



California Statewide Automated Welfare System

## **Design Document**

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Add Family Stabilization List and Detail Pages

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# 1 OVERVIEW

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This SCR provides the changes necessary to collect data for Family Stabilization (FS). The FS data will be facilitated through the new Family Stabilization List and Detail page for both the LRS and C-IV systems. From the Family Stabilization Detail page, the worker can enter and view data for FS Eligibility, Service Arrangements, Activities, and Barriers with the associated dates for case members.

## 1.1 Current Design

The system currently has no online pages to track FS data.

## 1.2 Requests

The FS component data cannot be tracked and managed. Provide online pages for FS data tracking and management.

## 1.3 Overview of Recommendations

A new page flow will be created which will allow a worker to enter information for the FS component. This will include associated FS 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 FS 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 FS component.

## 1.4 Assumptions

1. The worker is responsible for determining eligibility for the FS component.
2. As needs are person level data elements, they will appear on all cases associated to the person.
3. A FS record with no end date is considered high date.
4. Select calendar icons will be added to date fields when editable in Create/Edit mode. When selected, will be defaulted to current date and not be limited to any particular date.
5. If the only WTW participant was an exempt volunteer, the case would be able to receive FS services.
6. A child who turns 18 year old on any day of a given month, will remain a child for the remainder of the month and will be an adult for the following month.
7. Fields not mentioned in the Description of Changes sections, will not be updated.

8. The following Need Categories and Need types for FS will be added as part of SCR CA 205441 C-IV 10075.
  - Family Stabilization
  - Family Stabilization - Transportation
9. Primary Applicant on WTW/REP is considered the Payee for the FS services.
10. The need for FS can be created for a child, but the Payments will be issued to the Primary Applicant on CalWORKs, WTW/REP.
11. The need for FS can be created for a child, but the Valuables will be issued to the Primary Applicant on CalWORKs, WTW/REP.
12. Activities are NOT required in order for the user to be eligible for Family Stabilization, however workers can link existing activities to the Service Arrangement if needed on the Service Arrangement Detail page.
13. Eligibility for FS services will be determined by an Active record for the household on the Family Stabilization List page.
14. The 'Issuance Method' drop-down will have EBT, Warrant and Direct Deposit as selectable choices.
15. The same functionality listed in Section 2.10 for Valuables also applies when issuing Vouchers for FS. Voucher functionality currently only exists in C-IV.
16. References to REP in this document only apply to the LRS system.
17. Family Stabilization services can be issued if the Payee or the Program status meets the following criteria:
  - a) WTW Program status/REP program status is any of the following statuses for at least one day in the Service Month:
    - Active
    - Non-Comp
    - Good Cause
    - Sanction
    - Exempt
  - b) CalWORKs program status is 'Active'.



## 2 RECOMMENDATIONS

### 2.1 Family Stabilization List

#### 2.1.1 Overview

Add the Family Stabilization List page to the C-IV and LRS Systems. The Family Stabilization List page displays a list of records that have been created through the Family Stabilization Detail page and provides access to that page.

#### 2.1.2 Family Stabilization List

### Family Stabilization List

Display by  
Name:  

All

From:

To:

View

Search Results Summary

Results 1-1 of 1

Add

Date Created	Name	Begin Date	End Date	Eligible	
<input type="checkbox"/> <a href="#">01/20/2020</a>	Doe, Jane 5F Doe, John 50M	02/01/2020	03/01/2020	Yes	<div>Edit</div>

Remove

Add

Figure 2.1.1 –Family Stabilization List

#### 2.1.3 Description of Changes

1. Display by Name – This drop-down will contain an 'All' option, initially selected and case member names for all case persons that are not marked as hidden or duplicate. Name format will be as follows: [Last], [First] [Age][Gender].
2. From – FS records with a Date Created equal to or after this date will be returned in the search results. Also, FS Detail records with an Eligible Type of 'Yes' and Eligibility Outcome of 'Approved' with an End Date equal to or after this date will be returned in the search results.
3. To – FS records with a Date Created equal to or before this date will be returned in the search results. Also, FS Detail records with an Eligible

Type of 'Yes' and Eligibility Outcome of 'Approved' with a Begin Date equal to or before this date are returned in the search results.

4. View button – Executes a search for FS records matching the specified filter criteria. If no filters are specified, it will pull back all FS records. If a filter is blank, the filter will be ignored when returning the results.
5. Search Results Summary Section – This will be displayed when there is at least one record found. The results will be paginated with 25 results per page.
6. Add button – This button will lead the user to the Family Stabilization Detail page in Create mode. This button will only be viewable by users with the security right of 'FamilyStabilizationDetailEdit'.
7. Check box – This check box will be used to mark records to be removed. The check box will only be visible when the user has the 'FamilyStabilizationListRemove' security right and there is no FS activity, need or agreement during the FS record. This is defined as follows:
  - a. A FS activity is an activity with a Program Type of 'Family Stabilization' or a Family Stabilization value of 'Yes'. Also, the activity occurs during an FS record when the FS activity schedule Start Date is before or equal to the FS record End Date and the FS activity schedule End Date is equal to or after the FS record Begin Date.
  - b. A FS need is a need with the Category Type of 'Family Stabilization' or 'Family Stabilization–Transportation'. A FS need occurring during a FS record is defined as follows:
    - i. For a FS need that has a status of 'Indicated', this occurs during an FS record when the FS need Begin Date is equal to or after the FS record Begin Date and the FS need Begin Date is before or equal to the FS record End Date.
    - ii. For a FS need that has a status of 'Met', this occurs during an FS record when the FS need Begin Date is before or equal to the FS record End Date and the FS need End Date is after or equal to or after FS record Begin Date.
  - c. A FS agreement is an activity agreement with a Program Type of 'FS' and occurs during an FS record when the FS agreement create date is equal to or after the FS record Begin Date and the FS agreement create date is before or equal to the FS record End Date.
8. Date Created – The date that the FS record was initially saved. This will be in 'mm/dd/yyyy' format. The Date Created will be hyperlinked if the user has the 'FamilyStabilizationDetailView' security right. This hyperlink will lead to the Family Stabilization Detail page for the record

in View mode. This will be the primary default sorting, order by date descending.

9. Name – The name(s) of the participant(s) of the FS record. This will be displayed in alphabetical order for the record by Last Name and then First Name in ascending order. Name format should be as follows: [Last], [First] [Age][Gender]. This will be sortable in alphabetical order.

Note: The column value is considered one value, so the first name displayed will be used to sort the records, then the subsequent names.

10. Begin Date – The Begin Date for the FS record. This will be sortable in chronological order and will be in 'mm/dd/yyyy' format.
11. End Date – The End Date for the FS record. This will be sortable in chronological order and will be in 'mm/dd/yyyy' format. The default search results will display FS records that are 'Approved' and have an End Date set to high date.
12. Eligible – Displays whether the participant qualifies for FS services or not. This will be sortable alphabetically.
13. Edit button – This button will lead to the Family Stabilization Detail page in Edit mode for the record. The security right of 'FamilyStabilizationDetailEdit' is required to view this button.
14. Remove button – This button will remove all the records that have marked check boxes from the system. This button will only display if there are existing FS records with check boxes. The security right of 'FamilyStabilizationListRemove' is required to view this button.

#### 2.1.4 Page Location

- **Global**– Empl. Services
- **Local**– Case summary
- **Task**– Family Stabilization – The Family Stabilization link will navigate the user to the Family Stabilization List page. In the C-IV system this link will be below the WTW task navigation item. In the LRS system this link will be below the REP task navigation item. This link is only viewable if the user has the security right of 'FamilyStabilizationListView' and is in the context of a case.

## 2.1.5 Security Updates

### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
FamilyStabilizationListView	Family Stabilization List Page	Family Stabilization List View
FamilyStabilizationListRemove	Remove ability on the Family Stabilization List Page	Family Stabilization List Remove

### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
Family Stabilization List View	Gives the user the ability to view the Family Stabilization List Page	Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor
Family Stabilization List Remove	Gives the user the ability to remove a Family Stabilization record from The Family Stabilization List Page.	Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor

## 2.1.6 Page Mapping

Add page mapping for Family Stabilization List page.

### 2.1.7 Page Validation

Add a page validation to display when the View button is clicked with the To field populated by a date prior to or same as the date in the Display From field.

- To – To date must be after From date.

## 2.2 Family Stabilization Detail

### 2.2.1 Overview

Add the Family Stabilization Detail page to the C-IV and LRS Systems. The Family Stabilization Detail page captures, displays, and manages the fields for Family Stabilization.

### 2.2.2 Family Stabilization Detail

## Family Stabilization Detail

\*- Indicates required fields

Save and Return
Cancel

**Date Created:**

**Eligible:** \*

- Select -

**Date Referred to FS:**

**Eligibility Outcome:** \*

- Select -

**FSP 3 Mailing Date:**

**Person(s) \***

**Name**

▼

Add

**▸ Barriers**

**▸ Needs**

**▸ Activities**

**▸ Agreements**

Save and Return
Cancel

**Figure 2.2.1 – Family Stabilization Detail page Create mode**

# Family Stabilization Detail

\*- Indicates required fields

Save and Return

Cancel

Date Created:

Eligible: \*

Eligibility Outcome: \*

Denied/Ineligible Reason: \*

No

Ineligible

Adult exceeded the 48-Month CW Time Limit

Date Referred to FS:

FSP 3 Mailing Date:

Person(s) \*

Name

☐

Doe, John 50M

☐

Doe, Jane 5F

☐

Add

Remove

Barriers

Needs

Activities

Agreements

Save and Return

Cancel

Figure 2.2.2 – Family Stabilization Detail page Create mode

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## Family Stabilization Detail

\* - Indicates required fields

Save and Return

Cancel

Date Created:

02/01/2020


Eligible: \*

Yes ▾


Eligibility Outcome: \*

Approved ▾

Begin Date: \*

02/01/2020 

End Date:

03/01/2020 

Date Referred to FS:



FSP 3 Mailing Date:



### Person(s) \*

Name	Transitioned to WTW
<input type="checkbox"/> Doe, John 50M	Yes ▾
<input type="checkbox"/> Doe, Jane 5F	Yes ▾
<input type="checkbox"/> <input type="text"/>	<input type="text"/>

Add

Remove

### Barriers

Name	Begin Date	End Date	Referred	Type
<a href="#">Doe, John 50M</a>	02/12/2020		Yes	Behavioural Problems

Add

### Needs

Name	Begin Date	Status	Category	Type
<a href="#">Doe, John 50M</a>	02/01/2020	Indicated	Family Stabilization	Mental Health Services

Add

### Activities

Name	Start Date	End Date	Category	Type
<a href="#">Doe, John 50M</a>	02/01/2020	02/15/2020	Counseling	Drug/Alcohol

Add

### Agreements

Name	Date Created	Sign Date
<a href="#">Doe, John 50M</a>	02/01/2020	02/01/2020

Add

Save and Return

Cancel

**Figure 2.2.3 – Family Stabilization Detail Page Edit mode (C-IV)**



## Family Stabilization Detail

\*- Indicates required fields

Save and Return

Cancel

Date Created:

02/01/2020


Eligible: \*

Yes ▾


Eligibility Outcome: \*

Approved ▾

Begin Date: \*

02/01/2020 

End Date:

03/01/2020 



Date Referred to FS:



FSP 3 Mailing Date:



### Person(s) \*

Name	Transitioned to WTW
<input type="checkbox"/> Doe, John 50M	Yes ▾
<input type="checkbox"/> Doe, Jane 5F	Yes ▾
<input type="checkbox"/> 	

Add

Remove

### Barriers

Name	Begin Date	End Date	Referred	Type
<a href="#">Doe, John 50M</a>	02/12/2020		Yes	Behavioural Problems

Add

### Needs

Name	Begin Date	Status	Category	Type
<a href="#">Doe, John 50M</a>	02/01/2020	Indicated	Family Stabilization	Mental Health Services

Add

### Activities

Name	Start Date	End Date	Category	Type
<a href="#">Doe, John 50M</a>	02/01/2020	02/15/2020	Counseling	Drug/Alcohol

Add

### Agreements

Name	Date Created	Sign Date
<a href="#">Doe, John 50M</a>	02/01/2020	02/01/2020

 Add

Save and Return

Cancel

**Figure 2.2.4 – Family Stabilization Detail Page Edit mode (LRS)**

## Family Stabilization Detail

\*- Indicates required fields

Edit

Close

Date Created:

02/01/2020

Eligible: \*

Yes

Eligibility Outcome: \*

Approved

Begin Date: \*

02/01/2020

End Date:

Date Referred to FS:

FSP 3 Mailing Date:

Person(s) \*

Name

Doe, John 50M

Doe, Jane 5F

▼ Barriers

Name	Begin Date	End Date	Referred	Type
<a href="#">Doe, John 50M</a>	02/12/2020		Yes	Behavioural Problems

▼ Needs

Name	Begin Date	Status	Category	Type
<a href="#">Doe, John 50M</a>	02/01/2020	Indicated	Family Stabilization	Mental Health Services

▼ Activities

Name	Start Date	End Date	Category	Type
<a href="#">Doe, John 50M</a>	02/01/2020	03/01/2020	Counseling	Drug/Alcohol

▼ Agreements

Name	Date Created	Sign Date
<a href="#">Doe, John 50M</a>	02/01/2020	02/01/2020

Edit

Close

**Figure 2.2.5 – Family Stabilization Detail Page View mode**

### 2.2.3 Description of Changes

1. Edit button – Clicking the Edit button reloads the page in Edit mode. The security right of 'FamilyStabilizationDetailEdit' is required to view this button. This button only displays in View mode.
2. Close button – Clicking the Close button navigates to the Family Stabilization List page, where the previous search results will display. This button only displays in View mode.
3. Save and Return button – Clicking the Save and Return button saves any changes made to Family Stabilization record and navigates back to the Family Stabilization List page. This button only displays in Create and Edit modes.
4. Cancel button – Clicking the Cancel button discards any changes made to the Family Stabilization record and navigates to the Family Stabilization List page, where the previous search results will display. The Cancel button displays in Create and Edit modes.

5. Eligible – Displays whether the participant qualifies for FS services or not. The possible values of this field are:

- Yes
- No

This is a required field. This field is only editable in Create and Edit modes.

6. Eligibility Outcome – The status reason for eligibility. Values are dependent on the selection in the Eligible field. This is a required field. This field is only editable in Create and Edit modes.

The possible values for this field when the selected drop-down value for the Eligible field is 'No':

- Ineligible
- Denied

The possible values for this field when the selected drop-down value for the Eligible field is 'Yes':

- Approved
- Declined

7. Denied/Ineligible Reason – Displays when the Eligibility Outcome is set to Denied or Ineligible. This is a required field and only editable in Create and Edit modes. The possible values for this field are:
  - Adult exceeded the 48-Month CW Time Limit
  - Adult exhausted the WTW 24-Month Time Clock
  - Adult is receiving SSI

- Does not meet County's FS eligibility criteria
- Drug and fleeing felons
- Ineligible non-citizens
- Lack of Family Stabilization Funding
- Lack of Family Stabilization Services
- No one required to participate in WTW
- Non-needy caretaker relative

8. Begin Date – The beginning date for the FS Detail record. This field will only be available when the Eligibility Outcome is set to Approved. This will be in 'mm/dd/yyyy' format. When this field displays it is required. This field is only editable in Create and Edit modes.
9. End Date – The end date for the FS Detail record. This field will only be available when the Eligibility Outcome is set to Approved. This will be in 'mm/dd/yyyy' format. This field is only editable in Create and Edit modes.
10. Date Referred to FS – The date Family Stabilization was referred. This will be in 'mm/dd/yyyy' format. This field is only editable in Create and Edit modes.
11. FSP 3 Mailing Date – The date the FSP 3 form was mailed to the participant. This will be in 'mm/dd/yyyy' format. This field is only editable in Create and Edit modes.
12. Person(s) – This section displays the participants for the FS Detail record. Primary default sorting for these records will be alphabetical ascending.
  - Check box – This will be used to mark person records to be removed. The select all check box will not be available when there are no check boxes to be selected. Specific mode functionality is as follows:
    - a. Create Mode – check boxes will display for all persons.
    - b. Edit Mode – The check box will only be visible when there is no FS Activity, Need or Agreement during the FS Detail record for the person.
  - Name – Case person associated with the FS Detail record. The drop-down selection will display persons who are not marked as a hidden/duplicate person or is already added to the FS Detail record. This field is only editable in Create and Edit mode for rows that have not been added to the FS detail record through saving or pressing the Add button. Name format should be as follows: [Last], [First] [Age][Gender].

- Transitioned to WTW – Indicates if the person transitioned from Family Stabilization to Welfare to Work. This column dynamically displays when the End Date is populated. This field is only editable in Create and Edit modes. The default value of this field will be [Blank]. The possible values of this field are:
  - a) [Blank]
  - b) Yes
  - c) No
- Add button – Clicking the Add button will add the selected person to the current row and add an additional row containing the Name drop-down, Transitioned to WTW field (if the End Date is populated) and move the Add button to the additional row. When clicking the Add button with no person chosen in the Name drop-down and the Transitioned to WTW field in the row is blank, no action will be taken.
- Remove button – This button will not be displayed when there are no check boxes to be selected. When the Remove button is clicked it will remove all the people that have marked check boxes from the FS Detail record. When no person is selected and this button is clicked, no action will be taken. This button will only be displayed in Create and Edit modes.

13. Barriers – This section displays FS specific barriers for a case person that is associated to the FS record that has been saved to the database and that occur during the FS record. An FS barrier that occurs during an FS record is defined as the following:

- a. A FS barrier is a barrier with a Category of 'Family Stabilization' and occurs during an FS record when the FS barrier Begin Date is before or equal to the FS record End Date and the FS barrier End Date is equal to or after the FS record Begin Date.

The fields in this section are view only and not editable. Primary default order for these records will be the Begin Date descending

- Expandable section – This section will be expandable. When the page is loaded with a Barrier record, the section will be expanded.
- Name – The participant who has the barrier. The Name will be hyperlinked if the user has the security right of 'BarrierDetailView'. This hyperlink will lead to the Barrier Detail page in View mode. Records edited through this flow will be saved and returned to the Family Stabilization Detail page. Name format should be as follows: [Last], [First] [Age][Gender].
- Begin Date – The begin date of the barrier for the participant. This will be in 'mm/dd/yyyy' format.
- End date – The end date of the barrier for the participant. This will be in 'mm/dd/yyyy' format.

- Referred – This field displays if the participant was referred FS Services for the correlated barrier.
- Type – Reason for Family Stabilization Barrier.
- Add button – This button will navigate the user to the Barrier Detail page in Create mode. Records created through this flow will be saved and returned to the Family Stabilization Detail page. The security right of 'BarrierDetailEdit' is required to view this button. This button is only viewable in Edit mode.

14. Needs – This section will display needs for a case person that is associated with a FS record that has been saved to the database and with a Category of 'Family Stabilization' or 'Family Stabilization – Transportation' that are met or indicated and when the Begin Date of the need is between the FS Detail Begin Date and End Date. Primary order for these records will be the Begin Date descending.

- Expandable section – This section will be expandable. When the page is loaded with a Need record, the section will be expanded.
- Name – The participant who has the need. The Name will be hyperlinked if the user has the security right of 'NeedDetailView'. This hyperlink will lead to the Need Detail page in View mode. Records edited through this flow will be saved and returned to the Family Stabilization Detail page. Name Format should be as follows: [Last], [First] [Age][Gender].
- Begin Date – The begin date of the need for the participant. This will be in 'mm/dd/yyyy' format.
- Status – The current status of the need.
- Category – The category of the need.
- Type – The type of the need.
- Add button – This button will navigate the user to the Need Detail page in Create mode. Records created through this flow will be saved and the user will be returned to the Family Stabilization Detail page. The security right of 'NeedDetailEdit' is required to view this button. This button is only viewable in Edit mode.

15. Activities – This section will only display activities for a case person that is associated to the FS record that has been saved to the database with a selected program type of 'Family Stabilization', 'WTW' and 'REP' that occur during the FS record. Primary default sorting for these records will be the begin date descending.

- Expandable section – This section will be expandable. When the page is loaded with an activity record, the section will be expanded.
- Name – The participant who has the activity. The Name will be hyperlinked if the user has the security right of

'CustomerActivityDetailView'. This hyperlink will lead to the Customer Activity Detail page in View mode. Records edited through this flow will be saved and returned to the Family Stabilization Detail page. Name format should be as follows: [Last], [First] [Age][Gender].

- Start Date – The start date of the activity for the participant. This will be in 'mm/dd/yyyy' format.
- End Date – The end date of the activity for the participant. This will be in 'mm/dd/yyyy' format.
- Category – The selected category for the activity.
- Type – The selected type for the activity.
- Add button – This button will navigate the user to the Select Activity page. Records created through this flow will be saved and returned to the Family Stabilization Detail page. The security right of 'CustomerActivityDetailEdit' is required to view this button. This button is only viewable in Edit mode.

16. Agreements – This section will only display agreements for a case person that is associated to the FS record that has been saved to the database that have a Program value of 'FS' and were created between the Begin Date and End Date of the FS record. Primary default ordering for these records will be the Date Created descending.

- Expandable section – This section will be expandable. When the page is loaded with an agreement record, the section will be expanded.
- Name – The participant who has the agreement. The Name will be hyperlinked if the user has the security right of 'ActivityAgreementDetailView'. This hyperlink will lead to the Activity Agreement Detail page in View mode. Records edited through this flow will be saved and returned to the Family Stabilization Detail page. Name Format should be as follows: [Last], [First] [Age][Gender].
- Date Created – The initial date that the agreement was saved. This will be in 'mm/dd/yyyy' format.
- Sign Date – The date the agreement was signed. This will be in 'mm/dd/yyyy' format.
- Name drop-down – Person that will be associated to the added agreement when the Add button is clicked. The drop-down selection will display all case persons associated to the FS Detail and will only be visible in Edit mode. Name format should be as follows: [Last], [First] [Age][Gender]. The default value will be blank. (LRS Only)
- Add button – This button will navigate the user to the Activity Agreement Detail page in Create mode. Records created through this flow will be saved and returned to the Family Stabilization Detail page. The security right of

'ActivityAgreementDetailEdit' is required to view this button. This button is only viewable in Edit mode.

#### 2.2.4 Page Location

- **Global**– Empl. Services
- **Local**– Case Summary
- **Task**– Family Stabilization

#### 2.2.5 Security Updates

##### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
FamilyStabilizationDetailView	Family Stabilization Detail	Family Stabilization Detail View, Family Stabilization Detail Edit
FamilyStabilizationDetailEdit	Family Stabilization Detail	Family Stabilization Detail Edit

##### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
Family Stabilization Detail Edit	Gives the user access to view and edit Family Stabilization Detail page.	Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor



Security Group	Group Description	Group to Role Mapping
Family Stabilization Detail View	Gives the user view access to the Family Stabilization Detail List page.	Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor

### 2.2.6 Page Mapping

Add page mapping for Family Stabilization Detail page.

### 2.2.7 Page Validation

Add a page validation when the Save and Return button is clicked to display when no person is present in the Person(s) section.

- Name – A person is required.

Add a page validation to display when the Save and Return button is clicked with the End Date field populated by a date prior to or same as the date in the Begin Date field.

- Begin Date – Begin Date must be before End Date.

Add a page validation when the Save and Return button is clicked to display when the Eligibility Outcome field is set to 'Declined', 'Denied', or 'Ineligible'. Additionally, there is an FS associated Need, Activity or Agreement record during the FS Detail record.

- Eligibility Outcome – An existing associated Family Stabilization Need, Activity, or Agreement exists.

Add a page validation to display when the Save and Return button is clicked with the Begin Date field populated by a date prior to the effective policy date of January 1, 2014.

- Begin Date – Begin Date must be on or after 01/01/2014.

Add a page validation when the Save and Return button is clicked to display when the FS Detail record has an approval period overlapping an existing Approved FS detail record on the case.

- Begin Date – The Family Stabilization Detail record being saved overlaps with an existing Family Stabilization Detail record.

Add page validation where if the Eligibility Outcome is set to 'Ineligible' and has one of the following Denied/Ineligible Reasons:

- Adult exhausted the WTW 24-Month Time Clock
- Does not meet County's FS eligibility criteria
- Lack of Family Stabilization Funding
- Lack of Family Stabilization Services
- No one required to participate in WTW

Throw the following validation when the Save and Return button is clicked:

- Eligibility Outcome – This reason is unavailable for Ineligible Eligibility Outcome.

Add page validation where if the Eligibility Outcome is set to 'Denied' and has one of the following Denied/Ineligible Reasons:

- Drug and fleeing felons
- Ineligible non-citizens
- Adult exceeded the 48-Month CW Time Limit
- Adult is receiving SSI
- Non-needy caretaker relative

Throw the following validation **when the Save and Return button is clicked**:

- Eligibility Outcome – This reason is unavailable for Denied Eligibility Outcome.

Add a page validation to display when a FS Detail record had a change in the **Eligible, Eligibility Outcome, Begin Date, End Date or Name (in the Person(s) section)** and the Add button is clicked from the Barriers, Needs, Activities, or Agreements section.

