject to the Discretionary Exemption for either April 2020 or May 2020.

**Outreach Description:** Provide a list of CalFresh persons who were determined to be non-exempt ABAWDs and are subject to the Discretionary Exemption.

The list will be posted to the following location:  
CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CIV-106060

**Migration Impact Description:** Joint design has been approved through the CalWORKs/CalFresh Committee. C-IV will implement this Change with SCR CA-212650 in the 20.02.19 release.

**Migration Impact Analysis:** Manually update the ABAWD Time Limit for the April and May 2020 Effective Months to apply the Discretionary Exemption.

**Alternative Procedure Description:** Manually send the CF 377.11C, CF 377.11D, and CF 377.11E forms.

**Operational Impact:**  
**Estimate:** **668**

Automated Test :	0	Batch/Interfaces :	110	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	166
DBA :	0	Design :	100	Eligibility :	110
Fiscal :	0	Imaging :	7	IVR/CC :	0



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Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	115
Tech Arch :	0	Tech Ops :	0	Training :	0

## [CIV-103676] Migrate Kings County IVR to Amazon Connect

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Dheeraj Muralidara</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.03.26</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>370</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>03/20/2019 10:30 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Contact Center Management]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-207026</b>

### Non-Committee

<b>Review:</b>	
<b>Expedite Approval:</b>	Approved by Karen J Rapponotti on 09/06/2019
<b>Current Design:</b>	Currently the Kings County IVR is on the Cisco UCCE Platform
<b>Request:</b>	Move the currently IVR functionality from the Cisco platform to the Amazon Connect platform.
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.</li> <li>2) Recreate all IVR Web Service interactions using AWS Lambda.</li> <li>3) Update Useful links in CCP with Kings county specific links.</li> </ol>
<b>Outreach Description:</b>	Train Contact Center staff on differences between Amazon Connect and Cisco UCCE.
<b>Migration Impact Description:</b>	Contact Center/Call Log functionality is currently not in scope for migration and therefore this SCR will need to be re-evaluated once direction for this functionality has been defined.
<b>Migration Impact Analysis:</b>	
<b>Alternative Procedure Description:</b>	None
<b>Operational Impact:</b>	
<b>Estimate:</b>	<b>370</b>
Automated Test :	0
CalHEERS :	0
DBA :	0
Fiscal :	0
Online :	10
Reports :	0
Tech Arch :	0
Batch/Interfaces :	0
CalHEERS Test :	0
Design :	0
Imaging :	0
Performance :	0
Security :	0
Tech Ops :	0
Batch Operations :	0
Client Correspondence :	0
Eligibility :	0
IVR/CC :	260
Release Communication Support :	0
System Test Support :	100
Training :	0



## [CIV-104042] ACL 19-42 Implement the Automation of CalWORKs Home Visiting Program (HVP)

Team Responsible:	<b>Online</b>	Assignee:	<b>Chao Guan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Sarah Steimle</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>713</b>
Reporter:	<b>Binh Tran</b>	Regulation Reference:	<b>AB 1811, ACL 19-42, ACL 19-82</b>	Created:	<b>04/30/2019 05:47 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Documentation</b>	Migration Impact:		Funding Source ID:	<b>HVP</b>
Committee:	<b>[CalWORKs/ CalFresh, Welfare to Work/WPR]</b>	Approved by Committee:	<b>02/13/2020</b>	Other Agency Cross Reference:	<b>CA-208265</b>

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - 02/14/2020

**Current Design:** The system currently has no online pages to track HVP data.

**Request:** The HVP component data cannot be tracked and managed. Provide online pages for HVP data tracking and management.

**Recommendation:** A new page flow will be created which will allow a worker to enter information for the HVP component of the case. This will include associated HVP case persons and additional information to track the program.

### Outreach

**Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** Continue to administer the HSP program outside of the system.

### Operational Impact:

**Estimate:** 713

Automated Test :	34	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	120
DBA :	0	Design :	95	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	274	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	10	System Test Support :	115
Tech Arch :	0	Tech Ops :	0	Training :	0

**[CIV-104367] ACWDL June 11, 2019; CFL NO. 18/19-26 Add Functionality for Housing Support Program (HSP)**

Team Responsible:	<b>Online</b>	Assignee:	<b>Michael Wu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Matthew Lower</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>671</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>ACWDL June 11, 2019; CFL NO. 18/19-26</b>	Created:	<b>06/18/2019 09:18 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CO-115</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>02/13/2020</b>	Other Agency Cross Reference:	<b>CA-208988</b>

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 02/14/2020

**Current Design:** The system currently has no online pages to track HSP data.

**Request:** HSP component data cannot be tracked and managed. Provide online pages for HSP data tracking and management.

**Recommendation:** Create a new page flow to allow a worker to enter information for HSP.

**Outreach**

**Description:**

**Migration Impact Description:** LRS/CalSAWS will implement CA-208988 with the same release.

**Migration Impact**

**Description:**

**Alternative Procedure Description:** Continue to track HSP outside of the system

**Operational Impact:**

**Estimate:** **671**

Automated Test :	46	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	90	Eligibility :	0
Fiscal :	67	Imaging :	0	IVR/CC :	0
Online :	299	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	109
Tech Arch :	0	Tech Ops :	0	Training :	0



## [CIV-105720] Update Batch Sweeps Job Aid for 2020 MEDS Recon and Renewal Schedule SCR CIV-105719

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Carlos Zepeda</b>	Regulation Reference:		Created:	<b>11/22/2019 11:48 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>C-IV M&amp;O</b>
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	Joyce Oshiro 02/19/2020 - Approve				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 12/5/2019				
<b>Current Design:</b>	SCR CIV-105719 implemented the updated MEDS Recon and Renewal Schedule for December 2019 to January 2021.				
<b>Request:</b>	The Batch Sweeps job aid lists the dates for Recon and Renewal and so it needs to be updated with the new dates.				
<b>Recommendation:</b>	Update the Batch Sweeps job aid for CIV-105179.				
<b>Outreach Description:</b>	Updated job aid.				
<b>Migration Impact Description:</b>	Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.				
<b>Migration Impact Analysis:</b>	No Impact				
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact Estimate:</b>	<b>7</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	2
Tech Arch :	0	Tech Ops :	0	Training :	5

## [CIV-106191] Update Suspend logic for Tax Intercept Balancer

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Deron Schab</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Jyothirmayi Chavata</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>55</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>01/23/2020 10:42 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Tax Intercept]</b>	Approved by Committee:	<b>02/06/2020</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 01/27/2020

**Current Design:** The C-IV System and WIS (Welfare Intercept System) both store Tax Intercept Account balance information. Each week, the C-IV System sends Establish, Increase, Decrease, Delete, Suspend and Reactivate transactions to WIS to reflect changes in the C-IV System.

**Request:** When transactions error off at WIS, the C-IV System and WIS become out of sync. This causes customers to be notified and intercepted incorrectly.

**Recommendation:**

1. Update the annual WIS/C-IV Balancer (scheduled to run around the end of July 2020) to find CalFresh Tax Intercept Accounts that are in 'Suspend' status in the C-IV system, but the corresponding TOP (Treasury Offset Program) Account is not in Suspend status at WIS (Welfare Intercept System). C-IV will send a 'Suspend' (Record Type 8) to WIS in the Annual Balancer file.

NOTE: The C-IV System is already programmed to find CalWORKs Recovery Accounts that are in 'Suspend' Status in the C-IV system, and send a 'Delete' (Record Type 3) to WIS for the FTB (Franchise Tax Board) Account.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

None

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 55

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	40	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	15
Tech Arch :	0	Tech Ops :	0	Training :	0

## [CIV-10791] Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Krishna Akula</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Rajan Vadapalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>400</b>
Reporter:	<b>Elisa Miller</b>	Regulation Reference:	<b>ACWDL 17-35</b>	Created:	<b>12/29/2017 02:26 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>02/03/2020</b>	Other Agency Cross Reference:	<b>CA-58123</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved by JoAnne Osborn - 02/24/2020

#### Current Design:

When a MAGI Medi-Cal individual reports a change or is reevaluated during the annual renewal period, CalHEERS protects the individual from adverse actions to their MAGI Medi-Cal eligibility by placing the individual in Soft Pause. The annual renewal period begins two months prior to the RE Due Date until the program is renewed.

Soft Pause protects the individual until the County Eligibility Worker (CEW) evaluates the individual for MAGI Medi-Cal with a premium or for other Medi-Cal programs not subject to MAGI, such as Non-MAGI Medi-Cal or Consumer Protection Programs (CPPs).

CalHEERS Soft Pause protections will continue until Soft Pause is lifted by a CEW through an Eligibility Determination Request (EDR). Once Soft Pause is lifted, adverse actions can be applied per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual can be moved to another aid code or discontinued from MAGI Medi-Cal.

With CalHEERS Release 16.4, C-IV SCR 2713 and LRS SCR 36160 updated The Systems with functionality to allow a CEW to send a 'Soft Pause Lift' indicator to CalHEERS in an EDR. When CalHEERS receives the 'Soft Pause Lift' indicator, CalHEERS lifts Soft Pause and applies adverse actions per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual is moved to another aid code or discontinued from MAGI Medi-Cal. CalHEERS sends a MAGI Determination of Eligibility Response (DER) to The Systems with the individual's new MAGI Medi-Cal eligibility/discontinuance and the Eligibility Evaluation Reason code 'Soft Pause Lift'. The CEW can then move the individual to the new MAGI Medi-Cal aid code or evaluate the individual for Non-MAGI Medi-Cal.

C-IV Medi-Cal EDBC Batch skip logic will skip a case with skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause. C-IV generates through batch a Non-MAGI Screening Packet for any individual with Eligibility Evaluation Reason of 'Soft Paused' on the DER received during the Batch MAGI Renewal process. This allows the C-IV CEW to manually request the 'Soft Pause Lift' to determine the individual's correct benefits when the Non-MAGI Screening Packet is returned. CalSAWS does not have the Medi-Cal Batch EDBC Skip logic nor the batch to generate the Non-MAGI Screening Packet. CalSAWS CA-203981 added the Non-MAGI Screening Packet to the template repository in Release 19.11.

The Systems allow CEWs to run Medi-Cal EDBC against a MAGI Determination that contains an individual in Soft Pause and establish a new annual renewal period. When an individual is in Soft Pause, the MAGI Determination provides the updated income and household size information with incorrect Federal Poverty Level (FPL) limit. As a result, during MAGI Renewals, The Systems generates a MAGI Renewal Notice of Action (NOA) with the incorrect FPL amounts. This can be misleading to the individual.

C-IV allows the CEW to select the 'RE' EDBC Run Reason during the annual renewal period and outside the annual renewal period to establish a new renewal period when processing a reported change. In C-IV 'RE' EDBC Run Reason is displayed when EDBC benefit month is on or after the Re-Evaluation begin month.

CalSAWS allows a worker to select a Run Reason from the EDBC Run Reason dropdown only when running Medi-Cal EDBC for a single-month. In CalSAWS 'RE' EDBC Run Reason is displayed only if the benefit month is after the RE Due Date or if a 'RE' packet exists for the 'RE' Due month.

C-IV sends 'Renewal – manual renewal' (RM) EDR Run Reason to CalHEERS during the annual renewal period starting with the EDR Benefit Month two months prior to the RE Due Date and beyond.

For example: A Medi-Cal program has RE Due Date 06/30/2020.

Beginning with EDR benefit month 05/2020 and beyond, C-IV sends 'RM' EDR Run Reason until a new annual renewal period is established.

CalSAWS does not send 'RM' EDR Run Reason.

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the month following the RE Due Date or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is either 'Not Applicable' or 'Reviewed-Ready To Run EDBC'

C-IV does not have functionality to automatically set the EDBC Run Reason to 'RE', but C-IV does have a page validation on the Run EDBC and Negative Action Detail pages that require the worker to run EDBC with 'RE' Run Reason when all the following are true:

- The latest MAGI determination for the benefit month has a 'RE' or 'RM' Run Reason.
- The benefit month is no earlier than one month prior to 'RE' due month.
- 'RE' Run Reason was not selected while running EDBC.
- Not an Auto Test scenario.

The MAGI Emulator allows testing of changes to The Systems that rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment. The MAGI Emulator does not have functionality to return Soft Pause or Soft Pause Lift in the MAGI Determination. See the current functionality of MAGI Emulator in Supporting Documents.

**Request:**

Per ACDWL 17-35, Medi-Cal individuals must be evaluated for Non-MAGI Medi-Cal if the individual was found MAGI Medi-Cal eligible with Soft Pause during the renewal process before advancing the renewal due date.

1. Require the CEW to lift Soft Pause prior to running Medi-Cal EDBC with 'RE' EDBC Run Reason.
2. Add a new EDBC Run Reason, 'Soft Pause/Non-RE', that will allow a CEW to run Medi-Cal EDBC during the annual renewal period with an individual in Soft Pause that will not advance the renewal due date. This 'Soft Pause/Non-RE' EDBC Run Reason should only be used for exceptions when the CEW is unable to lift Soft Pause due to 10-day noticing or CalHEERS issues. For example: a 'Person Add' during renewal or to process a Negative Action for a non-Soft Pause individual while waiting for the Non-MAGI Screening Packet for the Soft Pause individual.
3. Update CalSAWS Batch EDBC Skip logic to skip a case with a new skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause.
4. Update The Systems to generate a Non-MAGI Screening Packet when an individual is skipped through batch for Soft Pause and the MAGI Determination Run Reason code is 'Renewal - batch administrative renewal' (RE).
5. Update CalSAWS to create a Journal entry when the Non-MAGI Screening Packet is generated through batch.
6. Update CalSAWS to allow the CEW to select 'RE' EDBC Run Reason to establish a new renewal period during reported changes outside the annual renewal period.
7. Update CalSAWS to send 'RM' EDR Run Reason during the annual renewal period.
8. Update The Systems to automatically set the EDBC Run Reason to either 'RE' or 'Soft Pause/Non-RE' when appropriate during the annual renewal period.
9. Update the MAGI Emulator to have Soft Pause and Soft Pause Lift functionality to allow the testing of changes in The Systems which rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment.

