

CalSAWS

California Statewide Automated Welfare System

Design Document

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Online CalWORKs Appraisal Tool (OCAT)

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CalSAWS

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Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	6
2	Recommendations.....	7
2.1	OCAT Referral List Page	7
2.1.1	Overview	7
2.1.2	OCAT Referral List Page Mockup	7
2.1.3	Description of Changes	8
2.1.4	Page Location	10
2.1.5	Page Validations	10
2.1.6	Security Updates.....	11
2.1.7	Page Mapping.....	12
2.1.8	Page Usage/Data Volume Impacts	12
2.2	OCAT Referral Detail Page.....	12
2.2.1	Overview	12
2.2.2	Description of Changes	13
2.2.3	Page Location	30
2.2.4	Security Updates.....	31
2.2.5	Page Mapping.....	32
2.2.6	Page Usage/Data Volume Impacts	32
2.3	OCAT Response Detail Page.....	32
2.3.1	Overview	32
2.3.2	Description of Changes	32
2.3.3	Page Location	35
2.3.4	Security Updates.....	35
2.3.5	Page Mapping.....	36
2.3.6	Page Usage/Data Volume Impacts	36
2.4	SAWS to OCAT Outbound Interface.....	37
2.4.1	Overview	37
2.4.2	Description of Change.....	37

2.4.3	Data Validation and Error Handling	39
2.4.4	Execution Frequency	40
2.4.5	Key Scheduling Dependencies	40
2.4.6	Counties Impacted	40
2.4.7	Data Volume/Performance	40
2.4.8	Failure Procedure/Operational Instructions	41
2.5	OCAT to SAWS Inbound Interface	41
2.5.1	Overview	41
2.5.2	Description of Change	41
2.5.3	Execution Frequency	47
2.5.4	Key Scheduling Dependencies	47
2.5.5	Counties Impacted	47
2.5.6	Data Volume/Performance	47
2.5.7	Failure Procedure/Operational Instructions	48
3	Supporting Documents	48
4	Requirements	49
4.1	Project Requirements	49
4.2	Migration Requirements	49
5	Migration Impacts	50
6	Outreach	51

1 OVERVIEW

OCAT is a Web-based tool that consists of a detailed comprehensive appraisal of the strengths, barriers, and overall work readiness of CalWORKs participants. With this SCR, a new interface is being added to send demographic data to the OCAT System. This assists workers in conducting appraisal interviews by leveraging existing customer data in the C-IV and CalSAWS Systems (referred to as 'The Systems' from here on) and pre-populating the corresponding fields in the OCAT, thereby reducing worker effort and time spent on data entry. The OCAT, in turn, sends a response to 'The Systems', outlining the barriers and recommendations identified, based on the customer data sent, as well as the additional data collected by workers manually via the existing interview and appraisal process. The user is able to review the information being sent to OCAT, and the results received from OCAT through new online forms.

1.1 Current Design

The current OCAT is a web-based interview tool that is used by caseworkers in each County welfare department to appraise the strengths and barriers of clients in the CalWORKs program, towards self-sufficiency and gainful employment.

The current process is a manual process for the user as there is no interface between 'The Systems' and OCAT. Currently users must enter the information first in The Systems and then re-enter the same information into OCAT.

When the appraisal is completed in OCAT, the information has to be saved and then manually attached to the case in The Systems. There currently is no interface to send the appraisal results back into The Systems.

1.2 Requests

As regulated by Assembly Bill (AB) 74 (Chapter 21, Statutes of 2013) the California Department of Social Services (CDSS) must implement changes to the OCAT; specifically, OCAT-related functionality must be implemented in SAWS to allow caseworkers to perform OCAT-related data collection in SAWS. The request is to send agreed-upon information from The Systems real time through an interface to the OCAT system and then receive appraisal results back through an interface real time to be viewable by the users in The Systems.

1.3 Overview of Recommendations

1. Create an OCAT Referral List Page which displays all records of OCAT referrals for each person on a case.
2. Create an OCAT Referral Detail Page to display all customer information elements being sent to OCAT.
3. Create an OCAT Response Detail Page to display the recommendations generated by OCAT for the worker to review with the customer.
4. Create an interface to send agreed upon data elements to OCAT and then receive another set of agreed upon data elements back to The Systems.
5. Create an emulator to test the interface.