- Save and Return – The Family Stabilization Detail **record** has been updated and must be saved before adding a **Barrier, Need, Activity, or Agreement**.

Add a page validation to display when an Approved FS Detail record is saved and all of the following criteria exists:

- a) There is no period of time between the Begin Date and End Date of the FS Detail record without a person who is Active for the CalWORKs program.
- b) There is no period of time between the Begin Date and End Date of the FS Detail record without a person who is Active, Non-Comp, Good Cause, Sanction, or Exempt for the WTW or REP program.

Note: If the CalWORKs program becomes Discontinued while the FS Detail is Approved, this validation will display when the page is saved.

- (CIV Only)
  - Begin Date – The Family Stabilization Detail Begin/End Date must exist during an active CalWORKs program and a WTW program in a status other than pending/deregistered.
- (LRS Only)
  - Begin Date – The Family Stabilization Detail Begin/End Date must exist during an active CalWORKs program and a WTW/REP program in a status other than pending/deregistered.

Add a page validation to display when there is no one selected in the name drop-down next to the Add button in the Agreements section and the 'Add' button next to the drop-down is clicked. (LRS Only)

- Name – Must select participant when adding an activity agreement.

Add a page validation when the Save and Return button is clicked to display when the Transitioned to WTW field is blank (while the End Date is populated) for any row that has a corresponding person in the Name field of the Person(s) section.

- Transitioned to WTW – This field is required when a Name in the Person(s) section is populated.

Add a page validation when the Save and Return button is clicked to display when the Name field in the Person(s) section is blank while the Transitioned to WTW field is populated in the same row.

- Name – This field is required when the Transitioned to WTW field is populated.

## 2.3 Welfare to Work Status Detail

### 2.3.1 Overview

The WTW Status Detail page allows the tracking of customer participation in the WTW Program.

## 2.3.2 Welfare to Work Status Detail

### WTW Status Detail

\*- Indicates required fields

Save and Return Cancel

Status: \* Status Reason: \*

Good Cause ▼ Family Stabilization ▼

Begin Date: \* Expected End Date: \* End Date:

02/01/2020 02/01/2020

Save and Return Cancel

Figure 2.3.1 – WTW Status Detail (LRS)

### WTW Status Detail

\*- Indicates required fields

Save and Return Cancel

Status: \* Status Reason: \*

Good Cause ▼ Family Stabilization ▼

Begin Date: \* End Date:

01/01/2020

Save and Return Cancel

Figure 2.3.2 – WTW Status Detail (C-IV)

## 2.3.3 Description of Changes

1. Status Reason – Cause for the current status of WTW. The following will be added to the current drop-down selection, when Good Cause is selected as a Status:

- Family Stabilization

This reason will be updated to send a 408 Other Good Cause exception when sent to the WDTIP interface.

## 2.3.4 Page Location

- **Global**– Empl. Services
- **Local**– Case Summary
- **Task**– WTW

### 2.3.5 Page Validations

Add a page validation that will prevent the user from adding a status of Pending or Deregistered when an existing approved FS Detail record exists during the new WTW Status period and there is no active CalWORKs program person during the FS Approved time period.

- a) A WTW status that occurs during an Active FS Detail record is defined as the following:
    - i. A FS Detail record is active when the Eligibility Type is 'Yes' and the Eligibility Outcome type is set to 'Approved'.
    - ii. A WTW status occurs during an active FS Detail record when the WTW status Begin Date is before or equal to the FS Detail record End Date and the WTW status End Date is equal to or after the FS Detail record Begin Date.
  - b) A WTW status that occurs during an Active CalWORKs program person is defined as the following:
    - i. The WTW status Begin Date is before or equal to the Active CalWORKs program person End Date and the WTW status End Date is after or equal to the Active CalWORKs program person Begin Date.
- Status – There is an existing Approved Family Stabilization record.

## 2.4 REP Status Detail (LRS Only)

### 2.4.1 Overview

The Refugee Employment Program detail page allows the tracking of customer participation.

## 2.4.2 REP Status Detail Page

### REP Status Detail

\*- Indicates required fields

Save and Return Cancel

Status: \* Status Reason: \*

Good Cause ▼ Family Stabilization ▼

Begin Date: \* Expected End Date: \* End Date:

02/01/2020 [Calendar Icon] [Empty] [Calendar Icon] [Empty] [Calendar Icon]

Designated Program:

[Empty] ▼

Save and Return Cancel

Figure 2.6.1 – REP Status Detail

### 2.4.3 Description of Change

1. Status Reason – Cause for the current status of REP. The following will be added to the current drop-down selection, when Good Cause is selected as a Status:

- Family Stabilization

This reason will be updated to send a 408 Other Good Cause exception when sent to the WDTIP interface.

### 2.4.4 Page Location

- **Global**– Empl. Services
- **Local**– Case Summary
- **Task**– REP

### 2.4.5 Page Validations

Add a page validation that will prevent the user from adding a status of Pending or Deregistered from being added when an approved FS Detail record exists during the new REP Status period and there is **no active CalWORKs** program person during the FS Approved time period.

- a. An FS Detail record is Active when the Eligible field is 'Yes' and the Eligibility Outcome field is set to 'Approved'.
- b. A REP status occurs during an active FS Detail record when the REP status Begin Date is before or equal to the FS Detail record

- End Date and the REP status End Date is equal to or after the FS Detail record Begin Date.
- c. A REP status that occurs during an Active CalWORKs program is defined as the following:
    - i. The REP status Begin Date is before or equal to the Active CalWORKs End Date and the REP status End Date is after or equal to the Active CalWORKs Begin Date.
- Status – There is an existing Approved Family Stabilization record.

## 2.5 Barriers List

### 2.5.1 Overview

Add the Barriers List page to the C-IV system and update the Barriers List page in the LRS system. The Barriers List page displays a list of records that have been created through the Barrier Detail page.

#### Barriers List

---

**Display by Name:**

▼

**From:**

📅

**To:**

📅

[View](#)

[Add](#)

Category	Name	Begin Date	End Date	Status
No Data Found				

[Add](#)

**Figure 2.4.1 – Barriers List**



## Barriers List

Search Results Summary					Results 1 - 1 of 1	
Display by Name:		From:	To:			
<input type="text"/>		<input type="text"/>	<input type="text"/>			
					<a href="#">View</a>	
					<a href="#">Add</a>	
<input type="checkbox"/>	Category	Name	Begin Date	End Date	Status	
<input type="checkbox"/>	<a href="#">Family Stabilization</a>	Doe, John	02/01/2020			<a href="#">Edit</a>
<a href="#">Remove</a>					<a href="#">Add</a>	

Figure 2.4.2 – Barriers List with Search Results Summary

### 2.5.2 Description of Change

1. Indicates required fields – Remove this icon and label. (LRS Only)
2. Display by Name – This drop-down will display all case members that are not marked as hidden or duplicate. Name format should be as follows: [Last], [First].
3. From – Only Barrier records with an End Date equal to or after this date are returned in the search results.
4. To – Only Barrier records with a Begin Date equal to or before this date are returned in the search results.
5. View button – This will filter the Barriers records based on the chosen criteria. If no filters are specified it will pull back all Barriers records.
6. Search Results Summary Section – This will be displayed when there is at least one record found. The results will be paginated with 25 results per page.
7. Add button – This button will lead the user to the Barrier Detail page in Create Mode. This button will only be viewable by users with the security right of 'BarrierDetailEdit'.

8. Check box – This check box will be used to mark records to be removed and will be visible with the 'BarrierListRemove' security right. The check box will not be available for records that are associated to an Activity Agreement.
9. Category – The Category will be in hyperlinked if the user has the 'BarrierDetailView' security right. This hyperlink will lead to the Barrier Detail page in View mode and will be sortable in alphabetical order.
10. Name – The name of the participant of the Barrier record. Name format should be as follows: [Last], [First]. This will be sortable in alphabetical order.
11. Begin Date – The beginning date for the Barrier record. This will be in 'mm/dd/yyyy' format. This will be the primary default sorting, order by date descending.
12. End Date – The end date for the Barrier record. This will be in 'mm/dd/yyyy' format. This will be sortable in chronological order.
13. Status – The status of the referral. This will display 'Referred' if the Barrier record Referred field is set to 'Yes', otherwise this field will be set to <blank value>. This will be sortable in alphabetical order.
14. Edit button – Clicking the Edit button navigates to the Barriers Detail page in Edit mode. This button is only available when the user has the 'BarrierDetailEdit' security right.
15. Remove button – This button will delete all the records that have marked check boxes, the button will only display if there are existing Barrier records. The security right of 'BarrierListRemove' is required to view this button.

### 2.5.3 Page Location

- **Global**– Empl. Services
- **Local**– Case Summary, Appraisal
- **Task**– Barriers - The Barriers link will navigate the user to the Barriers List page. In the C-IV system this link will be below the Medical Condition task. In the Appraisal local navigation, this link will be below the Goals task. This link is only viewable if the user has the security right of 'BarrierListView' and is in the context of a case.

## 2.5.4 Security Updates (C-IV Only)

### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
BarriersListView	Barriers List Page.	Barriers List View
BarriersListRemove	Remove ability on the Barriers List Page.	Barriers List Remove
BarrierDetailEdit	Barrier Detail Page Edit	Barrier Detail Edit
BarrierDetailView	Barrier Detail Page View	Barrier Detail Edit, Barrier Detail View

### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
Barriers List Remove	Gives the user the ability to remove a Barrier record.	Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor
Barriers List View	Gives the user view access on the Barriers List page.	Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor
Barrier Detail Edit	Gives the user the ability to edit and view Barrier Detail page.	Employment Services Contracted Staff,

Security Group	Group Description	Group to Role Mapping
		Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor
Barrier Detail View	Gives the user the ability to view the Barrier Detail page.	Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor

### 2.5.5 Page Mapping

Add page mapping for the Barriers List page in the C-IV and LRS systems.

### 2.5.6 Page Validations

Add a page validation to display when the View button is clicked with the To field populated by a date prior to or same as the date in the Display From field.

- To – To date must be after From date.

## 2.6 Barrier Detail

### 2.6.1 Overview

The Barrier Detail page allows for the entry and tracking of issues affecting a case person. This will be a new page in the C-IV system. The existing Barrier Detail page in the LRS system will be updated to support the FS component.

## 2.6.2 Barrier Detail

### Barrier Detail

\* - Indicates required fields

Save and Return

Cancel

Name: \*

- Select -

Category: \*

- Select -

Begin Date: \*

End Date:

Save and Return

Cancel

Figure 2.5.1– Barrier Detail Create Mode

### Barrier Detail

\* - Indicates required fields

Save and Return

Cancel

Name: \*

Doe, John 50M

Category: \*

Family Stabilization

Type: \*

Behavioral Problems

Begin Date: \*

02/01/2020

End Date:

02/15/2020

Referred:

Referral Agency:

Referral Date:

Accepted:

Save and Return

Cancel

Figure 2.5.2 – Barrier Detail(LRS) Create and Edit Mode

## Barrier Detail

\* - Indicates required fields

Save and Return

Cancel

Name: \*

Doe, John 50M

Category: \*

Family Stabilization

Type: \*

Behavioral Problems

Begin Date: \*

02/01/2020

End Date:

02/01/2020

Referred:

Referral Date:

Accepted:

Save and Return

Cancel

Figure 2.5.3– Barrier Detail(C-IV) Create and Edit Mode

## Barrier Detail

\* - Indicates required fields

Edit

Close

Name: \*

Doe, John 50M

Category: \*

Family Stabilization

Type: \*

Behavioral Problems

Begin Date: \*

02/01/2020

End Date:

Referred:

No

Referral Date:

02/01/2020

Accepted:

Yes

Edit

Close

Figure 2.5.4– Barrier Detail View Mode

### 2.6.3 Description of Change

1. Name – The participant who needs a Barrier removed. Selection values will contain case members that are not marked as hidden or duplicate. This is a required field. Name format will be as follows: [Last],

[First] [Age][Gender]. This field is only editable in Create and Edit mode.

2. Category – The category of the issue barrier affecting the participant. This is a required field. This field is only editable in Create and Edit mode.

For the C-IV system, this is a drop-down that will contain the following values:

- Family Stabilization

For the LRS system, the category of Family Stabilization will be added to the current drop-down selection.

3. Begin Date – The begin date of the Barrier for the participant. This is a required field and will be in 'mm/dd/yyyy' format. This field is only editable in Create and Edit mode.
4. End Date – The end date of the Barrier for the participant. This will be in 'mm/dd/yyyy' format. This field is only editable in Create and Edit mode.
5. Referred – Drop-down selection on whether or not the participant is referred for FS Services based on the Barrier selected. This field will only be visible when the Category is 'Family Stabilization'. This field is only editable in Create and Edit mode. The possible values of this field are:
  - <blank option>
  - Yes
  - No
6. Referral Date – The date on when the participant was referred FS Services for the correlated Barrier. This field will only be visible when the Category is 'Family Stabilization' and will be in 'mm/dd/yyyy' format. This field is only editable in Create and Edit mode.
7. Accepted – Display whether the participant accepts the FS referral or not. This field will only be visible when the Category is 'Family Stabilization'. This field is only editable in Create and Edit mode. The possible values of this field are:
  - <blank option>
  - Yes
  - No
8. Referral Agency – Outside Agencies for referral. This is a LRS change only. When the Category field is set to 'Family Stabilization', this field

will be county based and will not displayed if no values are available. **This field is only editable in Create and Edit mode.** The possible values of this field are:

- AV Kidz Connection
- San Fernando Mental Health Center
- East San Gabriel Valley Mental Health Center
- Downtown Mental Health Center
- Edelman Mental Health Center
- Augustus Hawkins Mental Health Center
- San Antonio Mental Health Center
- Long Beach Child and Adolescent Program

Note: This field will continue to be displayed with the existing values when Category field is set to 'Expungement'.

9. Type – Reason for the Family Stabilization Barrier Category. This field will be displayed when the Category field is set to 'Family Stabilization' and will be required when displayed. **This field is only editable in Create and Edit mode.** The possible selections are as follows:

- Behavioral Problems
- Caregiver for Child/Adult
- Child Care
- Child Custody Issues
- **Developmental Disability**
- Domestic Violence (Perpetrator)
- Domestic Violence (Victim)
- Education
- Employment
- Family Stabilization Counseling for Kids
- Health/Physical Issues
- History of Physical Assault
- History of Sexual Assault
- Homeless
- Housing
- Juvenile Justice System
- Language/Lack of Fluency in English
- Learning Disability
- **Legal Issues**
- Linkages Participation
- Mental Health
- Money Management
- No Reliable Transportation
- Other Children's Issues
- Parenting Issues
- Physical Disability
- Safety Issues
- School Expulsion/Suspension
- Substance Use Disorder



- Time Management
- Truancy

10. Save and Return – If the user has the security right of 'BarrierDetailEdit', clicking the Save and Return button saves any changes made to the Barriers record and returns the user to the Barriers List page. When a record with same Name, Category, and Type are saved in same time period, non continuous effective dating confirmation will be triggered and display Name, Begin Date, and End Date. The Save and Return button displays in Create or Edit modes.
11. Cancel button – Clicking the Cancel button discards any changes made to the Barriers record and navigates to the Barriers List page, where the previous search results will display. The Cancel button displays in Create or Edit modes.
12. Edit button – Clicking the Edit button navigates to the Barriers Detail page in Edit mode. This button is only available when the user has the 'BarrierDetailEdit' security right. This button only displays in View mode.
13. Close button – Clicking the Close button navigates to the Barriers List page, where the previous search results will display. This button only displays in View mode.
14. Update the Save and Return button and Cancel button to navigate the user back to the Family Stabilization Detail page if the page was initially navigated to from the Family Stabilization Detail page.

#### 2.6.4 Page Location

- **Global**– Empl. Services
- **Local**– Case Summary, Appraisal
- **Task**– Barriers - The Barriers link will navigate the user to the Barriers List page. In the C-IV system this link will be below the Medical Condition task. In the Appraisal local navigation, this link will be below the Goals task. This link is only viewable if the user has the security right of 'BarrierListView' and is in the context of a case.

#### 2.6.5 Security Updates (C-IV Only)

1. Security Rights

Security Right	Right Description	Right to Group Mapping
BarrierDetailEdit	Barrier Detail Page Edit	Barrier Detail Edit
BarrierDetailView	Barrier Detail Page View	Barrier Detail Edit, Barrier Detail View

## 2. Security Groups

Security Group	Group Description	Group to Role Mapping
Barrier Detail Edit	Gives the user the ability to edit and view Barrier Detail page.	Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor
Barrier Detail View	Gives the user the ability to view the Barrier Detail page.	Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor

### 2.6.6 Page Mapping

Add page mapping for the Barrier Detail page in the C-IV system.

Update page mapping for the Barrier Detail page in the LRS system.

### 2.6.7 Page Validations

Add a page validation to display when the Family Stabilization Category is selected, and the Begin Date is prior to the effective policy date of January 1, 2014.

- Begin Date – Begin Date must be on or after 01/01/2014.

Add a page validation that will display when the End Date is before the Begin Date.

- Begin Date - Begin Date must be **on or** before **the** End Date.

Add a page validation to display when the Barrier being created or updated will cause a Barrier with the same Name, Category and Type which is tied to an Activity Agreement to be removed due to the Effective Dating logic.

- Begin Date – The date range provided will cause the removal of a Barrier tied to an Activity Agreement.

## 2.7 Need Detail

### 2.7.1 Overview

The Need Detail page allows user to view and add needs for supportive services. When adding a need, users will specify a Need Category and a Need Type.

## 2.7.2 Need Detail

### Need Detail

\*- Indicates required fields

Save and Return

Cancel

Name: \*

Grundi Sturges

Category: \*

- Select -  
Family Stabilization  
Family Stabilization - Transportation

10/08/2019

Description:

Status: \*

- Select -

Type: \*

- Select -

End Date: \*

Status Reason: \*

- Select -

Save and Return

Cancel

Figure 2.7.1– Need Detail when adding from Family Stabilization Detail page

## 2.7.3 Description of Change

This section describes the updates to the Need Detail page when the categories of 'Family Stabilization' or 'Family Stabilization-Transportation' are selected.

1. If the user navigates to the Need Detail page from the Family Stabilization Detail page, only the persons having an Active record on the Family Stabilization Detail page will be displayed in the 'Name' drop-down.
2. If the user navigates to the Need Detail page from the Family Stabilization Detail page, only the categories of 'Family Stabilization' and 'Family Stabilization - Transportation' will be displayed in the 'Category' drop-down. If the user navigates to the Need Detail page from the Needs List page, all persons associated to the case will be displayed in the 'Name' drop-down and all categories will be listed in the 'Category' drop-down.
3. Update the Save and Return button and Cancel button to navigate the user back to the Family Stabilization Detail page if the page was initially navigated to from the Family Stabilization Detail page (Family Stabilization Detail > Need Detail).

Note: The need categories, need types and pay codes for Family Stabilization will be added as part of SCR CA 205441 C-IV 10075.

#### 2.7.4 Page Location

- **Global:** Empl. Services
- **Local:** Supportive Services
- **Task:** Needs

#### 2.7.5 Page Usage/Data Volume Impacts

Approximately 2000 records are estimated to be created monthly for Family Stabilization by all CalSAWS counties from this page. Please note that this is an approximation and this number may vary.

#### 2.7.6 Page Validations

Add page validation if the user navigates to the Need Detail page from the Needs List page, selects a Need person, selects the Category of 'Family Stabilization' or 'Family Stabilization -Transportation' and then selects a 'Begin Date', check if there exists an active record for the Need person for the Begin Date on the Family Stabilization Detail page. If no active record is found display the validation –

- Begin Date - No Active Family Stabilization record found for <Name> for <Begin Date>.

### 2.8 Referral Detail

#### 2.8.1 Overview

The Referral Detail page allows user to view and add Referrals for Supportive Services. When adding a Referral, users will specify a Need Category and a Need Type.

## Need Detail

\*- Indicates required fields

Save And Return

Cancel

Name: \*

Doe, John 51M

Category: \*

Family Stabilization

Type: \*

Mental Health Services

Begin Date: \*

10/09/2019

Description:

Status: \*

Indicated

Status Reason: \*

- Select -

Save & Add New: Referral

Go

Save And Return

Cancel

Figure 2.8.1– Adding a Referral through Need Detail (LRS)

## Need Detail

\*- Indicates required fields

Save and Return

Cancel

Name: \*

John Doe

Category: \*

Family Stabilization

Type: \*

Mental Health Services

Begin Date: \*

10/09/2019

Description:

Status: \*

Indicated

Status Reason: \*

Documented

Save & Add New: Referral

Go

Save and Return

Cancel

Figure 2.8.1– Adding a Referral through Need Detail (C-IV)

## 2.8.2 Referral Detail

### Referral Detail

\* - Indicates required fields

Save and Return Cancel

**Need**

Type	Name	Category	Begin Date
<input checked="" type="radio"/> <a href="#">Mental Health Services</a>	Greendance, Chas	Family Stabilization	10/04/2019

Provider: \*

Select

Comments:

Status History

Status	Status Reason	Status Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

Save and Return Cancel

Figure 2.8.1– Referral Detail

## 2.8.3 Description of Changes

1. Update the Save and Return button and Cancel button to navigate the user back to the Family Stabilization Detail page if the page was initially navigated to from the FS Detail page (Family Stabilization Detail > Need Detail > Referral Detail). The Referral Detail page can be accessed from the FS Detail page when adding a Need that is Indicated and choosing 'Referral' from the Save & Add New field and clicking the Go button.

## 2.8.4 Page Location

- **Global:** Empl. Services
- **Local:** Supportive Services
- **Task:** Referrals

### **2.8.5 Page Usage/Data Volume Impacts**

Approximately 2000 records are estimated to be created monthly for Family Stabilization by all CalSAWS counties from this page. Please note that this is an approximation and this number may vary.

## **2.9 Service Arrangement Detail**

### **2.9.1 Overview**

The Service Arrangement Detail page allows users to create a service arrangement for a requested supportive service need. This section will describe the changes to allow service arrangement to be created for FS needs.

### **2.9.2 Service Arrangement Detail**



## Service Arrangement Detail

[Save and Return](#)[Cancel](#)

### Need


Type	Name	Category	Begin Date
<input checked="" type="radio"/> <a href="#">Medical/Legal Services</a>	[REDACTED]	Family Stabilization	05/16/2019

### Activities

Type	Status	Begin Date	End Date
<div>Select</div>			

### Arrangement Details

#### Arrangement Period: \*

From: 05/09/2019 To: 05/15/2019 

#### Program Type: \*

REP 

#### Aid Code: \*

35 - CW-Two Parent (Fed) 

#### Payee: \*

REP Payee 

#### Employed: \*

No 

Payee Name:




Payee Address:

Additional Payee:

### Service Type Description

Total 

### Status History

Status	Status Reason	Status Date
		05/16/2019 

Comments:

[Save and Return](#)[Cancel](#)

Figure 2.9.1 – Create Service Arrangement (LRS)

### Service Arrangement Detail

\*- Indicates required fields

Images Save and Return Cancel

**Need \***

Type	Name	Category	Begin Date
<input checked="" type="radio"/> <a href="#">Security Deposits</a>		Family Stabilization	10/03/2019

**Activities**

Type	Status	Begin Date	End Date
<div>Select</div>			

**Arrangement Details**

**Arrangement Period: \***  
 From:  To:

**Program Type: \***  **Aid Code: \***

**Voucher: \***  **Voucher Type: \***

**Payee: \***

**Employed: \***

Service Type Description	Total *
<input type="text"/>	<input type="text"/>

**Status History \***

Status	Status Reason	Status Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Comments:**

Images Save and Return Cancel

Figure 2.9.2 – Create Service Arrangement with Voucher (C-IV)

### 2.9.3 Description of Changes

1. The 'Program Type' drop-down will contain '**CalWORKs**', '**Welfare to Work**' and '**REP**' (for LRS only).
2. Modify the page logic to not validate the Need person (Person for whom Need is being created) to be Active on CalWORKs, WTW/REP if the Need category is 'Family Stabilization' or 'Family Stabilization – Transportation'.
3. Allow a service arrangement for Family Stabilization and Family Stabilization – Transportation to be created if the Primary Applicant/Payee status on the CalWORKs, WTW/REP programs is any of the following: Active, Non-Compl, Sanction, Good-Cause or Exempt.
4. Update the Save and Return button and Cancel button to navigate the user back to the Family Stabilization Detail page if the page was initially navigated to from the Family Stabilization Detail page (Family Stabilization Detail > Need Detail > Service Arrangement Detail).

### 2.9.4 Page Location

- **Global:** Empl. Services
- **Local:** Supportive Services
- **Task:** Service Arrangements

### 2.9.5 Page Validation

1. Add a page validation when a Need category of 'Family Stabilization' or 'Family Stabilization – Transportation' is selected and the Service Arrangement period does not have any date within the Family Stabilization period (Begin and End dates on Family Stabilization Detail).
  - **Arrangement Period (From)** - No Active Family Stabilization record found for <Need person> on Family Stabilization Detail page. Cannot create a Service Arrangement.
2. If the Program Type selected is "CalWORKs", allow the service arrangement to be issued to the CalWORKs Payee. Add the following validation if option 'Same as Customer' is selected from the Payee drop-down:
  - **Payee** – The selected payee is not valid. Please select a valid payee.

