

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-57266

DDCR 5082 Add Voucher Type to Service
Arrangement Detail Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/11/2019	1.0	Initial Draft	Eric Wu
03/31/2020	2.0	Change Page Mapping for Voucher Type	Eric Wu

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1 OVERVIEW

This document will address required changes to close a design difference between LRS and C-IV as the changes were implemented with SCR 10401 in C-IV.

1.1 Current Design

The Service Arrangement Detail page allow Workers to arrange supportive services to Customers with a Need. The current supportive services that can be requested are Valuables and Payment Requests. In C-IV system, the “Voucher Type” is for users to determine which voucher option to select when there are multiple vouchers applicable for each program. However, the “Voucher Type” field is not in LRS system.

1.2 Requests

Per Design Difference Committee Review (DDCR) 5082, the “Voucher Type” field needs to be added to the Service Arrangement Detail page in LRS so users can select which Voucher Type to issue to a customer when there are more than one Voucher Type applicable.

1.3 Overview of Recommendations

1. Add “Voucher Type” drop down field to the Service Arrangement Detail page. This field will only be visible as a mandatory field if “Voucher” value is Yes.
2. Remove ‘Effective Month’ column from Valuables Inventory Detail page when Valuable Category is Voucher.
3. Update ‘Effective Month’ of existing Voucher inventories to null value.
4. Update Valuable Request Detail page to display the Voucher Type with lowest ID for the County and Program Code when Voucher Type of the Service Arrangement Detail page is empty.

1.4 Assumptions

1. The “Voucher” field will be implemented in LRS with SCR CA-207333 for version 19.11. It will only be visible as a non-mandatory dropdown field for counties that allow Vouchers to be issued as a valuable.
2. Valuable Request Detail page will display selected Voucher Type of the Service Arrangement Detail page.
3. No additional changes are needed for Control Number field on Service Arrangement Detail. Control Number will be displayed when a voucher was requested.
4. There is no impact to Payment Request Detail page for Edit/Approval.
5. DDID 1327 will be adding/migrating Valuable Categories from the 57 Migration Counties. Until the DDID is implemented, mock data will be required to test this functionality for the Migration Counties in CalSAWS.

2 RECOMMENDATIONS

2.1 Service Arrangement Detail

2.1.1 Overview

The Service Arrangement Detail page allows Workers to arrange supportive services to Customers with a Need. Per DDCR 5082, the "Voucher Type" dropdown field will be added to the Service Arrangement Detail page as a mandatory field when "Voucher" value is Yes.

2.1.2 Service Arrangement Detail Mockup

Service Arrangement Detail

Need ✳

Type	Name	Category	Begin Date
<input type="radio"/> Clothing	Last, Name	Ancillary - Work Related	10/25/2019
<input checked="" type="radio"/> Clothing	Last, Name	Ancillary - Work Related	10/25/2019

Activities

Type	Status	Begin Date	End Date
------	--------	------------	----------

Arrangement Details

Arrangement Period: *
From: To:

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

Voucher: * **Voucher Type: ***

Payee: *

Employed: *

Additional Payee:

Figure 2.1.1 – Service Arrangement Detail Create Mode

Service Arrangement Detail

*- Indicates required fields

Create Valuable Request

Edit

Close

Name: *
NAME LAST

Service Arrangement ID:
00000000

Need *

Need Type: *
[Clothing](#)

Need Category:
Ancillary - Work Related

Need Status:
Met

Need Description:

Activities

Type	Status	Begin Date	End Date
------	--------	------------	----------

Arrangement Details

Arrangement Period: *
From: 06/03/2019 To: 08/31/2019

Program Type: *
Welfare to Work

Aid Code: *
30 - CW-All Other Families (Fed)

Voucher: *
Yes

Voucher Type: *
Voucher

Control Number:

Payee: *
Same as Customer

Employed: *
No

Additional Payee:

Figure 2.1.2 – Service Arrangement Detail View Mode

2.1.3 Description of Changes

1. Add a new dropdown field 'Voucher Type':
 - a. Dynamically display this field only when User selects 'Voucher' value of Yes.
 - b. Display all the voucher types available for the county and program code in the dropdown in alphabetical order.
 - c. Default the Voucher Type option if the County has only 1 Voucher Type.
 - d. This field is editable in Create Mode only
 - e. This is a required field. Add the following validation when the Voucher Type field is missing value – 'Voucher type – Field is required. Please enter a value'.
 - f. Save the voucher type information in SERV_ARRG_LN_ITEM_VALBL_TY table when user clicks the Save and Return button.

2.1.4 Page Location

No Change

2.1.5 Security Updates

No Change

2.1.6 Page Mapping

Update page mapping for the Service Arrangement Detail page for the newly added field as follows:

Page Name: Service Arrangement Detail

Field Name: Voucher Type

Table Name: VALBL_TYPE

Column Name: VALBL_DESCR

Comment Description: The description of the valuable type from the VALBL_TYPE table.

2.1.7 Page Usage/Data Volume Impacts

No Change

2.2 Valuable Inventory Detail

2.2.1 Overview

This page allows the User to add or remove valuables from the inventory. Below describe changes are needed to manage Voucher valuables.