1.4 Assumptions

1. The worker must be in a case context to view any OCAT-related online forms and create and send new referrals to OCAT.
2. Fields not mentioned to be modified within the description of changes retain their current functionality.
3. Any interface elements without corresponding data in the Systems will not be sent to OCAT.
4. No new data collection updates will be required for the demographic information that will be sent by the C-IV and CalSAWS Systems to the new OCAT System.
5. The Appraisal Summary and Recommendations ("ASR") sent by the OCAT System to the C-IV and CalSAWS Systems will be in PDF file format.
6. A request to have a person assessed by the OCAT will be initiated by the C-IV and CalSAWS Systems. The C-IV and CalSAWS Systems will support only referrals initiated within the C-IV and CalSAWS Systems; referrals initiated by the OCAT system will not be supported.
7. The implementation of single sign-on functionality that would enable a User to log into the C-IV/CalSAWS application and the OCAT via a single set of credentials will not be supported with this SCR.
8. Amounts will be pulled based on the amount saved regardless of frequency.
9. Due to the timing of the release, the Security Updates will not be implemented in the systems with this effort.

2 RECOMMENDATIONS

2.1 OCAT Referral List Page

2.1.1 Overview

The user can get to the OCAT Referral List Page by navigating to Employment Services global navigation, Case Summary Local navigation or Employment Services Global Navigation and Appraisal Local navigation. The OCAT Referral List Page is a new page that contains the history of OCAT Referrals created for individuals on a specific case. From this page the user can filter, sort, and view OCAT Referral Detail records. The OCAT Referral List Page contains information about the date the OCAT Referral was created, the person's name, the status of the OCAT Referral, the date the status went into effect, as well as buttons linking to the OCAT Response Detail for Referrals in completed status. Lastly, the user can add new OCAT Referrals for non-deregistered Welfare-to-Work and Refugee Employment Program (REP) individuals on the Case.

2.1.2 OCAT Referral List Page Mockup

OCAT Referral List

*- Indicates required fields

Display By Name: From: To:

Search Results Summary Results 1 - 5 of 5

OCAT Referral Date	Name	Status	Status Date	
10/31/2019	Delgado-Pritchett, Gloria 39F	Pending	10/31/2019	
10/31/2019	Delgado-Pritchett, Gloria 39F	Sent	10/31/2019	
09/31/2019	Delgado-Pritchett, Gloria 39F	Completed	10/15/2019	<input type="button" value="Recommendations"/>
09/31/2019	Delgado, Manny 20M	Completed	10/15/2019	<input type="button" value="Recommendations"/>
09/31/2019	Pritchett, Jay 74M	Error	10/01/2019	
08/31/2019	Pritchett, Jay 74M	Cancelled	09/31/2019	

New OCAT Referral: *

- Select -
- Select -
- Delgado, Manny 20M
- Delgado-Pritchett, Gloria 39F
- Pritchett, Jay 72M

Figure 2.1.1 – OCAT Referral List Page

2.1.3 Description of Changes

- 1) The user can filter the OCAT Referral List based on a person's "Name", a "From" date, and a "To" date by entering the criteria and clicking the "View" button.
 - a) The "Display By Name:" search filter is a single selection dropdown field which limits the display of entries in the list below to show only those for the person selected.
 - i) The selector options include all people on the case who have an OCAT Referral in "Pending", "Sent", "Completed", "Cancelled", or "Error" status.
 - ii) The options in the selector are formatted as the concatenated "Last Name", "First Name", "Gender", and "Age" fields from the person record.
 - b) The "From:" field is a calendar date selection field, and accepts manual date entry as well as the use of the "calendar" tool. This search field limits the table of entries below to any entries with a "Date of OCAT Referral" on or after the entered date.
 - i) Acceptable date format for this field is MM/DD/YYYY.
 - ii) The field defaults to a blank value, however, the list is by default filtered to display all records from 2 years before the system date, through the system date.
 - c) The "To:" field is a calendar date selection field, and accepts manual date entry as well as the use of the "calendar" tool. This search field limits the list below to any entries with a "Date of OCAT Referral" on or before the entered date.
 - i) Acceptable date format for this field is MM/DD/YYYY.
 - ii) The field defaults to a blank value.
 - d) The "View" button limits the display of the OCAT Referral records to the criteria specified in the "Name", "Display From", and "To" fields.
 - i) If the search filter date input fields are empty upon clicking the "view" button, the search results returned will include only those with an OCAT Referral Date 2 years before the system date through to the current system date.
 - ii) There is a standard validation on this button that only allows the user to proceed if the "From" date entered is after the date entered for the "To" field.