This will prevent the service arrangement from being issued to a child if the Need person is a child.

3. If the Program Type selected is "WTW" or "REP", allow the service arrangement to be issued to the WTW or REP Primary Applicant. Add the following validation if option 'Same as Customer' is selected from the Payee drop-down:

- Payee – The selected payee is not valid. Please select a valid payee.

This will prevent the service arrangement from being issued to a child if the Need person is a child.

4. Add a new validation on the Service Arrangement Detail page after the Arrangement Period is selected, to prevent a Service Arrangement from being created for Family Stabilization or Family Stabilization - Transportation when the status of the Payee on CalWORKs, WTW, or REP is NOT Active, Non-Comp, Good Cause, Exempt or Sanction.
  - Payee - The <Program> program or the person within it is not Active, Non-Comp, Good Cause or Sanction for a single day in the Arrangement period. Please adjust the dates.

**Note:** <Program> will be CalWORKs, WTW, or REP program in this validation. If the program/person status is not any of the following - Active, Non-Comp, Good Cause, Exempt or Sanction, for even a single **date within the Service Arrangement period**, then the program/person becomes ineligible to receive Family Stabilization services.

## 2.10 Customer Activities List

### 2.10.1 Overview

The Customer Activities List page displays a list of records that have been created through the Customer Activity Detail page.

## 2.10.2 Customer Activity List

### Customer Activities List

Images

Display by  
Name:

John Doe ▾

From:

To:

View

Search Results Summary

Results 1 - 1 of 1

Add Activity

Type	Activity Number	Name	Start Date	Status	Status Date	
<input type="checkbox"/> <a href="#">Drug/Alcohol</a>	Drug/Alcohol	Doe, John	09/25/19	Active	09/25/19	<div>EditView Progress</div>

Remove

Add Activity

Images

Figure 2.10.1 – Customer Activities List

## 2.10.3 Description of Changes

1. Update the List page to include records that have a program type of 'Family Stabilization'.

## 2.10.4 Page Location

- **Global**– Empl. Services
- **Local**– Activities
- **Task**– Customer Activities

## 2.11 Customer Activity Detail

### 2.11.1 Overview

The Customer Activity Detail page captures, displays, and manages the information that comprises the Customer Activity.

## 2.11.2 Customer Activity Detail

### Customer Activity Detail

\*- Indicates required fields

Images

Save And Return

Cancel

Name: \*

John Doe

#### Activity Detail

Type:

Drug/Alcohol

Number:

Category:

Counseling

Provider:

Counseling Assessment

Address:

555 Test Dr.  
Test, CA 55555

Program Type: \*

Welfare to Work ▼

Family Stabilization:

No ▼

Review Date:




#### Schedule

Start Date: \*

02/01/2020

End Date: \*

02/15/2020 

Start Time:

8 ▼ : 00 ▼ AM ▼

End Time:

5 ▼ : 00 ▼ PM ▼

Scheduled Hours per Week for this Activity: \*

5

Activity Days:

☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

Show As Appointment: \*

Yes ▼

Additional Comments:

Status

Status Reason

Begin Date

End Date

Active

02/01/2020

Add

Images

Save And Return

Cancel

Figure 2.11.1 – Customer Activity Detail

## 2.11.3 Description of Changes

1. Program Type – Add the option of 'Family Stabilization' in the Program Type field when there is an existing Approved Family Stabilization Detail

record as of the current date and the person in the Name field is associated to that record.

2. Family Stabilization – Add the 'Family Stabilization' field. This field will be visible when there is an existing Approved Family Stabilization Detail record for the person on the case and 'Welfare to Work' or 'REP' is selected from the Program Type field. This will contain the following values:
  - Yes
  - No

Note: The default value will be set to 'No'.

3. Update the Save and Return button and Cancel button to navigate the user back to the Family Stabilization Detail page if the page was initially navigated to from the Family Stabilization Detail page.

#### 2.11.4 Page Location

- **Global**– Empl. Services
- **Local**– Activities
- **Task**– Customer Activities

#### 2.11.5 Page Mapping

Update page mapping for the Customer Activity Detail page.

#### 2.11.6 Page Validations

Add a page validation that will prevent the user from setting the Start Date to be prior to the Begin Date of an Approved Family Stabilization record that the person is a part of. This will occur only when Program Type field is 'Family Stabilization'.

- Start Date – This date does not occur during an Approved Family Stabilization record.

Add a page validation that will prevent the user from setting the End Date to be after to the End Date of the Approved Family Stabilization record that was used in the prior Start Date validation. This will occur only when Program Type field is 'Family Stabilization'.

- End Date – This date does not occur during an Approved Family Stabilization record.

Add a page validation that will prevent the user from setting the Family Stabilization field to 'Yes' when the person on the case is not part of an Approved Family Stabilization Detail record between the scheduled Start Date and End Date of the Customer Activity Detail record.

- Family Stabilization – An Approved Family Stabilization record does not exist during this Activity.

## **2.12 WTW Assistance Unit Summary (LRS Only)**

### **2.12.1 Overview**

The WTW Assistance Unit Summary page is used to display required hours, assistance unit adults, scheduled activities and plans by month. The page will be updated for the FS Program.

### **2.12.2 WTW Assistance Unit**



## WTW Assistance Unit Summary

From:

10/2019

[View](#)

### Required Hours For Month

Month	Total Minimum	Total Federal	Core Federal
<a href="#">10/2019</a>	0	0	0

### Assistance Unit Adults for Month

Name	CW Role	Work Reg. Type	Work Reg. Status	Empl. Program	Last Program Status	Last Program Status Reason
Ali Ababwa	MEM	WTW	<u>Exempt</u>	WT	Pending	
Ali Ababwa	MEM			RE	Active	WPR

### Scheduled Customer Activities for Month

Name	Activity Type	Status	Begin Date	Schedule Start Date	Schedule End Date	Minimum Hours	Federal Hours	Core Hours
Ali Ababwa	<a href="#">Appraisal</a>		10/11/2019	10/11/2019	10/12/2019	1	0	0
Ali Ababwa	<a href="#">Domestic Violence</a>		10/02/2019	10/02/2019	10/31/2019	3	3	0
Ali Ababwa	<a href="#">Domestic Violence</a>		10/02/2019	10/02/2019	10/04/2019	2	2	0
Ali Ababwa	<a href="#">Domestic Violence</a>		10/02/2019	10/02/2019	10/17/2019	2	2	0
Ali Ababwa	<a href="#">Domestic Violence</a>		10/09/2019	10/09/2019	10/31/2019	12	12	0
Ali Ababwa	<a href="#">Domestic Violence</a>		10/05/2019	10/05/2019	10/05/2019	2	2	0
Ali Ababwa	<a href="#">Domestic Violence</a>		10/11/2019	10/11/2019	10/11/2019	2	2	0
Ali Ababwa	<a href="#">Domestic Violence</a>		10/01/2015	10/01/2019	10/01/2019	3	3	0
Ali Ababwa	<a href="#">Domestic Violence</a>		10/02/2019	10/02/2019	10/17/2019	2	2	0

### WTW Plans for Month

Form Type	Name	Plan Type	Create Date	Sign Date	Total Hours	Core Hours	WTW Clock	
<a href="#">WTW 2</a>	Ababwa, Ali	Pre-Plan	<a href="#">10/24/2019</a>		12	0	No	<a href="#">Edit</a>

Name:

[Add Agreement](#)

Figure 2.12.1 – WTW Assistance Unit Summary

### 2.12.3 Description of Changes

Update the WTW Plans for Month section to not display plans that have a Program field value of 'Family Stabilization'.

### 2.12.4 Page Location

- **Global**– Empl. Services
- **Local**– Activities
- **Task**– WTW AU Summary

## 2.13 Activity Agreement Detail

### 2.13.1 Overview

The Activity Agreement Detail page is used to create and sign agreements for customers. The page will be updated to support the FS Program.


### 2.13.2 Activity Agreement Detail

#### Activity Agreement Detail

\*- Indicates required fields

Save and Return Cancel

Name: \*  
John Doe ▼

Type: \* Program: \* Signature Date: Welfare to Work Clock: Family Crisis: \*  
Agreement ▼ Family Stabilization ▼   No ▼ Yes ▼

Activities:

Type	Status	Start Date	End Date
No Data Found			

Add Activity

Barriers: \*

Type	Begin Date	End Date
No Data Found		

Add Barrier

Save and Return Cancel

Figure 2.13.1 – Activity Agreement Detail (C-IV)

## Activity Agreement Detail

\*- Indicates required fields

Save and Return

Cancel

Name: \*

Doe, John 51M

Form Type: \*

WTW 2

Signature Date:

Program: \*

Family Stabilization

Family Crisis: \*

Yes

WTW Clock:

No

Plan Type: \*

Family Stabilization

### Assistance Unit Summary

Required Hours:

Month: \* 10/2019

View

Month	Total Minimum	Total Federal	Core Federal
<a href="#">10/2019</a>	N/A	N/A	N/A

Total Planned Hours in Current Activities for Month:

Participant	Minimum Hours	Federal Hours	Core Hours
No Data Found			

### Activity:

<input type="checkbox"/>	Type	Core	Weekly Hours	Status	Start Date	End Date
<input type="checkbox"/>	<a href="#">Domestic Violence</a>	No	3	Active	10/02/2019	10/31/2019

Remove

Add Activity

### Barrier: \*

<input type="checkbox"/>	Type	Begin Date	End Date
<input type="checkbox"/>	<a href="#">Behavioral Problems</a>	02/01/2020	02/15/2020

Remove

Add Barrier

### Unlinked Employment

Employer	Type	Hours/Week	Date Hired	Termination Date
No Data Found				

Save and Return

Cancel

Figure 2.13.2 – Activity Agreement Detail (LRS)

### 2.13.3 Description of Changes

1. Update page to include a Program field. This field will contain the following values:

- Family Stabilization
- REP
- Welfare to Work

'Welfare to Work' will be selected by default in Create mode. The REP option will only be available for LRS.

Note: Existing Agreements will have a <blank value>.

2. Family Crisis - This field will be viewable when the Program field has the value of 'Family Stabilization' When visible this field will be required. This field will contain the following values:

- Yes
- No

The default value for this field will be 'Yes'.

3. Remove asterisk specifying required fields in the Activity section.
4. Update activity section in Create mode to also populate with activities that have a program of FS and are active for the current month. (LRS Only)
5. Add Barrier section. Primary default sorting for these records will be the Begin Date descending. This section will be displayed when Program is set to 'FS' and will be required when shown. For LRS, in Create mode, this section will be populated with Barrier(s) for the person that have a category of FS and when the Barrier Begin Date is before or equal to the last day of the current month and the Barrier End Date is after or equal to the first day of the month.
  - Check box - This check box will be used to mark records to be removed and be visible in Create/Edit mode. The select all check box will not be available when there are no check boxes to be selected. When the agreement has not been signed.
  - Type – Reason for Family Stabilization Barrier. This will be hyperlinked if the user has the security right of 'BarrierDetailView'. This hyperlink will lead to the Barrier Detail page in View mode.
  - Begin Date – The Begin Date of the barrier for the participant. This will be in 'mm/dd/yyyy' format.
  - End Date – The End Date of the barrier for the participant. This will be in 'mm/dd/yyyy' format.
  - Remove – This button will allow the user to remove records with a marked check box. If no records are marked and this button is clicked no action will occur. This button will not display when the agreement is signed.
  - Add Barrier – In LRS, when this button is clicked will navigate the user to the Barrier Detail page in Create mode. Barrier records created through this flow will be added to the Barrier section in the Activity Agreement Detail page. In C-IV, when this button is clicked will navigate the user to the Select Barrier page. This button is

viewable in Create/Edit mode and will only be viewable by users with the security right of 'BarriersDetailEdit' and when the agreement is not signed.

6. Update the Save and Return button and Cancel button to navigate the user back to the Family Stabilization Detail page if the page was initially navigated to from the Family Stabilization Detail page.

#### **2.13.4 Page Mapping**

Update page mapping for the Activity Agreement Detail page.

#### **2.13.5 Page Validations**

Add page validation when Family Crisis is set to 'No'.

- Family Crisis – A Family Stabilization Activity Agreement must have a Family Crisis.

Add page validation when no barrier is entered in the Barrier section and when Program field is set to 'FS'.

- Add Barrier – Each contract must have at least one barrier. Please click the Add Barrier button to select one or more barriers for this agreement.

Update page validation restricting activities for active and non compliant WTW programs to allow activities to be added when the Program is set to 'Family Stabilization'.

Update page validation to allow Activity Agreements to be saved when no activities are selected and when Program field is set to 'Family Stabilization'.

### **2.14 Select Customer Activities Page (C-IV Only)**

#### **2.14.1 Overview**

The Select Customer Activities page allows FS Activities to be associated to an FS Agreement Plan.

## 2.14.2 Select Customer Activities

### Select Customer Activities

					Images	Select	Cancel
Type	Name	Start Date	Status	Status Date			
<input type="checkbox"/> <a href="#">Domestic Violence</a>	Doe, John	02/01/2020	Active	10/01/2019			
					Images	Select	Cancel

Figure 2.14.1 – Select Customer Activities (C-IV)

## 2.14.3 Description of Changes

1. Update the Select Customer Activities page when accessed from the Activity Agreements **Detail** page to display activity records that are associated with a Program of FS and latest status is Active.

## 2.14.4 Page Location

- **Global**– Empl. Services
- **Local**– Activities
- **Task**– Activity Agreements

## 2.15 Select Barrier Page (C-IV Only)

### 2.15.1 Overview

Add the Select Barrier page to C-IV. The Select Barrier page allows FS Barriers to be associated to an FS agreement.

### 2.15.2 Select Barrier

#### Select Barrier

					Select	Cancel
Type	Name	Begin Date	End Date			
<input type="checkbox"/> <a href="#">Behavioral Problems</a>	Doe, John 51M	02/01/2020	02/15/2020			
					Select	Cancel

Figure 2.15.1 – Select Barrier (C-IV)

### 2.15.3 Description of Changes

When loaded, this page will be populated with barrier records with a Category of 'Family Stabilization' which have an End Date after the system date for the person.

1. Select button – clicking the Select button will associate barriers that have marked check boxes to the Activity Agreement Detail page and will navigate the user back to the Activity Agreement Detail Page.
2. Cancel button – clicking the Cancel button will navigate the user back to the Activity Agreement Detail page.
3. Check box – This check box will be used to mark records to be selected.
4. Type – Type of barrier. The T
5. ype will be hyperlinked if the user has the 'BarrierDetailView' security right. This hyperlink will lead to the Barrier Detail page in View mode.
6. Name – The participant who has the barrier. Name format will be as follows: [Last], [First] [Age][Gender].
7. Begin Date – The Begin Date of the Barrier record. This will be in 'mm/dd/yyyy' format.
8. End Date – The End Date of the Barrier record. This will be in 'mm/dd/yyyy' format.

### 2.15.4 Page Location

- **Global**– Empl. Services
- **Local**– Activities
- **Task**– Activity Agreements

### 2.15.5 Page Mapping

Create page mapping for the Select Barrier page.

## 2.16 Correspondence: Family Stabilization Evaluation Request (FSP 1) Form (CalSAWS only)

### 2.16.1 Overview

The FSP 1 form is used to request services for FS Services. The newest state version(8/14) will be added to Template Repository for CalSAWS. Note: C-IV already has the FSP 1 (8/14) in Template Repository.

**State Form:** FSP 1 (8/14)

**Programs:** CW/WTW/REP

**Attached Forms:** N/A

**Forms Category:** Form

**Languages:**

English and Spanish

## 2.16.2 Description of Change

This effort will add FSP 1 to the Template Repository.

### 2.16.2.1 Create FSP 1 Form XDP

Create a XDP for FSP 1 Form. This form will not include a Form Header and will only be available to Print Locally. The Form will contain editable text boxes, see Mockup for location of text boxes.

**Form Header:** N/A, This Form will only be available to print locally.

**Form Title:** Family Stabilization Program Evaluation Request

**Form Number:** FSP 1

**Include NA Back 9:** No.

**Form Mockups/Examples:** See Supporting Documents #1

### 2.16.2.2 Add Form Variable Population for FSP 1

FSP 1 will populate the following seven fields when generated from Template Repository in the context of a case.

**Form Body Variables:**

Variable Name	Population	Formatting	Template Repository Population	Populates with Form Generation
CASE_NAME	Populates the Case Name.  For Example, "John Doe"	Arial Font 10	Yes	N/A, only generates from Template Repository.
CASE_NUMBER	Populates the Case Number.  For Example, "809337372"	Arial Font 10	Yes	N/A, only generates from Template Repository.



CUSTOMER_NAME	Populates the Person Name based on the Document Parameters Person ID.  For Example, "John Doe"	Arial Font 10	Yes	N/A, only generates from Template Repository.
CUSTOMER_PHONE	Populates the Person's phone number.  For Example, "(555) 555-5555"	Arial Font 10	Yes	N/A, only generates from Template Repository.
STAFF_NAME	Populates the Staff name based on the Document Parameters Position ID.  For Example, "John Doe"	Arial Font 10	Yes	N/A, only generates from Template Repository.
WORKER_ID	Populates the Worker ID.  For Example, "19AS49150A"	Arial Font 10	Yes	N/A, only generates from Template Repository.
STAFF_PHONE	Populate the Worker phone number.  For Example, "(555) 555-5555"	Arial Font 10	Yes	N/A, only generates from Template Repository.

**Variables Requiring Translations: N/A**

### **2.16.2.3 Add FSP 1 Form to Template Repository**

Add the FSP 1 Form to Template Repository with the following Document Parameters:

**Required Document Parameters: Case Number, Customer Name, Program, Language**

#### 2.16.2.4 Add FSP 1 Form Print Options and Mailing Requirements

Add Print Local options for the FSP 1 Form.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	N	Y	N

**Mailing Requirements:**

N/A, Local Print only

**Additional Requirements:**

Special Paper Stock: None

Enclosures: None

Electronic Signature: No

Post to YBN/C4Y: Yes

### 2.17 Correspondence: Add Family Stabilization Program Denial Notice (FSP 2) Form (CalSAWS only)

#### 2.17.1 Overview

The FSP 2 form is used to Deny services for FS Services. The newest state version(8/14) will be added to Template Repository for CalSAWS. Note: C-IV already has the FSP 2 (8/14) in Template Repository.

**State Form:** FSP 2 (8/14)

**Programs:** CW/WTW/REP

**Attached Forms:** N/A

**Forms Category:** NOA

**Languages:**

English and Spanish

#### 2.17.2 Description of Change

This effort will add FSP 2 to the Template Repository.

### 2.17.2.1 Create FSP 2 Form XDP

Create a XDP for FSP 2 Form. This form will not include a Form Header and will only be available to Print Locally. The Form will contain editable text boxes, see Mockup for location of text boxes.

**Form Header:** N/A, This Form will only be available to print locally.

**Form Title:** Family Stabilization Program Denial Notice

**Form Number:** FSP 2

**Include NA Back 9:** Yes

**Form Mockups/Examples:** See Supporting Documents #2

### 2.17.2.2 Add Form Variable Population for FSP 2

FSP 2 will populate the following six fields when generated from Template Repository in the context of a case.

#### Form Body Variables:

Variable Name	Population	Formatting	Template Repository Population	Populates with Form Generation
CASE_NAME	Populates the Case Name.  For Example, "John Doe"	Arial Font 10	Yes	N/A, only generates from Template Repository.
CASE_NUMBER	Populates the Case Number.  For Example, "809337372"	Arial Font 10	Yes	N/A, only generates from Template Repository.
COUNTY	Populates the County.  For Example, "Los Angeles"	Arial Font 10	Yes	N/A, only generates from Template Repository.
STAFF_NAME	Populates the Staff name based on the Document Parameters Position ID.  For Example, "John Doe"	Arial Font 10	Yes	N/A, only generates from Template Repository.

WORKER_ID	Populates the Worker ID.  For Example, "19AS49150A"	Arial Font 10	Yes	N/A, only generates from Template Repository.
STAFF_PHONE	Populate the Worker phone number.  For Example, "(555) 555- 5555"	Arial Font 10	Yes	N/A, only generates from Template Repository.

**Variables Requiring Translations:** N/A

### 2.17.2.3 Add FSP 2 Form to Template Repository

Add the FSP 2 Form to Template Repository with the following Document Parameters:

**Required Document Parameters:** Case Number, Customer Name, Program, Language

### 2.17.2.4 Add FSP 2 Form Print Options and Mailing Requirements

Add Print Local options for the FSP 2 Form.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	N	Y	N

**Mailing Requirements:**

N/A, Local Print only

**Additional Requirements:**

Special Paper Stock: None

Enclosures: None

Electronic Signature: No

Post to YBN/C4Y: Yes

## 2.18 Correspondence: Add Family Stabilization Program Change Notice (FSP 3) Form (CalSAWS only)

### 2.18.1 Overview

The FSP 3 form is used to Notice for Change in Status for FS Services. The newest state version(8/14) will be added to Template Repository for CalSAWS. Note: C-IV already has the FSP 3 (8/14) in Template Repository.

**State Form:** FSP 3 (8/14)

**Programs:** CW/WTW/REP

**Attached Forms:** N/A

**Forms Category:** NOA

**Languages:**

English and Spanish

### 2.18.2 Description of Change

This effort will add FSP 3 to the Template Repository.

#### 2.18.2.1 Create FSP 3 Form XDP

Create a XDP for FSP 3 Form. This form will not include a Form Header and will only be available to Print Locally. The Form will contain editable text boxes, see Mockup for location of text boxes.

**Form Header:** N/A, This Form will only be available to print locally.

**Form Title:** Family Stabilization Program Notice of Change in Program Status

**Form Number:** FSP 3

**Include NA Back 9:** Yes

**Form Mockups/Examples:** See Supporting Documents #3

#### 2.18.2.2 Add Form Variable Population for FSP 3

FSP 3 will populate the following seven fields when generated from Template Repository in the context of a case.

**Form Body Variables:**

Variable Name	Population	Formatting	Template Repository Population	Populates with Form Generation

CASE_NAME	Populates the Case Name.  For Example, "John Doe"	Arial Font 10	Yes	N/A, only generates from Template Repository.
CASE_NUMBER	Populates the Case Number.  For Example, "809337372"	Arial Font 10	Yes	N/A, only generates from Template Repository.
OFFICE_ADDRESS	Populates with the Workers Office Address.  For Example, "Office Description 123 4th Street Somewhere, CA 99999"	Arial Font 10	Yes	N/A, only generates from Template Repository.
NOTICE_DATE	Populates with the Date the Notice is generated.  For Example, "03/03/2020"	Arial Font 10	Yes	N/A, only generates from Template Repository.
STAFF_NAME	Populates the Staff name based on the Document Parameters Position ID.  For Example, "John Doe"	Arial Font 10	Yes	N/A, only generates from Template Repository.
WORKER_ID	Populates the Worker ID.  For Example, "19AS49150A"	Arial Font 10	Yes	N/A, only generates from Template Repository.
STAFF_PHONE	Populate the Worker phone number.  For Example, "(555) 555-5555"	Arial Font 10	Yes	N/A, only generates from Template Repository.

--	--	--	--	--

**Variables Requiring Translations:** N/A

### 2.18.2.3 Add FSP 3 Form to Template Repository

Add the FSP 3 Form to Template Repository with the following Document Parameters:

**Required Document Parameters:** Case Number, Customer Name, Program, Language

### 2.18.2.4 Add FSP 3 Form Print Options and Mailing Requirements

Add Print Local options for the FSP 3 Form.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	N	Y	N

**Mailing Requirements:**

N/A, Local Print only

**Additional Requirements:**

Special Paper Stock: None

Enclosures: None

Electronic Signature: No

Post to YBN/C4Y: Yes

## 2.19 Automated Regression Test

### 2.19.1 Overview

Create new automated regression test scripts to cover the new data entry options and page level validations on the following pages:

- Family Stabilization List
- Family Stabilization Detail
- WTW Status Detail
- Barriers List
- Barrier Detail
- REP Status Detail (LRS Only)
- Need Detail
- Referral Detail
- Service Arrangement Detail
- Customer Activities List
- Customer Activity Detail
- Activity Agreement Detail
- Select Customer Activities
- Select Barrier.

### 2.19.2 Description of Change

Create new automated scripts for each of the following scenarios:

1. Add Family Stabilization details for an active CalWORKs program with an Eligible value of No, and a reason of 'Adult exceeded the 48-Month CW Time Limit'.
2. Add Family Stabilization details for an active Welfare to Work program with an Eligible value of Yes, and associated Barrier, Need, Activity, and Agreement information. Add a WTW Status record with a Status Reason of 'Family Stabilization'.
3. (LRS Only) Add Family Stabilization details for a pending REP program with an Eligible value of Yes, and associated Barrier, Need, Activity, and Agreement information. Add a REP Status record with a Status Reason of 'Family Stabilization'.