**Recommendation:**

1. Update the Run EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason and hide 'RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.
2. Update the Negative Action Detail page to display 'Soft Pause/Non-RE' EDBC Run Reason and hide 'RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.
3. Update Create Manual EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason.
4. Update the Medi-Cal EDBC Summary page to display a notification message when 'Soft Pause/Non-RE' Run Reason is auto-set during the Medi-Cal EDBC evaluation.



5. Add 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program. Update The Systems to auto-set the EDBC Run Reason to either 'Soft Pause/Non-RE' or 'RE' when appropriate.
6. Update eHIT Disposition functionality for the new EDBC Run Reason 'Soft Pause/Non-RE'. CalSAWS only: Update eHIT logic to have 'RM' EDR Run Reason functionality.
7. CalSAWS only: Add a Batch EDBC Skip Reason 'Soft Paused' that will skip a case from Batch EDBC processing when the valid DER has at least one individual with Eligibility Evaluation Reason of Soft Pause.
8. CalSAWS only: Update the Batch MAGI Renewal Sweep to exclude cases from processing through Batch MAGI if the worker has already initiated the MAGI Renewal manually (RM) from the online page.
9. Create a new batch job for CalSAWS and update the existing batch job for C-IV to only generate the Non-MAGI Screening packet through batch for cases which are skipped during Batch EDBC with the reason of Soft Pause. CalSAWS only: Add a journal entry when the Non-MAGI Screening packet is generated through batch.
10. Update the MAGI Emulator to return MAGI Determinations with Soft Pause and Soft Pause Lift. The MAGI Emulator is used for testing purposes only to emulate the results returned from CalHEERS on a MAGI Determination.
11. Regression test the DHCS Renewals Master Request reports for the updated manual renewal EDR run reason functionality.

See CA-58123\_CIV-10791\_SoftPause during RE.docx for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

CalSAWS will implement this Change with SCR CA-58123 in the 20.06 release.

Reject NOA and create a manual one.

**400**

Automated Test :	20	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	225	CalHEERS Test :	105	Client Correspondence :	50
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Security :	0	Support :	0
Tech Arch :	0	Tech Ops :	0	System Test Support :	0
				Training :	0

# [CIV-106264] Automated Regression Test - Execution and Maintenance - 20.05 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:		Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.07.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>210</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>02/04/2020 09:30 AM</b>
Status:	<b>New</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:		Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-213283</b>

**Non-Committee Review:** Jo Anne Osborn 2/18/2020

**Expedite Approval: Current Design:**

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

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

- Recommendation:**
1. Execute the major release automated regression suite against the 20.05 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 20.05 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 20.05 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact**

**Analysis:**

Accounted for in SOR

**Alternative**

**Procedure**

**Description:**

Execute all regression testing manually for major and minor version releases.

**Operational Impact:**

**Estimate: 210**

Automated Test :	210	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**[CIV-100845] CF 296 - Changes in logic for Line 10 - Overdue Recertifications (CWD Caused) during the month**

Team Responsible:	<b>Reports</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>170</b>
Reporter:	<b>Justin Dobbs</b>	Regulation Reference:	<b>All County Letter 16-39E2</b>	Created:	<b>03/28/2018 04:01 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:	<b>02/14/2020</b>	Other Agency Cross Reference:	<b>CA-201742</b>

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

Currently, Line 10 of CF 296 captures zero counts for the number of overdue recertifications caused by the County.

**Request:**

Add logic to Line 10 to capture the number of overdue recertifications caused by the County.

**Recommendation:**

1. Update the logic of the CF 296 report to populate line 10 (Overdue recertifications (CWD caused) during the month).
2. Update the text description of Line 3 in the automated CF 296 to comply with ACL 16-39E2.
3. Update the CF 296 template to adhere to cosmetic standards. (Reference the attached detailed design for report layout)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the State/Fiscal Reports Committee. The LRS/CalSAWS System will implement this Change with SCR CA-201742 in the 20.07 release.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 170**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	132	Security :	0	System Test Support :	38
Tech Arch :	0	Tech Ops :	0	Training :	0

## [CIV-104986] Deactivating Pre-ACA Aid Codes

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Antony Lerner</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>63</b>
Reporter:	<b>Maureen Votta</b>	Regulation Reference:	<b>MEDIL 19-13</b>	Created:	<b>08/29/2019 10:43 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>01/29/2020</b>	Other Agency Cross Reference:	<b>CA-210307</b>

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** The Systems Medi-Cal EDBC rules no longer grant the obsolete Pre-ACA aid codes in MEDIL 19-13 except for aid code 55 to Long Term Care (LTC) - Medically Indigent Adult (MIA) age 21- 65.

The following obsolete Pre-ACA aid codes are available in the Other Program Assistance (OPA) and Manual EDBC pages:

- 3N, 3V, 44, 47, 48, 55, 69, 72, 74, 7A, 7C, 7S, 7U, 7W, 8N, 8P, 8R, 8T, H1, H2, H3, H4 and H5

The following obsolete Pre-ACA aid codes are available in EDBC Override page:

- 55, 7S, 7U, 7W

Note: Pre-ACA aid codes 58 and 5F mentioned in MEDIL 19-13 are deactivated in The Systems.

**Request:**

1. Deactivate the obsolete Pre-ACA aid codes in The Systems so they are no longer granted in Medi-Cal EDBC rules and no longer available for OPA, Manual EDBC or EDBC Override.
2. Create a one-time list for county follow-up of individuals active in the deactivated Pre-ACA aid codes.

**Recommendation:**

Deactivate the obsolete Pre-ACA aid codes and create a one-time list for county follow-up of individuals active in the deactivated Pre-ACA aid codes.

1. Update The Systems Medi-Cal EDBC rules to no longer grant the obsolete Pre-ACA aid code 55 LTC - Medically Indigent Adult (MIA) (age 21 - 65) effective the EDBC benefit month that follows SCR implementation.
2. Deactivate the following obsolete Pre-ACA aid codes from OPA and Manual EDBC pages effective the EDBC benefit month that follows SCR implementation:
  - 3N, 3V, 44, 47, 48, 55, 69, 72, 74, 7A, 7C, 7S, 7U, 7W, 8N, 8P, 8R, 8T, H1, H2, H3, H4 and H5
3. Deactivate the following obsolete Pre-ACA aid codes from EDBC Override page effective the EDBC benefit month that follows SCR implementation:
  - 55, 7S, 7U, 7W
4. Create a one-time list for county follow-up of individuals active in the deactivated Pre-ACA aid codes. (See outreach 5.1)

**Outreach Description:** One-time list

**Migration Impact Description:** The joint design was approved by Medi-Cal/CMSP Committee and same changes will be implemented with CA-210307 in Release 20.07

**Migration Impact Analysis:**  
**Alternative Procedure Description:** None

**Operational Impact:**  
**Estimate:** 63

Automated Test :	12	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	32	CalHEERS Test :	19	Client Correspondence :	0

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

**[CIV-105277] Auto assign task to the MC Worker for the IEVS NHR combo (CF and MC) only case**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>108</b>
Reporter:	<b>Howard Suksanti</b>	Regulation Reference:		Created:	<b>10/07/2019 03:10 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>01/28/2020</b>	Other Agency Cross Reference:	<b>CA-210948</b>

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** When IEVS NHR abstracts are loaded into the System for a combo case (CalWORKs (CW) / CalFresh (CF)) and Medi-Cal (MC), The System automatically sends out a SAWS 30 Form and dispositions/closes the NHR abstract.  
**Request:** There is no task for the worker to review the MC program in case any appropriate action is required.  
**Recommendation:** Add a new Task Sweep batch job to create a task for the current MC program assigned worker when an NHR Abstract for a (CW/CF) and MC combo case is loaded into The System.  
 Please refer to more details in the attached Design document.

**Outreach**

**Description:**  
**Migration Impact Description:** Joint design has been approved through the MC Committee. CalSAWS will implement this Change with CA 210948 in the same release.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** NA.  
**Operational Impact Estimate:** **108**

Automated Test :	0	Batch/Interfaces :	83	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	25
Tech Arch :	0	Tech Ops :	0	Training :	0

## [CIV-106126] Imaging: Associate Doc Types to Views

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Christopher Vasquez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Christopher Vasquez</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>16</b>
Reporter:	<b>Christopher Vasquez</b>	Regulation Reference:		Created:	<b>01/09/2020 03:29 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	Danielle Benoit 2/10/2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	The AR 3 - Mid-Year Status Report form does not map to any C-IV page Images button (View Filter)				
<b>Request:</b>	Imaging will map the document types to the appropriate page view filters.				
<b>Recommendation:</b>	Map the form "AR 3 - Mid-Year Status Report" to the "Customer Reporting Case" Imaging Document View.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	No impact as existing views will be invalid with the 58 county imaging solution.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	Documents can be located manually by Users in Imaging.				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>16</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	11	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	5
Tech Arch :	0	Tech Ops :	0	Training :	0

# [CIV-106271] Automated Regression Test - Execution and Maintenance - 20.07 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:		Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.09.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>210</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>02/04/2020 02:34 PM</b>
Status:	<b>New</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:		Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-213304</b>

**Non-Committee Review:**

Jo Anne Osborn 2/18/2020

**Expedite Approval:**

**Current Design:**

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

**Request:**

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

**Recommendation:**

1. Execute the major release automated regression suite against the 20.07 major version build on a regular basis.
2. Execute the major release automated regression suite against the final build for the 20.07 major version, prior to the build being deployed to production.
3. Execute the minor release automated regression suite against the final build of each applicable 20.07 minor version, prior to the build being deployed to production.
4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact**

**Analysis:**

Accounted for in SOR

**Alternative**

**Procedure**

**Description:**

Execute all regression testing manually for major and minor version releases.

**Operational Impact:**

**Estimate:**

**210**

Automated Test :	210	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



End SCRs



# [CIV-104373] Data Change: Update RE Due Date for SSI/SSP Households

- Resolved: 11/26/2019 03:27 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Jennifer Chen</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.01]</b>	Designer Contact:	<b>Mark Keehn</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>20.02.13</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>288</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:		Created:	<b>06/18/2019 03:08 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Tyler Vaisau</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>2019-11-19</b>	Other Agency Cross	<b>CA-209006</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Committee:	<b>00:00:00.0</b>	Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

SCR CIV-101471 updated CF EDBC to allow for SSI/SSP households to qualify for CalFresh. These households as receiving Public Assistance and therefore not eligible for ESAP.

### Request:

Counties were informed of an alternative process through CIT # 0032 - 19. Counties have requested that affected cases are updated through a data change.

### Recommendation:

Identify SSI/SSP household that would otherwise qualify for ESAP had they not been considered Public Assistance. For these cases, apply the following:

- 1) Update the RE Due Month based on approving EDBC and accurate staggered Due Month
- 2) Generate Journal entry for updated cases
- 3) Generate a list of cases that have a staggered redetermination due date that doesn't match expectations and cannot be accurately updated.

### Outreach

#### Description:

Counties will be provided a list of cases with SSI/SSP Only CF programs with a staggered redetermination due date that doesn't match expectations and cannot be accurately updated.  
 CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2019 > CIV-104373

### Migration Impact

#### Description:

Joint design has been approved through the CalWORKs/CalFresh Committee. LRS will implement this Change with SCR CA-209006.

### Migration Impact

#### Analysis:

### Alternative

### Procedure

#### Description:

User would need to manually adjust the Redetermination Due Date by adding 12 months.

### Operational Impact:

#### Estimate:

**288**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	221
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Security :	0	Support :	
Tech Arch :	0	Tech Ops :	0	System Test Support :	67
				Training :	0

### Content Revision

Pending CCB

### Status-1:

### Content Revision

1. Recommendation Change:

### Description-1:

Eligibility  
 1. Update condition in Section 2.1.2. 1.e to remove 'SSI Only' as one of the valid Other Program Assistance (OPA) types.

2. Fixed header title from 'Actual Redetermination Due Date' to 'Expected Redetermination Due Date' in Section 2.1.2.2.b.ii.5.

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:

# [CIV-105458] Automated Regression Test - Execution and Maintenance - 20.01 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.01]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.03.XX</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>340</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>10/28/2019 01:44 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sharon Teramura</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-211451</b>

**Non-Committee Review:** Approved by Karen Rapponotti on 10/29/2019

**Expedite Approval:** Karen Rapponotti 10/29/2019

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

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

- Recommendation:**
1. Execute the major release automated regression suite against the 20.01 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 20.01 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 20.01 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact Description:** Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

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

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

**Operational Impact: Estimate:** **340**

Automated Test :	340	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

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

**Content Revision  
Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:  
Before: 20.01  
After: 20.02
4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

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

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

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

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

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

**[CIV-789] ACL 14-12, CFL 13/14-35 Family Stabilization Program for CalWORKs (51903)**

Team Responsible:	<b>Online</b>	Assignee:	<b>Aaron Fowler</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Robert Untalan</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1616</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:	<b>ACL 14-12, CFL 13/14-35, I-64-15</b>	Created:	<b>12/29/2017 02:23 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	<b>Cal-OAR</b>
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-51700, CA-57298</b>
Committee:	<b>[Welfare to Work/ WPR]</b>				

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 11/06/2019

**Current Design:** The system currently has no online pages to track Family Stabilization data.

**Request:** The Family Stabilization component data cannot be tracked and managed. Provide online pages for Family Stabilization data tracking and management.

**Recommendation:** A new page flow will be created which will allow a worker to enter information for the Family Stabilization component. This will include associated Family Stabilization case persons, services and activities that are being used for clearing barriers.