2.2.2 Service Arrangement Detail Mockup

Valuables Inventory Detail

*- Indicates required fields Save Cancel

Display By:

Valuable Category: * Go

Valuable Type:

Type *	Starting Number *	Ending Number *	Quantity
Voucher	111111	111112	2
Voucher	<input type="text"/>	<input type="text"/>	Add Remove
Total:			2

Save Cancel

This [Type 1](#) page took 0.39 seconds to load.

Figure 2.1.1 – Valuable Inventory Detail

2.2.3 Description of Changes

Remove 'Effective Month' column when Valuable Category is Voucher.

2.2.4 Page Location

No Change

2.2.5 Security Updates

No Change

2.2.6 Page Mapping

No Change

2.2.7 Page Usage/Data Volume Impacts

No Change

2.3 Valuable Request Detail

2.3.1 Overview

This page allows the User to edit and view the valuable status. Service Arrangement Details will display selected Voucher Type of the Service Arrangement Detail page. Below describe changes are needed when Voucher Type of the Service Arrangement Detail page is empty.

2.3.2 Service Arrangement Detail Mockup

Valuable Request Detail

*- Indicates required fields

Generate Form

Close

Valuable Request ID:

0000000

Service Arrangement Details		
Service Arrangement ID: 000000000	Case Name: Case Name	Case Number: 0000000
Payee Name: Name Last	Program: Welfare to Work	Aid Code: 30 - CW-All Other Families (Fed)
Need Category: Transportation	Need Type:	Employed: No
Valuable Type: Voucher	Quantity: 1	
Arrangement Period: From: 08/14/2019 To: 08/28/2019		

Figure 2.1.1 – Valuable Request Detail

2.3.3 Description of Changes

Update Valuable Request Detail page to display the Voucher Type with lowest ID for the County and Program Code when Voucher Type of the Service Arrangement Detail page is empty.

2.3.4 Page Location

No Change

2.3.5 Security Updates

No Change

2.3.6 Page Mapping

No Change

2.3.7 Page Usage/Data Volume Impacts

No Change

2.4 Update Voucher Inventories

2.4.1 Overview

Vouchers do not have 'Effective Month' in C-IV. This DCR will update existing Voucher inventories in LRS to have no Effective Month.

2.4.2 Description of Change

Update 'Effective Month' of Voucher inventories to null value.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.1	<p>The LRS shall include the ability to issue and maintain the history of the following benefits:</p> <ul style="list-style-type: none">a. Monthly benefits issued on a recurring basis, on either a calendar month or fiscal (cyclical) period;b. Emergency issuances (e.g., Immediate Need, Expedited Services and Emergency Aid Requests);c. Diversion payments;d. Supplemental benefits;e. Recovery refunds;f. Special needs payments;g. Retroactive payments;	<p>"Voucher Type" field needs to be added to the Service Arrangement Detail page in LRS so users can select which Voucher Type to issue to a customer when there are more than one Voucher Type applicable.</p>

<ul style="list-style-type: none">h. Vendor and/or Service Provider payments;i. Tokens and cash bus passes;j. Non-traditional/alternative transportation (e.g., car pool, taxi vouchers, and parking fees);k. Vouchers/cash for special payments, ancillary payments and other services;l. Interim assistance payments;m. Transportation payments;n. Petty cash;o. Cal-Learn bonus;p. Cal-Learn graduation bonus;q. Vehicle repair program;r. Additional transportation expense payments;s. Ancillary payments; andt. Child care payments.	
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CalSAWS

California Statewide Automated Welfare System

Design Document

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

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	Reviewed By	Lien Phan, Joel Acevedo, Gingko Luna

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11/27/2019	1.0	Initial version	Jennifer Muna
12/13/2019	1.1	Updated design per BA recommendation	Jennifer Muna
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1 OVERVIEW

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. The Cal-OAR data files (Monthly, Quarterly, and Semi-annual) should capture all persons active, pending, or ineligible in the CalWORKs program with MEM role reason including active FRE with specific CalWORKs program person role reasons.

Data File	Submission Frequency	Submission Due Date
Cal-OAR19	Monthly	The 1 st day three months after the measurement month
Cal-OAR19A	Monthly	The 1 st day three months after the measurement month
Cal-OAR19B	Monthly	The 1 st day six months after the measurement month
Cal-OAR19C	Quarterly	The 1 st day five months after the measurement quarter ends
Cal-OAR19D	Quarterly	The 1 st day two months after the measurement quarter ends
Cal-OAR19E	Semi-Annual	The 1 st 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. The Cal-OAR data files (Monthly, Quarterly, and Semi-annual) will capture the target population of individuals who are active/ineligible/pending in CalWORKs with role of MEM or role is FRE and CalWORKs program role reason is for the following program person role reasons:
 - a. C-IV:

- i. CW Non-Participant
 - ii. Didn't Sign WTW
 - iii. Quit a Job
 - iv. Reduced Earnings
 - v. Refused a Job
 - vi. Post WTW 24 MTC CW Fed Requirements Not Met
- b. CalSAWS:
- i. CW Non-Participant or Post 24 MTC CW Fed Requirements Not Met

2 RECOMMENDATIONS

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 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: "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 1st 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 1st 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 1st 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 1st 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 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: "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 1st 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 1st day five months after the measurement quarter ends. For example, 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 1st 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 1st 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 1st 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 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: "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 1st 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 1st 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

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208265 | CIV-104042

Home Visiting Program

DOCUMENT APPROVAL HISTORY		
CalSAWS	Prepared By	Sarah Steimle, Matthew Lower
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/21/2020	1.0	Initial Version	Sarah Steimle
3/04/2020	1.1	Content Revision 1	Matthew Lower

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1 OVERVIEW

This SCR provides the changes necessary to collect data for the Home Visiting Program (HVP). The HVP data will be facilitated through the new Home Visiting Program List and Detail page for both the LRS and C-IV systems.