Within these scripts, verify the following page validations:

- Family Stabilization List:
  - To - To date must be after From date.
- Family Stabilization Detail:
  - Add - a Person is required.
  - Begin Date - The date must be a valid calendar date and be in the form MM/DD/YYYY.
  - Begin Date - Begin Date must be before End Date.
  - Begin Date - Begin Date must be on or after 01/01/2014.
  - Begin Date - The Family Stabilization Detail Begin/End Date active CalWORKs program or a WTW program in a status other



- then pending/deregistered must exist during the Family Stabilization program period.
  - Begin Date - The Family Stabilization Detail record being saved overlaps with an existing Family Stabilization Detail record.
  - Eligibility Outcome - This reason is unavailable for Denied Eligibility Outcome.
  - Eligibility Outcome - This reason is unavailable for Ineligible Eligibility Outcome.
  - Eligible - An existing associated Family Stabilization service, activity, or agreement exists.
  - Save and Return - The Family Stabilization Detail Begin/End Date has been updated and must be saved before adding a need, activity, or agreement.
- WTW Status Detail:
  - Status - There is an existing Approved Family Stabilization record.
- Barriers List:
  - To - To date must be after the From date.
- Barrier Detail:
  - Begin Date - Begin Date must be before End Date.
  - Begin Date - Begin Date must be on or after 01/01/2014.
- REP Status Detail:
  - Status - There is an existing Approved Family Stabilization record.
- Need Detail:
  - Begin Date - No Active Family Stabilization record found for <Name> for <Begin Date>.
- Service Arrangement Detail:
  - From - No Active Family Stabilization record found for <Need person> on Family Stabilization Detail page. Cannot create a Service Arrangement.
  - Payee - Select as Customer is not a valid option.
  - Payee - The selected payee is not valid. Please select a valid payee.
  - Payee - The <Program> program or the person within it is not Active, Non-Comp, Good Cause or Sanction for a single day in the Arrangement period. Please adjust the dates.
- Customer Activity Detail:
  - End Date - This date does not occur during an Approved Family Stabilization record.
  - Start Date - This date does not occur during an Approved Family Stabilization record.
- Activity Agreement Detail:
  - Add Barrier - Each contract must have at least one barrier. Please click the Add Barrier button to select one or more barriers for this agreement.
  - Family Crisis - A Family Stabilization Activity Agreement must have a Family Crisis.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	WTW	Form to request FS services.	 FSP1_EN.pdf  FSP1_SP.pdf
2	WTW	Form to notify Denial of FS Services.	 FSP2_EN.pdf  FSP2_SP.pdf
3	WTW	Form to notify transition into WTW program	 FSP3_EN.pdf  FSP3_SP.pdf
4	Security	Security Matrix	 SCR CA-57298_CIV-789 S

## 4 REQUIREMENTS

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### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.1.2	The LRS shall allow COUNTY-specified Users to record and track the applicant s/participant s actual needs, including immediate needs, emergency needs (domestic violence, expedited CalFresh services, supportive services, homeless, medical services), and crisis intervention needs separately.	FSP services will be recorded and tracked in this SCR.

### 4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	N/A		

## 5 MIGRATION IMPACTS

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SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
		N/A			

## 6 APPENDIX

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California Statewide Automated Welfare System

## **Design Document**

CA-203824 | CIV-11725

Add Functionality to Manage Conditionally Eligible  
Status in MAGI Determinations

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rajan Vadapalli
	Reviewed By	Renee Gustafson

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/20/2019	0.1	Added Overview, Request, Current Design	Rajan V
09/30/2019	0.2	Version sent to committee for feedback	Rajan V
10/07/2019	1.0	Updated Recommendations	Rajan V
02/18/2019	2.0	Content Revision 1	Rajan V

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# 1 OVERVIEW

Update The Systems to provide a means of tracking and managing cases where Conditionally Eligibility status is received in Modified Adjusted Gross Income (MAGI) Determinations.

## 1.1 Current Design

CalHEERS may determine a person Conditionally Eligible to MAGI Medi-Cal when a verification is missing. This status can be valid for up to three months depending on the type of missing verification. After that, the status should no longer be considered valid. Since CalHEERS does not manage the expiration of the Conditionally Eligible status, CalHEERS nor The Systems are programed to automatically reevaluate the individual after the Conditionally Eligible period and it is up to the County Eligibility Worker (CEW) to manage. The CEW is expected to request a new MAGI Determination to reevaluate the person when the verification is received or after the reasonable opportunity period expires to update the MAGI Medi-Cal eligibility to either Eligible (without condition) or Ineligible/Discontinued.

The Systems display the specific MAGI Medi-Cal status on the MAGI Referral Detail and MAGI Determination Detail pages. The Systems display a "Household Eligibility" on the MAGI Determination List page **and MAGI Determination page** which is derived by comparing the MAGI Medi-Cal status of all persons on the MAGI Determination to show a high-level household status for the CEW. MAGI Conditionally Eligible and MAGI Eligible are both treated as 'Eligible' to determine the display of this "Household Eligibility" status so there is no indication to the worker that someone is Conditionally Eligible.

For example, if a person is MAGI Conditionally Eligible, the "Household Eligibility" displays "Eligible." If one person is MAGI Conditionally Eligible and another is MAGI Eligible", the "Household Eligibility" displays "Eligible."

Household Eligibility Status combinations

Household Eligibility	MAGI Eligibility Status in DER
Could Not Determine	<ul style="list-style-type: none"><li>At least one person MAGI Pending</li></ul>
Eligible	<ul style="list-style-type: none"><li>All persons MAGI Eligible and/or MAGI Conditionally Eligible</li></ul>
Not Eligible	<ul style="list-style-type: none"><li>All persons MAGI Ineligible and/or MAGI Discontinue</li></ul>
Partially Eligible	<ul style="list-style-type: none"><li>At least one person MAGI Eligible and/or MAGI Conditionally Eligible <b>and</b></li><li>At least one person MAGI Ineligible and/or MAGI Discontinue</li></ul>

The Systems do not create a task for the worker to manage cases where Conditional Eligibility to MAGI Medi-Cal is received.

## 1.2 Requests

1. Update The Systems to provide a means of tracking or managing the cases where Conditional Eligibility is received by providing a household status 'Conditionally Eligible' on MAGI Determination List page and MAGI Determination Summary page.
2. Create an automated task for the CEW to manage cases where Conditional Eligibility to MAGI Medi-Cal is received from CalHEERS.

## 1.3 Overview of Recommendations

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 and MAGI Determination Summary page.
2. Create an Automated task for CEW to manage cases where Conditional Eligibility is received.

## 1.4 Assumptions

1. The Systems Medi-Cal EDBC rules consider MAGI Medi-Cal Conditionally Eligible as Eligible to MAGI Medi-Cal and EDBC grants the person Active status in Medi-Cal. There are no changes to Medi-Cal EDBC rules for this SCR as it pertains to MAGI Conditionally Eligible status.

## 2 RECOMMENDATIONS

### 2.1 MAGI Determination List and MAGI Determination Summary

#### 2.1.1 Overview

Update the MAGI Determination List page and **MAGI Determination Summary page** to display 'Conditionally Eligible' as Household Eligibility when at least one of the individuals in the MAGI Determination has MAGI Conditionally Eligible status and no individuals with MAGI Pending status.

#### 2.1.2 MAGI Determination List page and MAGI Determination Summary page Mockups

**MAGI Determination List**

\*- Indicates required fields

**Request MAGI Determination**

Benefit Month: \*  
10/2019

Program Identifier: \*  
Medi-Cal

Life Change Event:  
[Dropdown]

☐ Bypass Primary Contact Matching Criteria  
☐ Request Lift Options  
☐ Request Negative Action Determination  
☐ Restart VLP e-Verification

**Request MAGI**

**Display MAGI Determinations**

Begin Date: [Calendar Icon] End Date: [Calendar Icon]

**View**

**Search Results Summary** Results 1 - 7 of 7

Benefit Month	Type	Status	Date Run	System Initiated	Household Eligibility
10/2019	<a href="#">Determination</a>	Reviewed	08/28/2019 2:05 PM	C-IV	Conditionally Eligible
10/2019	<a href="#">Determination</a>	Reviewed	08/28/2019 2:04 PM	C-IV	Could Not Determine
11/2018	<a href="#">Determination</a>	Reviewed	10/05/2018 1:16 AM	C-IV	Not Eligible
03/2018	<a href="#">Determination</a>	Reviewed	01/24/2018 10:13 AM	C-IV	Not Eligible

Figure 2.1.1 – MAGI Determination List Page

MAGI Determination Summary

Close

Request ID:  
1010101001010

Benefit Month:  
02/2020

Date Run:  
01/14/2020

Household Eligibility:  
Conditionally Eligible

Run Reason:  
Renewal - manual renewal

Requested by C-IV Batch:  
No

Name	Primary Aid Code	Status	Eligibility Evaluation Reasons	Negative Action Reason	Carry Forward Status
<a href="#">Test_One</a>	M3	Conditionally Eligible			
<a href="#">Test_Two</a>	M3	Conditionally Eligible			
<a href="#">Test_Three</a>	M3	Conditionally Eligible			

EDBC's Run Against this MAGI Determination

Begin Month	End Month	Type	EDBC Program Status	Date Run	EDBC Source
No Data Found.					

Close

Figure 2.1.2 – MAGI Determination Summary Page

### 2.1.3 Description of Changes

- 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.
  - Update the existing Household Eligibility status to display when the following are true:

Household Eligibility	MAGI Eligibility Status in DER
Eligible	<ul style="list-style-type: none"> <li>All persons MAGI Eligible</li> </ul>
Partially Eligible	<ul style="list-style-type: none"> <li>At least one person MAGI Eligible <b>and</b></li> <li>At least one person MAGI Ineligible and/or MAGI Discontinue <b>and</b></li> <li>No person MAGI Conditionally Eligible and/or MAGI Pending</li> </ul>

- Display Household Eligibility status when the following is true:

Household Eligibility	MAGI Eligibility Status in DER
Conditionally Eligible	<ul style="list-style-type: none"> <li>At least one person MAGI Conditionally Eligible <b>and</b></li> <li>No person MAGI Pending</li> </ul>

#### 2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility

#### 2.1.5 Security Updates

No Changes

#### 2.1.6 Page Mapping

No Changes

#### 2.1.7 Page Usage/Data Volume Impacts

No Changes

### 2.2 Automated Task Creation

#### 2.2.1 Overview

Create a new automated task to alert the CEW when at least one of the individuals in the MAGI Determination is Conditionally Eligible to MAGI Medi-Cal.

Note: C-IV automated tasks can be turned off by county depending on county business need.

#### 2.2.2 Description of Change

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.
  - b. There is no open task for MAGI Conditionally Eligible Status for the same program worker on the case.

Note: The Batch sweep will check for the latest DER for the come-up month to see if there is an individual in the MAGI Determination with MAGI Conditionally Eligible status. Example: If Household Eligibility status of DER #1 was Conditionally Eligible and Household Eligibility status of DER# 2 was Eligible, then do not create a task.

2. Create the automated task with the following details:
  - a. CalSAWS Task details:

<b>MAGI DER Conditionally Eligible - CalSAWS</b>	
Trigger Condition	When MC participant is in MAGI Conditionally Eligible status.
Task Type	MAGI Conditionally Eligible Status
Task Category	Case update
Task Priority	Medium
Task Due Date	30 days
Task Expiration Date	90 days
Task Long Description	Individual in the Case is MAGI Conditionally Eligible, please review and take appropriate action.
Office Distribution	Yes
Task Initial Assignment	Case carrying worker.
Task Navigation Template	Default – Case Summary page.

b. C-IV Task details:

<b>MAGI DER Conditionally Eligible Details - C-IV</b>	
Trigger Condition	When MC participant is in MAGI Conditionally Eligible status.
Automated Action Name	MAGI Conditionally Eligible Received
Automated Action Scenario	A DER with MAGI Conditionally Eligible status is received from CalHEERS
Automated Action Program	MC
Automated Action Source	Batch
Automated Action Run Date	Batch run date
Task Initial Assignment	Case carrying worker
Task Due Date	30 days
Task Long Description	Individual in the Case is MAGI Conditionally Eligible, please review and take appropriate action.

Task Type	MAGI Conditionally Eligible Status
Task Sub-Type	N/A
Task Priority	Medium
Expire Tasks	Yes
Expiration Period	90 days
Expiration Type	After Task is created.
Task Available Online	No
Task Newly Assigned Indicator	5 days

### 2.2.3 Execution Frequency

Daily

The first batch run will process all DERs for come-up month received on or after 01/20/2020 through the system date.

Note: The first time the batch runs, it will create a task for any program where the latest MAGI Determination for the come-up month has at least one person Conditionally Eligible to MAGI Medi-Cal even if it was not received on that day.

### 2.2.4 Key Scheduling Dependencies

Run the task sweep job at 4AM.

### 2.2.5 Counties Impacted

All counties

### 2.2.6 Data Volume/Performance

LRS has an average of 4,700 cases with at least one MAGI Conditionally Eligible person per month; C-IV has an average of 4,400. The expected volume of tasks to be created is around 4000-5000 per month per system.

No measurable amount of batch performance change is expected.

### 2.2.7 Failure Procedure/Operational Instructions

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

## 2.3 Automated Regression Test

### 2.3.1 Overview

Create new automated test scripts to validate the Household Eligibility on the MAGI Determination List and MAGI Determination Summary pages.

### 2.3.2 Description of Change

Create a case with a Medi-Cal program with multiple persons such that the MAGI Determination returns a combination of Eligible and Conditionally Eligible.

1. Verify that the Household Eligibility displays Conditionally Eligible if at least one person is Conditionally Eligible.
2. Verify that the Household Eligibility displays Eligible if and only if all persons are Eligible.

## 3 REQUIREMENTS

---

### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.7	The LRS shall determine when an individual is eligible for Medi-Cal coverage and shall ensure that all required information is collected, eligibility is determined, and share of cost is computed.	LRS will display 'Conditionally Eligible' status when at least one of the individuals on the MAGI Determination has Conditionally Eligible status and no individual is MAGI Pending. LRS will create a task when an individual is determined MAGI Conditionally Eligible to remind the worker to request the missing verification.





California Statewide Automated Welfare System

## **Design Document**

CA-204569 | CIV-102191

ACL 19-40 CalWORKs Outcome and  
Accountability Review (Cal-OAR) Phase II

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Lien Phan, Joel Acevedo, Gingko Luna

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/27/2019	1.0	Initial version	Jennifer Muna
12/13/2019	1.1	Updated design per BA recommendation	Jennifer Muna
1/2/2020	1.2	Updated design per Build/System test recommendation	Jennifer Muna
2/20/2020	1.3	Updated data element criteria	Jennifer Muna

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# 1 OVERVIEW

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The State Department of Social Services shall establish, by July 1, 2019, the California CalWORKs Outcomes and Accountability Review (Cal-OAR) to facilitate a local, data-driven program management system to facilitate continuous improvement in county CalWORKs programs by collecting, analyzing, and disseminating outcomes and best practices.

Cal-OAR consists of three core components: performance measures, a county CalWORKs self-assessment (Cal-CSA), and CalWORKs system improvement plan (Cal-SIP). The Cal-OAR is structured into three-year cycles, with the Cal-CSA and Cal-SIP required from each county every three years. The first three-year cycle begins July 2019 and concludes June 2022.

The Cal-OAR performance measures will be calculated and reported in a staggered manner based on data availability over the first three-year cycle. The specific data elements, timing, and data collection method will vary depending on the performance indicators selected. The LRS and C-IV system is expected to submit the necessary data files, containing the performance measures reported by the counties, to CDSS. As part of Cal-OAR Phase I, SCR CA-208030 | CIV-103934, LRS and C-IV implemented the development of ad hoc queries to produce the Cal-OAR monthly data files to be sent to the California Department of Social Services (CDSS).

This SCR outlines the changes needed to implement Cal-OAR Phase II, which is to add the remaining data elements to the currently scripted monthly data files and to automate the process of capturing and sending the Cal-OAR data files to CDSS.

## 1.1 Current Design

Per ACL 19-40, LRS and C-IV is required to submit periodic data files to CDSS to update the Cal-OAR system. The CDSS will combine LRS and C-IV data, available CDSS data, and other statewide data to calculate the County Welfare Department's Cal-OAR performance measures. Currently, the LRS and C-IV system does not automatically generate and send the monthly (Cal-OAR19, Cal-OAR19A, & Cal-OAR19B), quarterly (Cal-OAR19 C & Cal-OAR19D), and semi-annual (Cal-OAR19E) data file(s) to CDSS.

## 1.2 Requests

Create new interface batch jobs to generate and send the Cal-OAR monthly (Cal-OAR19, Cal-OAR19A, & Cal-OAR19B), quarterly (Cal-OAR19C & Cal-OAR19D), and semi-annual (Cal-OAR19E) data file(s) to CDSS. Per ACL 19-40, each data file will have a specified submission date.

Data File	Submission Frequency	Submission Due Date
Cal-OAR19	Monthly	The 1 <sup>st</sup> day three months after the measurement month
Cal-OAR19A	Monthly	The 1 <sup>st</sup> day three months after the measurement month
Cal-OAR19B	Monthly	The 1 <sup>st</sup> day six months after the measurement month
Cal-OAR19C	Quarterly	The 1 <sup>st</sup> day five months after the measurement quarter ends
Cal-OAR19D	Quarterly	The 1 <sup>st</sup> day two months after the measurement quarter ends
Cal-OAR19E	Semi-Annual	The 1 <sup>st</sup> day two months after the semi-annual measurement period ends

### 1.3 Overview of Recommendations

1. Create new interface job to generate and transmit the Cal-OAR19 monthly data file to CDSS.
2. Create new interface job to generate and transmit the Cal-OAR19A monthly data file to CDSS.
3. Create new interface job to generate and transmit the Cal-OAR19B monthly data file to CDSS.
4. Create new interface job to generate and transmit the Cal-OAR19C quarterly data file to CDSS.
5. Create new interface job to generate and transmit the Cal-OAR19D quarterly data file to CDSS.
6. Create new interface job to generate and transmit the Cal-OAR19E semi-annual data file to CDSS.

### 1.4 Assumptions

1. Current functionality will be based on the 39 counties of C-IV and the Los Angeles county pending migration of the CalWIN counties. The Cal-OAR data files will be maintained for all 58 counties after migration.



## 2 RECOMMENDATIONS

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Create new interface and File Transfer Protocol (FTP) batch jobs to generate and transmit the Cal-OAR monthly, quarterly, and semi-annual data files to CDSS.

### 2.1 Create New Interface Batch Job for Cal-OAR19 Monthly Data File

#### 2.1.1 Overview

Create a new interface batch job to generate the monthly Cal-OAR19 data file to CDSS.

#### 2.1.2 Description of Change

1. Create new sweep job for the Cal-OAR19 data file to read from LRS and C-IV data collection table and write the outbound data to a new aggregate table with the following data elements:
  - a. Variable Number column: This column specifies the data element position in the data file.
  - b. Variable Name column: This column defines the variable code name.
  - c. Variable Code column: This column contains the data element variable to be sent to CDSS.
  - d. Description: This column contains the description of the data element. The data element description is provided in ACL 19-40.
  - e. Criteria column: This column will indicate the required condition(s) of the data element.
  - f. Online Page Location column: This column lists the page navigation where the data element content is derived from.
  - g. Type column: This column specifies the data type of the data element.
  - h. Field Length column: This column specifies the length of the data element value sent to CDSS.
  - i. Required column: This column indicates if the data element is required to be received by CDSS.
  - j. Response Options: This column contains values for the data element field.
  - k. Data File(s): This column indicates which data file the data element will be reported in.
  - l. Cal-OAR Data Element specifications:



Cal-OAR Data  
Element Specificatio

Technical note: Pending Online efforts to create new data elements there are a number of data elements that have not been

mapped. These data elements have been highlighted and marked as TBD.

- m. Add logic to purge records from the aggregate table after a predetermined time period. The parameter default is 90 days. Technical note: If necessary to re- run a file for the same measurement period, then the job will purge the records created from the previous execution and insert new records into the aggregate table.
2. Create new writer job to read from the aggregate table and create an outbound file in XLSX format.
  - a. Generate file name to include the data file name, consortia name, and measurement period and year. Use the following format for the file name: "CalOAR19\_Consortia Name\_Measurement Period\_Calendar Year". Example of file name for Cal-OAR19: "CalOAR19\_LRS\_JAN\_2020".
3. CalSAWS Only: Create two sets of batch job properties for the new job:
  - a. Production Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the County Code List will contain a list of one County only - Los Angeles. SCRs 208599, 208600, 208601, 208602, 208603, 208604, and 208605 will update the production version of the County Code List to include each migration County that is included in each migration wave/release.
  - b. Test Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the Test version of the County Code List will contain ALL 58 California Counties. This test property will allow testing environments to test the functionality for Migration Counties that have not yet migrated into the system.

### 2.1.3 Execution Frequency

The new interface for Cal-OAR19 data file will be scheduled to run on the 1<sup>st</sup> day three months after the measurement month. For example, if measurement period is for April 2021 then submission due date for Cal-OAR19 data file will be August 1, 2021.

Per request from CDSS, if the data file due date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

### 2.1.4 Key Scheduling Dependencies

N/A

### 2.1.5 Counties Impacted

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

#### **2.1.6 Data Volume/Performance**

Approximately 300,000 records will be generated in the monthly Cal-OAR19 data file.

#### **2.1.7 Interface Partner**

California Department of Social Services (CDSS).

#### **2.1.8 Failure Procedure/Operational Instructions**

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

### **2.2 Create New FTP Batch Job to Transfer the Cal-OAR19 data file to CDSS**

#### **2.2.1 Overview**

Create a new secure FTP batch job to send the monthly data file for Cal-OAR19 to CDSS.

#### **2.2.2 Description of Change**

Create a new secure FTP batch job that will transfer the Cal-OAR19 monthly data file the Cal-OAR SFT server.

#### **2.2.3 Execution Frequency**

The new FTP batch job for Cal-OAR19 data file will be scheduled to run on the 1<sup>st</sup> day three months after the measurement month. If the batch date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

#### **2.2.4 Key Scheduling Dependencies**

The new FTP job will run after the new Interface batch job that will generate the Cal-OAR19 data file.

### **2.2.5 Counties Impacted**

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

### **2.2.6 Data Volume/Performance**

N/A

### **2.2.7 Interface Partner**

California Department of Social Services (CDSS).

### **2.2.8 Failure Procedure/Operational Instructions**

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

## **2.3 Create New Interface Batch Job for Cal-OAR19A Monthly Data File**

### **2.3.1 Overview**

Create a new interface batch job to generate the monthly Cal-OAR19A data file to CDSS.

### **2.3.2 Description of Change**

1. Create new sweep job for the Cal-OAR19A data file to read from LRS and C-IV data collection table and write the outbound data to a new aggregate table with the following data elements:
  - a. Variable Number column: This column specifies the data element position in the data file.
  - b. Variable Name column: This column defines the variable code name.
  - c. Variable Code column: This column contains the data element variable to be sent to CDSS.
  - d. Description: This column contains the description of the data element. The data element description is provided in ACL 19-40.
  - e. Criteria column: This column will indicate the required condition(s) of the data element.

- f. Online Page Location column: This column lists the page navigation where the data element content is derived from.
- g. Type column: This column specifies the data type of the data element.
- h. Field Length column: This column specifies the length of the data element value sent to CDSS.
- i. Required column: This column indicates if the data element is required to be received by CDSS.
- j. Response Options: This column contains values for the data element field.
- k. Data File(s): This column indicates which data file the data element will be reported in.
- l. Cal-OAR Data Element specifications:



Cal-OAR Data  
Element Specification

Technical note: Pending Online efforts to create new data elements there are a number of data elements that have not been mapped. These data elements have been highlighted and marked as TBD.

- m. Add logic to purge records from the aggregate table after a predetermined time period. The parameter default is 90 days.  
Technical note: If necessary to re- run a file for the same measurement period, then the job will purge the records created from the previous execution and insert new records into the aggregate table.
- 2. Create new writer job to read from the aggregate table and create an outbound file in XLSX format.
  - a. Generate file name to include the data file name, consortia name, and measurement period and year. Use the following format for the file name: "CalOAR19A\_Consortia Name\_Measurement Period\_Calendar Year". Example of file name for Cal-OAR19A: "CalOAR19A\_LRS\_JAN\_2020".
- 3. CalSAWS Only: Create two sets of batch job properties for the new job:
  - a. Production Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the County Code List will contain a list of one County only - Los Angeles. SCRs 208599, 208600, 208601, 208602, 208603, 208604, and 208605 will update the production version of the County Code List to include each migration County that is included in each migration wave/release.
  - b. Test Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the Test version of the County Code List will contain ALL 58 California Counties. This test property will allow testing environments to test the

functionality for Migration Counties that have not yet migrated into the system.

### **2.3.3 Execution Frequency**

The new interface for Cal-OAR19A data file will be scheduled to run on the 1<sup>st</sup> day three months after the measurement month. For example, if measurement period is for April 2021 then submission due date for Cal-OAR19A data file will be August 1, 2021.

Per request from CDSS, if the data file due date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

### **2.3.4 Key Scheduling Dependencies**

N/A

### **2.3.5 Counties Impacted**

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

### **2.3.6 Data Volume/Performance**

Approximately 300,000 records will be generated in the monthly Cal-OAR19A data file.