Validation Message: "To - To date must be after From date".
- 2) The list of OCAT Referrals is displayed in a table of historical and current OCAT Referrals for applicable members on the case. The table is sorted according to most recent "OCAT Referral Date" first with all records following in reverse chronological order. The list is paginated to a default maximum of 25 entries per page. The pagination text displays "1 - # of # Results", with # being the amount of entries in the

OCAT Referral List table. The table contains the following columns, which are sortable in ascending and descending order:

- a) OCAT Referral Date – This column contains the date when the OCAT Referral was created for the specific case person noted in the Name entry for this OCAT Referral record.
 - i) The entries in this column are in MM/DD/YYYY format and reflect the date that the OCAT Referral record was created.
 - ii) The entry is a clickable link that navigates the user to the OCAT Referral detail page for the corresponding record. If the status of the referral is "Pending", the link directs the user to the OCAT Referral in "Pending" status. If the status of the referral is "Sent", the link directs the user to the OCAT Referral in "Sent" status. If the status is completed, the link directs the user to the OCAT Referral in "Completed" status. If the referral is in "Cancelled" status, the link directs the user to the OCAT Referral Detail in "Cancelled" status. If the referral is in "Error" status, the link directs the user to the OCAT Referral Detail page in "Error" status. Access to this page is limited to the "OCATReferralDetailView" and "OCATReferralDetailEdit" security rights.
 - iii) This column can be sorted in ascending and descending date order. As a default, the column is sorted in descending date order (latest first).
- b) Name – This column contains the concatenated "last name", "first name" "age" and "gender" fields reflecting the customer information about the person for whom the OCAT Referral record was created.
- c) Status – This column lists the latest status of the OCAT Referral. The possible values are as follows:
 - i) Pending – an OCAT Referral that has not yet been successfully transmitted via the interface to OCAT.
 - ii) Sent – an OCAT Referral was successfully transmitted via the interface to OCAT, but which has not yet received a response with the ASR from the interface.
 - iii) Completed – a record for which an ASR Form was received via the interface. An entry with this status value links to the OCAT Referral Detail page in "completed" status.
 - iv) Cancelled – status displayed when interface indicates "cancelled" on the OCAT side.
 - v) Error – status displayed when the interface indicates an error in transmission to OCAT or an error in transmission to CalSAWS/C-IV.
- d) Status Date – This column contains the entries which reflect the date at which the status changed to the current status on the record.

- e) "Recommendations" Button - This column has an empty column header. It contains entries in the form of a "Recommendations" button. The button appears only when the status of the OCAT Referral is "Completed". This button directs the user to the "OCAT Response" page for the specific record. This button has security rights of "OCATRecommendationsDetailView" detailed in section 2.1.5.
- 3) The "New OCAT Referral:" selector field and "Add" button allows the worker to select any non-hidden, non-duplicate and non-deceased person from the case who is non-deregistered on a Welfare-to-Work program (as well as REP in CalSAWS) as of the system date, and add/create an OCAT Referral for the individual.
- a) The dropdown selector only allows for single selection, and defaults to a blank value. The values in this dropdown are in the format of the concatenated Last Name, First Name, Age, and Gender information from the case persons on Welfare-to-Work program in a non-deregistered status. This is a required field in order to click the "Add" button.
 - b) Upon selecting a case person and clicking the "Add" button, the user is directed to the "OCAT Referral Detail" page in "Pending" status for that specific person.
 - c) In CalSAWS only, any case members with a pending or active Refugee Employment Program (REP) will also be included in the selector list.

2.1.4 Page Location

- **Global: Empl. Services**
- **Local: Appraisal, Case Summary**
- **Task: OCAT (appears after Employment option. The Security Right of 'OCATReferralListView' is required to view this Task Nav item.)**

2.1.5 Page Validations

- 1) "View" Button for search filters has a custom field validation.
 - i. If the date value of the "From:" field is after the "To:" search filter, then a validation triggers and the user cannot proceed to filter the OCAT Referral List table.