1.1 Current Design

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

1.2 Requests

The HVP component data cannot be tracked and managed. Provide online pages for HVP 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 HVP component of the case. This will include associated HVP case persons and additional information to track the program.

1.4 Assumptions

1. A HVP record with no end date is considered high dated.
2. 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.
3. Fields not mentioned in the Description of Changes sections, will not be updated.
4. The CW 2224 will be added in English and Spanish only. Threshold language versions will be added in a future effort .
5. Home Visiting Records that are created are initially set as visible.

2 RECOMMENDATIONS

2.1 Home Visiting List

2.1.1 Overview

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

2.1.2 Home Visiting List

Home Visiting List

The screenshot shows a web interface for the Home Visiting List. At the top, there are search filters: 'Display by Name:' with a dropdown menu set to 'All', 'From:' and 'To:' date pickers, and a 'View' button. Below the filters is a 'Search Results Summary' header with 'Results 1-1 of 1' and an 'Add' button. The main content is a table with columns: 'Date Offered', 'Name', 'Accepted Offer', 'Begin Date', and 'End Date'. There are two rows of data. The first row has a checkbox, the date '10/01/2020', the name 'Doe, Jane 5F' and 'Doe, John 50M', 'Accepted Offer' set to 'Yes', 'Begin Date' '10/02/2020', and 'End Date' '11/15/2020'. The second row has a checkbox, the date '06/15/2020', the name 'Doe, Jane 5F' and 'Doe, John 50M', 'Accepted Offer' set to 'No', and empty 'Begin Date' and 'End Date' fields. At the bottom of the table are 'Remove' and 'Add' buttons.

Date Offered	Name	Accepted Offer	Begin Date	End Date	
<input type="checkbox"/> 10/01/2020	Doe, Jane 5F Doe, John 50M	Yes	10/02/2020	11/15/2020	Edit
<input type="checkbox"/> 06/15/2020	Doe, Jane 5F Doe, John 50M	No			Edit

Figure 2.1.1 – Home Visiting 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 – HVP records with an Offer Date equal to or after this date will be returned in the search results. Also, HVP Detail records with an Accepted Offer set to 'Yes' and an End Date equal to or after this date will be returned in the search results.
- 3) To – HVP records with an Offer Date equal to or before this date will be returned in the search results. Also, HVP Detail records with an Accepted Offer set to 'Yes' and a Begin Date equal to or before this date are returned in the search results.
- 4) View button – Executes a search for HVP records matching the specified filter criteria. If no filters are specified, it will pull back all HVP records. If a filter is blank, the filter will be ignored when returning the results.

- 5) Add button – This button will lead the user to the Home Visiting Detail page in Create mode. This button will only be viewable by users with the security right of 'HomeVisitingDetailEdit'.
- 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) Check box – The check box will be used to mark records to be removed. The Check box will only be visible when the user has the 'HomeVisitingListRemove' security right.
- 8) Offer Date – The date that the client was offered HVP. This will be in 'mm/dd/yyyy' format. The Offer Date will be hyperlinked if the user has the 'HomeVisitingDetailView' security right. This hyperlink will lead to the Home Visiting Detail page for the record in View mode. This will be the primary default sorting, order by date descending. This will be sortable in chronological order. Only records that are marked as visible will be displayed on this page.
- 9) Name – The name(s) of the participant(s) of the HVP 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) Accepted Offer – Whether the client accepted the offer of HVP services. This will be sortable in alphabetical order.
- 11) Begin Date – The Begin Date for the HVP record. This will be sortable in chronological order and will be in 'mm/dd/yyyy' format.
- 12) End Date – The End Date for the HVP record. This will be sortable in chronological order and will be in 'mm/dd/yyyy' format. The default search results when the page is navigated to from the Task Nav Item will display HVP records that have an end date set to high date.
- 13) Edit Button – This button will lead to the Home Visiting Detail page in Edit mode for the record. The security right of 'HomeVisitingDetailEdit' is required to view this button.
- 14) Remove button – This button will remove all the records that have marked check boxes from the system. These records will become no longer visible. This button

will only display if there are existing HVP records with check boxes. The security right of 'HomeVisitingListRemove' is required to view this button.

a. When a record is removed, create a Journal entry to document the removal.

- i. Journal Category: Eligibility
- ii. Journal Type: Narrative
- iii. Short Description: Home Visiting List Removed
- iv. Long Description:

Home Visiting List data was removed for <Worker Name>.