### **2.3.7 Interface Partner**

California Department of Social Services (CDSS).

### **2.3.8 Failure Procedure/Operational Instructions**

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

## **2.4 Create New FTP Batch Job to Transfer the Cal-OAR19A data file to CDSS**

### **2.4.1 Overview**

Create a new secure FTP batch job to send the monthly data file for Cal-OAR19A to CDSS.

### **2.4.2 Description of Change**

Create a new secure FTP batch job that will transfer the Cal-OAR19A monthly data file the Cal-OAR SFT.

### **2.4.3 Execution Frequency**

The new FTP batch job for Cal-OAR19A data file will be scheduled to run on the 1<sup>st</sup> day three months after the measurement month. If the batch date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

### **2.4.4 Key Scheduling Dependencies**

The new FTP job will run after the new Interface batch job that will generate the Cal-OAR19A data file.

### **2.4.5 Counties Impacted**

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

### **2.4.6 Data Volume/Performance**

N/A

### **2.4.7 Interface Partner**

California Department of Social Services (CDSS).

### **2.4.8 Failure Procedure/Operational Instructions**

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

## 2.5 Create New Interface Batch Job for Cal-OAR19B Monthly Data File

### 2.5.1 Overview

Create a new interface batch job to generate the monthly Cal-OAR19B data file to CDSS.

### 2.5.2 Description of Change

1. Create new sweep job for the Cal-OAR19B data file to read from LRS and C-IV data collection table and write the outbound data to a new aggregate table with the following data elements:
  - a. Variable Number column: This column specifies the data element position in the data file.
  - b. Variable Name column: This column defines the variable code name.
  - c. Variable Code column: This column contains the data element variable to be sent to CDSS.
  - d. Description: This column contains the description of the data element. The data element description is provided in ACL 19-40.
  - e. Criteria column: This column will indicate the required condition(s) of the data element.
  - f. Online Page Location column: This column lists the page navigation where the data element content is derived from.
  - g. Type column: This column specifies the data type of the data element.
  - h. Field Length column: This column specifies the length of the data element value sent to CDSS.
  - i. Required column: This column indicates if the data element is required to be received by CDSS.
  - j. Response Options: This column contains values for the data element field.
  - k. Data File(s): This column indicates which data file the data element will be reported in.
  - l. Cal-OAR Data Element specifications:



Cal-OAR Data  
Element Specificatio

Technical note: Pending Online efforts to create new data elements there are a number of data elements that have not been mapped. These data elements have been highlighted and marked as TBD.

- m. Add logic to purge records from the aggregate table after a predetermined time period. The parameter default is 90 days.

Technical note: If necessary to re- run a file for the same measurement period, then the job will purge the records



- created from the previous execution and insert new records into the aggregate table.
2. Create new writer job to read from the aggregate table and create an outbound file in XLSX format.
    - a. Generate file name to include the data file name, consortia name, and measurement period and year. Use the following format for the file name: "CalOAR19B\_Consortia Name\_Measurement Period\_Calendar Year". Example of file name for Cal-OAR19B: "CalOAR19B\_LRS\_JAN\_2020".
  3. CalSAWS Only: Create two sets of batch job properties for the new job:
    - a. Production Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the County Code List will contain a list of one County only - Los Angeles. SCRs 208599, 208600, 208601, 208602, 208603, 208604, and 208605 will update the production version of the County Code List to include each migration County that is included in each migration wave/release.
    - b. Test Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the Test version of the County Code List will contain ALL 58 California Counties. This test property will allow testing environments to test the functionality for Migration Counties that have not yet migrated into the system.

### **2.5.3 Execution Frequency**

The new interface for Cal-OAR19B data file will be scheduled to run on the 1st day six months after the measurement month. For example, if measurement period is for April 2021 then submission due date for Cal-OAR19B data file will be November 1, 2021.

Per request from CDSS, if the data file due date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

### **2.5.4 Key Scheduling Dependencies**

N/A

### **2.5.5 Counties Impacted**

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

### **2.5.6 Data Volume/Performance**

Approximately 300,000 records will be generated in the monthly Cal-OAR19B data file.

### **2.5.7 Interface Partner**

California Department of Social Services (CDSS).

### **2.5.8 Failure Procedure/Operational Instructions**

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

## **2.6 Create New FTP Batch Job to Transfer the Cal-OAR19B data file to CDSS**

### **2.6.1 Overview**

Create a new secure FTP batch job to send the monthly data file for Cal-OAR19B to CDSS.

### **2.6.2 Description of Change**

Create a new secure FTP batch job that will transfer the Cal-OAR19B monthly data file the Cal-OAR SFT.

### **2.6.3 Execution Frequency**

The new FTP batch job for Cal-OAR19B data file will be scheduled to run on the 1<sup>st</sup> day six months after the measurement month. If the batch date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

### **2.6.4 Key Scheduling Dependencies**

The new FTP job will run after the new Interface batch job that will generate the Cal-OAR19B data file.

### **2.6.5 Counties Impacted**

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN

counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

#### **2.6.6 Data Volume/Performance**

N/A

#### **2.6.7 Interface Partner**

California Department of Social Services (CDSS).

#### **2.6.8 Failure Procedure/Operational Instructions**

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

### **2.7 Create New Interface Batch Job for Cal-OAR19C Quarterly Data File**

#### **2.7.1 Overview**

Create a new interface batch job to generate the quarterly Cal-OAR19C data file to CDSS.

#### **2.7.2 Description of Change**

1. Create new sweep job for the Cal-OAR19C data file to read from LRS and C-IV data collection table and write the outbound data to a new aggregate table with the following data elements:
  - a. Variable Number column: This column specifies the data element position in the data file.
  - b. Variable Name column: This column defines the variable code name.
  - c. Variable Code column: This column contains the data element variable to be sent to CDSS.
  - d. Description: This column contains the description of the data element. The data element description is provided in ACL 19-40.
  - e. Criteria column: This column will indicate the required condition(s) of the data element.
  - f. Online Page Location column: This column lists the page navigation where the data element content is derived from.
  - g. Type column: This column specifies the data type of the data element.
  - h. Field Length column: This column specifies the length of the data element value sent to CDSS.

- i. Required column: This column indicates if the data element is required to be received by CDSS.
- j. Response Options: This column contains values for the data element field.
- k. Data File(s): This column indicates which data file the data element will be reported in.
- l. Cal-OAR Data Element specifications:



Cal-OAR Data  
Element Specification

Technical note: Pending Online efforts to create new data elements there are a number of data elements that have not been mapped. These data elements have been highlighted and marked as TBD.

- m. Add logic to purge records from the aggregate table after a predetermined time period. The parameter default is 90 days.  
Technical note: If necessary to re- run a file for the same measurement period, then the job will purge the records created from the previous execution and insert new records into the aggregate table.

2. Create new writer job to read from the aggregate table and create an outbound file in XLSX format.
  - a. Generate file name to include the data file name, consortia name, and measurement period and year. Use the following format for the file name: "CalOAR19C\_Consortia Name\_Measurement Period\_Calendar Year". Example of file name for Cal-OAR19C: "CalOAR19C\_C-IV\_APR-JUN\_2020".
3. CalSAWS Only: Create two sets of batch job properties for the new job:
  - a. Production Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the County Code List will contain a list of one County only - Los Angeles. SCRs 208599, 208600, 208601, 208602, 208603, 208604, and 208605 will update the production version of the County Code List to include each migration County that is included in each migration wave/release.
  - b. Test Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the Test version of the County Code List will contain ALL 58 California Counties. This test property will allow testing environments to test the functionality for Migration Counties that have not yet migrated into the system.

### 2.7.3 Execution Frequency

The new interface for Cal-OAR19C data file will be scheduled to run on the 1<sup>st</sup> day five months after the measurement quarter ends. For example,

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if measurement period is for July through September 2021 then submission due date for Cal-OAR19C data file will be March 1, 2022.

Per request from CDSS, if the data file due date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

#### **2.7.4 Key Scheduling Dependencies**

N/A

#### **2.7.5 Counties Impacted**

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

#### **2.7.6 Data Volume/Performance**

N/A

#### **2.7.7 Interface Partner**

California Department of Social Services (CDSS).

#### **2.7.8 Failure Procedure/Operational Instructions**

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

### **2.8 Create New FTP Batch Job to Transfer the Cal-OAR19C data file to CDSS**

#### **2.8.1 Overview**

Create a new secure FTP batch job to send the quarterly data file for Cal-OAR19C to CDSS.

#### **2.8.2 Description of Change**

Create a new secure FTP batch job that will transfer the Cal-OAR19C quarterly data file the Cal-OAR SFT.

### **2.8.3 Execution Frequency**

The new FTP batch job for Cal-OAR19C data file will be scheduled to run on the 1<sup>st</sup> day five months after the measurement quarter ends. If the batch date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

### **2.8.4 Key Scheduling Dependencies**

The new FTP job will run after the new Interface batch job that will generate the Cal-OAR19C data file.

### **2.8.5 Counties Impacted**

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

### **2.8.6 Data Volume/Performance**

N/A

### **2.8.7 Interface Partner**

California Department of Social Services (CDSS).

### **2.8.8 Failure Procedure/Operational Instructions**

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

## **2.9 Create New Interface Batch Job for Cal-OAR19D Quarterly Data File**

### **2.9.1 Overview**

Create a new interface batch job to generate the quarterly Cal-OAR19D data file to CDSS.

## 2.9.2 Description of Change

1. Create new sweep job for the Cal-OAR19D data file to read from LRS and C-IV data collection table and write the outbound data to a new aggregate table with the following data elements:
  - a. Variable Number column: This column specifies the data element position in the data file.
  - b. Variable Name column: This column defines the variable code name.
  - c. Variable Code column: This column contains the data element variable to be sent to CDSS.
  - d. Description: This column contains the description of the data element. The data element description is provided in ACL 19-40.
  - e. Criteria column: This column will indicate the required condition(s) of the data element.
  - f. Online Page Location column: This column lists the page navigation where the data element content is derived from.
  - g. Type column: This column specifies the data type of the data element.
  - h. Field Length column: This column specifies the length of the data element value sent to CDSS.
  - i. Required column: This column indicates if the data element is required to be received by CDSS.
  - j. Response Options: This column contains values for the data element field.
  - k. Data File(s): This column indicates which data file the data element will be reported in.
  - l. Cal-OAR Data Element specifications:



Cal-OAR Data  
Element Specification

Technical note: Pending Online efforts to create new data elements there are a number of data elements that have not been mapped. These data elements have been highlighted and marked as TBD.

- m. Add logic to purge records from the aggregate table after a predetermined time period. The parameter default is 90 days.  
Technical note: If necessary to re- run a file for the same measurement period, then the job will purge the records created from the previous execution and insert new records into the aggregate table.
2. Create new writer job to read from the aggregate table and create an outbound file in XLSX format.
  - a. Generate file name to include the data file name, consortia name, and measurement period and year. Use the following format for the file name: "CalOAR19D\_Consortia

Name\_Measurement Period\_Calendar Year". Example of file name for Cal-OAR19D: "CalOAR19D\_C-IV\_APR-JUN\_2020".

3. CalSAWS Only: Create two sets of batch job properties for the new job:
  - a. Production Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the County Code List will contain a list of one County only - Los Angeles. SCRs 208599, 208600, 208601, 208602, 208603, 208604, and 208605 will update the production version of the County Code List to include each migration County that is included in each migration wave/release.
  - b. Test Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the Test version of the County Code List will contain ALL 58 California Counties. This test property will allow testing environments to test the functionality for Migration Counties that have not yet migrated into the system.

### **2.9.3 Execution Frequency**

The new interface for Cal-OAR19D will be scheduled to run on the 1<sup>st</sup> day two months after the measurement quarter ends. For example, if measurement period is for July through September 2021 then submission due date for Cal-OAR19D data file will be December 1, 2021.

Per request from CDSS, if the data file due date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

### **2.9.4 Key Scheduling Dependencies**

N/A

### **2.9.5 Counties Impacted**

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

### **2.9.6 Data Volume/Performance**

N/A

### **2.9.7 Interface Partner**

California Department of Social Services (CDSS).



### **2.9.8 Failure Procedure/Operational Instructions**

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

## **2.10 Create New FTP Batch Job to Transfer the Cal-OAR19D data file to CDSS**

### **2.10.1 Overview**

Create a new secure FTP batch job to send the quarterly data file for Cal-OAR19D to CDSS.

### **2.10.2 Description of Change**

Create a new secure FTP batch job that will transfer the Cal-OAR19D quarterly data file the Cal-OAR SFT.

### **2.10.3 Execution Frequency**

The new FTP batch job for Cal-OAR19D data file will be scheduled to run on the 1<sup>st</sup> day two months after the measurement quarter ends. If the batch date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

### **2.10.4 Key Scheduling Dependencies**

The new FTP job will run after the new Interface batch job that will generate the Cal-OAR19D data file.

### **2.10.5 Counties Impacted**

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

### **2.10.6 Data Volume/Performance**

N/A

### **2.10.7 Interface Partner**

California Department of Social Services (CDSS).

## 2.10.8 Failure Procedure/Operational Instructions

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

## 2.11 Create New Interface Batch Job for Cal-OAR19E Semi-Annual Data File

### 2.11.1 Overview

Create a new interface batch job to generate the semi-annual Cal-OAR19E data file to CDSS.

### 2.11.2 Description of Change

1. Create new sweep job for the Cal-OAR19E data file to read from LRS and C-IV data collection table and write the outbound data to a new aggregate table with the following data elements:
  - a. Variable Number column: This column specifies the data element position in the data file.
  - b. Variable Name column: This column defines the variable code name.
  - c. Variable Code column: This column contains the data element variable to be sent to CDSS.
  - d. Description: This column contains the description of the data element. The data element description is provided in ACL 19-40.
  - e. Criteria column: This column will indicate the required condition(s) of the data element.
  - f. Online Page Location column: This column lists the page navigation where the data element content is derived from.
  - g. Type column: This column specifies the data type of the data element.
  - h. Field Length column: This column specifies the length of the data element value sent to CDSS.
  - i. Required column: This column indicates if the data element is required to be received by CDSS.
  - j. Response Options: This column contains values for the data element field.
  - k. Data File(s): This column indicates which data file the data element will be reported in.
  - l. Cal-OAR Data Element specifications:



Cal-OAR Data  
Element Specificatio

Technical note: Pending Online efforts to create new data elements there are a number of data elements that have not been

mapped. These data elements have been highlighted and marked as TBD.

- m. Add logic to purge records from the aggregate table after a predetermined time period. The parameter default is 90 days. Technical note: If necessary to re- run a file for the same measurement period, then the job will purge the records created from the previous execution and insert new records into the aggregate table.
2. Create new writer job to read from the aggregate table and create an outbound file in XLSX format.
  - a. Generate file name to include the data file name, consortia name, and measurement period and year. Use the following format for the file name: "CalOAR19E\_Consortia Name\_Measurement Period\_Calendar Year". Example of file name for Cal-OAR19E: "CalOAR19E\_CalWIN\_JAN-JUN\_2020".
3. CalSAWS Only: Create two sets of batch job properties for the new job:
  - a. Production Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the County Code List will contain a list of one County only - Los Angeles. SCRs 208599, 208600, 208601, 208602, 208603, 208604, and 208605 will update the production version of the County Code List to include each migration County that is included in each migration wave/release.
  - b. Test Batch Job Properties will include a County Code List parameter. Upon implementation of this SCR, the Test version of the County Code List will contain ALL 58 California Counties. This test property will allow testing environments to test the functionality for Migration Counties that have not yet migrated into the system.

### 2.11.3 Execution Frequency

The new interface for Cal-OAR19E data file will be scheduled to run on the 1<sup>st</sup> day two months after the semi-annual measurement period ends. For example, if measurement period is for July through December 2021 then submission due date for Cal-OAR19E data file will be March 1, 2022.

Per request from CDSS, if the data file due date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

### 2.11.4 Key Scheduling Dependencies

N/A

### 2.11.5 Counties Impacted

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

#### **2.11.6 Data Volume/Performance**

N/A

#### **2.11.7 Interface Partner**

California Department of Social Services (CDSS).

#### **2.11.8 Failure Procedure/Operational Instructions**

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

### **2.12 Create New FTP Batch Job to Transfer the Cal-OAR19E data file to CDSS**

#### **2.12.1 Overview**

Create a new secure FTP batch job to send the semi-annual data file for Cal-OAR19E to CDSS.

#### **2.12.2 Description of Change**

Create a new secure FTP batch job that will transfer the Cal-OAR19E semi-annual data file the Cal-OAR SFT.

#### **2.12.3 Execution Frequency**

The new FTP batch job for Cal-OAR19E data file will be scheduled to run on the 1<sup>st</sup> day two months after the semi-annual measurement period ends. If the batch date falls on a Saturday, Sunday or Holiday, then batch will run on the next business day.

#### **2.12.4 Key Scheduling Dependencies**

The new FTP job will run after the new Interface batch job that will generate the Cal-OAR19E data file.

### 2.12.5 Counties Impacted

C-IV: All C-IV counties.

CalSAWS: All CalSAWS counties. Prior to CalSAWS migration, Los Angeles county only will be included in the outbound file. As the C-IV and CalWIN counties migrate into the CalSAWS system, CalSAWS will begin including the migrated counties.

### 2.12.6 Data Volume/Performance

N/A

### 2.12.7 Interface Partner


California Department of Social Services (CDSS).

### 2.12.8 Failure Procedure/Operational Instructions

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

## 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	Batch Design	Cal-OAR Data Variables and Attributes	 Cal-OAR Data Element Specificatio

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

SCR CA-205441 CIV-10075 – Add Need  
Categories and Need types for Family  
Stabilization and Housing Support to Need  
Detail page

	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/11/2018	V0	Initial Revision	Rainier Dela Cruz
10/03/2019	V1	Final Revision V1	Ishrath Khan
2/11/2020	V2	Final Revision V2	Ishrath Khan

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# 1 OVERVIEW

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## 1.1 Current Design

There are currently no Need categories of 'Family Stabilization' and 'Housing Support Program' on the Need Detail page.

## 1.2 Requests

To track Family Stabilization (FS) and Housing Support Program (HSP) needs and payments in the system, three new Need categories with need types under each category will need to be added to the Need Detail page.

## 1.3 Overview of Recommendations

To track Family Stabilization (FS) and Housing Support Program (HSP) needs and payments in the system, the following new Need categories and subsequent Need Types under them will be added:

1. Family Stabilization (FS)
  - a. Domestic Abuse Services
  - b. Mental Health Services
  - c. Substance Abuse Services
  - d. Ancillary/Other Services
  - e. Rental Assistance
  - f. Security Deposits
  - g. Utility Payments
  - h. Moving Cost Assistance
  - i. Hotel/Interim/Temp Housing
  - j. Other
  
2. Family Stabilization – Transportation
  - a. ~~Bus Card Tap Card~~
  - b. Campus Parking
  - c. Bus pass – No Valid Month
  - d. Bus Pass – Valid Month
  - e. Bus Ticket
  - f. Bus Token
  - g. Gas Card
  - h. Imprest Cash
  - i. Transportation

**NOTE:** ~~Bus Card~~ Tap Card is only available in LRS system.
  
3. Housing Support Program (HSP)
  - a. Full Rent Assistance
  - b. Partial Rent Assistance

- c. Additional Case Rental Payment
- d. Security Deposits
- e. Utility Payments
- f. Moving Costs
- g. Hotel / Interim / Temp Housing
- h. Habitability Items
- i. Other

## 2 RECOMMENDATIONS

---

### 2.1 Need Detail

#### 2.1.1 Overview

The Need Detail page allows user to view and add needs for supportive services. When adding a need, users will specify a Need Category and a Need Type. This section will describe the update to add new Need Categories and Need Types for Family Stabilization (FS) and Housing Support Program (HSP).

#### 2.1.2 Need Detail Mockup

## Need Detail

\*- Indicates required fields

Save and Return

Cancel

Name: \*

Category: \*

- Select -
- Ancillary - Education
- Ancillary - Work Related
- CalLearn Bonus
- CalWORKs EOA
- CalWORKs HSP
- Counseling
- Dependent Care
- Diversion Services
- Education/Job Training
- Family Stabilization
- Family Stabilization-Transportation
- Housing Support program
- Foster Care/Kin-GAP Services
- Homeless Assistance
- LD Accommodations
- Medical/Legal Services
- Other
- Other Supportive Services
- Special Needs
- Transportation

Type: \*

End Date: \*



Status Reason: \*

Save and Return

Cancel

This Type 1 page took 0.35 seconds to load.

Figure 2.1.1 – New Need Categories

# Need Detail

\*- Indicates required fields

Save and Return

Cancel

Name: \*

Category: \*

Family Stabilization

Begin Date: \*

10/24/2019

Description:

Status: \*

- Select -

Type: \*

- Select -  
Domestic Abuse Services  
Mental Health Services  
Substance Abuse Services  
Ancillary/Other Services  
Rental Assistance  
Security Deposits  
Utility Payments  
Moving Cost Assistance  
Hotel/Interim/Temp Housing  
Other

- Select -

Save and Return

Cancel

This [Type 1](#) page took 0.30 seconds to load.

Figure 2.1.2 – New Need Types – Family Stabilization

## Need Detail

\*- Indicates required fields

Save and Return


Cancel

Name: \*

Category: \*

Family Stabilization-Transportation ▼

Begin Date: \*

10/24/2019 

Description:

Status: \*

- Select - ▼

Type: \*

- Select -  
Bus Card  
Campus Parking  
Bus Pass - No Valid Month  
Bus Pass - Valid Month  
Bus Ticket  
Bus Token  
Gas Card  
Imprest Cash  
Transportation

Status Reason: \*

- Select - ▼

Save and Return

Cancel

This [Type 1](#) page took 0.30 seconds to load.

Figure 2.1.3 – New Family Stabilization Need Types (Family Stab -Transportation)

## Need Detail

\*- Indicates required fields

Save And Return

Cancel

Name: \*

- Select -

Category: \*

Housing Support Program

Begin Date: \*

09/25/2019

Description:

Status: \*

- Select -

Type: \*

- Select -  
Full Rent Assistance  
Partial Rent Assistance  
Additional Case Rental Payment  
Security Deposits  
Utility Payments  
Moving Costs  
Hotel/Interim/Temp Housing  
Habitability Items  
Other

Status Reason: \*

- Select -

Save And Return

Cancel

This Type 1 page took 0.52 seconds to load.

**Figure 2.1.4 – New Family Stabilization Need Types (Housing Support Program)**

### 2.1.3 Description of Changes

To track Family Stabilization (FS) and Housing Support Program (HSP) needs and payments in the system, the following new Need categories and subsequent Need Types under them will be added:

1. Family Stabilization (FS)
  - a. Domestic Abuse Services
  - b. Mental Health Services
  - c. Substance Abuse Services
  - d. Ancillary/Other Services
  - e. Rental Assistance
  - f. Security Deposits
  - g. Utility Payments

- h. Moving Costs
  - i. Hotel/Interim/Temp Housing
  - j. Other
2. Family Stabilization – Transportation
    - a. ~~Bus Card Tap Card~~
    - b. Campus Parking
    - c. Bus pass – No Valid Month
    - d. Bus Pass – Valid Month
    - e. Bus Ticket
    - f. Bus Token
    - g. Gas Card
    - h. Imprest Cash
    - i. Transportation

**NOTE:** ~~Bus Card Tap Card~~ is only available in LRS system.

3. Housing Support Program (HSP)
  - a. Full Rent Assistance
  - b. Partial Rent Assistance
  - c. Additional Case Rental Payment
  - d. Security Deposits
  - e. Utility Payments
  - f. Moving Costs
  - g. Hotel / Interim / Temp Housing
  - h. Habitability Items
  - i. Other

4. Add new code values to Category 1870 (Customer Need to Program Map) to add the mapping for the new need category and new need types to the allowed program.
  - **C-IV only:** The allowed programs for Need Category of 'Housing Support Program (HSP) will be CalWORKS, Welfare to Work and ~~General Assistance (Managed)~~. The allowed programs for Need Category of 'Family Stabilization', 'Family Stabilization- Transportation' will be CalWORKS and Welfare to Work
  - **LRS only:** The allowed programs for Need Category of 'Family Stabilization', 'Family Stabilization- Transportation' and 'Housing Support Program (HSP)' will be CalWORKS, Welfare to Work and REP (for LRS only).

5. For CalSAWS, for the new code values referenced in **recommendation #4** above, set the reference columns (refer\_table\_11\_descr, refer\_table\_12\_descr, refer\_table\_13\_descr) in category 1870 that look up the issuance method to use **Electronic Benefit Transfer (EBT), Warrant and Direct Deposit.**



## LRS Only:

1. Add a Need Category of "Family Stabilization (FS)" and the following Need Types under it as mentioned below. This will allow a service arrangement to be created.