The barriers, service arrangement, activities, and customer activities will be updated to include elements for the Family Stabilization component.

The REP(Refugee Employment Program) and WTW (Welfare to Work) Status Detail pages will be updated for Good Cause status by adding supplementary status reasons for the Family Stabilization component.

**Outreach**

**Description:**

**Migration Impact Description:** Joint design has been approved through the WTW Committee. LRS will implement this change with SCR CA-57298 in the 20.03 release.

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** Continue to track Family Stabilization outside the system.

**Operational Impact:**

**Estimate:** **1616**

Automated Test :	108	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	330	Imaging :	0	IVR/CC :	0
Online :	822	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	10	System Test Support :	346
Tech Arch :	0	Tech Ops :	0	Training :	0

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

**Content Revision Description-1:** Before: CA-57298 CIV-789 Family Stabilization  
After: CA-57298 CIV-789 Family Stabilization Content Revision 1 - Yellow Highlighting

## [CIV-5165] Add Medi-Cal Negative Action Reason 'Worker Initiated-Skip CalHEERS'

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Dylan Patel</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Antony Lerner</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>199</b>
Reporter:	<b>Maksim Volf</b>	Regulation Reference:		Created:	<b>12/29/2017 02:25 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Elisa Miller</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Performance</b>	Approved by	<b>2019-11-01</b>	Other Agency Cross	<b>CA-209381</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Committee:	<b>00:00:00.0</b>	Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

#### 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 negative action MAGI determination.

#### Request:

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

#### Recommendation:

1. Update the Negative Action Detail page as follows:
  - a. Add a program-level only negative action reason, "Worker Initiated-Skip CalHEERS" to 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.

#### 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.

Please refer to the design documentation for details on the recommendations listed above.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this change with CA-209381 in the 20.03 release.

**Migration Impact**

**Analysis:**

**Alternative**

Manual Override

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

199

Automated Test :	10	Batch/Interfaces :	24	Batch Operations :	0
CalHEERS :	119	CalHEERS Test :	39	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	7	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1.

A. Recommendation Change: Remove recommendation to exclude 'Worker Initiated-Skip CalHEERS' Negative Action Reason from EDBC override.

Before:

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

After:

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 MAGI Negative action: No

B. Recommendation Change: Add MC Negative Action Skip MAGI Security Group to System Administrator Role

Before: 2.1.4 Security Updates

2. Security Groups



Security Group: MC Negative Action Skip MAGI  
Group to Role Mapping: 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.

After: 2.1.4 Security Updates  
2. Security Groups

Security Group: MC Negative Action Skip MAGI  
Group to Role Mapping: System Administrator

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision**

**Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:

2. ETC Change: {Description of ETC Change}  
Before:  
After:

3. Release Change: {Description of Release Change}  
Before:  
After:

**Content Revision**

**Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:

2. ETC Change: {Description of ETC Change}  
Before:  
After:

3. Release Change: {Description of Release Change}  
Before:  
After:

**Content Revision**

**Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:

2. ETC Change: {Description of ETC Change}  
Before:  
After:

3. Release Change: {Description of Release Change}  
Before:  
After:

# [CIV-9947] Change Recovery Account Cause Code editing logic

- Resolved: 02/12/2020 04:08 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Deron Schab</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>224</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>12/29/2017 02:25 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Collections]</b>	Approved by Committee:	<b>2019-10-22 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-205652</b>

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 10/18/2019

### Current Design:

C-IV 9947

The Cause of a Recovery Account indicates the reason that gave rise to the Recovery Account. Below Cash Cause Codes are tracked in report CA812 for CalWORKS, Diversion, and Immediate Needs

- Cash – Admin Caused
- Cash – Customer Caused
- Cash – Potential IPV
- Cash – Late QR7
- Cash – Late SAR7
- Cash – IPV (waiver)
- Cash – IPV (ADH)
- Cash – IPV (Court)

Below CalFresh Cause Codes are tracked in report FNS209

- CalFresh - Admin Caused (prior to 3/2000)
- CalFresh - Admin Caused (after 3/2000)
- CalFresh - IHE (Customer Caused)
- CalFresh - Potential IPV
- CalFresh - IPV (waiver)
- CalFresh - IPV (Court)
- CalFresh - IPV (ADH)

On Recovery Account Detail page, the following Cause Codes, which are not tracked in any reports, are shown together with report-tracked Cause Codes above in Edit Mode.

- Court Filing Fees
- Sheriff Service Fees
- Bounce Check Charges
- Collection Fee

Changing an active Recovery Account from a report-tracked Cause Code to a non-report-tracked Cause Code or vice-versa will negatively impact CA812 and FNS209.

**Request:** Do not allow active Recovery Accounts to be edited from a report-tracked Cause Code to a non-report-tracked Cause Code, or from a non-report-tracked Cause Code to a tracked Cause Code.

### Recommendation:

1. When editing an active regular Recovery Account, if Cause of the Recovery Account is one of non-report-tracked Cause Codes below, only have below Cause Codes available for selections

- Court Filing Fees
- Sheriff Service Fees
- Bounce Check Charges
- Collection Fee

If Cause is not one of the above, hide above Cause Codes from selections.

2. When creating or editing a non-external regular Recovery Account with New or Pending Status, hide above non-report-tracked cause codes from selections.

3. When editing an non-external regular Recovery Account with New or Pending Status, default the Cause to '- Select-'(no value) so users have to choose a new Cause Code when updating the account.

Note: If users cancel editing the account, do not make any change to the current Cause of the Recovery Account.

4. Provide a list to the Counties of non-external regular Recovery Accounts with Cause Code 'Court Filing Fees', 'Sheriff Service Fees', 'Bounce Check Charges' or 'Collection Fee', and the account status is not currently voided for reviews.

**Outreach**

**Description:**

Provide a list to the Counties of non-external regular Recovery Accounts with Cause Code 'Court Filing Fees', 'Sheriff Service Fees', 'Bounce Check Charges' or 'Collection Fee', and the account status is not currently voided for reviews.

**Migration Impact**

**Description:**

Joint design has been approved through the Collections Committee. LRS will implement this change with SCR CA-205652 in the 20.03 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

224

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	178	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	46
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before: section 2.1.3 1. Under Note

If Cause of the account is a Cash IHE or CalFresh IHE Cause Code, only IHE and IPV Cause Codes are available for selections.

After:

If Cause of the account is either:

Cash - Customer Caused

Cash - Potential IPV

Cash - Late QR7 (LRS\CalSAWS only)

Cash - Late SAR7 (LRS\CalSAWS only)

GR - Customer Causes (LRS\CalSAWS only)

GR - Potential IPV (LRS\CalSAWS only)

Fraud Referral (LRS\CalSAWS only)

Only the following are available for selections:

Cash - Customer Caused

Cash - Potential IPV

Cash - Late QR7 (LRS\CalSAWS only)

Cash - Late SAR7 (LRS\CalSAWS only)

GR - Customer Causes (LRS\CalSAWS only)

GR - Potential IPV (LRS\CalSAWS only)

Fraud Referral (LRS\CalSAWS only)

Cash - IPV (ADH)

Cash - IPV (waiver)

Cash - IPV (Court)

GR - IPV(Court) (LRS\CalSAWS only)

GR - IPV(ADH) (LRS\CalSAWS only)

GR - IPV(Waiver) (LRS\CalSAWS only)

If Cause of the account is either:

CalFresh - Potential IPV

CalFresh - IHE (C-IV only)

CalFresh - IHE (Customer Caused) (LRS\CalSAWS only)  
Only the following are available for selections:  
CalFresh - Potential IPV  
CalFresh - IHE (C-IV only)  
CalFresh - IHE (Customer Caused) (LRS\CalSAWS only)  
CalFresh - IPV (Court)  
CalFresh - IPV (waiver)  
CalFresh - IPV (ADH)

2. ETC Change: No Change
3. Release Change: No Change
4. Funding Source Change: No Change

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:

2. ETC Change: {Description of ETC Change}  
Before:  
After:

3. Release Change: {Description of Release Change}  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:

2. ETC Change: {Description of ETC Change}  
Before:  
After:

3. Release Change: {Description of Release Change}  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:

2. ETC Change: {Description of ETC Change}  
Before:  
After:

3. Release Change: {Description of Release Change}  
Before:  
After:

## [CIV-11725] Add functionality to manage Conditionally Eligible status in MAGI Determinations

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Krishna Akula</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Rajan Vadapalli</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>266</b>
Reporter:	<b>Maksim Volf</b>	Regulation Reference:		Created:	<b>12/29/2017 02:26 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>2019-11-06 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-203824, CA-211516</b>

**Non-Committee Review:** Expedited Build Approval received from Karen Rapponotti 2/20/2019 for Content Revision 2.

**Expedite Approval:**  
**Current Design:** When some information is missing for parents, their children may be given a temporary eligibility status of Conditionally Eligible. Depending on the reasons, this status can be valid for up to 3 months. After that, the status is no longer valid. Eligibility Worker is expected to collect more information for the case and move it to either Eligible (without condition) or Ineligible/Discontinued.

**Request:** If a person is not moved from Conditionally Eligible status in due time, it is considered a County Error. The system does not provide any means of tracking or managing the cases where Conditional Eligibility is received. Worker has to manually create tasks or visit every case to locate such individuals.

**Recommendation:**

- 1) Update The Systems to display "Conditionally Eligible" as a "Household Eligibility" status when at least one person is MAGI Conditionally Eligible in the MAGI Determination on the MAGI Determination List page.
- 2) Create an Automated task for CEW to manage cases where Conditionally Eligibility is received.

**Outreach Description:** CIV-105337 Create a Job Aid for SCR CIV-11725 - Functionality to Manage Conditionally Eligible.

**Migration Impact Description:** Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this change with SCR CA-203824 in 20.03 release.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** Worker would have to control manually.

**Operational Impact:**  
**Estimate:** **266**

Automated Test :	16	Batch/Interfaces :	140	Batch Operations :	0
CalHEERS :	45	CalHEERS Test :	65	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

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

**Content Revision Description-1:** 1. Recommendation Change:  
 Before:  
 Recommendation 2.1.3

1. Update the MAGI Determination List page to display the Household Eligibility status based on the MAGI eligibility status(es) returned in the DER.

After:

Recommendation 2.1.3

1. Update the MAGI Determination List page and MAGI Determination Summary page to display the Household Eligibility status based on the MAGI eligibility status(es) returned in the DER

Before:

Recommendation 2.2.2

1. Add a Task Sweep job to create an automated task for the Medi-Cal program when the following is true:  
a. The latest DER for the come-up month has at least one person with MAGI Conditionally Eligible status.

After:

Recommendation 2.2.2

1. Add a Task Sweep job to create an automated task for the Medi-Cal program with Active or Pending status when the following is true:  
a. The latest benefit month DER has at least one person with MAGI Conditionally Eligible status.

2. ETC Change:

Before:

Batch/Interfaces : 140

CalHEERS : 45

Automated Test: 16

CalHEERS Test: 65

After:

Batch/Interfaces : 140

CalHEERS : 45

Automated Test: 8

CalHEERS Test: 77

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

## [CIV-104383] ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Thresholds Tiers (IRTs)

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Jagadeesh Dasu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Josias Caveto</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.04.16</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>562</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>ACL 19-76</b>	Created:	<b>06/19/2019 03:25 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Business Process, Central Print]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2020-01-15 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-209033</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved 01/27/2020 - K. Rapponotti

#### Current Design:

To determine the CalWORKs Net Non-Exempt Income (NNI) is calculated by disregarding the first \$225 of disability-based unearned income (DBI) and/or any earned income and 50 percent of any remaining earned income. If the AU has earned income only, the first \$225 and 50 percent of the remaining earned income is used as part of the family's NNI when calculating the MAP.

The CalWORKs Income Reporting Threshold (IRT) for the AU is the lower of two tiers. The two tiers include:  
Tier 1: 55 percent of the Federal Poverty Level (FPL) for a family of three, plus the amount of income last used to calculate the AU's monthly grant amount.

Tier 2: The amount of income likely to render the AU ineligible for CalWORKs benefits. The formula is  $MAP \times 2 + \$225 + 1$ .

NOAs and forms reference the value of \$225 for the Earned Income Disregard and Disability based Income Disregard.

NOAs and forms reference the value of \$2,250, \$2000, \$3000 or \$3,500 for the Maximum Asset limit value.

#### Request:

1. Based on the new policy, increase the disregard from \$225 to \$500 effective June 1, 2020.
2. The CW Tier 2 will change to use 130 percent of the FPL instead of  $MAP \times 2 + \$225$  (Disregard prior to June 1, 2020)+1.
3. Keep the CW case active with Zero grant amount when the AU's total earned, and unearned income are under the CW Tier 2 IRT (130% of the SPL).
4. Update impacted Forms and NOAs to reflect the new values.

#### Recommendation:

1. Update the CW Disability Based Earned Income Disregard (CT 335 – AI) and CW Disability Based Unearned Income Disregard (CT 335 – 53) from \$225 to \$500, effective June 1, 2020.
2. Update the forms to replace Disability-Based Unearned Income(DBI) or Earned Income Disregard(EID) references from \$225 to \$500.
3. Update the NOAs to replace the text \$225 with a variable to populate the updated value of \$500 from EDBC.
4. Replace Tier 2 with Tier 3 calculation rules effective June 1, 2020.
5. Update the impacted Forms and NOAs to reflect the new values as per the ACLs.
6. Keep the CW Case Open When the benefit grant Amount is \$0 under the new tier two of the IRT (130% FPL)

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the CW/CF Committee. CalSAWS will implement this change with SCR CA-209033 in 20.04 release.