"To - To date must be after From date"
- 2) "Add" button for "New OCAT Referral:" selector has a custom field validation.
 - i. If no Welfare-to-Work or REP (in CalSAWS) exists on the case, and the "add" button is clicked, the following validation displays:

"New OCAT Referral - Field is required. Please enter a value."

2.1.6 Security Updates

These Security Rights and Security Groups will not be added in the systems with this enhancement. A future enhancement will implement these changes.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
OCATReferralListView	Right to view the OCAT Referral List Page	OCAT View, OCAT Edit
OCATReferralDetailView	Right to view the OCAT Referral Detail Page	OCAT View OCAT Edit
OCATReferralDetailEdit	Right to edit the OCAT Referral Detail Page	OCAT Edit
OCATRecommendationsDetailView	Right to view the OCAT Recommendations Detail Page	OCAT View OCAT Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
OCAT View	Ability to view OCAT referrals and view recommendations	Employment Services Staff, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Supervisor
OCAT Edit	Ability to view and edit OCAT referrals and view recommendations	Employment Services Staff, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Supervisor

2.1.7 Page Mapping

Add Page mapping to the new fields being added to this page.

2.1.8 Page Usage/Data Volume Impacts

2.2 OCAT Referral Detail Page

2.2.1 Overview

- a) The OCAT Referral Detail Page is a new page that displays the person-specific data elements which are transmitted via the OCAT interface. This page is used by workers to send an OCAT referral or view an existing OCAT referral. The worker can navigate to this page from the "OCAT Referral List" page by selecting a person from the "New OCAT Referral" selector field, and clicking the "Add" button or by clicking the "OCAT Referral Date" hyperlink on the OCAT Referral List page.

NOTE – The customer data populated on the page reflects the current case and person data at the time that the "Add" button is clicked on the "OCAT Referral List" Page.

OCAT Referral Detail

[Close](#)

Request Information		
County: Los Angeles	Worker ID: 19DP605Y0G	Case Number: L002AE5
OCAT Referral Date: 10/31/2019	Status: Sent	Transaction ID: C345676523

- ▶ **Contact**
- ▶ **Individual Demographics**
- ▶ **Additional Household Members**
- ▶ **Pregnancy**
- ▶ **Other Program Benefits**
- ▶ **Expenses**
- ▶ **Military/Veterans**
- ▶ **Employment History**
- ▶ **Status History**

[Close](#)

2.2.1 – OCAT Referral Detail Page – All Sections (Collapsed)

2.2.1.1 Description of Changes

OCAT Referral Detail

[Send OCAT](#) [Cancel](#)

Request Information		
County: Los Angeles	Worker ID: 19DP605Y0G	Case Number: L002AE5
OCAT Referral Date: 10/31/2019	Status: Pending	Transaction ID: C345676523

2.2.2 – OCAT Referral Detail Page Request Information Section

OCAT Referral Detail

[Send OCAT](#) [Cancel](#)

Request Information		
County: Los Angeles	Worker ID: 19DP605Y0G	Case Number: L002AE5
OCAT Referral Date: 10/31/2019	Status: Pending	Transaction ID: C345676523

Pending Status, Before Sending OCAT

OCAT Referral Detail

[Close](#)

Request Information		
County: Los Angeles	Worker ID: 19DP605Y0G	Case Number: L002AE5
OCAT Referral Date: 10/31/2019	Status: Pending	Transaction ID: C345676523

2.2.3 – OCAT Referral Detail Page Request Information Section
Pending Status, After Sending OCAT

OCAT Referral Detail

[Close](#)

Request Information		
County: Los Angeles	Worker ID: 19DP605Y0G	Case Number: L002AE5
OCAT Referral Date: 10/31/2019	Status: Sent	Transaction ID: C345676523

2.2.4 – OCAT Referral Detail Page Request Information Section
Sent Status

OCAT Referral Detail

View ASR Close		
Request Information		
County: Los Angeles	Worker ID: 19DP605Y0G	Case Number: L002AE5
OCAT Referral Date: 10/31/2019	Status: Completed	Transaction ID: C345676523