Date Offered: <Date Offered>

Accepted Offer: <Accepted Offer>

Begin Date: <Begin Date>

End Date: <End Date>

Name: <Name>

Date of First Home Visit: <Date of First Home Visit>

Note: Name and Date of First Home Visit may have multiple records depending on the amount of people present on the Home Visiting Detail record. The Name will be followed by that person's Date of First Home Visit if it is populated. Subsequent people will add additional Name and Date of First Home Visit rows below the first person's set. Fields with no value entered will be blank.

2.1.4 Page Location

- **Global-** Eligibility
- **Local-** Case Summary
- **Task-** Home Visiting (Directly Above Legacy Case) ('HomeVisitingListView' is required to see this task nav item)

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
HomeVisitingListView	The ability to navigate to the Home Visiting List	Home Visiting List View

Security Right	Right Description	Right to Group Mapping
HomeVisitingListRemove	Remove ability on the Home Visiting List	Home Visiting List Remove
HomeVisitingDetailView	The ability to navigate to the Home Visiting Detail page in View Mode	Home Visiting Detail View, Home Visit Detail Edit
HomeVisitingDetailEdit	The ability to create and edit a Home Visiting Detail record	Home Visiting Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Home Visiting List View	Gives the user the ability to view the Home Visiting List Page	Eligibility Staff, Eligibility Supervisor
Home Visiting List Remove	Gives the user the ability to remove a Home Visiting record from The Home Visiting List Page.	Eligibility Staff, Eligibility Supervisor
Home Visiting Detail View	Gives the user the ability to view a Home Visiting Detail record	Eligibility Staff, Eligibility Supervisor
Home Visiting Detail Edit	Gives the user the ability to create and edit a Home Visiting Detail record	Eligibility Staff, Eligibility Supervisor

2.1.6 Page Mapping

Add page mapping for Home Visiting List page.

2.1.7 Page Validation

1. Add a page validation to display when the View button is clicked with the To field populated by a date prior the date in the Display From field.
 - a. To – To date must be after From date.

2.2 Home Visiting Detail

2.2.1 Overview

Add the Home Visiting Detail page to the C-IV and LRS Systems. The Home Visiting Detail page captures, displays, and manages the fields for HVP.

2.2.2 Home Visiting Detail

Home Visiting Detail

* - Indicates required fields

Save and Return Cancel

Date Offered: * Accepted Offer: *

- Select -

Person(s)	
<input type="checkbox"/>	Name
<input type="text"/>	<input type="text"/> Add

Remove

Save and Return Cancel

Figure 2.2.1 – Home Visiting Detail page Create mode

Home Visiting Detail

*- Indicates required fields

Save and Return

Cancel

Date Offered:*

10/01/2020

Accepted Offer: *

Yes

Begin Date:*

10/02/2020

End Date:

Person(s)	
Name	Date of First Home Visit
<input type="checkbox"/> Doe, John 50M	10/05/2020
<input type="checkbox"/> Doe, Jane 1F	10/05/2020
<input type="checkbox"/> <input type="text"/>	<input type="text"/>

Remove

Save and Return

Cancel

Figure 2.2.1 – Home Visiting Detail page Create mode (Accepted Offer)

Home Visiting Detail

*- Indicates required fields

Save and Return

Cancel

Date Offered:*

6/15/2020

Accepted Offer: *

No

Person(s)	
Name	
<input type="checkbox"/> Doe, John 50M	
<input type="checkbox"/> Doe, Jane 1F	
<input type="checkbox"/> <input type="text"/>	

Remove

Save and Return

Cancel

Figure 2.2.2 Home Visiting Detail Create mode (Declined Offer)

Home Visiting Detail

*- Indicates required fields

Save and Return

Cancel

Date Offered:*

10/01/2020

Accepted Offer: *

Yes

Begin Date:*

10/02/2020

End Date:

Person(s)

Name *	Date of First Home Visit
<input type="checkbox"/> Doe, John 50M	10/05/2020
<input type="checkbox"/> Doe, Jane 1F	10/05/2020
<input type="checkbox"/> <input type="text"/>	<input type="text"/>

Remove

Save and Return

Cancel

Last Updated On 10/01/2020 9:08:43 AM By: [321255](#)

Figure 2.2.3 – Home Visiting Detail Page Edit mode (Accepted Offer)

Home Visiting Detail

*- Indicates required fields

Save and Return

Cancel

Date Offered:*

6/15/2020

Accepted Offer: *

No

Person(s)

Name *
<input type="checkbox"/> Doe, John 50M
<input type="checkbox"/> Doe, Jane 1F
<input type="checkbox"/> <input type="text"/>

Remove

Save and Return

Cancel

Last Updated On 06/15/2020 9:08:43 AM By: [321255](#)

Figure 2.2.4 – Home Visiting Detail Page Edit mode (Declined Offer)

Home Visiting Detail

*- Indicates required fields

Edit

Close

Date offered: *

10/01/2020

Accepted Offer: *

Yes

Begin Date: *

10/05/2020

End Date:

11/15/2020

Person(s)	
Name *	Date of First Home Visit
Doe, John 50M	10/05/2020
Doe, Jane 1F	10/05/2020

Edit

Close

Last Updated On 10/01/2020 9:08:43 AM By: [321255](#)