#### Migration Impact

#### Analysis:

#### Alternative

EDBC Override

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**562**

Automated Test :	27	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	455
DBA :	0	Design :	0	Eligibility :	54
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	26
Tech Arch :	0	Tech Ops :	0	Training :	0

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

**Content Revision Description-1:** 1. Recommendation Change:  
Before

1. No references of CW tiers (overview Section 1)
2. Did not include TCF in assumption # 7 (Section 1.4)
3. No reference to Unearned income disregard ( Section 2.1.2)
4. Incorrectly referenced the CW tier (Section 2.7.2)
5. Not correct name for the grant (2.8)
6. Not clear verbiage (2.8.2)
7. No correct address for the impacted forms (Section 3)
8. Code Category Reference is incorrect(Section 2.4)

After

- 1- Added CW tiers references (Overview Section 1)
- 2 -Added TCF reference in assumption 7 ( Section 1.4)
- 3- Added Assumption # 15 (Section 1.4)
4. Reference to both earned and Unearned income disregards (Section 2.1.2)
5. Added a correct reference of the CW tier being updated (Section 2.7.2)
6. Added Correct name of the for the grant (Section 2.8)
7. Updated the verbiage for more clarity (Section 2.8.2)
8. Updated correct location of the form (Section 3)
8. Code Category Reference is updated (Section 2.4)

Note: For more details of the changes see highlighted in the attachment CA -209033 CIV- 104383 CalWORKs Change in EID and IRT Content Revision 1

2. Estimate Change: N/A  
Before: System test : 26  
After: System test : 153

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:** 1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:



## [CIV-102191] ACL 19-40 CalWORKs Outcome and Accountability Review (Cal-OAR) Phase II

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Chris Carandang</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Jennifer Muna</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1106</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>ACIN I-49-18, ACL 19-40</b>	Created:	<b>09/06/2018 04:50 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CO-115</b>
Committee:	<b>[Welfare to Work/WPR]</b>	Approved by Committee:	<b>2020-01-28 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-204569</b>

### Non-Committee

<b>Review:</b>	
<b>Expedite Approval:</b>	Received expedited build approval from JoAnne Osborn on 01/29/2020
<b>Current Design:</b>	Per ACL 19-40, SAWS is responsible for ensuring that the data files sent to CDSS are completed and submitted by the submission due date. In Phase I, CA-208030   CIV-103934, data elements for the monthly data files are manually transmitted to CDSS.
<b>Request:</b>	Add functionality to automatically generate and send the monthly, quarterly, and semi-annual Cal-OAR data files to CDSS.
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Create new interface job to generate and transmit the Cal-OAR19 data file to CDSS.</li> <li>2. Create new interface job to generate and transmit the Cal-OAR19A data file to CDSS.</li> <li>3. Create new interface job to generate and transmit the Cal-OAR19B data file to CDSS.</li> <li>4. Create new interface job to generate and transmit the Cal-OAR19C data file to CDSS.</li> <li>5. Create new interface job to generate and transmit the Cal-OAR19D data file to CDSS.</li> <li>6. Create new interface job to generate and transmit the Cal-OAR19E data file to CDSS.</li> </ol>

### Outreach

<b>Description:</b>	
<b>Migration Impact Description:</b>	Joint design has been approved through the WTW/WPR Committee. Changes will be made in both LRS and C-IV. Corresponding changes are implemented with CA-204569 for the 20.05 release

### Migration Impact

<b>Analysis:</b>	
<b>Alternative Procedure Description:</b>	N/A

### Operational Impact:

<b>Estimate:</b>	<b>1106</b>				
Automated Test :	0	Batch/Interfaces :	625	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	170	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	206
Tech Arch :	0	Tech Ops :	0	Training :	0

### Content Revision

<b>Status-1:</b>	Pending CCB
<b>Content Revision Description-1:</b>	1. Recommendation Change: Updates to Supporting Document criteria to match data element requirements from CDSS.

Before:

-Supporting Document #1

1. The Criteria, Online Page Location, and Database table for HSP and HVP data elements did not exist.
2. Variable 19 criteria: Latest WTW Program Status = 'Active' within measurement period.
3. Variable 22 criteria: TBD
4. Variable 23: Note: For LRS, look for REP which is synonymous to WTW for refugees.
5. Variable 23 Online Page Location description navigates to CW/WTW Person History Page.
6. Variable 26 Criteria did not match requirements from CDSS.
7. Variable 26 Online Page Location description navigates to Case Summary Page.
8. Variable 29 Online Page Location: TBD
9. Variable 30 Criteria did not include mapped responses
10. Variable 30 Online Page Location: TBD
11. Variable 31 Online Page Location: TBD
12. Variable 32 Criteria did not account for activity Excused Hours.
13. Variable 33 Criteria: #2. Start Date is populated within the month of the activity.
14. Variable 34 Criteria: #2. Status = 'Completed' within the month of activity.
15. Variable 35 Criteria did not meet condition requirements by CDSS.
16. Variable 36 Criteria did not meet individual condition requirements.
17. Variable 39 Criteria did not meet requirements by CDSS.
18. Variable 40 Online Page Location description navigates to Customer Activities List Page.
19. Variable 41 Criteria #2 Status = 'Active'.
20. Variable 46, 47, 48 Criteria did not include note for LA county.
21. Variable 52 Criteria did not meet data element requirement.
22. Variable 54 Criteria did not meet data element requirement.

After:

-Supporting Document #1

1. Updated Variable 55 and 56 to include Criteria, Online Page Location, and Database table for HSP and HVP data elements.
  2. Updated Variable 19 criteria: Latest WTW Program Status (except 'Deregistered') on last day of measurement period
  3. Updated Variable 22 Criteria and Online Page Location to include requirements and Online page navigation
  4. Updated Variable 23 Criteria by removing 'Note: for LRS, look for REP which is synonymous to WTW for refugees.' and adding 'Note: For LRS, include REP program'. Also included statement to 'include all CalWORKs Role reasons'.
  5. Updated Variable 23 Online Page Location description navigation to view WTW Program status and Program Role reason.
  6. Updated Variable 26 criteria to match requirements from CDSS.
  7. Updated Variable 26 Online Page Location description navigation to CW Person History Page.
  8. Updated Variable 29 Online Page Location description navigation to Housing Support List Page.
  9. Updated Variable 30 Criteria to include mapped responses.
  10. Updated Variable 30 Online Page Location description navigation to Housing Support List Page and Service Arrangement List Page.
  11. Updated Variable 31 Online Page Location description navigation to Family Stabilization List Page.
  12. Updated Variable 32 Criteria to include note for activity Excused Hours.
  13. Updated Variable 33 Criteria: #2. Start Date is populated within the month measurement month.
  14. Updated Variable 34 Criteria: #2. Status = 'Completed' within the measurement month.
  15. Updated Variable 35 Criteria to meet condition requirements by CDSS and mapped out responses.
  16. Updated Variable 36 Criteria to meet individual condition requirements and mapped out responses.
  17. Updated Variable 39 Criteria to meet requirements by CDSS and mapped out responses.
  18. Updated Variable 40 Online Page Location description navigation to Customer Activities Detail Page.
  19. Updated Variable 41 Criteria #2 to look at Earliest Education Activity Status = 'Active' and Status Reason = 'Attending' or 'Referred'.
  20. Updated Variable 46, 47, 48 Criteria to include note for LA county.
  21. Updated Variable 52 Criteria to meet data element requirement by updating WTW program status and mapped out responses.
  22. Updated Variable 54 Criteria to meet data element requirement.
- (Updated cells within Supporting document are highlighted in orange and text in red)  
(Updated cells within Supporting document are highlighted in orange and text in red)
2. ETC Change: N/A

Before:

After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. ETC Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. ETC Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. ETC Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**End Content Revisions**

# [CA-211064] 2020 Federal Poverty Levels for Medi-Cal

- Resolved: 02/07/2020 08:16 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Lucas Galleguillos</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.02]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.02.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>88</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:	<b>ACWDL 20-03</b>	Created:	<b>10/09/2019 05:47 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>02/05/2020</b>	Other Agency Cross Reference:	<b>CIV-105301</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti - 1/31/2020

### Current Design:

1. LRS/CalSAWS maintains Medi-Cal Federal Poverty Level (FPL) tables in accordance to the ACWDL 19-06. Three of these tables are used for FPL lookups for the following groups:
  - MSP without RSDI: Applicants and recipients of Medicare Savings Programs (MSP): Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), Qualified Individual-1 (QI-1), who do not receive Title II Retirement Survivors and Disability Insurance (RSDI) income.
  - MSP with RSDI: Applicants and recipients of MSP (QMB, SLMB, QI-1), who receive Title II RSDI income.
  - Other Medi-Cal FPL Groups: All other Medi-Cal recipients who receive benefits based on a calculation involving the FPL.These tables are using values which were implemented with the 2019 FPL Cost of Living Adjustment (COLA) under CA-200834 per ACWDL 19-06. These values are implemented in the system effective to high date (on-going).

Technical Note: Code Table stores values only up to family unit size 10. For every additional member in the family, additional amount is added.

2. Customer's Social Security Administration (SSA) income is updated every year based on the new SSA income increase rate effective the month of January of that particular year. FPL-related budgets also use this updated SSA income, but the new SSA income increase rate is not effective until the month of April for FPL budgets so the system uses a 'Backout Multiplier' to account for the difference. The Backout Multiplier holds the current year's SSA income increase rate value. When handling FPL budgets, the system takes the current SSA income amount and divides it with the Backout Multiplier (CT335\_A2\_SSA\_INCOME\_INCREASE\_MULTIPLIER) which results in the SSA income amount being equal to the previous SSA income amount for FPL-related budgets. With CA-200824, the Backout Multiplier was high-dated to continue for all of 2020.

### Request:

1. ACWDL 20-03 contains the 2020 FPL COLA values. The system needs to be updated with the new values.
2. With the release of ACWDL 20-03, the 'Backout Multiplier' is no longer needed effective 04/01/2020.

### Recommendation:

1. Update the following existing FPL values in the system to the new values in ACWDL 20-03:
  - a. FPL values for MSP without RSDI
    - i. End-Date the existing 2019 values to 12/31/2019
    - ii. Insert the new values effective 01/01/2020 to high-date
      - 100% FPL for QMB w/out SSA (CT351-52)
      - 120% FPL for SLMB w/out SSA (CT351-54)
      - 135% FPL for QI1 w/out SSA (CT351-56)
  - b. MSP with RSDI
    - i. End-Date the existing 2019 values to 02/29/2020
    - ii. Insert the new values effective 03/01/2020 to high-date
      - 100% FPL for QMB w/ SSA (CT351-53)
      - 120% FPL for SLMB w/ SSA (CT351-55)
      - 135% FPL for QI1 w/ SSA (CT351-57)

- c. Other Medi-Cal FPL Groups
  - i. End-Date the existing 2019 values to 03/31/2020
  - ii. Insert the new values effective 04/01/2020 to high-date
    - 100% FPL (CT351-01)
    - 120% FPL (CT351-02)
    - 133% FPL (CT351-04)
    - 135% FPL (CT351-05)
    - 138% FPL (CT351-67)
    - 150% FPL (CT351-59)
    - 160% FPL (CT351-50)
    - 185% FPL (CT351-07)
    - 200% FPL (CT351-08)
    - 250% FPL (CT351-09)

- d. CMSP Value
  - i. End Date the existing 2019 values to 12/31/2019
  - ii. Insert the new values effective 01/01/2020 to high-date
    - 300% FPL (CT351-75)

Technical Note: 300%FPL is not a part of the ACWDL but calculated as thrice the 100% FPL value from the ACWDL.

Please Note : Adding 300% FPL values has no functionality in the system as LRS/CalSAWS does not use CMSP values.  
 This value is purely added to make LRS/CalSAWS and C-IV systems consistent since C-IV will be using CMSP values post migration.

2. Update the 'Backout Multiplier' values (CT335\_A5 and CT335\_A6) to '3' (March) since the 2020 FPL limits are being added to the system.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSP Committee.  
 C-IV will implement this Change with CIV-105301 in the 20.02.19 release.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 88**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	43	CalHEERS Test :	20	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	20
Tech Arch :	0	Tech Ops :	0	Training :	0

# [CA-211066] Run Batch EDBC with 2020 FPL Values

- Resolved: 02/21/2020 06:32 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Lucas Galleguillos</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.02]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.03.06</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>243</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:	<b>ACWDL 20-03</b>	Created:	<b>10/09/2019 06:05 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Elisa Miller</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>02/05/2020</b>	Other Agency Cross	<b>CIV-105302</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Committee:		Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti - 02/06/2020

### Current Design:

LRS/CalSAWS recently updated the 2020 Federal Poverty Level (FPL) values based on ACWDL 20-03 with CA-211064/CIV-105301  
Any Medi-Cal EDBC run prior to the update used the 2019 FPL values per ACWDL 19-06.

### Request:

1.Run Batch EDBC for Medi-Cal cases in accordance with ACWDL 20-03 so that the new FPL values are correctly applied. The effective date of the 2020 FPL values vary as follows:

- Effective retroactively to January 01, 2020
  - oApplicants and recipients in Medicare Savings Programs (MSP): Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), Qualified Individual 1 (QI-1) who do not receive Title II - Retirement, Survivors and Disability Insurance (RSDI) income
- Effective retroactively to March 01, 2020
  - oApplicants and recipients in MSP (QMB, SLMB, QI-1) who are receiving Title II - RSDI income
- Effective April 01, 2020
  - oApplicants in an active, non-MAGI program not included in the groups above
- Exclude Medi-Cal cases from Batch EDBC processing if the Medi-Cal program is assigned to a DCFS worker.

2.Provide lists of cases to the county when a case or person is discontinued from Medi-Cal, a Medi-Cal EDBC is Read-Only or when a case is not processed through Batch EDBC either from being skipped or because a MAGI Determination was requested on the case, but Medi-Cal EDBC has never been run against any MAGI Determination.

### Recommendation:

Please refer to the attached design document for details on the listed recommendations.