- Substance Abuse Services
- Ancillary/Other Services
- Rental Assistance
- Security Deposits
- Utility Payments
- Moving Cost Assistance
- Other (Existing)

Rename the following Existing Need Types:

- Domestic Abuse to Domestic Abuse Services
- Mental Health to Mental Health Services
- Interim Shelter to Hotel / Interim / Temp Housing

2. Add a Need Category of "Family Stabilization - Transportation" and the following existing Need Types under it as mentioned below. This will allow a service arrangement to be created:

- ~~Bus Card~~ Tap card
- Campus Parking
- Bus Pass - No Valid Month
- Bus Pass - Valid Month
- Bus Ticket
- Bus Token
- Gas Card
- Imprest Cash
- Transportation

3. Add a Need Category of "Housing Support program (HSP)" and the following Need Types under it as mentioned below. This will allow a service arrangement to be created:

- Full Rent Assistance
- Partial Rent Assistance
- Additional Case Rental Payment
- Security Deposits
- Utility Payments
- Moving Costs
- Other (Existing)
- Habitability Items
- Hotel / Interim / Temp Housing

4. Update the code values of the following Customer Need Type Codes (CT 164) in LRS as they will now be used for Housing Support Program (HSP) Need type Codes.

Category	Short Description	Old Code Value	New Code Value
164	JCO/JCL Clothing Allowance	84	JCL
164	Family Reunification Moving Assistance	87	FMA
164	Work Supplies	88	WS
164	Books	89	BOO
164	Car Seats	82	CS
164	PES Clothing Allowance	83	PCL
164	Family Reunification Housing Support	86	FHS

Apply a DCR to update the existing Need type Code values in the following tables to the new code values as specified above

- i. CUST\_NEED
- ii. RECOV\_ACCT
- Update reference columns in CATGRY tables containing 'Need type' to use the new code values
  - i. Refer\_table\_2\_descr in CUSTOMER NEED TO PROGRAM MAP ( CT 1870)

#### C-IV Only:

2. Add a Need Category of "Family Stabilization (FS)" and the following Need Types under it as mentioned below. This will allow a service arrangement to be created.
  - Substance Abuse Services
  - Ancillary/Other Services
  - Rental Assistance
  - Moving Cost Assistance
  - Security Deposits (Existing)
  - Utility Payments (Existing)
  - Other (Existing)

Rename the following Existing Need Types:

- Interim Shelter to Hotel / Interim / Temp Housing
  - Domestic Abuse to Domestic Abuse Services
  - Mental Health to Mental Health Services
3. Add a Need Category of "Family Stabilization - Transportation" and the following existing Need Types under it as mentioned below. This will allow a service arrangement to be created:
- Campus Parking
  - Bus Pass - No Valid Month
  - Bus Pass - Valid Month
  - Bus Ticket
  - Bus Token
  - Gas Card
  - Imprest Cash
  - Transportation
4. Rename the Need Category of "CalWORKS HSP" to "Housing Support program (HSP)" and add the following Need Types under it as mentioned below. This will allow a service arrangement to be created:
- Hotel / Interim / Temp Housing
  - Security Deposits (Existing)
  - Utility Payments (Existing)
  - Moving Costs (Existing)
  - Other (Existing)
  - Habitability Items (Existing)
- Rename the following existing Need types under CalWORKS HSP
- Permanent Housing Cost to Full Rent Assistance
  - Temporary housing Cost to Partial Rent Assistance
  - Utility deposits to Additional Case Rental Payment

Remove the existing association in CODE\_HIERCHY for the following Need types to HSP

- Credit Repair/Past Evictions

#### 2.1.4 Page Location

**Global:** Employment Services

**Local:** Supportive Services

**Task:** Needs

### **2.1.5 Security Updates**

No change.

### **2.1.6 Page Mapping**

No change.

### **2.1.7 Page Usage/Data Volume Impacts**

Approximately 2000 records are estimated to be created monthly for Family Stabilization by all CalSAWS counties from this page. Please note that this is an approximation and this number may vary.

## **2.2 Service Arrangement Detail**

### **2.2.1 Overview**

The Service Arrangement Detail page allows users to create a service arrangement for a requested supportive service need. This section will describe the changes to allow a service arrangement to be created for Family Stabilization (FS) and Housing Support Program (HSP).

### **2.2.2 Service Arrangement Detail Mockup**

## Service Arrangement Detail

[Save and Return](#)[Cancel](#)

### Need

Type	Name	Category	Begin Date
 <a href="#">Security Deposits</a>	RANDAL, GUDRUN 1F	Family Stabilization	03/04/2020

### Activities

Type	Status	Begin Date	End Date
<div>Select</div>			

### Arrangement Details

#### Arrangement Period: \*

From: To: 

#### Program Type: \*

- Select -  
CalWORKs  
REP-PAYEE NAME  
Welfare to Work-PAYEE NAME

#### Aid Code: \*

- Select -

#### Payee: \*

Same as Provider

#### Provider: \*

Select

#### Employed: \*

- Select -

#### Additional Payee:

### Service Type Description

**Total** 

<input type="text"/>	<input type="text"/>
----------------------	----------------------

### Status History

Status	Status Reason	Status Date
<div></div>	<div></div>	03/04/2020 

#### Comments:

[Save and Return](#)[Cancel](#)This [Type 1](#) page took 1.23 seconds to load.

**Figure 2.2.1 – Create Service Arrangement (LRS)**

## Service Arrangement Detail

\*- Indicates required fields

Images

Save and Return

Cancel

### Need \*

Type	Name	Category	Begin Date
<input checked="" type="radio"/> <a href="#">Security Deposits</a>		Family Stabilization	03/04/2020

### Activities

Type	Status	Begin Date	End Date

Select

### Arrangement Details

#### Arrangement Period: \*

From: 03/04/2020 To:

#### Program Type: \*

Welfare to Work - FAITH GONZALES

#### Aid Code: \*

30 - CW-All Other Families (Fed)

#### Voucher: \*

Yes

#### Voucher Type: \*

WTW Voucher

#### Payee: \*

Welfare to Work Payee

#### Employed: \*

No

#### Payee Address:

#### Payee Name:

### Service Type Description

Total \*

### Status History \*

Status	Status Reason	Status Date

### Comments:

Images

Save and Return

Cancel

## Figure 2.2.1 – Create Service Arrangement with Voucher (C-IV)

### 2.2.3 Description of Changes

#### 1. C-IV only:

- The 'Program Type' drop down will contain CalWORKs and 'Welfare to Work' for the Need Category of 'Family Stabilization' or 'Family Stabilization- Transportation'.
- The 'Program Type' drop down will contain CalWORKs, 'Welfare to Work', ~~General Assistance (Managed)~~ for the Need Category of 'Housing Support Program (HSP)'.

#### 2. LRS Only:

- The 'Program Type' drop down will contain CalWORKs, 'Welfare to Work' and 'REP' for the Need Category of 'Family Stabilization' or 'Family Stabilization- Transportation' and 'Housing Support program (HSP)'.

#### 3. Update the Program Type Drop down when the Program is WTW or REP and Need Category is "Family Stabilization" or "Family Stabilization -Transportation" as follows:

- a. Append the latest primary applicant's name to the program name. For example, "Welfare-to-Work – John Smith".
- b. If there are multiple programs of the same type on the case, then multiple entries will be listed that are appended with each program's primary applicant.

**Note:** One of the values in the Payee drop down will be "Welfare To Work Payee". If the Program is CalWORKs and Need Category is "Family Stabilization" or "Family Stabilization -Transportation", the program type field will list "CalWORKs" as the Program type. No Changes are being made to the Payee drop down field for CalWORKs. One of the values in Payee drop down will display as "CalWORKs Payee".

4. The 'Aid Code' field will default to the aid code of CalWORKs or RCA program on the case. In the scenario where the aid code information is not available, the aid code will not be set. The user will need to select an aid code from the drop down.
5. Modify page logic to not validate for Activities for need categories for any of the following:
  - Family Stabilization (FS)
  - Family Stabilization – Transportation
  - Housing Support Program (HSP)

6. Add a new validation on the Service Arrangement Detail page after the Arrangement period is selected, to prevent a service arrangement from being created for Housing Support Program (HSP) when the status of the Payee on CalWORKs, WTW/REP is NOT Active, Non-Comp or Exempt.

- **Payee** - The <Program> program or the person within it is not Active, Non-Comp or Exempt for a single day in the Arrangement period. Please adjust the dates.

**Note:** <Program> will be CalWORKs, WTW/REP program in this validation. If the program/person status is not any of the following - Active, Non-Comp or Exempt, for even a single **date within the Service Arrangement period**, then the program/person becomes ineligible to receive Housing Support Program (HSP) services.

7. The 'Service Type Description' field will be identical for dependent on the all need types pertaining to these three programs) as in **Figure 2.2.1**. If the need type can be issued as a valuable, the Service type description will display the available valuable types.

8. If the county the user is logged into allows for vouchers, the 'Voucher' drop down field will be displayed with the current selectable choices of 'Yes' or 'No'. If 'Yes' is selected, the 'Voucher Type' field will be displayed, and the current selectable vouchers types will populate the drop down. The Valuable Request Detail page will be used to issue Vouchers for Family Stabilization (FS) or Housing Support Program (HSP) Need types.

Note: DDCR # 5043 documented the need to keep C-IV County Voucher options current. CalSAWS SCR # CA201484 was created for DDCR # 5043.

#### 2.2.4 Page Location

**Global: Employment Services**

**Local: Supportive Services**

**Task: Service Arrangements**

#### 2.2.5 Security Updates

No change.

#### 2.2.6 Page Mapping

No change.

#### 2.2.7 Page Usage/Data Volume Impacts

Approximately 2000 records are estimated to be created monthly for Family Stabilization by all CalSAWS counties from this page. Please note that this is an approximation and this number may vary.



## 2.3 Payment Request Detail

### 2.3.1 Overview

The Payment Request Detail page allows user to create or approve a recipient's request for a supportive service. When creating/approving a request, users specify the Service Month for the request. This section will describe the changes to allow a payment request to be created or approved for Family Stabilization (FS)

Note:

1. Family Stabilization services can be issued when one of the following is true
9. WTW/REP program status is Active, Non-Compliance, Good Cause, sanction or Exempt (per ACL 14-12.)
10. CalWORKs program status is Active
2. Housing Support program services will be issued when the following is true
  - WTW/REP program status is Active, Non-Compliance and Exempt.
  - CalWORKs/~~General Assistance (Managed)~~ program status is Active

## 2.3.2 Payment Request Detail Mockup

### Payment Request Detail

\*- Indicates required fields

SaveCancel

Service Arrangement ID:

Payment Request Number:

Service Arrangement Details

<b>Payee Name:</b>	<b>Case Name:</b>	<b>Case Number:</b>
<b>Program:</b>	<b>Funding Source:</b>	<b>Aid Code:</b>
Welfare to Work		30 - CW-All Other Families (Fed)
<b>Need Category:</b>	<b>Need Type:</b>	<b>Voucher Number:</b>
Family Stabilization	Security Deposits	
<b>Service Type:</b>	<b>Employed:</b>	
	No	

**Requested Amount: \***

100

**Adjusted Amount:**

100.00

**Status: \***

Awaiting Approval

**Service Month: \***

- Select -

**Issuance Method: \***

EBT

**Pay Code:**

NF TR UE FS  
NF TR EM FS  
NF AE EM FS  
NF WR EM FS  
NF OSS UE FS  
FE TR UE FS  
FE TR EM FS  
FE AE EM FS  
FE WR EM FS  
FE OSS UE FS  
FE HA FS  
NF HA FS  
NM TR UE FS  
NM TR EM FS  
NM AE EM FS  
NM WR EM FS  
NM OSS UE FS  
NM HA FS

**Creation Date:**

**Immediacy: \***

Routine

**Invoice Number:**

**Purchase Order Number:**

SaveCancel

This Type 1 page took 1.32 seconds to load.

Figure 2.3.1 – Creating Payment Request (C-IV)

## Payment Request Detail

\* - Indicates required fields

Save

Cancel

Service Arrangement ID:  
826306680

Payment Request Number:

### Service Arrangement Details

Payee Name:  
CARLOS RODRIGUEZ

Case Name:

Case Number:

Program:  
Welfare to Work

Funding Source:

Aid Code:  
35 - CW-Two Parent (Fed)

Need Category:  
Family Stabilization

Need Type:  
Security Deposits

Voucher Number:

Service Type:

Employed:  
No

Requested Amount: \*

100

Adjusted Amount:

100.00

Advanced: \*

Yes

Service Arrangement

Requested Amount:  
121.00

Status: \*

Awaiting Approval

Service Month: \*

09/2019

Issuance Method: \*

Warrant

Service Arrangement

Remaining Amount:  
21.00

Pay Code:

NF TR UE FS  
NF TR EM FS  
NF AE EM FS  
NF WR EM FS  
NF OSS UE FS  
FE TR UE FS  
FE TR EM FS  
FE AE EM FS  
FE WR EM FS  
FE OSS UE FS  
FE HA FS  
NF HA FS  
NM TR UE FS  
NM TR EM FS  
NM AE EM FS  
NM WR EM FS  
NM OSS UE FS  
NM HA FS

Receipt Verification Date:

Receipt Amount:

Creation Date:

Invoice Number:

Immediacy: \*

Routine

Purchase Order Number:

Level of Approval  
Required:

Save

Cancel

This page took 0.76 seconds to load.

Figure 2.3.2 – Creating Payment Request (LRS)

### 2.3.3 Description of Changes

1. Add the following Family Stabilization (FS) pay codes:
  - Fed Transportation Unemployed Family Stabilization (AC)
  - Fed Transportation Employed Family Stabilization
  - Fed Ancillary Expenses Employed Family Stabilization
  - Fed Work Related Employed Family Stabilization

- ~~Fed Other Supportive Services Unemployed Family Stabilization~~
- Non-Fed Transportation Unemployed Family Stabilization
- Non-Fed Transportation Employed Family Stabilization
- Non-Fed Ancillary Expenses Employed Family Stabilization
- Non-Fed Work Related Employed Family Stabilization
- ~~Non Fed Other Supportive Services Unemployed Family Stabilization~~
- Fed Housing Assistance Family Stabilization
- Non-Fed Housing Assistance Family Stabilization
- ~~Non-MOE Transportation Unemployed Family Stabilization~~
- ~~Non-MOE Transportation Employed Family Stabilization~~
- ~~Non-MOE Ancillary Expenses – Employed Family Stabilization~~
- ~~Non-MOE Work Related Activities & Exp – Employed Family Stabilization~~
- ~~Non-MOE Other Supportive Services – Unemployed Family Stabilization~~
- ~~Non-MOE Housing Assistance Family Stabilization~~

**Note:** This recommendation is for LRS only, as these pay codes already exist in C-IV. The code\_num\_identif "AC" is currently being used by LRS for Approved Caregiver functionality and will need to be updated to align with C-IV pay codes to avoid migration impacts. Please refer to the attached CA-205441 CIV-10075 - Family Stabilization Pay Codes Fund Codes.xlsx file under **Section 3.0** for pay code details.

## 2. LRS Only:

- Update the code values of the following Pay Code (CT 623) in LRS as they will now be used for Family Stabilization Pay Codes.

Category	Short Description	Old Code Value	New Code Value
623	Approved Relative Caregiver	AC	1Z
623	Learning Disability Assessment	AL	1X
623	Vocational Assessment	AS	1Y

- Apply a DCR to update the Pay Code values in the following tables from "AC" to "1Z", "AL" to "1X" and "AS" to "1Y".
  - FISCAL\_TRANSACT\_MAP
  - FUND\_CODE\_MAP
  - ISSUANCE\_DETL
  - ISSUANCE\_CLAIM\_TRANSACT
  - CLAIM\_HIST
  - GL
  - FUND
- Update the code for the following functional areas to use the new code value "1Z" for "Approved Relative Caregiver" pay code instead of the old pay code value "AC".
  - DCFS Claim Data Report – Report generation Query
  - GenerateBlueVoucherForSkippedCasesFCPayrollBatch – Query in FosterCareVoucherDaoImpl.java  
GET\_SKIPPED\_CASES\_DURING\_FC\_MAIN\_PAYROLL

- iii. CreatePlacementVerifRecordsBatch - Query in FosterCareVoucherDaoImpl.java  
GET\_NO\_Placement\_Verif\_Records\_FC\_MAIN\_PAYROLL
  - iv. VerifyARCVouchersAsReceivedBatch - Query in FosterCareVoucherDaoImpl.java  
REC\_NOT\_EXISTS\_CHILD\_PLACEMT\_VERIF
  - v. MarkARCVouchersReceivedBatch - Query in FosterCareVoucherDaoImpl.java  
REC\_EXISTS\_CHILD\_PLACEMT\_VERIF
  - vi. Special Warrant Request Writer – Miscellaneous Vendor Customer  
Code population logic for ARC aid codes – MISC-LRSARC.
  - vii. Trust Warrant Request Writer – Miscellaneous Vendor Customer  
Code population logic for ARC aid codes – MISC-LRSARC.
3. Add the following Housing Support Program (HSP) pay codes:
    - Fed Housing Support Program
    - Non-Fed Housing Support Program
    - Non-MOE Housing Support Program
    - Fed Transportation-Employed HSP
    - Fed Transportation-Unemployed HSP
    - Non Fed Transportation-Employed HSP
    - Non Fed Transportation-Unemployed HSP
    - Non-MOE Transportation-Employed HSP
    - Non-MOE Transportation-Unemployed HSP
    - **Note:** This recommendation is for LRS only, as these pay codes are already in C-IV. Please refer to the attached CA-205441 CIV-10075 - Family Stabilization Pay Codes Fund Codes.xlsx file under **Section 3.0** for pay code details.
  4. Add new fund codes in the system to store the accounting string information for Family Stabilization needs (LRS Only).
  5. Add the values in the 'Claim Based On Paycode' column in Category 623 (Pay Code) to allow the Family Stabilization and Housing Support pay codes to be used for claiming. The payment amount will be claimed based on the Federal Indicator on the pay code.
  6. **C-IV Only:** The Housing Support Program (HSP) pay codes will now be available to "Welfare to Work" and "General Assistance Program (Managed)" in addition to "CalWORKS". Please see spreadsheet "HSP\_PayCodes\_FundCodes" under Supporting documents -Section 3 for details. Update the 'Pay Code' drop down to only have the pay codes corresponding to the Need Category of Family Stabilization or Housing Support Program. For ex. If a Need Category of 'Family Stabilization' is selected, only the pay codes relevant to it (listed in Recommendation 1 of Section 2.3.3) will be populated. The pay code will not be automated. The user will need to manually select a pay code from the Pay Code drop down. Update the logic in C-IV to only display the pay codes that are relevant to the Need Category on Payment Request Detail page. This can be done by adding a reference table column of 'custom pay code' to CT 1870.
  7. The 'Issuance Method' drop down will have EBT, warrant and Direct Deposit (LRS only) as selectable choices.

**Note:** Direct deposit will only be available if the existing issuance method on the parent program is Direct Deposit.

8. Add the following validation for Family Stabilization and Family Stabilization - Transportation when the 'Approve' button is clicked and the CalWORKS/WTW/REP Program status is not Active, Non-Comp, Good Cause, Sanction or Exempt:
  - Cannot approve Payment Request for this Service Arrangement. CalWORKS/WTW/REP Program for Family Stabilization Needs must be Active, Non-Comp, Good Cause, Sanction or Exempt during the Service Month.
9. The Nightly Payment Request Sweep will be updated for Family Stabilization, Family Stabilization-Transportation payment requests to pick WTW/REP/CalWORKs program in Active, Non-Comp, Exempt, Good Cause and Sanction status.
10. The Nightly Payment Request Sweep will be updated for Housing Support program payment requests to pick WTW/REP/CalWORKs /General Assistance (Managed) program in Active, Non-Comp and Exempt status.
11. Add the following validation for Housing Support Program when the 'Approve' button is clicked and the CalWORKS/WTW/REP /General Assistance (Managed) Program status is not Active, Non-Comp or Exempt:
  - Cannot approve Payment Request for this Service Arrangement. CalWORKs/WTW/REP /General Assistance(Managed) Program for Housing Support Needs must be Active, Non-Comp or Exempt during the Service Month.

**Note: C-IV:** If the program is CalWORKS, the default issuance method on the Payment request Detail page will be the same as that of CalWORKS. If the WTW Payee on the Payment Request is the same as the CalWORKS Primary Applicant and the issuance method for CalWORKS is EBT, then the default issuance method selected on the Payment Request Detail page will be EBT. Otherwise it will be 'Warrant'. If the program is General Assistance (Managed), the issuance method will be same as that of General Assistance (Managed).

**LRS:** The system finds the issuance method for the payment request's program where the payee is both the Primary Applicant and the Payee. The program must be Active or Discontinued.

- If the program is CalWORKS, CalLearn or Welfare to **Work**, CalWORKs' issuance method is used.
- If the program is REP, RCA or CalWORKs is used, with CalWORKs having priority if both programs are present.
- If no issuance method is found, the default is set to Warrant.

**Note: C-IV Only:** On the Payment Request Detail page, Pay Code field will not be displayed as a required field (with a red asterisk) but when user saves the page a validation is thrown if the Need Category is Family Stabilization, Family Stabilization-Transportation or Housing Support Program (HSP) and program code is WTW. Pay code field is not a required field and no validation is thrown if the Need Category is Family

Stabilization, Family Stabilization- Transportation or Housing Support Program (HSP) and program code is CalWORKS

#### 2.3.4 Level of Approval (LRS Only):

LRS uses a two-tier approach for Approval of Payment requests.

- Supervisor Approval: The 'Approve' button is visible after a Worker creates a Payment Request which will trigger an alert to a Supervisor as well as a change of status of the Payment Request to "Awaiting Approval". The same worker that creates the payment request cannot approve it. When a Supervisor clicks on the "Approve" button, the status of the payment request changes from "Awaiting Approval" to "Awaiting Deputy Approval" (if a Deputy Approval is required).
  - Deputy Approval: When a Deputy clicks on the "Approve" button, the status of the payment request changes from "Awaiting Deputy Approval" to "issuance created".
1. Add issuance threshold levels for Deputy Approval pertaining to the Need types for Family Stabilization and Housing Support as described in the document "IssuanceThresholdLimits\_LRS" under **Section 3 Supporting Documents**.

#### 2.3.5 Validations:

LRS:

Field	Validation	Message
Requested Amount	Custom	<del>Requested Amount is greater than Remaining Balance-</del> The Requested Amount exceeds the amount authorized on the Service Arrangement.
Pay Code	Custom	Field is required. Please enter a value
Requested Amount	Custom	Requested Amount exceeds issuance threshold
Requested Amount	Custom	The Requested Amount cannot be less than or equal to zero.
Adjusted Amount	Custom	The Adjusted Request Amount cannot be less than zero.
Adjusted Amount	Custom	The Adjusted Request Amount cannot be zero, unless there are Recovery Account Transactions.
Immediacy	Custom	Cannot Rush a Future Month Supplement.
Approve	Custom	Payment Request cannot be approved unless status of Program is Active or Deferred.

Deputy Approval	Custom	<ul style="list-style-type: none"> <li>Cannot be created and approved by a same worker</li> <li>Supervisor and Deputy approval cannot be the same worker</li> </ul>
Approve	Custom	Cannot be created and approved by a same worker
Approve	Custom	Payment Request cannot be approved for Rush Warrants
Save	Custom *If the payment request is made to accommodate a need for homeless assistance, and the address of the participants is the address of a district office, they must provide another mailing address, choose direct deposit, or select an alternate cardholder.	Provide another mailing address, choose direct deposit, or select an alternate cardholder.
Save and Copy	Custom	Duplicate payment request found.
Approve	Custom	Cannot approve Payment Request for this Service Arrangement. CalWORKs/WTW/REP Program for Family Stabilization Needs must be Active, Non-Comp, Good Cause, Sanction or Exempt during the Service Month.
Approve	Custom	Cannot approve Payment Request for this Service Arrangement. CalWORKs/WTW/REP Program for Housing Support Needs must be Active, Non-Comp or Exempt during the Service Month.

#### C-IV:

Field	Validation	Message
Requested Amount	Custom	Requested Amount is greater than Remaining Balance—The Adjusted Amount exceeds the



		remaining amount authorized on the Service Arrangement.
Pay Code	Custom	Field is required. Please enter a value
Requested Amount	Custom	Requested Amount exceeds issuance threshold
Requested Amount	Custom	The Requested Amount cannot be less than or equal to zero.
Adjusted Amount	Custom	The Adjusted Request Amount cannot be less than zero.
Adjusted Amount	Custom	The Adjusted Request Amount cannot be zero, unless there are Recovery Account Transactions.
Immediacy	Custom	Cannot Rush a Future Month Supplement.
Approve	Custom	Cannot approve Payment Request for this Service Arrangement. CalWORKs/WTW Program for Family Stabilization Needs must be Active, Non-Comp, Good Cause, Sanction or Exempt during the Service Month.
Approve	Custom	Cannot approve Payment Request for this Service Arrangement. CalWORKs/WTW <del>General Assistance (Managed)</del> Program for Housing Support Program Needs must be Active, Non-Comp or Exempt during the Service Month.

### 2.3.6 Page Location

**Global: Fiscal**

**Local: Payment Requests**

**Task: Payment Request Search**

### 2.3.7 Security Updates

No change.