Figure 2.2.5 – Home Visiting 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 'HomeVisitingDetailEdit' is required to view this button. This button only displays in View mode.
- 2) Close Button – Clicking the Close button navigates to the Home Visiting 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 a new instance of the Home Visiting record and navigates back to the Home Visiting List page. If the page was in Edit mode, the button will still save a new record, but will also update the existing record that was viewed on the page to no longer be visible. This button only displays in Create and Edit modes.
- 4) Cancel Button – Clicking the Cancel button discards any changes made to the Home Visiting record and navigates to the Home Visiting List page, where the previous search results will display. The Cancel button displays in Create and Edit modes.
- 5) Date Offered – The date HVP was offered. This will be in 'mm/dd/yyyy' format. This field is only editable in Create and Edit modes. This is a required field.
- 6) Accepted Offer – Whether the client accepted the offer of HVP services. This is a required field. The options for this dropdown are:
 - a. No
 - b. Yes

- 7) Begin Date – The beginning date for the HVP Detail record. This field will only be available when the Accepted Offer field is set to “Yes”. 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.
- 8) End Date – The end date for the HVP Detail record. This field will only be available when the Accepted Offer field is set to “Yes”. This will be in ‘mm/dd/yyyy’ format. This field is only editable in Create and Edit modes.
- 9) Person(s) – This section displays the participants for the HVP Detail record. This section will give the user the option to choose people from the case in the drop down. Primary default sorting for these records will be alphabetical order ascending.
 - a) 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. Once a person has been added to the list and the name is display only, check boxes will be available to all rows. The check boxes only display in Create and Edit modes.
 - b) Name – Case person associated with the HVP Detail record. The dropdown selection will display persons who are not marked as hidden or duplicate person and not yet added to the HVP Detail record. Name format should be as follows: [Last], [First] [Age][Gender]. The drop down will only be available when the row is being added. If the row has already been added or saved, this value will be display only.
 - c) Date of First Home Visit – The date of the case person’s first home visit associated to each individual. This will be in ‘mm/dd/yyyy’ format. This field will only display when the Accepted Offer value is set to ‘Yes’.
 - d) Add Button – Clicking the add button will add the selected person to the current row **with the name being display only** and add an additional row containing the Name dropdown, Date of First Home Visit field and Add Button. When clicking the add button and no person is selected, no action will be taken. This button will only displays in Create and Edit modes.
 - e) Remove Button – This button will not be displayed when there are no checkboxes to be selected. When the Remove Button is clicked it will remove all the people that have marked checkboxes from the HVP 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.

10) Last Updated On – This tag is used to display the last time the record was updated. The information for the tag will be of the HVP record. This will only display in Edit and View mode.

2.2.4 Page Location

- **Global**– Eligibility
- **Local**– Case Summary
- **Task**– Home Visiting (Directly Above Legacy Case) ('HomeVisitingListView' is required to see this task nav item)

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
HomeVisitingDetailView	Home Visiting Detail	Home Visiting Detail View, Home Visit Detail Edit
HomeVisitingDetailEdit	Gives the user the ability to create and edit a Home Visiting Detail record	Home Visiting Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Home Visiting Detail Edit	Gives the user access to view and edit Home Visiting Detail page.	Eligibility Staff, Eligibility Supervisor
Home Visiting Detail View	Gives the user view access to the Home Visiting Detail List page.	Eligibility Staff, Eligibility Supervisor

2.2.6 Page Mapping

Add page mapping for the Home Visiting Detail page.

2.2.7 Page Validation

- 1) 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 the date in the Begin Date field.
 - a. Begin Date – Begin Date must be before or equal to the End Date.
- 2) Add a page validation to display when the HVP Detail record has an Accepted period overlapping an existing Accepted HVP detail record on the case. The record that is being compared must be visible.
 - a. Begin Date – The Home Visiting Detail record being saved overlaps with an existing Home Visiting Detail record.
- 3) Add a page validation to display when the Save and Return button is clicked with the Date of First Home Visit field populated with a date prior to the Begin Date field.
 - a. Date of First Home Visit – This Date must be populated with a date after or on the Begin Date.
- 4) Add a page validation to display when the Save and Return button is clicked with the Date of First Home Visit field populated with a date while no person is selected.
 - a. Date of First Home Visit – This Date must be associated to a Name.
- 5) Add a page validation to display when the Save and Return button is clicked without any names selected in the Name Column.
 - a. Name – At least one person is required.

2.3 Correspondence: Add the CW 2224 Form

2.3.1 Overview

The CW 2224- CalWORKs Home Visiting Program (HVP) form is used to volunteer for Home Visiting Program. The newest state version(2/20) will be added to the Template Repository for LRS/CalSAWS and C-IV.

State Form: CW 2224 - CalWORKs Home Visiting Program (HVP) (2/20)

Programs: CW

Attached Forms: N/A

Forms Category- LRS/CalSAWS: Form

Forms Category- C-IV: Application

Languages: English and Spanish

(Need Spanish translation as CW 2224 - CalWORKs Home Visiting Program (HVP) (2/20) is not available on state website)

2.3.2 Description of Change

This effort will create CW 2224- CalWORKs Home Visiting Program (HVP) (2/20) and add to the Template Repository.

2.3.2.1 Create CW 2224 Form XDP

Create a XDP for CW 2224 Form. This form will not include a Form Header and will only be available with the Print Local option. 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: CALWORKS HOME VISITING PROGRAM (HVP)

Form Number: CW 2224 (2/20)

Include NA Back 9: No.