2.2.5 – OCAT Referral Detail Page Request Information Section Completed Status

- 1) Action buttons display above the “Request Information” section, as well as below the “Status History” section in each status.
 - b) The “Send OCAT” button only appears if the OCAT Referral does not have a Transaction ID and the user has the security right of “OCATReferralDetailEdit” which is detailed in section 2.2.4. Upon clicking the “Send OCAT” button, the user is directed back to the OCAT Referral List page, and the new Referral record appears in “Pending” status, while the data is sending to OCAT. Once the data is sent to OCAT, the status changes to “Sent”.
 - i) Technical Note – the “Send OCAT” button triggers the saving of customer data, which is then utilized by the interface.
 - ii) There is no limit to how many OCAT Referrals can be sent for each case person.
 - c) The “Cancel” button only appears if the OCAT Referral has no transaction ID. Upon clicking the “Cancel” button, the user is directed back to the OCAT Referral List page. There is no data saved upon clicking this button, and no new records appear for this referral on the OCAT Referral List Page.
 - d) The “Close” button only appears when the OCAT Referral is in either “Pending”(with transaction ID populated), “Sent”, “Completed”, “Cancelled”, or “Error” status. Upon clicking the “Close” button, the user is directed back to the OCAT Referral List Page.
 - e) The “View ASR” button displays only when the OCAT Referral is in “Completed” status. It appears to the left of the “Close” button. Upon clicking this button, the user is directed to the ASR form received via the OCAT interface, which opens a PDF document in a new window.
- 2) The “Request Information” section displays below the action buttons.
 - a) The first row contains the following data elements:
 - i) County – this value reflects the county of the person on the case from which the OCAT Referral is being created. This field displays the name of the county.

- (1) Technical Note – while the county name is displayed, the county code should be saved for the interface to send to OCAT
 - ii) Worker ID – this value reflects the worker ID of the user that created the OCAT Referral.
 - iii) Case Number – This value reflects the case number of the OCAT member's case.
- b) The second row contains the following data elements:
 - i) OCAT Referral Date – This date value displays the system date when the user adds a new OCAT referral on the OCAT Referral List page.
 - ii) Status – This value reflects the status of the OCAT Referral. The status is initialized as "pending" when the user first adds the OCAT referral on the OCAT Referral List Page. After and including when the OCAT Referral is in "sent" status, this value reflects the entry in the "status" column for the record on the OCAT Referral List page.
 - iii) Transaction ID – This value is a new field and a unique ID representing the transmission of OCAT referral data elements from The Systems to OCAT. The "transaction ID" field label displays for every status, but the "transaction ID" value only appears in "Pending" (after clicking "Send OCAT" button), "sent", "completed", "cancelled", and "error" status. This means that the user must click the "Send OCAT" button on an OCAT Referral in "pending" status in order for the "Transaction ID" value to be generated.
 - (1) The format of the "Transaction ID" is prefixed by an alphabetical character, followed by nine-digits (10 characters total), with numeric incrementing.
 - (a) S##### - Starts with 'S' for CalSAWS format and then increment starting at 000000001.
 - (b) C##### - Starts with 'C' for C-IV format and then increment starting at 000000001.
 - (2) This data element will be required in order for OCAT to accept a referral via the interface.
 - (3) A Transaction ID generated by a specific county will only be returned via the interface to a case within the same county

▼ Contact	
Address Type	Address
Mailing	121 S CLIFFWOOD AVE LOS ANGELES, CA 90049
Physical	121 S CLIFFWOOD AVE LOS ANGELES, CA 90049
Phone Type	Phone Number
Cell	(323)867-5309

2.2.6 – OCAT Referral Detail Page Contact Information Section

- 3) The “Contact” section appears below the “Request Information” section. This section displays the addresses and phone numbers available in the OCAT person's Customer Information Page – Contact tab.
- a) Within the “Contact” section, a table displays the “Mailing” and “Physical” addresses. If there is no Physical or Mailing address in the system for the customer, this section will be blank.
 - i) The “Address Type” column displays the “Mailing” type first, and the “Physical” address type second.
 - ii) The “Address” column displays the most recently saved address available under the “Address” column in the “Address Information” table on the Contact Summary page, in the following format:
 - (1) [Street Address Line 1]
[Street Address Line 2]
[City], [State] [Zip Code]

Note – the zip code displayed in this new page does not show the 4-digit zip code suffix, only the 5-digit zip code.
 - b) The “Phone Number” table, displayed below the “Address” table, contains the phone number information. The column labels include “Phone Type”, and “Phone Number”, respectively.
 - i) Only one phone number entry is displayed in the table, and it is determined by the following hierarchy. These are the only possible values for the “Phone Type” field, and only the most recently saved number is displayed for each type.
 - (1) TDD
 - (2) Main
 - (3) Cell
 - (4) Home
 - (5) Message
 - (6) Work
 - (7) Toll Free
 - (8) Fax

- ii) The "Phone Number" value reflects the most recently saved phone number determined by the hierarchy in the "Phone Type" column from all the numbers available for each "Phone Type" in the "Phone Number" column in the Contact Information table on the Contact Summary Page. The format is (XXX)XXX-XXXX.