### 2.3.8 Page Mapping

No change.

### 2.3.9 Page Usage/Data Volume Impacts

Approximately 2000 records are estimated to be created monthly for Family Stabilization by all CalSAWS counties from this page. Please note that this is an approximation and this number may vary.

## 2.4 Valuable Request Detail -Vouchers (C-IV & LRS)

### 2.4.1 Overview

When creating a Voucher for Family Stabilization (FS) or Housing Support Program (HSP), the pay codes need to be selectable on the page. This section will describe the update to allow the Family Stabilization pay codes to be selectable on the Valuables Request Detail page.

DRAFT

## 2.4.2 Valuables Detail Mockup

### Valuable Request Detail

\*- Indicates required fields

Save and Issue

Cancel

Valuable Request ID:

#### Service Arrangement Details

Service Arrangement ID:

Case Name:

Case Number:

Case Name

Payee Name:

Program:

Aid Code:

Welfare to Work

30 - CW-All Other Families (Fed)

Need Category:

Need Type:

Employed:

Family Stabilization - Transportation

No

Valuable Type:

Quantity:

WTW Voucher

1

Arrangement Period:

From: 02/05/2020 To: 02/07/2020

#### Financial Information

Pay Code: \*

FE AE EM FS  
FE HA FS  
FE OSS UE  
FE TR EM FS  
FE TR UE FS  
FE WR EM FS  
NF AE EM FS  
NF HA FS  
NF OSS UE FS  
NF TR EM FS  
NF TR UE FS  
NF WR EM FS  
NM AE EM FS  
NM HA FS  
NM OSS UE FS  
NM TR EM FS  
NM TR UE FS  
NM WR EM FS

#### Balance Summary

Authorized

Quantity Issued

0

Control Number \*

1

Comments:

Save and Issue

Cancel

This Type 1 page took 0.26 seconds to load.

Figure 2.2.1 –Valuable Request Detail (Vouchers)

### 2.4.3 Description of Changes

1. Update the Valuable Request Detail page to make the pay code field be a dropdown that contains the relevant pay codes when the Need Category is one of the following:
  - Family Stabilization (FS)
  - Housing Support Program (HSP)

### 2.4.4 Page Location

**Global: Fiscal**

**Local: Valuables**

**Task: Valuable Request Search**

### 2.4.5 Security Updates

No change.

### 2.4.6 Page Mapping

No change.

### 2.4.7 Page Usage/Data Volume Impacts

Approximately 2000 records are estimated to be created monthly for Family Stabilization by all CalSAWS counties from this page. Please note that this is an approximation and this number may vary.

## 2.5 Valuable Request Detail- Valuables (C-IV & LRS)

### 2.5.1 Overview

When creating a valuable using a Need category of "Family Stabilization-Transportation", the pay codes need to be selectable on the page. This section will describe the update to allow the Family Stabilization pay codes to be selectable on the Valuables Request Detail page.

## 2.5.2 Valuables Detail Mockup

DRAFT

## Valuable Request Detail

\*- Indicates required fields

Save and Issue

Cancel

Valuable Request ID:

### Service Arrangement Details

Service Arrangement ID:

Case Name:

Case Number:

Payee Name:

Program:

Aid Code:

Welfare to Work

30 - CW-All Other Families (Fed)

Need Category:

Family Stabilization-Transportation

Need Type:

Bus Pass - No Valid Month

Employed:

No

Valuable Type:

Student 31 day pass \$45

Quantity:

1

Arrangement Period:

From: 06/06/2019 To: 06/14/2019

### Financial Information

Pay Code: \*

FE TR UE FS  
FE TR EM FS  
FE AE EM FS  
FE WR EM FS  
FE OSS UE FS  
NF TR UE FS  
NF TR EM FS  
NF AE EM FS  
NF WR EM FS  
NF OSS UE FS  
FE HA FS  
NF HA FS  
NM TR UE FS  
NM TR EM FS  
NM AE EM FS  
NM WR EM FS  
NM OSS UE FS  
NM HA FS

### Balance Summary

Authorized

Quantity Issued

0

	Starting Control Number *	Ending Control Number *	Quantity
--	---------------------------	-------------------------	----------

☐

11

11

1

Remove

Comments:

Save and Issue

Cancel

This Type 1 page took 0.45 seconds to load.

Figure 2.2.1 –Valuable Request Detail (Valuables)

### 2.5.3 Description of Changes

1. Update the Valuable Request Detail page to make the pay code field be a dropdown that contains the Family Stabilization pay codes when the Need Category is:
  - o Family Stabilization – Transportation

Note: Currently in C-IV, pay code field is a required field for WTW but not CalWORKs on the Valuable request detail page. This will apply to LRS/CalSAWS going forward.

### 2.5.4 Page Location

**Global: Fiscal**

**Local: Valuables**

**Task: Valuable Request Search**

### 2.5.5 Security Updates

No change.

### 2.5.6 Page Mapping

No change.

### 2.5.7 Page Usage/Data Volume Impacts

Approximately 2000 records are estimated to be created monthly for Family Stabilization by all C-IV counties from this page. Please note that this is an approximation and this number may vary.

## 2.6 Counties Interface Testing

### 2.6.1 Overview

Each CalSAWS county has its separate warrant print & auditor control file exchange process. This section describes the recommendations to perform interface testing for all CalSAWS counties.

### 2.6.2 Description of Changes




Perform the interface file testing for following counties:

- Los Angeles – eCAPS Special Warrant Request (SWR) and Journal Voucher Writer (JVW)

- Migration – Auditor Controller File

**NOTE:** Except for Los Angeles County, all interface test files will be uploaded to the CalSAWS Web Portal under System Changes > SCR and SIR Lists > 2019 > SCR 10075. Los Angeles County test file will be uploaded to eCAPS test FTP servers.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Fiscal	Family Stabilization Pay Codes	 FMD Input (5.2.19)_CA-205441 CIV-1007
2	Fiscal	Issuance threshold limits and levels of Approval	 IssuanceThresholdlimits_LRS.xls
3	Fiscal	Housing Support Program Pay Codes	 HSP_PayCodes_Fund Codes.xlsx



## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
368	The CONTRACTOR shall migrate the values of "Permanent" and "Temporary" in the "Type" field when "Homeless" is selected from the "Category" field on the Needs List page and the Need Detail page.	This SCR will provide additional need categories and need types for 'Family Stabilization 'and 'Housing Support program' services.

### 4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met

## 5 MIGRATION IMPACTS

---

C-IV currently has additional need types like 'Permanent Housing' and 'Temporary Housing' under the CalWORKs HSP Need Category.

DDID # 368 (SCR # CA-207464) will address bringing those need types into LRS.

CA SCR 207471 in Release 20.05 will Migrate Pay codes and Fund codes specific to the 58 counties.

## 6 OUTREACH

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N/A

## 7 APPENDIX

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N/A



California Statewide Automated Welfare System

## **Design Document**

CA-205652 CIV-9947 – Recovery Account Cause  
Code Editing Logic

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eric Wu
	Reviewed By	Naresh Barsagade, Jyothirmayi Chavata, Sidhant Garg, Kapil Santosh

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/22/2019	1.0	Initial Draft	Eric Wu
02/11/2019	1.1	Adding details on existing functionalities in section 2.1.3	Eric Wu

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# 1 OVERVIEW

---

This document describes the required changes in the system to prevent possible errors in report CA812 and FNS209 when changing Cause of a recovery Account.

## 1.1 Current Design

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.

## 1.2 Requests

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.

### 1.3 Overview of Recommendations

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 FeeIf 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 form 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.

### 1.4 Assumptions

Only External Recovery Accounts should have non-report-tracked Cause Codes.

## 2 RECOMMENDATIONS

---

### 2.1 Recovery Account Detail

#### 2.1.1 Overview

1. Hide or show non-report-tracked Cause Codes for selections in Edit Mode to prevent Recovery Accounts changing from a report-tracked Cause Code to a non-report-tracked Cause Code or vice-versa.
2. Hide non-report-tracked Cause Codes when creating non-external regular Recovery Accounts.

## 2.1.2 Recovery Account Detail Mockup

### Recovery Account Detail

\*- Indicates required fields

Save Cancel

**Recovery Account Number:**  
00000000

**Recovery Account Type:**  
Regular

**Created By:**  
[000000](#)

**Creation Date:**  
07/01/2019

**Case Number:** \*  
[0000000](#)

**Case Name:**  
Person 00

**LEADER Claim Number:**

#### Account Details

**Program Type:**  
General Assistance/General Relief

**Discovery Date:** \*  
07/01/2019

**Assigned To:** \*  
Staff 00 [Select](#)

**Cause:** \*  

Bounce Check Charges  
Collection Fee  
Court Filing Fees  
Sheriff Service Fees

**Cause Date:**  
09/09/2019

**Expiration Date:**

**Status:** \*  
Active

**Status Reason:** \*  
Active

**Status Date:**  
07/01/2019

**Is this an ICT:** \*  
No

**Originating County:**

**Investigations:** \*  
None

**Fraud Identification Date:**

#### Account Balance

**Original Balance:** \$ 100.00

**Total Recovered:** \$ 0.00

**Current Balance:** \$ 100.00

Figure 2.1.1 – Recovery Account Detail With Active Status and non-report-tracked Cause Codes Edit Mode

## Recovery Account Detail

\*- Indicates required fields

SaveCancel

**Recovery Account Number:**  
00000000

**Recovery Account Type:**  
Regular

**Created By:**  
000000

**Creation Date:**  
07/01/2019

**Case Number:** \*  
0000000

**Case Name:**  
Person 00

**LEADER Claim Number:**

### Account Details

**Program Type:**  
CalFresh

**Discovery Date:** \*  
07/01/2019

**Assigned To:** \*  
Staff 00 

Select

**Cause:** \*  

CalFresh - Admin Caused (after 3/2000)

CalFresh - Admin Caused (prior to 3/2000)

CalFresh - IHE (Customer Caused)

CalFresh - Potential IPV

**Cause Date:**  
09/09/2019

**Expiration Date:**

**Status:** \*  
Active

**Status Reason:** \*  
Active

**Status Date:**  
07/01/2019

**Is this an ICT:** \*  
No

**Originating County:**

**Investigations:** \*  
None

**Fraud Identification Date:**

### Account Balance

**Original Balance:** \$ 100.00  
**Total Recovered:** \$ 0.00  
**Current Balance:** \$ 100.00

Figure 2.1.2 – Recovery Account Detail With Active Status And Report-tracked Cause Code Edit Mode



Case Info	<b>Eligibility</b>	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools
-----------	--------------------	----------------	------------	-------------------	--------	---------------	---------	-----------------	-------------

### Recovery Account Detail

\*- Indicates required fields

Save and Return Cancel

<b>Recovery Account Number:</b>	<b>Recovery Account Type:</b> Regular	<b>Created By:</b>
<b>Creation Date:</b>	<b>Case Number: *</b> <a href="#">CASE 00</a>	<b>Case Name:</b> CASE 00
<b>LEADER Claim Number:</b>		

#### Account Details

<b>Program Type:</b> CalFresh	<b>Discovery Date: *</b> <input type="text"/>	<b>Assigned To: *</b> STAFF 00 <a href="#">Select</a>
<b>Cause: *</b> <div> <div>- Select -</div> <div> CalFresh - Admin Caused (after 3/2000)  CalFresh - Admin Caused (prior to 3/2000)  CalFresh - IHE (Customer Caused)  CalFresh - Potential IPV </div> </div>	<b>Status: *</b> Pending	<b>Cause Date:</b>
<b>Status Reason: *</b> In-Process	<b>Expiration Date:</b>	<b>Status Date:</b>
<b>Is this an ICT: *</b> No	<b>Originating County:</b> <input type="text"/>	
<b>Investigations: *</b> - Select -	<b>Fraud Identification Date:</b>	

#### Account Balance

<b>Original Balance:</b> \$ 0.00
<b>Total Recovered:</b> \$ 0.00
<b>Current Balance:</b> \$ 0.00

**Figure 2.1.3 – Recovery Account Detail For Non-External Regular Recovery Account in Create Mode**

### Recovery Account Detail

\*- Indicates required fields

Save

Cancel

**Recovery Account Number:**  
00000000

**Recovery Account Type:**  
Regular

**Created By:**  
[000000](#)

**Creation Date:**  
07/01/2019

**Case Number: \***  
[0000000](#)

**Case Name:**  
Person 00

**LEADER Claim Number:**

#### Account Details

**Program Type:**  
CalFresh

**Discovery Date: \***  
07/01/2019

**Assigned To: \***  
Staff 00 

Select

**Cause: \***  

CalFresh - Admin Caused (after 3/2000)

CalFresh - Admin Caused (prior to 3/2000)

CalFresh - IHE (Customer Caused)

CalFresh - Potential IPV

Composition

**Cause Date:**  
07/01/2019

**Expiration Date:**

**Status: \***  

Pending

**Status Reason: \***  

In-Process

**Status Date:**  
07/01/2019

**Is this an ICT: \***  
No

**Originating County:**

**Investigations: \***  

None

**Fraud Identification Date:**

#### Account Balance

**Original Balance:** \$ 161.00  
**Total Recovered:** \$ 0.00  
**Current Balance:** \$ 161.00

**Figure 2.1.4 – Recovery Account Detail For Pending Non-External Regular Recovery Account in Edit Mode**

## Recovery Account Detail

\*- Indicates required fields

SaveCancel

Recovery Account Number:  
00000000

Recovery Account Type:  
Regular

Created By:  
[000000](#)

Creation Date:  
07/01/2019

Case Number: \*  
[0000000](#)

Case Name:  
Person 00

LEADER Claim Number:

### Account Details

Program Type:  
CalFresh

Discovery Date: \*  
07/01/2019

Assigned To: \*  
Staff 00 

Select

Cause: \*

-Select-

CalFresh - Admin Caused (after 3/2000)

CalFresh - Admin Caused (prior to 3/2000)

CalFresh - IHE (Customer Caused)

CalFresh - Potential IPV

Composition

Status: \*  

Pending

Status Reason: \*  

In-Process

Cause Date:  
07/01/2019

Expiration Date:

Is this an ICT: \*  
No

Originating County:

Investigations: \*  

None

Fraud Identification Date:

Status Date:  
07/01/2019

### Account Balance

Original Balance: \$ 161.00

Total Recovered: \$ 0.00

Current Balance: \$ 161.00

**Figure 2.1.5 – Recovery Account Detail For Pending Non-External Regular Recovery Account With Non-report-Tracked Cause in Edit Mode**

### 2.1.3 Description of Changes

1. In Edit Mode of an active Recovery Account, if Cause of the account is one of the non-report-tracked below, have only below Cause Codes available for selections. Please see Figure 2.1.1.

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

For other Causes, hide above Cause Codes from selections. Please see Figure 2.1.2.

Note:

The following functionalities will be maintained when edit an active Recovery Account -

- If Cause of the account is either:
  - i. Cash - Customer Caused
  - ii. Cash - Potential IPV
  - iii. Cash - Late QR7 (LRS\CalSAWS only)
  - iv. Cash - Late SAR7 (LRS\CalSAWS only)
  - v. GR - Customer Causes (LRS\CalSAWS only)
  - vi. GR - Potential IPV (LRS\CalSAWS only)
  - vii. Fraud Referral (LRS\CalSAWS only)

Only the following are available for selections:

- i. Cash - Customer Caused
- ii. Cash - Potential IPV
- iii. Cash - Late QR7 (LRS\CalSAWS only)
- iv. Cash - Late SAR7 (LRS\CalSAWS only)
- v. GR - Customer Causes (LRS\CalSAWS only)
- vi. GR - Potential IPV (LRS\CalSAWS only)
- vii. Fraud Referral (LRS\CalSAWS only)
- viii. Cash - IPV (ADH)
- ix. Cash - IPV (waiver)
- x. Cash - IPV (Court)
- xi. GR - IPV(Court) (LRS\CalSAWS only)
- xii. GR - IPV(ADH) (LRS\CalSAWS only)
- xiii. GR - IPV(Waiver) (LRS\CalSAWS only)

- If Cause of the account is either:
  - i. CalFresh - Potential IPV
  - ii. CalFresh - IHE (C-IV only)
  - iii. CalFresh - IHE (Customer Caused) (LRS\CalSAWS only)

Only the following are available for selections:

- i. CalFresh - Potential IPV
- ii. CalFresh - IHE (C-IV only)
- iii. CalFresh - IHE (Customer Caused) (LRS\CalSAWS only)
- iv. CalFresh - IPV (Court)
- v. CalFresh - IPV (waiver)
- vi. CalFresh - IPV (ADH)

- If Cause of the account is IPV, the Cause field is not editable.

2. In Create Mode and Edit Mode of an non-external regular Recovery Account with New or Pending Status, hide above non-report-tracked Cause Codes for selections. Please see Figure 2.1.3 and 2.1.4.
3. In Edit Mode of an non-external regular Recovery Account with New or Pending Status, if Cause of the account is non-report-tracked, default the Cause to '-Select-'(no value). Please see Figure 2.1.5.

#### **2.1.4 Page Location**

No Change

#### **2.1.5 Security Updates**

No Change

#### **2.1.6 Page Mapping**

No Change

#### **2.1.7 Page Usage/Data Volume Impacts**

No Change

## 3 REQUIREMENTS

---

### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.11.4.4	The LRS shall provide financial quarterly and monthly claiming reports in accordance with federal, State, and COUNTY policies to maintain audit trails in support of the federal/State claims.	By not allowing report-tracked Causes of Recovery Accounts to be edited to a non-report-tracked Cause or vice versa.

## 4 OUTREACH

---

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.



California Statewide Automated Welfare System

## **Design Document**

CA-209006 | CIV-104373

Data Change: Update RE Due Date for SSI/SSP  
Only Households

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mark Keehn
	Reviewed By	Jason Francis

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/1/2019	1	Initial draft	Mark Keehn



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## 1 OVERVIEW

---

This SCR describes data changes to update the Redetermination Due Date (defined on REDETER table) for SSI/SSP only CalFresh (CF) households.

For the purposes of this SCR 'SSI/SSP' will refer to anyone receiving SSI/SSP, ~~SSI Only~~, or SSP Only (LRS Only).

### Background

ACL 17-34 provided new policy for the implementation of California's Elderly Simplified Application Project (ESAP) for CalFresh (CF). The ESAP policy was to be applied to non-assistance CalFresh (NACF) cases wherein all household members were elderly and/or disabled (E/D) with no earned income. This policy took effect October 2017.

Subsequent policy changes with ACL 18-90 reversed the exclusion of 'SSI/SSP' and 'SSP Only' (available in LRS Only) persons in CF. This policy was implemented with **SCR CA-203103/CIV-101471 – CalFresh Ending SSI Cash-Out** in the 19.05 release. This SCR made it possible to have an SSI/SSP only CF households that would otherwise meet the definition of an ESAP household other than the fact that the CF program is public assistance CalFresh (PACF) because of the receipt of SSI/SSP, which is defined as public assistance.

On May 9, 2019, the State provided an additional clarification with ACL 19-44 detailing that **SSI/SSP only CF households** should be eligible for ESAP if they met all ESAP criteria other than being PACF. These households would then be eligible for 36-month recertification periods per ESAP policy (or less than 36 months when initially staggered). This guidance was not received in time to be included with SCR CA 203103/CIV 101471, therefore, this change was implemented with **SCR CA-207629 CIV-103739 – Allow ESAP for SSI/SSP Households**. This SCR took effect in the system on 7/22/2019 with the 19.07 release.

Given the above background, any SSI/SSP only CF household with no earned income that applies and is initially authorized prior to 7/22/2019 will **not** be determined ESAP, when, based on ACL 19-44, they should be considered ESAP. This will impact the redetermination period defined for the CF household. The following chart (defined in ACL 18-90) shows the difference in the redetermination period defined for an elderly/disabled household versus an ESAP household.

Newly Eligible SSI/SSP-only Households  
Deemed Eligible June 1 – November 30, 2019

Last Digit of Case Number	Elderly/Disabled Household	ESAP Eligible Household
1, 2, A, or B	23 months	35 months
3, 4, or C	22 months	34 months
5, 6, or D	21 months	33 months
7, 8, or E	20 months	32 months
9, 0, or F	19 months	31 months

### 1.1 Current Design

Any new application for an SSI/SSP only CF household with no earned income initially authorized prior to 7/22/2019 was defined as a non-ESAP household. This means the system defined redetermination due date will be 12 months too short. The CF program would initially be defined with an ESAP indicator of 'No', however, any EDBC processed after 7/22/2019 would redefine the CF program as ESAP.

### 1.2 Requests

Perform a data change to extend the redetermination due date by twelve months for CF programs when the defined criteria are met.

### 1.3 Overview of Recommendations

1. Extend the redetermination due date by twelve months for CF programs meeting the defined criteria.
2. Provide a list to the counties of the cases for which the redetermination due date cannot be adjusted because of a potential user interaction.
3. Enter a journal record for cases with an updated redetermination due date.

### 1.4 Assumptions

1. Originally this SCR data change was going to include a data change for the ESAP indicator. However, **SCR CA-206229/CIV-103090** implemented the CF COLA which processed CF programs for the Oct. 2019 benefit month on 9/14/2019. By running EDBC after 7/22/2019, this COLA will have already corrected the ESAP indicator. This means that ongoing (i.e., high-dated) EDBC and program detail data will have the correct ESAP indicator. If the user looks

back at historical information (i.e., either program detail or past EDBC's), they could still see an incorrect ESAP indicator that was defined prior to 7/22/2019.

## 2 RECOMMENDATIONS

---

### 2.1 Data Changes

#### 2.1.1 Overview

1. Extend the redetermination due date by twelve months for CF programs meeting the defined criteria.
2. Provide a list to the counties of the cases for which the redetermination due date cannot be adjusted because of a potential user interaction.
3. Enter a journal record for cases with an updated redetermination due date.

#### 2.1.2 Description of Changes

1. Identify the CF redetermination records that were potentially defined with an incorrect due date based on the criteria below.  
Note: Given system logic pre-19.07 release, an SSI/SSP only CF household with no earned income would be given a SARA reporting type with reporting type reason of 'Elderly/Disabled'. In addition, the redetermination due date would be staggered from a base 24 month redetermination period based on the case identifiers last digit. Only an SSI/SSP only CF household would receive a staggered redetermination due date.
  - a. The redetermination record belongs to a CF program and is the latest redetermination record for the CF program that has not been completed (i.e., the Completion Reason is not set).
  - b. The CF program meets the following criteria.
    - i. The CF program is still active (i.e., the high dated program detail record still has an 'Active' status).
    - ii. The CF program is not TCF during the primary applicant's Beginning Date of Aid (BDA) benefit month (defined below).
    - iii. The CF program is not currently TCF based on the high-dated program detail record.
  - c. The primary applicant for the CF program meets the following criteria.
    - i. The primary applicants 'Aid Begin Date' is on or after 6/1/2019
    - ii. The person application (PERS\_APP) record used to determine the 'Aid Begin Date' is tied (via the PERS\_APP\_ID) to an 'Active'

- 'Member' program person detail record valid for the 'Aid Begin Date' benefit month.
- d. The earliest (by run date) 'Accepted-Saved', 'Regular' EDBC record that overlaps the month of the primary applicant's 'Aid Begin Date' meets the following criteria:
    - i. has a run date prior to 7/22/2019
    - ii. has an Active status
    - iii. has a Reporting Type of Semi-Annual Reporting Annually (SARA) with a Reporting Type Reason of 'Elderly/Disabled'
    - iv. has an ESAP indicator of 'No'
  - e. Based on the budget associated to the EDBC record identified above verify that the number of program person Members for the month of the primary applicant's 'Aid Begin Date' matches the Assistance Unit (AU) size on the budget. These Members (one or more) must also meet the following criteria:
    - i. The Members have an Other Program Assistance (OPA) record that meets the following criteria:
      1. The OPA record overlaps the month of the primary applicant's BDA.
      2. The OPA record program code is for SSI/SSP, **SSI Only**, or SSP Only (LRS Only).
      3. The OPA record is not suspended (i.e., the 'SSI/SSP Suspended/Interrupted State' is blank or 'No').
    - ii. If any of the Members are under the age of 18 as of the primary applicant's 'Aid Begin Date', the Member must have no earned income records that overlap the month of the primary applicant's BDA. The earned income designation is defined by code table 186 reference column 6.
    - iii. None of the active program persons associated with the budget are non-Members.
2. Take the appropriate action (as defined in the points below) for all of the CF redetermination records that meet the above criteria (point 1).
- Note: All of the CF program redetermination records that meet the above criteria would be expected to have a staggered redetermination due based on the last digit of the case number (see chart below).
- a. **Update the redetermination due date:** If the existing redetermination record matches the expected redetermination due date (per the Elderly/Disabled column of the State chart), the redetermination due date will be updated by adding 12 months to the existing redetermination due date. This will give the CF program the redetermination due date valid for an ESAP household.
  - b. If the existing redetermination record does not match the expected staggered redetermination due date (per the chart), this would indicate one of the following:
    - i. **No action:** If the redetermination length is exactly 12, 24, or 36 months this would indicate that the SSI/SSP was not present during the initial authorization and the system correctly did not

stagger the redetermination due date. No change will be made to these redetermination due dates.