#### Summarized Recommendations:

1. Identify Medi-Cal cases for which Batch EDBC must run for 2020 benefit months according to the guidelines in ACWDL 20-03 to apply the updated 2020 FPL values. Insert identified Medi-Cal cases into SYS\_TRANSACT for Batch EDBC processing.
2. Operationally execute Batch EDBC. Batch EDBC will run only for the cases identified.
3. Generate lists to aid the counties after Batch EDBC completes.

### Outreach

#### Description:

Memorandum Webcast  
County Lists

Lists will be posted at below location:

CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2020> CA-211066

### Migration Impact Description:

Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this Change with CIV-105302 in the 20.03.07 release.

### Migration Impact Analysis:

**Alternative Procedure Description:**  
**Operational Impact Estimate:**      **243**  
None

Automated Test :	0	Batch/Interfaces :	14	Batch Operations :	0
CalHEERS :	127	CalHEERS Test :	82	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0





# [CA-212650] ABAWD Geographical Waiver and Discretionary Waiver Updates

- Resolved: 02/07/2020 08:16 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Caroline Bui</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.02]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.02.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>887</b>
Reporter:	<b>Caroline Bui</b>	Regulation Reference:	<b>ACL 20-XX</b>	Created:	<b>01/06/2020 12:46 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Tyler Vaisau</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>ABAWD</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-106060</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti and Jo Anne Osborn on 1/22/2020

**Current Design:** Under current SNAP regulations, all ABAWDs subject to the time limit are eligible to no more than three full months of CalFresh benefits in a 36-month period, unless they are exempt from the time limit or are satisfying the ABAWD work requirement. Federal discretionary exemptions are only available to individuals at risk of losing federal SNAP benefits due to the ABAWD time limit. These exemptions are manually applied in the Time Limit records. Marin is the only C-IV county subject to the ABAWD work requirement.

**Request:** Per ACL 20-XX, changes to time limit waiver criteria are effective April 1, 2020. In addition, the new rule limits carry over of unused discretionary exemptions, previously known as "percentage exemptions" or "15 percent exemptions." Changes to discretionary exemptions are effective October 1, 2020.

- Recommendation:**
1. Update the Counties with ABAWD Geographical Waiver as of April 2020.
  2. Run the ABAWD Batch job for the April 2020 and May 2020 Effective Months to remove the geographical waiver exemption for affected counties.
  3. Update the Countable Month NOA job to not generate for the April 2020 or May 2020 effective months. This will prevent the CF 377.11B (CalFresh Countable Month Letter) from being generated for those months.
  4. Suppress the ABAWD Discontinuance Sweep Job
  5. Update the Time Limit Sync Job to Apply a Discretionary Exemption for non-exempt ABAWDs in the April 2020 and May 2020 effective months.
  6. Add the CF 377.11C (updated in C-IV), CF 377.11D, and CF 377.11E forms to the Template Repository.
  7. Provide a list of cases with a CalFresh person who was determined to be non-exempt ABAWDs and are subject to the Discretionary Exemption for either April 2020 or May 2020.

**Outreach Description:** Provide a list of CalFresh persons who were determined to be non-exempt ABAWDs and are subject to the Discretionary Exemption.

The list will be posted to the following location:  
CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-212650

**Migration Impact Description:** Joint design has been approved through the CalWORKs/CalFresh Committee. C-IV will implement this Change with SCR CIV-106060 in the 20.02.19 release.

**Migration Impact Analysis:** Manually update the ABAWD Time Limit for the April and May 2020 Effective Months to apply the Discretionary Exemption.

**Alternative Procedure Description:** Manually send the CF 377.11C, CF 377.11D, and CF 377.11E forms.

**Operational Impact:**  
**Estimate:** **887**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	220
DBA :	0	Design :	100	Eligibility :	170
Fiscal :	95	Imaging :	7	IVR/CC :	0

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Online :	0	Performance :	0	Release Communication Support :	37
Reports :	0	Security :	0	System Test Support :	156
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-213069] Load Updated Desk Aid 225 GR MSUDRP Instructions to Online Help

- Resolved: 02/24/2020 12:49 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Cristina Garcia</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>01/24/2020 12:30 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 2/13/2020

**Current Design:** Online Help does not contain the most recent version of Desk Aid 225 GR MSUDRP Instructions.

**Request:** Online Help needs to be updated with the latest version of the Desk Aid.

**Recommendation:** Load 225 DA GR MSUDRP Instructions TR19.11 to Online Help

## Outreach

### Description:

### Migration Impact

### Description:

### Migration Impact

### Analysis:

**Alternative Procedure** None

### Description:

### Operational Impact:

**Estimate:** 5

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



**[CA-205454] LRS only change: Remove DPSS-at-a-glance link from LRS Business Intelligence dashboard**

Team Responsible:	<b>Reports</b>	Assignee:	<b>Judith Roldan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Vallari Bathala</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>23</b>
Reporter:	<b>Inez Finnigan</b>	Regulation Reference:		Created:	<b>11/05/2018 10:40 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Dennis Kong</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	Laura Chavez				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	DPSS-at-a-glance link is available in LRS under Reports Business intelligence (BI) report Statistic Summary Analysis: Analytical reports for: Active Caseload, Application Processing and Terminations, Statistical Reports Table of Content DPSS at a Glance				
<b>Request:</b>	LRS only change: remove DPSS-at-a-glance link from LRS Business Intelligence table of content. LA County is requesting to just remove the link/reference from the Statistical Reports. We will handle this report in house with our ad hoc team going forward.				
<b>Recommendation:</b>	LRS only change: remove DPSS-at-a-glance link from LRS Business Intelligence Reports				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	LRS (Los Angeles County only)				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	Report will be handled by the ad hoc team going forward.				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>23</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	17	Security :	0	System Test Support :	6
Tech Arch :	0	Tech Ops :	0	Training :	0



## [CA-208265] ACL 19-42 Implement the Automation of CalWORKs Home Visiting Program (HVP)

Team Responsible:	<b>Online</b>	Assignee:	<b>Chao Guan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Sarah Steimle</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>824</b>
Reporter:	<b>Binh Tran</b>	Regulation Reference:	<b>AB 1811, ACL 19-82, ACL 19-42</b>	Created:	<b>04/30/2019 05:07 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lien Phan</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>HVP</b>
Committee:	<b>[CalWORKs/ CalFresh, Welfare to Work/WPR]</b>	Approved by Committee:	<b>02/13/2020</b>	Other Agency Cross Reference:	<b>CIV-104042</b>

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - 02/14/2020

**Current Design:** The system currently has no online pages to track HVP data.

**Request:** The HVP component data cannot be tracked and managed. Provide online pages for HVP data tracking and management.

**Recommendation:** A new page flow will be created which will allow a worker to enter information for the HVP component of the case. This will include associated HVP case persons and additional information to track the program.

### Outreach

**Description:**

**Migration Impact Description:** CIV-104042 is being added in the same release for the C-IV system.

**Migration Impact Analysis:**

**Alternative Procedure Description:** Continue to administer the HVP program outside of the system.

### Operational Impact:

**Estimate:** **824**

Automated Test :	34	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	110
DBA :	0	Design :	100	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	274	Performance :	0	Release Communication Support :	36
Reports :	0	Security :	10	System Test Support :	157
Tech Arch :	0	Tech Ops :	0	Training :	0



## [CA-208988] ACWDL June 11, 2019; CFL NO. 18/19-26 Add Functionality for Housing Support Program (HSP)

Team Responsible:	<b>Online</b>	Assignee:	<b>Michael Wu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Matthew Lower</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>778</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>ACWDL June 11, 2019; CFL NO. 18/19-26</b>	Created:	<b>06/18/2019 09:07 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>Cal-OAR</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>02/13/2020</b>	Other Agency Cross Reference:	<b>CA-208109; CIV-104367</b>

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 02/14/2020

**Current Design:** The system currently has no online pages to track HSP data.

**Request:** HSP component data cannot be tracked and managed. Provide online pages for HSP data tracking and management.

**Recommendation:** Create a new page flow to allow a worker to enter information for HSP.

#### Outreach

##### Description:

**Migration Impact Description:** C-IV is scheduled to release CIV-104367 with the same release.

##### Migration Impact Analysis:

**Alternative Procedure Description:** Continue to track HSP outside of the system

##### Operational Impact:

##### Estimate:

**778**

Automated Test :	46	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	90	Eligibility :	0
Fiscal :	67	Imaging :	0	IVR/CC :	0
Online :	299	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	146
Tech Arch :	0	Tech Ops :	0	Training :	0

 **[CA-209367] Training: Update WBTs per SCR CA-205441**

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>10</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/09/2019 05:17 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ana Cruz on 07/09/19

**Expedite Approval:** Approved by Karen Rapponotti on 07/10/2019. See email approval attached.

**Current Design:** WBTs impacted by SCR CA-205441 are not up-to-date.

**Request:** Update WBTs that are impacted by SCR CA-205441.

**Recommendation:** Update the following WBTs per impact of AppDev SCR CA-205441:  
 060-WBT-ESA-Employment Services-GAIN-06  
 062-WBT-ESB-Employment Services-GROW-05  
 \*Note: The above list is non-exhaustive, based on a high-level impact analysis, and subject to change.

**Outreach Description:**

**Migration Impact Description:** Updates to the existing LRS Web Based Training materials to support 40 counties in CalACES are currently not in scope for migration.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None

**Operational Impact Estimate:** **10**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	10

 **[CA-213173] Create Online Help Pages for CA-50302 OCAT**

Team Responsible:	<b>Training</b>	Assignee:	<b>Kelly Worthington</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>15</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:	<b>AB-74</b>	Created:	<b>01/30/2020 01:47 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>OCAT</b>
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Jayna Longstreet 2/19/2020

**Expedite Approval:** Approved by Karen Rapponotti on 2/13/2020

**Current Design:** The following is not in Online Help: OCAT Referral List page, OCAT Referral Detail page and OCAT Response Detail page.

**Request:** Per SCR CA-50302, The OCAT Referral List, OCAT Referral Detail and OCAT Response Detail pages are to be added to Online Help.

**Recommendation:** Add the following pages to Online Help::  
 1) OCAT Referral List  
 2) OCAT Referral Detail  
 3) OCAT Response Detail

**Outreach**

**Description:**

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

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 15

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	15





# [CA-213671] Training: Load Job Aids updated for CA-210318 to the LMS

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>10</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>02/18/2020 02:06 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approve by Ana Cruz on 02/18/2020

**Expedite Approval:**  
**Current Design:** SCR CA-210318 requires the update of some job aid titles so that the file names and titles in the Online Help Table of Contents match.

**Request:** Job aid titles in the LMS should match the job aid file names and titles in Online Help Table of Contents.

**Recommendation:**  
For any job aids updated per CA-210318:  
1. Update the LMS document shell to reflect the new job aid title  
2. Load the updated job aid to the LMS

**Outreach Description:**  
**Migration Impact Description:** This SCR is for LMS updates only.  
**Migration Impact Analysis:** No Impact  
**Alternative Procedure Description:** None.

**Operational Impact:**  
**Estimate:** **10**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	10



## [CA-58123] Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Lucas Galleguillos</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Rajan Vadapalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>980</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:	<b>ACWDL 17-35</b>	Created:	<b>01/19/2018 11:42 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>02/03/2020</b>	Other Agency Cross Reference:	<b>CIV-10791</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved by JoAnne Osborn - 02/24/2020

#### Current Design:

When a MAGI Medi-Cal individual reports a change or is reevaluated during the annual renewal period, CalHEERS protects the individual from adverse actions to their MAGI Medi-Cal eligibility by placing the individual in Soft Pause. The annual renewal period begins two months prior to the RE Due Date until the program is renewed.

Soft Pause protects the individual until the County Eligibility Worker (CEW) evaluates the individual for MAGI Medi-Cal with a premium or for other Medi-Cal programs not subject to MAGI, such as Non-MAGI Medi-Cal or Consumer Protection Programs (CPPs).

CalHEERS Soft Pause protections will continue until Soft Pause is lifted by a CEW through an Eligibility Determination Request (EDR). Once Soft Pause is lifted, adverse actions can be applied per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual can be moved to another aid code or discontinued from MAGI Medi-Cal.

With CalHEERS Release 16.4, C-IV SCR 2713 and LRS SCR 36160 updated The Systems with functionality to allow a CEW to send a 'Soft Pause Lift' indicator to CalHEERS in an EDR. When CalHEERS receives the 'Soft Pause Lift' indicator, CalHEERS lifts Soft Pause and applies adverse actions per the CalHEERS MAGI Medi-Cal discontinuance rules and the individual is moved to another aid code or discontinued from MAGI Medi-Cal. CalHEERS sends a MAGI Determination of Eligibility Response (DER) to The Systems with the individual's new MAGI Medi-Cal eligibility/discontinuance and the Eligibility Evaluation Reason code 'Soft Pause Lift'. The CEW can then move the individual to the new MAGI Medi-Cal aid code or evaluate the individual for Non-MAGI Medi-Cal.

C-IV Medi-Cal EDBC Batch skip logic will skip a case with skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause. C-IV generates through batch a Non-MAGI Screening Packet for any individual with Eligibility Evaluation Reason of 'Soft Paused' on the DER received during the Batch MAGI Renewal process. This allows the C-IV CEW to manually request the 'Soft Pause Lift' to determine the individual's correct benefits when the Non-MAGI Screening Packet is returned. CalSAWS does not have the Medi-Cal Batch EDBC Skip logic nor the batch to generate the Non-MAGI Screening Packet. CalSAWS CA-203981 added the Non-MAGI Screening Packet to the template repository in Release 19.11.

The Systems allow CEWs to run Medi-Cal EDBC against a MAGI Determination that contains an individual in Soft Pause and establish a new annual renewal period. When an individual is in Soft Pause, the MAGI Determination provides the updated income and household size information with incorrect Federal Poverty Level (FPL) limit. As a result, during MAGI Renewals, The Systems generates a MAGI Renewal Notice of Action (NOA) with the incorrect FPL amounts. This can be misleading to the individual.