Form Mockups/Examples: See Supporting Documents #1 & 3

2.3.2.2 Add Form Variable Population for CW 2224

CW 2224 (2/20) will populate the following six fields when generated from Template Repository in the context of a case.

Form Body Variables:

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

Name of Parent or Caretaker Relative	Populates the Person Name based on the Document Parameters Person ID. For Example, "John Doe"	Arial Font 10	Yes	Yes	N/A, only generates from Template Repository.
Phone of Parent or Caretaker Relative	Populates the Person's phone number. For Example, "(555) 555-5555"	Arial Font 10	Yes	Yes	N/A, only generates from Template Repository.
Name of County Contact	Populates the Staff name based on program. For Example, "John Doe"	Arial Font 10	Yes	Yes	N/A, only generates from Template Repository.
Phone of County Contact	Populate the Worker phone number. For Example, "(555) 555-5555"	Arial Font 10	Yes	Yes	N/A, only generates from Template Repository.

Variables Requiring Translations: N/A

2.3.2.3 Add Form Control

The CW 2224 Form needs to be returned but have no due date. The form is triggered in Template Repository and have no batch triggers.

Due Date: None

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

2.3.2.4 Add CW 2224 Form to Template Repository

Add the CW 2224 Form to Template Repository with the following Document Parameters:

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

2.3.2.5 Add CW 2224 Form Print Options and Mailing Requirements

The following Print options will be included for the CW 2224 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

2.4 Automated Regression Test

2.4.1 Overview

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

- Home Visiting List
- Home Visiting Detail




2.4.2 Description of Change

Create new automated scripts for each of the following scenarios:

1. Successfully create Home Visiting Detail records with the following data combinations:
 - a. Date Offered populated with:
 - i. A past date
 - ii. The current system date

- iii. A future date
- b. Accepted Offer set to 'No'
- c. Accepted Offer set to 'Yes', with the following Begin and End dates:
 - i. Begin Date after the Date Offered, and no End Date
 - ii. Begin Date matching the Date Offered, and no End Date
 - iii. Begin Date after the Date Offered, and no End Date
 - iv. Begin Date matching the Date Offered, and a later End Date
 - v. Begin Date matching the Date Offered, and an End Date matching the Begin Date
- 2. Successfully edit and remove Home Visiting Detail records.
- 3. Attempt to create and save a Home Visiting Detail record meeting each of the following criteria, and verify that the appropriate validation message displays:
 - a. End Date populated with a date prior to the Begin Date
 - b. Accepted period overlapping an existing Accepted Home Visiting Detail record for the same case
 - c. Date of First Home Visit populated with a date prior to the Begin Date
 - d. Date of First Home Visit populated while no person is selected

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CW 2224 Mockup English	 CW2224 2.20 English Updated 330.pdf
2	Security	Security Matrix	 CA-57298 CIV-104042 Security
3	Correspondence	CW 2224 Mockup Spanish	 CW2224 2.20 Spanish_Updated 330

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.16	The LRS shall include the ability to compile statistics and generate reports for all interface activities performed, including standard and ad hoc reports.	HVP information will be utilized in reporting that is interfaced to external agencies.

4.2 Migration Requirements

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

5 MIGRATION IMPACTS

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-210813 | CIV-105185

Update CFWR

Work Registration Exempt Status Reason
Replace “Physically/Mentally Incapacitated”
with “Unfit For Employment-Medically Verified”

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/08/2019	1.0	Initial Draft	T. Lazio
11/4/2019	1.1	Provided additional clarification to the design	T. Lazio
11/19/2019	2.0	Added revisions based on Committee feedback	T.Lazio
03/19/2020	3.0	<p>Removed the following scheduling recommendation from Section 2.3.2 as the Batch team confirmed the DCR will have no impact on Time Limit exceptions or the WDTIP interface:</p> <ul style="list-style-type: none"> - DCR needs to be scheduled to run after the 'Time Limit' super triggers have been completed but before the materialized views are refreshed. 	T. Lazio

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1 OVERVIEW

The CalWORKs program provides (MPP Section 42-712.44) individuals who are disabled are exempt from Welfare-To-Work (WTW) or Refugee Employment Program (REP) participation. The CalFresh program provides (MPP Section 63-407.21 (b)) persons physically or mentally unfit for employment are exempt from work registration requirements. Additionally, the CF program provides (ACL 19-93) individuals who are medically certified as physically or mentally unfit to work due to a verified disability are exempt from both work registration requirements and the ABAWD time limit.

For program specific disability exemptions, this SCR provides a CF selection Reason of "Unfit for Employment - Medically Verified" only when the selected Work Registration type is CalFresh Work Registration (CFWR) and the CF registration Status is Exempt. This SCR does not change the WTW or REP selection of "Physically/Mentally Incapacitated" when the selected Work Registration type is WTW or REP and the WTW or REP registration status is Exempt.

1.1 Current Design

SCR CA-57971 CIV-7215 - ABAWD (Able-Bodied Adults Without Dependents) Phase II Design renamed the disability exemption reason for both CW and CF programs from "Physically/Mentally Incapacitated" to "Unfit for Employment". SCR CA-210718/CIV-105157 renamed this exemption to "Physically/Mentally Incapacitated" for both CW and CF.