- ii. **Define list:** If the redetermination due date does meet the above condition, the user has potentially updated/alterd the redetermination record. Because of this the redetermination due date will not be updated, instead a list will be created to be shared with the counties. These cases can then be reviewed to determine if any further manual action is needed for the redetermination due date. The fields to be included on the list are the following:

1. Standard List Columns to display on the listings:
  - a. Case Name
  - b. Case Number
  - c. County
  - d. Unit
  - e. Unit Name
  - f. Office Name
  - g. Worker ID
2. Actual Redetermination Begin Date
3. Actual Redetermination Due Date
4. Expected Redetermination Begin Date (Primary Applicant's BDA)
5. ~~Actual~~ Expected Redetermination Due Date (calculated from chart based on last digit of Case identifier)

Newly Eligible SSI/SSP-only Households  
Deemed Eligible June 1 – November 30, 2019

Last Digit of Case Number	Elderly/Disabled Household	ESAP Eligible Household
1, 2, A, or B	23 months	35 months
3, 4, or C	22 months	34 months
5, 6, or D	21 months	33 months
7, 8, or E	20 months	32 months
9, 0, or F	19 months	31 months

3. Create a journal entry of type 'Conversion' with filter of 'Eligibility' for any case that has a redetermination due date altered based on the criteria in point 2a above.
  - a. Short Description: "CF redetermination due date was adjusted to <new redetermination due date>."
 

The redetermination due date format will be MM/YYYY (e.g., 03/2020).

**Commented [RW1]:** This recommendation is for extending the RE period, this point now contradicts that and states that sometimes a list will be generated.  
I would suggest this be fully split into 2 recommendations; One for what will be updated, and a second detailing the list in full.

**Commented [MK2R1]:** I agree with your point. I have reorganized as follows:  
Point 1 – identify redetermination records  
Point 2 – take appropriate action based on the scenario

- b. Long Description: Redetermination due date was extended by 12 months for the ESAP CF household. The new redetermination due date is <new redetermination due date>."

### 2.1.3 Estimated Number of Records Impacted/Performance

Approximately 140,000 Redetermination records will be updated.

## 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.4.4	The LRS shall include the ability to process a mass update that involves the development of new policy in response to changes in federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	Data change to account for ACL 19-44 which allows SSI/SSP only CF household to be considered ESAP and receive a staggered RE Due Date based on 36 months rather than 24 months.

## 5 OUTREACH

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Counties will be provided a list of cases with SSI/SSP Only CF programs with staggered redetermination due date that don't match the queries expectations. See section 2.1.2.1.f.ii.2 above.





California Statewide Automated Welfare System

## **Design Document**

CA-209033 | CIV- 104383

CalWORKs Change in Earned Income Disregard  
(EID) and Income Reporting Thresholds Tiers  
(IRTs)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Josias Caveto, Nithya Cherreddy
	Reviewed By	Jason Francis

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/18/2019	1.0	Initial Draft of the artifact	Josias Caveto
12/19/2019	2.0	Adding Correspondence updates for Vehicle Asset limit values	Nithya Cherreddy
1/15/2020	3.0	Updates per committee feedback	Josias Caveto
1/23/2020	4.0	Updates per Comments from Committee	Josias Caveto/ Nithya Cherreddy
2/11/20	5.0	Clarifications made per Development recommendations	Josias Caveto
2/25/2020	6.0	Updated incorrect reference of the Code Category from CT 355 to CT 335	Nithya Cherreddy

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# 1 OVERVIEW

---

Per ACL 19-76 effective on June 1, 2020, there will be an increase in the earned income disregard (EID) for CalWORKs (CW) applicant recipients from \$225 to \$500. The existing CW Tier 2 will be replaced with the existing CW Tier 3 IRT rules, which is 130 percent of the Federal Poverty Level (FPL). The current CW Tier 1 will remain the same. Under current law and system functionality, the net non-exempt income (NNI) used to determine the Assistance Unit's (AU) Maximum Aid Payment (MAP) is calculated by disregarding the first \$225 of disability-based unearned income (DBI).

Per ACL 19-67, effective June 1, 2020 and annually thereafter the resource threshold will increase by an amount equal to the increase in the California Necessities Index for the most recent fiscal year, therefore the CalWORKs resource limits will no longer be based on CalFresh. The maximum asset limit for a CalWORKs AU will be increased from \$2,250 to \$10,000. When a CalWORKs AU includes a member, who is 60 years of age or older or disabled, the maximum asset limit will be increased from \$3,500 to \$15,000.

## 1.1 Current Design

There are two tiers in use for the CW income reporting threshold for the AU:

1. Tier 1 – 55% of FPL for a family of three, plus the amount of income last used to calculate the AU's monthly grant amount.
2. Tier 2 – The amount of income likely to render the AU ineligible for CW benefits. The formula is  $\text{MAP} \times 2 + \$225 + 1$ . Currently the NNI used to determine the AU's MAP is calculated by disregarding the first \$225 of 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 disregarded when calculating the MAP.
3. There is an additional Tier 3 used for CalFresh (CF) only. This Tier 3 is calculated based on 130% of FPL or the amount likely to render a recipient ineligible for federal Supplemental Nutrition Assistance Program (SNAP) benefits.
4. NOAs and forms reference the value of \$225 for the Earned Income Disregard and Disability based Income Disregard.
5. NOAs and forms reference the value of \$2,250, \$2000, \$3000 or \$3,500 for the Maximum Asset limit value.

## 1.2 Requests

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  $\text{MAP} \times 2 + \$225$  (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.

### 1.3 Overview of Recommendations

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)

### 1.4 Assumptions

1. For CW cases where the AU's budget results in a MAP of less than \$10, no benefit will issue, but the case's status will show active due to the AU remaining eligible for supportive services and/or CW Special Needs. The cases will remain eligible for cash based Medi-Cal.
2. No change in Tier 1, it shall work according to current functionality.
3. Under the new changes, families will still be required to report whenever their income exceeds Tier 1.
4. NOAs with the Maximum Asset Limit values need not be updated to reflect the limits mentioned in this SCR as the limits will be pulled in from the EDBC which will have the updated limits.
5. NOAs will populate the updated values based on the benefit month effective date.
6. CF income and reporting will remain unchanged.
7. For a CW/CF case which the CW benefit grant is \$0 and the client opts to close the case (Discontinued by participant's request), **this case shall be processed for TCF.**
8. CW reporting responsibilities will remain the same, no change applicable to the zero-dollar benefit population and the timeclock logic will not change for zero-grant benefit cases
9. The current functionality for AR2, SAR2 and SAWS 30 which populates the IRT from EDBC will remain the same.
10. CalWORKs Benefit Change NOAs will generate as per current functionality.
11. The grants for all the recipients will be re-evaluated by the county and participants who are entitled to higher grants shall be notified.
12. The impacted cases in which the user has not yet run EDBC with the new EID will be updated through a batch EDBC process, refer to SCR [CA 211596 CIV-105562](#)
13. NA BACK 9 will not be updated with this SCR. All the forms and NOAs will have the existing NA BACK 9 in the system.
14. All the supporting documents are uploaded to the SharePoint and Web Portal.

15. Effective 06/01/2020, when EDBC job run (using the new EID), system should not use any voluntary reported income mid period in the CalWORKs grant calculation.

## 2 RECOMMENDATIONS

### 2.1 Update the CW Disability Based Earned Income Disregard (CT 335 – AI) and CW Disability Based Unearned Income Disregard CT 335 – 53) to \$500, effective June 1, 2020.

#### 2.1.1 Overview

Under the current law, the NNI that is used to determine the AU's MAP is calculated by disregarding the first \$225 of 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 disregarded when calculating the MAP.

#### EDBC Person Line Item Detail - Earned Income Disregards

				Close	
Name	Type	Description	Amount		
Unused	\$225	Disability Based Income Disregard	\$	225.00	
		50% Earned Income Disregard	\$	412.50	
Total			\$	637.50	

Figure 1: CalWORKs EDBC Person Line Item Detail

#### 2.1.2 Description of Changes

1. Update the values from \$225 to \$500 for the following disregard records, effective June 1, 2020:
  - a. CW Disability Based Unearned Income Disregard (CT 335 – 53)
  - b. CW Disability Based Earned Income Disregard (CT 335 – AI)

Note: The \$225 reference will be removed from CTCR code description. The reference to \$225 on the EDBC Person Line Item Detail page for Both Unearned and Earned Income Disregards will be removed.

Note: Per ACL 19-76, the table below reflects the increase to the EID for upcoming years:

Amount	Effective Date	SCR#
\$550	June 1, 2021	CA-212912
\$600	June 1, 2022	CA-212913

CalWORKs Budget	Regular
Unearned Income	\$ 575.00
Unearned Income Disregards	- 500.00
Net Unearned Income	= 75.00
Earned Income	\$ 1,180.00
Earned Income Disregards	- 590.00

Figure 2: CalWORKs EDBC Summary

### EDBC Person Line Item Detail - Earned Income Disregards

				Close
Name	Type	Description	Amount	
	Unused Disability Based Income Disregard	\$	500.00	
	50% Earned Income Disregard	\$	489.50	
		Total	\$ 989.50	
				Close

Figure 3: CalWORKs EDBC Person Line Item Detail - Earned Income Disregards

### 2.1.3 Programs Impacted

CalWORKs/RCA



## 2.2 Correspondence: Update CalWORKs Fragments to reflect the new value of \$500 DBI.

### 2.2.1 Overview

This effort is to update the fragments which contain references to Disability Based Unearned Income Disregard (DBI) from \$225 to a variable which will pull the value of \$500 from EDBC.

### 2.2.2 Description of Changes

Update all the following fragments to add a variable in place of the static text "\$225" and populate the value from CT335\_53 which will be \$500.

- Following are the C-IV fragments to be updated

Fragment Name	Fragment Languages to be updated
BUDGT_CW_APPROVAL_AR	All 13 C-IV supported languages
BUDGT_CW_APPROVAL_SAR	All 13 C-IV supported languages
BUDGT_CW_RCA_APPROVAL	All 13 C-IV supported languages
BUDGT_CW_RCA_SUPPLEMENT	All 13 C-IV supported languages
BUDGT_CW_SUPPLEMENT_AR	All 13 C-IV supported languages
BUDGT_CW_SUPPLEMENT_SAR	All 13 C-IV supported languages
BUDGT_IN_INCOME_DENIAL	All 13 C-IV supported languages
RSN_INCOMEDISREGARD_CHANGE	All 13 C-IV supported languages
RSN_INCOMEDISREGARD_DISC	All 13 C-IV supported languages
RSN_MAP_INCOMEDISREGARD_CHANGE	All 13 C-IV supported languages
RSN_MAP_INCOMEDISREGARD_DISC	All 13 C-IV supported languages

**Table 2.2.2.1 C-IV Fragments to be updated**

Note: These are all the 13 C-IV supported languages. English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog, Hmong, Korean, Lao, Russian and Vietnamese

- Following are the CalSAWS fragments to be updated

Fragment Name	Fragment Languages to be updated
BUDGT_CW_APPROVAL_SAR_EN	English, Spanish, Armenian, Cambodian, Chinese, Farsi, Tagalog, Korean, Russian and Vietnamese
BUDGT_CW_NA274G_EN	English
NA200	English and Spanish

**Table 2.2.2.2 CalSAWS Fragments to be updated**

### 2.2.3 Programs Impacted

- a. CalWORKs/RCA

## **2.3 Correspondence: Update the DBI or EID limit to reflect the new value on the impacted forms**

### **2.3.1 Overview**

The effort is to update the existing forms which contain references to Disability Based Unearned Income Disregard (DBI) or Earned Income Disregard (EID) to the new limit of \$500.

The following table lists the forms that are available in C-IV and/or LRS/CalSAWS.

Form Name	Availability in C-IV and Form updates	Availability in LRS/CalSAWS and Form updates
M44-316E	Y	Y
M44-316SAR	Y	N
NA1239AR	Y	N
NA1242	Y	Y
NA200	Y	Y (Implemented as a NOA)
NA274_E	Y	N
NA281	Y	N
NA281A	Y	N
NA301_02 NA301_04 NA301_06 NA301_08 NA301_10 NA301_12	Y	N
NA303_02 NA303_04 NA303_06 NA303_08 NA303_10 NA303_12	Y	N
SAWS2ASAR	Y	Y
NA816	Y	Y (It is implemented as a NOA – A473C without the Budget)
NA817	Y	Y (It is implemented as a NOA – A471C without the Budget)
NA840	Y	Y

NA845	Y	Y
NOA290	N	Y
OPCALCULATION	N	Y
WFPI274	N	Y

### 2.3.2 Description of Change

1. Update the following forms to change the Disability Based Unearned Income Disregard (DBI) of \$225 to populate the value from CT335\_53 which will be \$500.
  2. Update the following forms to change the Earned Income Disregard of \$225 to populate the value from CT335\_AI which will be \$500.
- Following are the C-IV forms to be updated.

Form Name	Form Languages to be updated
M44-316E	English and Spanish
M44-316SAR	English and Spanish
NA1239AR	English and Spanish
NA1242	All 13 C-IV supported languages
NA200	English and Spanish
NA274_E	English and Spanish
NA281	English and Spanish
NA281A	English and Spanish
NA301_02 NA301_04 NA301_06 NA301_08 NA301_10 NA301_12	English and Spanish
NA303_02 NA303_04 NA303_06 NA303_08 NA303_10 NA303_12	English
SAWS2ASAR	All 13 C-IV supported languages

Form Name	Form Languages to be updated
NA816	All 13 C-IV supported languages
NA817	All 13 C-IV supported languages
NA840	All 13 C-IV supported languages
NA845	All 13 C-IV supported languages

**Table 2.3.2.1 C-IV Forms to be updated**

- Following are the CalSAWS forms to be updated.

Form Name	Form Languages to be updated
NOA290	English, Spanish, Tagalog, Russian and Vietnamese
OPCALCULATION	English
SAWS2ASAR	English, Spanish, Armenian, Cambodian, Chinese, Tagalog, Korean, Russian and Vietnamese
WFPI274	English
M44-316E	English and Spanish
NA 840	English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Tagalog, Korean, Russian and Vietnamese
NA 845	English and Spanish
NA 1242	English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Tagalog, Korean, Russian and Vietnamese

**Table 2.3.2.2 CalSAWS Forms to be updated**

## 2.4 Correspondence: Update forms to the new version

### 2.4.1 Overview

This effort is to update the following forms to the latest version provided in the ACL 19-67.

Form Name	Availability in C-IV and Form updates	Availability in LRS/CalSAWS and Form updates
CW2218	Y - EID amended from \$225 to \$500, property limit requirements revised, and deleted obsolete reference	Y - EID amended from \$225 to \$500, property limit requirements revised, and deleted obsolete reference

	to fingerprint/ photo imaging and replaced with photo identification	to fingerprint/ photo imaging and replaced with photo identification
NA274G	N	Y - Form modified to reflect "Overpayment Amount Owed (For Overpayments Occurring on or after 10/1/2013 to 6/20/2020."
NA1239SAR	Y - Disregard amount increased from \$225 to \$500. Obsolete MFG verbiage deleted	Y - Disregard amount increased from \$225 to \$500. Obsolete MFG verbiage deleted

## 2.4.2 Description of changes

1. Update the following forms to change the Disability Based Unearned Income Disregard (DBI) of \$500 to populate the value from CT335\_53 which will be \$500.
2. Update the following forms to change the Earned Income Disregard of \$225 to populate the value from CT335\_AI which will be \$500.

- Following are the C-IV forms to be updated.

Form Name	Form Languages to be updated
CW2218	English and Spanish
NA1239SAR	All 13 C-IV supported languages

**Table 2.4.2.1 C-IV Forms to be updated**

- Following are the LRS/CalSAWS forms to be updated.

Form Name	Form Languages to be updated
CW2218	English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Vietnamese
NA274G	English and Spanish
NA1239SAR	English and Spanish

**Table 2.4.2.2 LRS/CalSAWS Forms to be updated**

## 2.5 Correspondence: C-IV Only - Add the updated version of the forms

### 2.5.1 Overview

ACL 19-67 has updated version of the forms which includes EID value updates and text updates listed below.

Form Name	Availability in C-IV and Form Updates	Availability in LRS/CalSAWS and Form updates
CW 2166	Y- Budget calculations updated to reflect increases in minimum wage and EID	N
WTW 16A	Y- EID amended from \$225 to \$500; Examples updated with to reflect current changes	N
WTW 16B	Y - EID amended from \$225 to \$500; Examples updated with to reflect current changes	N

### 2.5.2 Description of Changes

This effort is to add the updated version of the following forms to C-IV system. End date the existing version of the forms as of 05/31/2020 and add the updated forms to the system to be generated effective 06/01/2020.

Form Name	Form Languages to be updated
CW2166	All 13 C-IV supported languages
WTW 16A	English and Spanish
WTW 16B	English and Spanish



## 2.6 Correspondence: Update vehicle property limits and resource limits to reflect the new values on the impacted forms

### 2.6.1 Overview

The effort is to update the forms which contain references to the limit for resources and vehicle property limits to the new limits based on the ACL 19-67.

The following table list the forms that are available in C-IV and/or LRS/CalSAWS.

Form Name	Available in C-IV	Available in LRS/CalSAWS
CW 2218	Y	Y
SAWS 2A SAR	Y	Y
CW 86-LA	N	Y
M44-316C SAR	Y	N

### 2.6.2 Description of Changes

Update the following forms to add a variable in place of the static text which has references to the current resources and vehicle property limits.

1. Below table lists the current limits, updated limits and the reference to the database value.

	Current limit	Updated limit	Database table and code_num_identif to pull the value from
CalWORKs Property Limit	\$2000 or \$2,000	\$10,000	CT 335_84
	\$2,250 or \$2250		
CW Elderly and Disabled Property Limit	\$3,000	\$15,000	CT 335_03
	\$3,500 or \$3500		
	\$3,250 or \$3250		

CW Motor Vehicle Disregard	\$4,650	\$25,000	CT 335_AN
CW Motor Vehicle Disregard	\$9,500 or \$9500		

**Table 2.3.2.1 List of Current and Updated limits**

2. CalSAWS: Below table has the list of forms that needs to be updated.

Form Name	Limits listed in the form	Form Languages to be updated
CW 2218	\$2,250	English Spanish Armenian Cambodian Chinese Korean Russian Vietnamese
SAWS 2A SAR	\$2250 \$3250 \$9,500	English Spanish Armenian Cambodian Chinese Tagalog Korean Russian Vietnamese
CW 86-LA	\$2,000 \$3,000	English Spanish Armenian Cambodian Chinese Tagalog Korean Russian Vietnamese

**Table 2.3.2.2 CalSAWS forms to be updated**

3. C-IV: Below table has the list of forms that needs to be updated.

Form Name	Limits listed in the form	Form Languages to be updated
CW 2218	\$2,250	English Spanish
M44-316C SAR	\$2,250 \$3,500	English Spanish
SAWS 2A SAR	\$2250 \$3250 \$9,500 \$4,650(Hmong form currently displays the incorrect value \$4,650 in place of \$9,500)	English Spanish Armenian Arabic Cambodian Chinese Farsi Tagalog Hmong Korean Lao Russian Vietnamese

**Table 2.3.2.3 C-IV forms to be updated**

## 2.7 Modify IRT Tier 2 Rules.

### 2.7.1 Overview

The first two CW tiers never exceed the third tier outlined in the table 1 from **ACL 19-76 page 10**. In Tier 2 the amount of income likely to render the AU ineligible for CW benefits uses the current formula of MAP X 2 +\$225+1.

AU Size	Income Reporting Threshold
0	\$1,354
1	\$1,354
2	\$1,832
3	\$2,311
4	\$2,790
5	\$3,269
6	\$3,748
7	\$4,227
8	\$4,705
Each additional member	\$479

Table 1: Federal Fiscal Year (FFY) 2019 CalWORKs Income Reporting Threshold (IRT) Effective June 1, 2020

### 2.7.2 Description of Change

1. Effective June 1, 2020:
  - a. Update CW Tier 2 to use 130% of FPL values for current year instead of the MAP X 2 +225 (prior to June 1, 2020)+1 formula. ACL 19-76 replaces the CW IRT Tier 2 (the amount of income likely to render the AU ineligible for CW with what was previously the CW Tier 3 IRT (130 percent of the FPL).
  - b. Update rules to use 130%FPL for Tier 2 instead of Calculation.

▼ New IRT Calculation	
Description	IRT
Tier 2 (\$1,832.00 130% FPL)	\$ 1,832.00

Figure 4 CW EDBC Summary

### **2.7.3 Counties Impacted**

All Counties are impacted per change implemented.

### **2.7.4 Report Usage/Performance**

2. Impacted cases in which the user has not yet run EDBC with the new EID will be updated through a batch EDBC process, refer to SCR [CA 211596 CIV-105562](#)

## 2.8 Keep the CW Case Open When the Potential Grant Amount is \$0

### 2.8.1 Overview

The current CW business rules functionality fails when the recipient qualifies for \$0 grant benefit or the recipient's income is above the IRT threshold.

### 2.8.2 Description of Changes

1. Update CalWORKS EDBC to not fail the EDBC for over income when the Gross Income amount is under 130% FPL based on the household size (MAP Family Unit Size). The case may still fail due to over income on the applicant test.

## 2.9 Automated Regression Test


### 2.9.1 Overview

Create and update regression test scripts to validate the new Earned Income Disregard, Unearned Income Disregard, the new Income Reporting Threshold, and the new \$0 Allotment logic.

### 2.9.2 Description of Changes

1. Create a CW and RCA case, add a significant amount of earned income and unearned income, run EDBC, and verify that the Disability Based Earned and Unearned Income Disregards reflects the new values.
2. Update the following scripts to verify the new Tier 2 IRT.
  - a. **CW – MAP Exempt – Assistance Unit Size #**
  - b. **CW – MAP Non-Exempt – Assistance Unit Size #**
3. Create a CW case, add enough income such that the benefit amount is less than \$10 (forcing \$0 allotment), and verify that the program remains open.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	This document contains a list of snippets that are update per this SCR	 Snippets_to_update.xlsx
2	Client Correspondence	A copy of all the impacted forms are uploaded to JIRA	Supporting Documents.zip



## 5 REQUIREMENTS

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The following requirements will be resolved in order to resolve and achieve the desired outcome

### 5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.1.2	The LRS shall include an automated method for implementing mass updates triggered by policy changes or mass participant financial changes, including Social Security or Veterans benefits cost of living adjustments (COLAs)	EID will be updated from \$225 to \$500



California Statewide Automated Welfare System

## **Design Document**

CA -209381 | CIV-5165

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

Version 1.2

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/21/2019	1.0	Design Draft	Antony Lerner
09/30/2019	1.0	Version sent to committee for feedback	Antony Lerner
10/11/2019	1.0	Final version for Committee vote	Antony Lerner
12/11/2019	1.1	Content Revision: Remove recommendation to exclude Negative Action Reason from Override.	Renee Gustafson
02/17/2020	1.2	Content Revision: Add MC Negative Action Skip MAGI Security Group to System Administrator Role	Antony Lerner

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# 1 OVERVIEW

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

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

## 1.1 Current Design

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

For Example:

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

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

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

## 1.2 Requests

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

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

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

### 1.3 Overview of Recommendations

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

### 1.4 Assumptions

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

## 2 RECOMMENDATIONS

---

### 2.1 Negative Action Detail page

#### 2.1.1 Overview

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

## 2.1.2 Description of Changes

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

### Negative Action Detail

\* - Indicates required fields

Benefit Month: \*  
11/2019

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

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

**Negative Action Reason:**

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

Run EDBC

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

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

Note: The page validation is a hard stop validation.

### Negative Action Detail

\*- Indicates required fields

Run EDBC

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

Benefit Month: \*  
11/2019

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

Negative Action Reason:  
Worker Initiated-Skip CalHEERS

Run Reason:

Run EDBC

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



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

Note: The page validation is a hard stop validation.

**Negative Action Detail**

\*- Indicates required fields

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

Benefit Month: \*  
11/2019

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

Negative Action Reason:  
Worker Initiated-Skip CalHEERS

Run Reason:  
[Dropdown]

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

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

### 2.1.3 Page Location

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

## 2.1.4 Security Updates

### 1. Security Rights

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

### 2. Security Groups

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

## 2.1.5 Page Mapping

No changes

## 2.1.6 Page Usage/Data Volume Impacts

No changes

## 2.2 Medi-Cal EDBC Rules

### 2.2.1 Overview

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

### 2.2.2 Description of Changes

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

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

#### MEDS Code Descriptions

99 – Other; R – Other

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

### 2.2.3 Programs Impacted

Medi-Cal

#### **2.2.4 Performance Impacts**

No change.

## 2.3 Automated Regression Test

### 2.3.1 Overview

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

### 2.3.2 Description of Change

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

## 3 REQUIREMENTS

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### 3.1 Project Requirements

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

[illegible]

**Group De**

[illegible]

### **Description**

[illegible]



[illegible]

### ***Application Security A***

*Note: If the right gives access to more than*

[illegible]

**Administrator Use Only**

1 page, add row for each individual page.

[illegible]