C-IV allows the CEW to select the 'RE' EDBC Run Reason during the annual renewal period and outside the annual renewal period to establish a new renewal period when processing a reported change. In C-IV 'RE' EDBC Run Reason is displayed when EDBC benefit month is on or after the Re-Evaluation begin month.

CalSAWS allows a worker to select a Run Reason from the EDBC Run Reason dropdown only when running Medi-Cal EDBC for a single-month. In CalSAWS 'RE' EDBC Run Reason is displayed only if the benefit month is after the RE Due Date or if a 'RE' packet exists for the 'RE' Due month.

C-IV sends 'Renewal – manual renewal' (RM) EDR Run Reason to CalHEERS during the annual renewal period starting with the EDR Benefit Month two months prior to the RE Due Date and beyond.

For example: A Medi-Cal program has RE Due Date 06/30/2020.

Beginning with EDR benefit month 05/2020 and beyond, C-IV sends 'RM' EDR Run Reason until a new annual renewal period is established.

CalSAWS does not send 'RM' EDR Run Reason.

CalSAWS automatically sets the EDBC Run Reason to 'RE' if the EDBC Run Reason is left blank when all the following are true:

- The EDBC benefit month is equal to the month following the RE Due Date or the EDBC benefit month is equal to the come-up month.
- The appropriate RE packet was generated for the RE Due Month for the program.
- The latest RE packet status is either 'Not Applicable' or 'Reviewed-Ready To Run EDBC'

C-IV does not have functionality to automatically set the EDBC Run Reason to 'RE', but C-IV does have a page validation on the Run EDBC and Negative Action Detail pages that require the worker to run EDBC with 'RE' Run Reason when all the following are true:

- The latest MAGI determination for the benefit month has a 'RE' or 'RM' Run Reason.
- The benefit month is no earlier than one month prior to 'RE' due month.
- 'RE' Run Reason was not selected while running EDBC.
- Not an Auto Test scenario.

The MAGI Emulator allows testing of changes to The Systems that rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment. The MAGI Emulator does not have functionality to return Soft Pause or Soft Pause Lift in the MAGI Determination. See the current functionality of MAGI Emulator in Supporting Documents.

**Request:**

Per ACDWL 17-35, Medi-Cal individuals must be evaluated for Non-MAGI Medi-Cal if the individual was found MAGI Medi-Cal eligible with Soft Pause during the renewal process before advancing the renewal due date.

1. Require the CEW to lift Soft Pause prior to running Medi-Cal EDBC with 'RE' EDBC Run Reason.
2. Add a new EDBC Run Reason, 'Soft Pause/Non-RE', that will allow a CEW to run Medi-Cal EDBC during the annual renewal period with an individual in Soft Pause that will not advance the renewal due date. This 'Soft Pause/Non-RE' EDBC Run Reason should only be used for exceptions when the CEW is unable to lift Soft Pause due to 10-day noticing or CalHEERS issues. For example: a 'Person Add' during renewal or to process a Negative Action for a non-Soft Pause individual while waiting for the Non-MAGI Screening Packet for the Soft Pause individual.
3. Update CalSAWS Batch EDBC Skip logic to skip a case with a new skip reason of 'Soft Paused' when an individual on the MAGI Determination returns as MAGI Eligible with an Eligibility Evaluation Reason of Soft Pause.
4. Update The Systems to generate a Non-MAGI Screening Packet when an individual is skipped through batch for Soft Pause and the MAGI Determination Run Reason code is 'Renewal - batch administrative renewal' (RE).
5. Update CalSAWS to create a Journal entry when the Non-MAGI Screening Packet is generated through batch.
6. Update CalSAWS to allow the CEW to select 'RE' EDBC Run Reason to establish a new renewal period during reported changes outside the annual renewal period.
7. Update CalSAWS to send 'RM' EDR Run Reason during the annual renewal period.
8. Update The Systems to automatically set the EDBC Run Reason to either 'RE' or 'Soft Pause/Non-RE' when appropriate during the annual renewal period.
9. Update the MAGI Emulator to have Soft Pause and Soft Pause Lift functionality to allow the testing of changes in The Systems which rely on specific results in a MAGI Determination without a direct connection to a CalHEERS-connected test environment.

**Recommendation:**

1. Update the Run EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason and hide 'RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.
2. Update the Negative Action Detail page to display 'Soft Pause/Non-RE' EDBC Run Reason and hide 'RE' EDBC Run Reason for the Medi-Cal program to prevent a CEW from advancing the renewal when an individual is Soft Paused.
3. Update Create Manual EDBC page to display 'Soft Pause/Non-RE' EDBC Run Reason.
4. Update the Medi-Cal EDBC Summary page to display a notification message when 'Soft Pause/Non-RE' Run Reason is auto-set during the Medi-Cal EDBC evaluation.

5. Add 'Soft Pause/Non-RE' EDBC Run Reason for the Medi-Cal program. Update The Systems to auto-set the EDBC Run Reason to either 'Soft Pause/Non-RE' or 'RE' when appropriate.
6. Update eHIT Disposition functionality for the new EDBC Run Reason 'Soft Pause/Non-RE'. CalSAWS only: Update eHIT logic to have 'RM' EDR Run Reason functionality.
7. CalSAWS only: Add a Batch EDBC Skip Reason 'Soft Paused' that will skip a case from Batch EDBC processing when the valid DER has at least one individual with Eligibility Evaluation Reason of Soft Pause.
8. CalSAWS only: Update the Batch MAGI Renewal Sweep to exclude cases from processing through Batch MAGI if the worker has already initiated the MAGI Renewal manually (RM) from the online page.
9. Create a new batch job for CalSAWS and update the existing batch job for C-IV to only generate the Non-MAGI Screening packet through batch for cases which are skipped during Batch EDBC with the reason of Soft Pause. CalSAWS only: Add a journal entry when the Non-MAGI Screening packet is generated through batch.
10. Update the MAGI Emulator to return MAGI Determinations with Soft Pause and Soft Pause Lift. The MAGI Emulator is used for testing purposes only to emulate the results returned from CalHEERS on a MAGI Determination.
11. Regression test the DHCS Renewals Master Request reports for the updated manual renewal EDR run reason functionality.

See CA-58123\_CIV-10791\_SoftPause during RE.docx for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

C-IV will implement this Change with SCR CIV-10791 in the 20.02 release.

N/A

**980**

Automated Test :	25	Batch/Interfaces :	50	Batch Operations :	0
CalHEERS :	350	CalHEERS Test :	265	Client Correspondence :	185
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	20	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-213283] Automated Regression Test - Execution and Maintenance - 20.05 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:		Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.07.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>540</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>02/04/2020 09:38 AM</b>
Status:	<b>New</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sharon Teramura</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-106264</b>

**Non-Committee Review:**

Jo Anne Osborn 2/18/2020

**Expedite Approval:**

**Current Design:**

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

**Request:**

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

**Recommendation:**

1. Execute the major release automated regression suite against the 20.05 major version build on a regular basis.
2. Execute the major release automated regression suite against the final build for the 20.05 major version, prior to the build being deployed to production.
3. Execute the minor release automated regression suite against the final build of each applicable 20.05 minor version, prior to the build being deployed to production.
4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact**

**Analysis:**

Accounted for in SOR

**Alternative**

**Procedure**

**Description:**

Execute all regression testing manually for major and minor version releases.

**Operational Impact:**

**Estimate:**

**540**

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



**[CA-201742] CF 296 - Changes in logic for Line 10 - Overdue Recertifications (CWD Caused) during the month.**

Team Responsible:	<b>Reports</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>204</b>
Reporter:	<b>Karine Margaryan</b>	Regulation Reference:	<b>All County Letter 16-39E2</b>	Created:	<b>03/28/2018 08:36 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lisa Chea</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:	<b>02/14/2020</b>	Other Agency Cross Reference:	<b>CIV-100845</b>

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

Currently, Line 10 of CF 296 captures zero counts for the number of overdue recertifications caused by the County.

**Request:**

Add logic to Line 10 to capture the number of overdue recertifications caused by the County.

**Recommendation:**

1. Update the logic of the CF 296 report to populate line 10 (Overdue recertifications (CWD caused) during the month).
2. Update the text description of Line 3 in the automated CF 296 to comply with ACL 16-39E2.
3. Update the CF 296 template to adhere to cosmetic standards. (Reference the attached detailed design for report layout)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the State/Fiscal Reports Committee. The C-IV System will implement this Change with SCR CIV-100845 in the 20.07 release.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 204**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	132	Security :	0	System Test Support :	52
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-210307] Deactivating Pre-ACA Aid Codes

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Antony Lerner</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>72</b>
Reporter:	<b>Maureen Votta</b>	Regulation Reference:	<b>MEDIL I 19-13</b>	Created:	<b>08/29/2019 10:50 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>01/29/2020</b>	Other Agency Cross Reference:	<b>CIV-104986</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The Systems Medi-Cal EDBC rules no longer grant the obsolete Pre-ACA aid codes in MEDIL 19-13 except for aid code 55 to Long Term Care (LTC) - Medically Indigent Adult (MIA) age 21- 65.

The following obsolete Pre-ACA aid codes are available in the Other Program Assistance (OPA) and Manual EDBC pages:

- 3N, 3V, 44, 47, 48, 55, 69, 72, 74, 7A, 7C, 7S, 7U, 7W, 8N, 8P, 8R, 8T, H1, H2, H3, H4 and H5

The following obsolete Pre-ACA aid codes are available in EDBC Override page:

- 55, 7S, 7U, 7W

Note: Pre-ACA aid codes 58 and 5F mentioned in MEDIL 19-13 are deactivated in The Systems.

#### Request:

1. Deactivate the obsolete Pre-ACA aid codes in The Systems so they are no longer granted in Medi-Cal EDBC rules and no longer available for OPA, Manual EDBC or EDBC Override.
2. Create a one-time list for county follow-up of individuals active in the deactivated Pre-ACA aid codes.

#### Recommendation:

Deactivate the obsolete Pre-ACA aid codes and create a one-time list for county follow-up of individuals active in the deactivated Pre-ACA aid codes.

1. Update The Systems Medi-Cal EDBC rules to no longer grant the obsolete Pre-ACA aid code 55 LTC - Medically Indigent Adult (MIA) (age 21 - 65) effective the EDBC benefit month that follows SCR implementation.
2. Deactivate the following obsolete Pre-ACA aid codes from OPA and Manual EDBC pages effective the EDBC benefit month that follows SCR implementation:
  - 3N, 3V, 44, 47, 48, 55, 69, 72, 74, 7A, 7C, 7S, 7U, 7W, 8N, 8P, 8R, 8T, H1, H2, H3, H4 and H5
3. Deactivate the following obsolete Pre-ACA aid codes from EDBC Override page effective the EDBC benefit month that follows SCR implementation:
  - 55, 7S, 7U, 7W
4. Create a one-time list for county follow-up of individuals active in the deactivated Pre-ACA aid codes. (See outreach 5.1)

#### Outreach

#### Description:

One-time list

#### Migration Impact

#### Description:

The joint design was approved by Medi-Cal/CMSP Committee and same changes will be implemented with CIV-104986 in Release 20.07

#### Migration Impact

#### Analysis:

#### Alternative

None

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**72**

Automated Test :

12

Batch/Interfaces :

0

Batch Operations :

0

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CalHEERS :	32	CalHEERS Test :	23	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0





**[CA-210948] Auto assign task to the MC Worker for the IEVS NHR combo (CF and MC) only case**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>127</b>
Reporter:	<b>Howard Suksanti</b>	Regulation Reference:		Created:	<b>10/07/2019 03:09 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>01/28/2020</b>	Other Agency Cross Reference:	<b>CIV-105277</b>

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** When IEVS NHR abstracts are loaded into the System for a combo case (CalWORKs (CW) / CalFresh (CF)) and Medi-Cal (MC), The System automatically sends out a SAWS 30 Form and dispositions/closes the NHR abstract.  
**Request:** There is no task for the worker to review the MC program in case any appropriate action is required.  
**Recommendation:** Add a new Task Sweep batch job to create a task for the current MC program assigned worker when an NHR Abstract for a (CW/CF) and MC combo case is loaded into The System.  
 Please refer to more details in the attached Design document.

**Outreach**

**Description:**  
**Migration Impact Description:** Joint design has been approved through the MC Committee. C-IV will implement this Change with CIV 105277 in the same release.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** NA.  
**Operational Impact Estimate:** 127

Automated Test :	0	Batch/Interfaces :	83	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	34
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-213304] Automated Regression Test - Execution and Maintenance - 20.07 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:		Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.09.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>540</b>
Reporter:	<b>William Baretzky</b>	Regulation Reference:		Created:	<b>02/04/2020 02:34 PM</b>
Status:	<b>New</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:		Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-106271</b>

**Non-Committee Review:**

Jo Anne Osborn 2/18/2020

**Expedite Approval:**

**Current Design:**

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

**Request:**

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

**Recommendation:**

1. Execute the major release automated regression suite against the 20.07 major version build on a regular basis.
2. Execute the major release automated regression suite against the final build for the 20.07 major version, prior to the build being deployed to production.
3. Execute the minor release automated regression suite against the final build of each applicable 20.07 minor version, prior to the build being deployed to production.
4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact**

**Analysis:**

Accounted for in SOR

**Alternative**

**Procedure**

**Description:**

Execute all regression testing manually for major and minor version releases.