Currently, EDBC creates CFWR disability exemption reason "Physically/Mentally Incapacitated" when the participant meets following criteria:

Has any Active or Presumptive Medical Condition at any point in the benefit month being evaluated including the Unfit for Employment for CalFresh medical condition, but excluding "Obviously Unfit for Employment for CalFresh" medical condition.

OR

Is in receipt of any of the following Income / Other Program Assistance types at any point in the benefit month being evaluated:

- SSI Only
- SSP Only
- SSI/SSP
- Agent Orange
- Employee - Temporary
- Employee - Permanent
- Private - Temporary
- Private - Permanent
- SDI
- Radiation Exposure
- Voc Rehab - Training Allowance

- Railroad - Disability
- Ricky Ray Hemophilia
- Social Security Disability
- Disability – Partial
- Disabled Survivor Benefits
- Work Therapy
- Worker's Comp – Temporary
- Worker's Comp – Permanent
- Disability – Total

1.2 Requests

Provide distinct CW (WTW) and CF (CFWR) program disability exemption reasons with "Physically/Mentally Incapacitated" specific to WTW and REP program participation and "Unfit for Employment - Medically Verified" specific to CFWR work registration requirements. Specifically, provide a selection of "Unfit for Employment-Medically Verified" and restrict selection of "Physically/Mentally Incapacitated" when the Work Registration type is CFWR and the registration status is Exempt. "Physically/Mentally Incapacitated" should only be available when the Work Registration type is WTW or REP and the registration status is Exempt.

Update data in existing CFWR records with Exemption Status Reason of "Physically/Mentally Incapacitated" to the new Exemption Status Reason of "Unfit for Employment - Medically Verified". "Physically/Mentally Incapacitated" exempt status reason will remain unchanged for WTW and REP records.

1.3 Overview of Recommendations

1. Add a new Work Registration Exempt Status Reason of "Unfit for Employment - Medically Verified" for Work Registration type of 'CFWR' only.
2. Update ABAWD ruleset used by CF EDBC and ABAWD Batch for determining ABAWD status for CF (CalFresh) program persons to use the new Exemption Status Reason of "Unfit for Employment - Medically Verified" instead of "Physically/Mentally Incapacitated" when autogenerating the work registration exemption record based on existing participant criteria.
3. Add data change to update existing CFWR Work Registration exempt records from status reason "Physically/Mentally Incapacitated" to "Unfit for Employment - Medically Verified".

1.4 Assumptions

1. CFWR exemption criteria has not changed.

2. This SCR does not change the entry of a Medical Condition of "Unfit for Employment for CalFresh" to exempt the individual from both CF work registration and ABAWD time limit or the entry of "Obviously Unfit for Employment for CalFresh" as a medical condition to only exempt the individual from the ABAWD work requirement and the ABAWD time limit.
3. The existing Disabled (EDBC determined) batch job for WTW and REP will remain unchanged.

2 RECOMMENDATIONS

2.1 Work Registration Detail

2.1.1 Overview

The Work Registration Detail page allows the User to add, edit, or view work registration information.

Update the Status Reason field to allow the selection of 'Unfit for Employment - Medically Verified' for Work Registration type of 'CFWR'.

2.1.2 Work Registration Detail Mockup

The screenshot shows a web form titled "Work Registration Detail". At the top left, there is a legend: "* - Indicates required fields". On the right side, there are three buttons: "Save and Add Another", "Save and Return", and "Cancel".

The form fields are as follows:

- Name:** * Sophie Truesword (dropdown)
- Type:** * CFWR (dropdown)
- Status:** * Exempt (dropdown)
- Status Reason:** * A dropdown menu is open, showing a list of options. The option "Unfit For Employment-Medically Verified" is highlighted with a red box.
- Volunteer:** * No (dropdown)
- Begin Date:** * (calendar icon)

At the bottom right of the form, there are two buttons: "Save and Return" and "Cancel".

Figure 2.1.1 – Work Registration Detail – C-IV

Work Registration Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Name: * Smith, John 39M

Type: * CFWR

Status: * Exempt

Volunteer: * No

Begin Date: *

Status Reason: *

- Select -
- 16/17 and School Requirements Met or Not Required
- 60 years of age or Older
- Applied for or Receiving Unemployment
- Cares for HH Member Mental/Physically Impaired
- Child under 16
- Cares for Dependent Child Under 6
- Drug/Alcohol Program Participant
- Student Half Time or More
- Unfit For Employment-Medically Verified**
- Welfare to Work Participant
- Weekly Earnings = Fed Minimum Wage x 30hrs
- Working 30 hrs or more weekly

Selected End Date:

Save and Return Cancel

Figure 2.1.2 – Work Registration Detail – CalSAWS

2.1.3 Description of Changes

1. Add the following value to Work Registration Status Reason field (CT 249) for Work Registration type of 'CFWR':
 - a. Unfit for Employment - Medically Verified
2. Restrict the following Work Registration Status Reason option from displaying for Work Registration type of 'CFWR':
 - a. Physically/Mentally Incapacitated

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Work Regist.**

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
N/A		

2. Security Groups

Security Group	Group Description	Group to Role Mapping
N/A		

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 ABAWD Rules Update: Work Registration

2.2.1 Overview

Update ABAWD ruleset used by CF EDBC and ABAWD Batch for determining ABAWD status for CF (CalFresh) program persons to use the new Exemption Status Reason of "Unfit for Employment - Medically Verified" instead of "Physically/Mentally Incapacitated" when autogenerating the work registration exemption for a verified disability or unfit for employment record based on existing participant criteria, as referenced in section 1.1.