**Operational Impact:**

**Estimate:**

**540**

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

End SCRs



# [CA-209006] Data Change: Update RE Due Date for SSI/SSP Households

- Resolved: 02/03/2020 09:56 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivas Sajja</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.01]</b>	Designer Contact:	<b>Mark Keehn</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>20.02.06</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>340</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:		Created:	<b>06/18/2019 03:11 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Janet Mitri</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>2019-11-19</b>	Other Agency Cross	<b>CIV-104373</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Committee:	<b>00:00:00.0</b>	Reference:	

## Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** SCR CA-203103 updated CF EDBC to allow for SSI/SSP households to qualify for CalFresh. These households as receiving Public Assistance and therefore not eligible for ESAP.  
**Request:** Counties were informed of an alternative process through CIT # 0032 - 19. Counties have requested that affected cases are updated through a data change.

**Recommendation:** Identify SSI/SSP household that would otherwise qualify for ESAP had they not been considered Public Assistance. For these cases, apply the following:  
 1) Update the RE Due Month based on approving EDBC and accurate staggered Due Month  
 2) Generate Journal entry for updated cases  
 3) Generate a list of cases that have a staggered redetermination due date that doesn't match expectations and cannot be accurately updated.

**Outreach Description:** Counties will be provided a list of cases with SSI/SSP Only CF programs with a staggered redetermination due date that doesn't match expectations and cannot be accurately updated.  
 CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2019 > CA-209006

**Migration Impact Description:** Joint design has been approved through the CalWORKs/CalFresh Committee. C-IV will implement this Change with SCR CIV-104373.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** User would need to manually adjust Redetermination Due Date by adding 12 months.

**Operational Impact:**

<b>Estimate:</b>	<b>340</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	221
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	89
Tech Arch :	0	Tech Ops :	0	Training :	0

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

**Content Revision Description-1:** 1. Recommendation Change:  
 Eligibility  
 1. Update condition in Section 2.1.2. 1.e to remove 'SSI Only' as one of the valid Other Program Assistance (OPA) types.

2. Fixed header title from 'Actual Redetermination Due Date' to 'Expected Redetermination Due Date' in Section 2.1.2.2.b.ii.5.

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:



# [CA-211451] Automated Regression Test - Execution and Maintenance - 20.01 Release Cycle

- Resolved: 02/11/2020 02:51 PM

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretzky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.01]</b>	Designer Contact:	<b>William Baretzky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.03.XX</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>660</b>
Reporter:	<b>William Baretzky</b>	Regulation Reference:		Created:	<b>10/28/2019 01:42 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sharon Teramura</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-105458</b>

**Non-Committee Review:** Approved by Karen Rapponotti on 10/29/2019

**Expedite Approval:** Karen Rapponotti 10/29/2019

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

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

- Recommendation:**
1. Execute the major release automated regression suite against the 20.01 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 20.01 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 20.01 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

## Outreach

### Description:

### Migration Impact

### Description:

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

### Migration Impact

### Analysis:

Accounted for in SOR

### Alternative

### Procedure

Execute all regression testing manually for major and minor version releases.

### Description:

### Operational Impact:

### Estimate:

**660**

Automated Test :	660	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision  
Status-1:**

Pending CCB

**Content Revision  
Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:  
Before: 20.01  
After: 20.02
4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

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

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

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

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

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



# [CA-57298] ACL 14-12, CFL 13/14-35 Family Stabilization Program for CalWORKs

- Resolved: 02/02/2020 09:08 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Getnet Beyene</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Robert Untalan</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>2143</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:	<b>ACL 14-12 &amp; ACL 14-64</b>	Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lien Phan</b>	Training Impacted:	<b>[CFP/WBT, Online Help]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>Cal-OAR</b>
Committee:	<b>[Welfare to Work/WPR]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-789 and CIV-10075</b>

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 11/06/2019

**Current Design:** The system currently has no way to track Family Stabilization data.

**Request:** The Family Stabilization component data cannot be tracked and managed. Provide online pages for Family Stabilization data tracking and management.

**Recommendation:** A new page flow will be created which will allow a worker to enter information for the Family Stabilization component. This will include associated Family Stabilization case persons, services and activities that are being used for clearing barriers.

The barriers, service arrangement, activities, and customer activities will be updated to include elements for the Family Stabilization component.

The REP(Refugee Employment Program) and WTW (Welfare to Work) Status Detail pages will be updated for Good Cause status by adding supplementary status reasons for the Family Stabilization component.

## Outreach

### Description:

**Migration Impact Description:** Joint design has been approved through the WTW Committee. C-IV will implement this change with SCR CA-789 in the 20.03 release.

### Migration Impact Analysis:

**Alternative Procedure Description:** Continue to track Family Stabilization outside of the system.

### Operational Impact:

**Estimate:** **2143**

Automated Test :	156	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	194
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	464	Imaging :	0	IVR/CC :	0
Online :	622	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	512
Tech Arch :	0	Tech Ops :	0	Training :	0

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

**Content Revision Description-1:** Before: CA-57298 CIV-789 Family Stabilization  
After: CA-57298 CIV-789 Family Stabilization Content Revision 1 - Yellow Highlighting





# [CA-59071] DDCR 3155: CalACES - MPP 42-763.711- Do not open or reopen Cal-Learn for a person with a CHSPE degree

- Resolved: 02/02/2020 09:11 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Giovanni Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Josias Caveto</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>552</b>
Reporter:	<b>Lien Phan</b>	Regulation Reference:	<b>MPP 42-763.711</b>	Created:	<b>01/19/2018 11:41 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lien Phan</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/CalFresh]</b>	Approved by Committee:	<b>2019-11-19 00:00:00</b>	Other Agency Cross Reference:	<b>CIV-105702</b>

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

LRS opens a Cal-Learn program for a person with a CHSPE degree whereas C-IV does not.

### Request:

1. LRS opens a Cal-Learn program for a person with a CHSPE degree whereas C-IV does not.
2. LRS to add a High School Equivalency Test (HSET) as a new degree type for Cal\_Learn

### Recommendation:

- Add an HiSET (High School Equivalency Test) program as a Degree Type
- The mandatory Cal-Learn requirement check must not make Cal-Learn a mandatory program for a CW pregnant teen or a teen parent with a CHSPE or HiSET degree when the user runs the CalWORKs EDBC. CHSPE and HiSET will have the same Cal-Learn exemption as the GED or HS Diploma
- Update EDBC to include CHSPE and HiSET for CW (Non Cal-Learn) Cash Aid and Pregnancy Special Need with No Other Eligible Child (SCR 12551)
- Modify Cal-Learn Discontinuance Sweep batch (PB00E903) to include CHSPE and HiSET into the batch trigger conditions.
- Modify GR Employability Status Change Sweep batch (PB19E481) to remove the school degree trigger conditions.
- Update Service Arrangement Detail page to check for an HiSET, CHSPE, GED, or HS Diploma when Cal-Learn Graduation bonus is entered.
- Update Cal-Learn Progress Detail page to check for an HiSET, CHSPE, GED, or HS Diploma when Cal-Learn Graduation bonus is entered.
- Update the Cal-Learn Program Administration Reports to include CL participants with a CHSPE or HiSET degree.

For detailed design, see 'CA-59071 DDCR 3155 Do Not Open or Reopen Cal-Learn For a Person With a CHSPE Degree.docx' attached.

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

The user can manually insert CHSPE

### Operational Impact:

### Estimate:

**552**

Automated Test :	0	Batch/Interfaces :	55	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	89

Fiscal :	34	Imaging :	0	IVR/CC :	0
Online :	204	Performance :	0	Release Communication	0
Reports :	89	Security :	0	Support :	
Tech Arch :	0	Tech Ops :	0	System Test Support :	61
				Training :	0

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

**Content Revision Description-1:** Before: Mock-up has the incorrect verbiage of 'HSET'  
After: Mock-up has the correct verbiage of 'HiSET'

Estimates

Before

Online:

ETC 1 84

ETC 2 80

ETC 3 40

Reports:

ETC1 80

ETC2 9

System Test: 61

Un-allocated Hours: 20

Correspondence: 0

After

Online:

ETC 1- 23

ETC 2- 21

ETC 3- 21

Reports:

ETC1- 24

ETC2 -20

System Test: 125

Un-allocated Hours: 45

Correspondence: 23

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**



# [CA-203824] Add Functionality to Manage Conditionally Eligible Status in MAGI Determinations

- Resolved: 02/02/2020 09:13 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Krishna Akula</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Rajan Vadapalli</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>291</b>
Reporter:	<b>Victor Nunez</b>	Regulation Reference:		Created:	<b>08/01/2018 01:27 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Design</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>2019-11-06 00:00:00</b>	Other Agency Cross Reference:	<b>CIV-11725, CIV-105337</b>

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

When information is missing for individuals, CH can temporary give eligibility status of Conditionally Eligible. Depending on the reasons, this status can be valid for up to 3 months. After that, the status is no longer valid. Eligibility Worker is expected to collect more information for the case and move it to either Eligible (without condition) or Ineligible/Discontinued, or restricted eligibility. .

### Request:

If a person is not moved from Conditionally Eligible status in due time, it is considered a County Error.

The system does not provide any means of tracking or managing the cases where Conditional Eligibility is received. Worker has to manually create tasks or visit every case to locate such individuals

### Recommendation:

1) Update The Systems to display "Conditionally Eligible" as a "Household Eligibility" status when at least one person is MAGI Conditionally Eligible in the MAGI Determination on the MAGI Determination List page.

2) Create an Automated task for CEW to manage cases where Conditionally Eligibility is received.

### Outreach

#### Description:

CA-211516 Create a Job Aid for SCR CA-203824 - Functionality to Manage Conditionally Eligible.

#### Migration Impact

#### Description:

Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this change with SCR CIV-11725 in 20.03 release.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

Worker would have to control manually.

#### Operational Impact:

#### Estimate:

**291**

Automated Test :	16	Batch/Interfaces :	140	Batch Operations :	0
CalHEERS :	45	CalHEERS Test :	65	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

### Content Revision

#### Status-1:

Pending CCB

#### Content Revision

#### Description-1:

1. Recommendation Change:

Before:

Recommendation 2.1.3

1. Update the MAGI Determination List page to display the Household Eligibility status based on the MAGI eligibility status(es) returned in the DER.

After:

Recommendation 2.1.3

1. Update the MAGI Determination List page and MAGI Determination Summary page to display the Household Eligibility status based on the MAGI eligibility status(es) returned in the DER

Before:

Recommendation 2.2.2

1. Add a Task Sweep job to create an automated task for the Medi-Cal program when the following is true:
  - a. The latest DER for the come-up month has at least one person with MAGI Conditionally Eligible status.

After:

Recommendation 2.2.2

1. Add a Task Sweep job to create an automated task for the Medi-Cal program with Active or Pending status when the following is true:
  - a. The latest benefit month DER has at least one person with MAGI Conditionally Eligible status.

2. ETC Change:

Before:

Batch/Interfaces : 140

CalHEERS : 45

Automated Test: 16

CalHEERS Test: 65

After:

Batch/Interfaces : 165

CalHEERS : 45

Automated Test: 8

CalHEERS Test: 97

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision**

**Status-4:**



# [CA-205652] Change Recovery Account Cause Code editing logic

- Resolved: 02/02/2020 09:17 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Alex Neilson</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>264</b>
Reporter:	<b>Christine Cheung</b>	Regulation Reference:		Created:	<b>11/16/2018 04:14 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Gloria Williams</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Collections]</b>	Approved by Committee:	<b>2019-10-22 00:00:00</b>	Other Agency Cross Reference:	<b>CIV-9947</b>

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 10/18/2019

### Current Design:

C-IV 9947  
The Cause of a Recovery Account indicates the reason that gave rise to the Recovery Account. Below Cash Cause Codes are tracked in report CA812 for CalWORKS, Diversion, and Immediate Needs

- Cash – Admin Caused
- Cash – Customer Caused
- Cash – Potential IPV
- Cash – Late QR7
- Cash – Late SAR7
- Cash – IPV (waiver)
- Cash – IPV (ADH)
- Cash – IPV (Court)

Below CalFresh Cause Codes are tracked in report FNS209

- CalFresh - Admin Caused (prior to 3/2000)
- CalFresh - Admin Caused (after 3/2000)
- CalFresh - IHE (Customer Caused)
- CalFresh - Potential IPV
- CalFresh - IPV (waiver)
- CalFresh - IPV (Court)
- CalFresh - IPV (ADH)

On Recovery Account Detail page, the following Cause Codes, which are not tracked in any reports, are shown together with report-tracked Cause Codes above in Edit Mode.

- Court Filing Fees
- Sheriff Service Fees
- Bounce Check Charges
- Collection Fee

Changing an active Recovery Account from a report-tracked Cause Code to a non-report-tracked Cause Code or vice-versa will negatively impact CA812 and FNS209.

**Request:** Do not allow active Recovery Accounts to be edited from a report-tracked Cause Code to a non-report-tracked Cause Code, or from a non-report-tracked Cause Code to a tracked Cause Code.

**Recommendation:** 1. When editing an active regular Recovery Account, if Cause of the Recovery Account is one of non-report-tracked Cause Codes below, only have below Cause Codes available for selections

- Court Filing Fees
- Sheriff Service Fees
- Bounce Check Charges
- Collection Fee

If Cause is not one of the above, hide above Cause Codes from selections.

2. When creating or editing a non-external regular Recovery Account with New or Pending Status, hide above non-report-tracked cause codes from selections.

3. When editing a non-external regular Recovery Account with New or Pending Status, default the Cause to 'Select' (no value) so users have to choose a new Cause Code when updating the account.  
 Note: If users cancel editing the account, do not make any change to the current Cause of the Recovery Account.

4. Provide a list to the Counties of non-external regular Recovery Accounts with Cause Code 'Court Filing Fees', 'Sheriff Service Fees', 'Bounce Check Charges' or 'Collection Fee', and the account status is not currently voided for reviews.

**Outreach Description:**

Provide a list to the Counties of non-external regular Recovery Accounts with Cause Code 'Court Filing Fees', 'Sheriff Service Fees', 'Bounce Check Charges' or 'Collection Fee', and the account status is not currently voided for reviews.

**Migration Impact Description:**

Joint design has been approved through the Collections Committee. C-IV will implement this change with SCR CIV-9947 in the 20.03 release.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:**

**264**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	178	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	61
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:**

Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:  
 Before: section 2.1.3 1. Under Note  
 If Cause of the account is a Cash IHE or CalFresh IHE Cause Code, only IHE and IPV Cause Codes are available for selections.  
 After:  
 If Cause of the account is either:  
 Cash - Customer Caused  
 Cash - Potential IPV  
 Cash - Late QR7 (LRS\CalSAWS only)  
 Cash - Late SAR7 (LRS\CalSAWS only)  
 GR - Customer Causes (LRS\CalSAWS only)  
 GR - Potential IPV (LRS\CalSAWS only)  
 Fraud Referral (LRS\CalSAWS only)  
 Only the following are available for selections:  
 Cash - Customer Caused  
 Cash - Potential IPV  
 Cash - Late QR7 (LRS\CalSAWS only)  
 Cash - Late SAR7 (LRS\CalSAWS only)  
 GR - Customer Causes (LRS\CalSAWS only)  
 GR - Potential IPV (LRS\CalSAWS only)  
 Fraud Referral (LRS\CalSAWS only)  
 Cash - IPV (ADH)  
 Cash - IPV (waiver)  
 Cash - IPV (Court)  
 GR - IPV(Court) (LRS\CalSAWS only)  
 GR - IPV(ADH) (LRS\CalSAWS only)  
 GR - IPV(Waiver) (LRS\CalSAWS only)

If Cause of the account is either:

CalFresh - Potential IPV  
CalFresh - IHE (C-IV only)  
CalFresh - IHE (Customer Caused) (LRS\CalSAWS only)  
Only the following are available for selections:  
CalFresh - Potential IPV  
CalFresh - IHE (C-IV only)  
CalFresh - IHE (Customer Caused) (LRS\CalSAWS only)  
CalFresh - IPV (Court)  
CalFresh - IPV (waiver)  
CalFresh - IPV (ADH)  
2. ETC Change: No Change  
3. Release Change: No Change  
4. Funding Source Change: No Change

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change:

Before:

After:



# [CA-209033] ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Thresholds Tiers (IRTs)

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Priya Sridharan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Josias Caveto</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.04.16</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>360</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>ACL 19-76</b>	Created:	<b>06/19/2019 03:24 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Business Process, Central Print]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2020-01-15 00:00:00</b>	Other Agency Cross Reference:	<b>CIV-104383</b>

**Non-Committee**

**Review:**

**Expedite Approval:** Approved 01/27/2020 - K. Rapponotti

**Current Design:**

To determine the CalWORKs Net Non-Exempt Income (NNI) is calculated by disregarding the first \$225 of disability-based unearned income (DBI) and/or any earned income and 50 percent of any remaining earned income. If the AU has earned income only, the first \$225 and 50 percent of the remaining earned income is used as part of the family's NNI when calculating the MAP.

The CalWORKs Income Reporting Threshold (IRT) for the AU is the lower of two tiers. The two tiers include:  
 Tier 1: 55 percent of the Federal Poverty Level (FPL) for a family of three, plus the amount of income last used to calculate the AU's monthly grant amount.

Tier 2: The amount of income likely to render the AU ineligible for CalWORKs benefits. The formula is MAP X 2 + \$225 +1.

NOAs and forms reference the value of \$225 for the Earned Income Disregard and Disability based Income Disregard.

NOAs and forms reference the value of \$2,250, \$2000, \$3000 or \$3,500 for the Maximum Asset limit value.

**Request:**

1. Based on the new policy, increase the disregard from \$225 to \$500 effective June 1, 2020.
2. The CW Tier 2 will change to use 130 percent of the FPL instead of MAP X 2 + \$225 (Disregard prior to June 1, 2020)+1.
3. Keep the CW case active with Zero grant amount when the AU's total earned, and unearned income are under the CW Tier 2 IRT (130% of the SPL).
4. Update impacted Forms and NOAs to reflect the new values.

**Recommendation:**

1. Update the CW Disability Based Earned Income Disregard (CT 335 – AI) and CW Disability Based Unearned Income Disregard (CT 335 – 53) from \$225 to \$500, effective June 1, 2020.
2. Update the forms to replace Disability-Based Unearned Income(DBI) or Earned Income Disregard(EID) references from \$225 to \$500.
3. Update the NOAs to replace the text \$225 with a variable to populate the updated value of \$500 from EDBC.
4. Replace Tier 2 with Tier 3 calculation rules effective June 1, 2020.
5. Update the impacted Forms and NOAs to reflect the new values as per the ACLs.
6. Keep the CW Case Open When the benefit grant Amount is \$0 under the new tier two of the IRT (130% FPL)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the CW/CF Committee. CIV will implement this change with SCR CIV-104383 in 20.04 release.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

EDBC Override

**Description:**

**Operational Impact:**

**Estimate:**

**360**



Automated Test :	26	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	245
DBA :	0	Design :	0	Eligibility :	54
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	35
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:**

Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:

Before

1. No references of CW tiers (overview Section 1)
2. Did not include TCF in assumption # 7 (Section 1.4)
3. No reference to Unearned income disregard ( Section 2.1.2)
4. Incorrectly referenced the CW tier (Section 2.7.2)
5. Not correct name for the grant (2.8)
6. Not clear verbiage (2.8.2)
7. No correct address for the impacted forms (Section 3)
8. Code Category Reference is incorrect(Section 2.4)

After

- 1- Added CW tiers references (Overview Section 1)
- 2 -Added TCF reference in assumption 7 ( Section 1.4)
- 3- Added Assumption # 15 (Section 1.4)
4. Reference to both earned and Unearned income disregards (Section 2.1.2)
5. Added a correct reference of the CW tier being updated (Section 2.7.2)
6. Added Correct name of the for the grant (Section 2.8)
7. Updated the verbiage for more clarity (Section 2.8.2)
8. Updated correct location of the form (Section 3)
9. Code Category Reference is updated (Section 2.4)

Note: For more details of the changes see highlighted in the attachment CA -209033 CIV- 104383 CalWORKs Change in EID and IRT Content Revision 1

2. Estimate Change: N/A

Before:

System test : 35  
unallocated hours : 0

After:

System test : 99  
unallocated hours : 40

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:



# [CA-209381] Add Medi-Cal Negative Action Reason 'Worker Initiated-Skip CalHEERS'

- Resolved: 02/02/2020 09:27 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Kevin Ha</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Antony Lerner</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>212</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>07/10/2019 12:44 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>2019-11-01</b>	Other Agency Cross	<b>CIV-5165</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Committee:	<b>00:00:00.0</b>	Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### 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 negative action MAGI determination.

### Request:

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

### Recommendation:

1. Update the Negative Action Detail page as follows:
  - a. Add a program-level only negative action reason, "Worker Initiated-Skip CalHEERS" to 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.

### 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.

Please refer to the design documentation for details on the recommendations listed above.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSP Committee. CalSAWS will implement this change with CIV-5165 in the 20.03 release.

**Migration Impact**

**Analysis:**

**Alternative**

Manual Override

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**212**

Automated Test :	10	Batch/Interfaces :	24	Batch Operations :	0
CalHEERS :	119	CalHEERS Test :	52	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	7	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1.

A. Recommendation Change: Remove recommendation to exclude 'Worker Initiated-Skip CalHEERS' Negative Action Reason from EDBC override.

Before:

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

After:

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 MAGI Negative action: No

B. Recommendation Change: Add MC Negative Action Skip MAGI Security Group to System Administrator Role

Before: 2.1.4 Security Updates

2. Security Groups

Security Group: MC Negative Action Skip MAGI  
Group to Role Mapping: 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.

After: 2.1.4 Security Updates  
2. Security Groups

Security Group: MC Negative Action Skip MAGI  
Group to Role Mapping: System Administrator

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:



# [CA-204569] ACL 19-40 CalWORKs Outcome and Accountability Review (Cal-OAR) Phase II

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Chris Carandang</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Jennifer Muna</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1603</b>
Reporter:	<b>Binh Tran</b>	Regulation Reference:	<b>ACIN I-49-18, ACL 19-40</b>	Created:	<b>09/07/2018 09:07 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>Cal-OAR</b>
Committee:	<b>[Welfare to Work/ WPR]</b>	Approved by Committee:	<b>2020-01-28 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-102191</b>

## Non-Committee

<b>Review:</b>	
<b>Expedite Approval:</b>	Received expedited build approval from JoAnne Osborn on 01/29/2020
<b>Current Design:</b>	Per ACL 19-40, SAWS is responsible for ensuring that the data files sent to CDSS are completed and submitted by the submission due date. In Phase I, CA-208030   CIV-103934, data elements for the monthly data files are manually transmitted to CDSS.
<b>Request:</b>	Add functionality to automatically generate and send the monthly, quarterly, and semi-annual Cal-OAR data files to CDSS.
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Create new interface job to generate and transmit the Cal-OAR19 data file to CDSS.</li> <li>2. Create new interface job to generate and transmit the Cal-OAR19A data file to CDSS.</li> <li>3. Create new interface job to generate and transmit the Cal-OAR19B data file to CDSS.</li> <li>4. Create new interface job to generate and transmit the Cal-OAR19C data file to CDSS.</li> <li>5. Create new interface job to generate and transmit the Cal-OAR19D data file to CDSS.</li> <li>6. Create new interface job to generate and transmit the Cal-OAR19E data file to CDSS.</li> </ol>

## Outreach

<b>Description:</b>	
<b>Migration Impact Description:</b>	Joint design has been approved through the WTW/WPR Committee. Changes will be made in both LRS and C-IV. Corresponding changes are implemented with CIV-102191 for the 20.05 release

## Migration Impact

<b>Analysis:</b>	
<b>Alternative Procedure Description:</b>	N/A

## Operational Impact:

<b>Estimate:</b>	<b>1603</b>
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Automated Test :	0	Batch/Interfaces :	808	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	200	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Security :	0	System Test Support :	323
Tech Arch :	0	Tech Ops :	0	Training :	0

<b>Content Revision Status-1:</b>	Pending CCB
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<b>Content Revision Description-1:</b>	1. Recommendation Change: Updates to Supporting Document criteria to match data element requirements from CDSS.
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Before:

-Supporting Document #1

1. The Criteria, Online Page Location, and Database table for HSP and HVP data elements did not exist.
2. Variable 19 criteria: Latest WTW Program Status = 'Active' within measurement period.
3. Variable 22 Criteria and Online Page Location: TBD
4. Variable 23: Note: For LRS, look for REP which is synonymous to WTW for refugees.
5. Variable 23 Online Page Location description navigates to CW/WTW Person History Page.
6. Variable 26 Criteria did not match requirements from CDSS.
7. Variable 26 Online Page Location description navigates to Case Summary Page.
8. Variable 29 Online Page Location: TBD
9. Variable 30 Criteria did not include mapped responses
10. Variable 30 Online Page Location: TBD
11. Variable 31 Online Page Location: TBD
12. Variable 32 Criteria did not account for activity Excused Hours.
13. Variable 33 Criteria: #2. Start Date is populated within the month of the activity.
14. Variable 34 Criteria: #2. Status = 'Completed' within the month of activity.
15. Variable 35 Criteria did not meet condition requirements by CDSS.
16. Variable 36 Criteria did not meet individual condition requirements.
17. Variable 39 Criteria did not meet requirements by CDSS.
18. Variable 40 Online Page Location description navigates to Customer Activities List Page.
19. Variable 41 Criteria #2 Status = 'Active'.
20. Variable 46, 47, 48 Criteria did not include note for LA county.
21. Variable 52 Criteria did not meet data element requirement.
22. Variable 54 Criteria did not meet data element requirement.

After:

-Supporting Document #1

1. Updated Variable 55 and 56 to include Criteria, Online Page Location, and Database table for HSP and HVP data elements.
2. Updated Variable 19 criteria: Latest WTW Program Status (except 'Deregistered') on last day of measurement period
3. Updated Variable 22 Criteria and Online Page Location to include requirements and Online page navigation
4. Updated Variable 23 Criteria by removing 'Note: for LRS, look for REP which is synonymous to WTW for refugees.' and adding 'Note: For LRS, include REP program'. Also included statement to 'include all CalWORKs Role reasons'.
5. Updated Variable 23 Online Page Location description navigation to view WTW Program status and Program Role reason.
6. Updated Variable 26 criteria to match requirements from CDSS.
7. Updated Variable 26 Online Page Location description navigation to CW Person History Page.
8. Updated Variable 29 Online Page Location description navigation to Housing Support List Page.
9. Updated Variable 30 Criteria to include mapped responses.
10. Updated Variable 30 Online Page Location description navigation to Housing Support List Page and Service Arrangement List Page.
11. Updated Variable 31 Online Page Location description navigation to Family Stabilization List Page.
12. Updated Variable 32 Criteria to include note for activity Excused Hours.
13. Updated Variable 33 Criteria: #2. Start Date is populated within the month measurement month.
14. Updated Variable 34 Criteria: #2. Status = 'Completed' within the measurement month.
15. Updated Variable 35 Criteria to meet condition requirements by CDSS and mapped out responses.
16. Updated Variable 36 Criteria to meet individual condition requirements and mapped out responses.
17. Updated Variable 39 Criteria to meet requirements by CDSS and mapped out responses.
18. Updated Variable 40 Online Page Location description navigation to Customer Activities Detail Page.
19. Updated Variable 41 Criteria #2 to look at Earliest Education Activity Status = 'Active' and Status Reason = 'Attending' or 'Referred'.
20. Updated Variable 46, 47, 48 Criteria to include note for LA county.
21. Updated Variable 52 Criteria to meet data element requirement by updating WTW program status and mapped out responses.
22. Updated Variable 54 Criteria to meet data element requirement.

(Updated cells within Supporting document are highlighted in orange and text in red)

2. ETC Change: N/A

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**End Content Revisions**