2.2.2 Description of Changes

1. Update the ABAWD ruleset used by CF EDBC and ABAWD Batch to trigger the creation of CFWR exemptions to instead use the new Exemption Status Reason of 'Unfit for Employment - Medically Verified' rather than "Physically/Mentally Incapacitated" when the participant meets the existing exemption criteria.

2.2.3 Programs Impacted

CF

2.2.4 Performance Impacts

N/A

2.3 Updating Existing CFWR Exempt Work Registration Records

2.3.1 Overview

SCR CA-210718/CIV-105157 updated the work registration exempt Status Reason from "Unfit for Employment" to "Physically/Mentally Incapacitated" on all exempt work registration records that matched the participant exemption criteria. Update the Work Registration exempt Status Reason from "Physically/Mentally Incapacitated" to "Unfit for Employment - Medically Verified" for CFWR records with an exempt status.

2.3.2 Description of Change


1. Identify existing CFWR exempt records with a Status Reason of "Physically/Mentally Incapacitated" . Update these records by changing the Status Reason to "Unfit for Employment - Medically Verified". All other fields will remain unchanged.
2. DCR needs to be scheduled to run after the 'Time Limit' super triggers have been completed but before the materialized views are refreshed.

2.3.3 Estimated Number of Records Impacted/Performance

C-IV record count: 670,938 records

CalSAWS record count: 406,557 records

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	ACL-18-08 - All County Letter which details exemption criteria for CalFresh work registration requirements.	 18-08.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.21	<p>The LRS shall determine all periods of ineligibility for the following situations:</p> <ul style="list-style-type: none"> a. Intentional Program Violations; b. Sanctions; c. Penalties; d. Voluntary quit; e. Certain overpayments and/or overissuances; f. Transfer of property; g. Incarcerated minor (MC); h. SSN Disqualifiers 63-404.4; i. QC refusal to cooperate with State QC reviewer 63-505.13; j. Work Requirement disqualified 63-407; k. Work Registration/FSET/ABAWD disqualifications; l. Participants that are IPV are not entitled to CF or TCF; m. Unallowable withdrawal of a Restricted Account; n. Temporary & Permanent Homeless due to One in a Lifetime Rule; and o. Diversion count. 	<p>Allows for work registration exemptions for CalFresh participants with the exempt status reason of 'Unfit for Employment - Medically Verified'.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-210926

Add EDBC Validation to Force Completion of
Customer Report

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/24/2019	1	Initial write up	Mark Keehn

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1 OVERVIEW

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

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

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

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

1. When running EDBC for multiple programs at the same time, all EDBC results must be accepted and saved at the same time (i.e., all EDBC) must be authorized together or none of them can be authorized). Given this, if a household is receiving AR/CO CW and SAR CF, it is possible that the validation

being added with this SCR would prevent the CF EDBC from being accepted for a SAR Customer Report. This in turn could prevent the authorization of a CW program (which did not have SAR due) if the CW and CF were being processed together. In this scenario, the user can still authorize (i.e., accept and save) a CW EDBC by running EDBC for CW alone.

2 RECOMMENDATIONS

2.1 Eligibility Rules Updates

2.1.1 Overview

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

2.1.2 Description of Changes

1. **CalSAWS Only:** Add a new validation upon clicking 'Accept' button on the [Program] EDBC Summary and [Program] EDBC (Manual) page to be displayed when the following conditions are met:
 - a. The program is
 - i. CalWORKs (CW)
 - ii. Refugee Cash Assistance (RCA)
 - iii. CalFresh (CF)
 - iv. General Assistance and General Relief (GA/GR)
 - v. Cash Assistance Program for Immigrants (CAPI)
 - vi. Transitional Nutrition Benefit (TNB)
 - b. The EDBC is not closing the program or marking it as ineligible.
 - c. The status of the current SAR7, SAR73, QR7, RE, GR Annual Agreement, CAPI Annual Agreement, TNB4 customer report is not 'Completed – EDBC Accepted', 'Reviewed- Ready to Run EDBC', or 'Not Applicable' for the given program.
Note: RCA does not have an RE customer report, but does have a SAR7 customer report.
 - d. The benefit month processing range includes any month (for multi-month EDBCs) or the benefit month (for manual EDBC or Negative action) is any month following the current SAR7, RE, QR7, GR AA, TNB due month

The text will be in a red font and prevent EDBC from being accepted and will reference the 'Cancel' button on the page. The validation message text will be "[Customer Report Type] due

[Customer Report Due Date, Month/Year] must be marked Reviewed - Ready to Run EDBC."

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

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

2.1.3 Programs Impacted

CW, CF, GA, RCA, CAPI, TNB

2.1.4 Performance Impacts

No performance impact.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

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

5 OUTREACH

6 APPENDIX