Individual Demographics		
Last Name: Delgado-Pritchett	First Name: Gloria	SSN: 123-45-6789
CIN: 87654321G	Gender: Female	Date of Birth: 03/29/1980
Race: American Indian, Other Hispanic	Hispanic or Latino: Yes	
Gender Identity: Female	Birth Certificate Gender: Female	Sexual Orientation: Straight or Heterosexual
Spoken Language: English	Written Language: Spanish	

2.2.7 – OCAT Referral Detail Page Individual Demographics Section

- 4) The "Individual Demographics" section appears below the "Contact" section. This section reflects data from the fields on the "Customer Information - Individual Demographics" tab for the OCAT member.
 - a) In the first row the following fields are displayed:
 - i) Last Name – the value of this field reflects the value of the "Last Name:" field in the "Name" Section of the Individual Demographics page for the person.
 - ii) First Name - the value of this field reflects the value of the "First Name" field in the "Name:" Section of the Individual Demographics page for the person.
 - iii) SSN - the value of this field reflects the value of the "SSN" table entry in the "SSN Status" Section of the Individual Demographics page for the person. SSN will be redacted in the CalSAWS system.
 - b) In the second row, the "CIN", "Gender", and "Date of Birth" fields are displayed:
 - i) CIN - the value of this field reflects the value of the "CIN:" field in the body section of the Individual Demographics page for the person. This data element will be required in order for OCAT to accept a referral via the interface.
 - ii) Gender - the value of this field reflects the value of the "Gender:" field in the body section of the Individual Demographics page for the person.
 - iii) Date of Birth - the value of this field reflects the value of the "Date of Birth:" field in the body section of the Individual Demographics

page for the person. This data element will be required in order for OCAT to accept a referral via the interface.

- c) In the third row, the "Race", and "Hispanic/Latino" fields are displayed:
 - i) Race - the value of this field displays all values selected under the "Race/Ethnic Origin:" section of the Individual Demographics page for the person. This field can have as many values as there are "races" and "ethnicities" in the systems. The values are listed in ascending alphabetical order, and separated by commas.
 - ii) Hispanic or Latino – a new Yes/No field derived from the "is this person Hispanic or Latino:" field in the Individual Demographics page.
- d) In the fourth row the following fields are displayed, reflecting the case person data found in the "Optional Sexual Orientation and Gender Identity (SOGI) Information" section of the Individual Demographics page:
 - i) Gender Identity – reflects the value of the "Gender Identity:" field for the person.
 - ii) Birth Certificate Gender – reflects the value of the "Birth Certificate Gender:" field for the person.
 - iii) Sexual Orientation – reflects the value of the "Sexual Orientation:" field for the person.
- e) In the fifth row the following fields are displayed, reflecting language information below the "Optional Sexual Orientation and Gender Identity (SOGI) Information" section of the Individual Demographics page:
 - i) Spoken Language - the value of this field reflects the value of the "Spoken Language:" field for the person in the CalSAWS system and "Language" field for the person in the C-IV system.
 - ii) Written Language – In CalSAWS, the value of this field reflects the value of the "Written Language:" field for the person. In C-IV, this information is not available, so the value is blank.

▼ Additional Household Members					
Name	Date of Birth	Gender	Relationship	Pregnancy Status	Due Date
Pritchett, Jay	05/23/1947	Transgender: Male to Female	Spouse	No	
Dunphy, Haley	12/10/1993	Female	Child	Yes	01/31/2020
Delgado, Manny	01/04/1999	Male	Child	No	
Pritchett, Joe	01/04/2013	Male	Child	No	

2.2.8 – OCAT Referral Detail Page Additional Household Members Section

- 5) The "Additional Household Members" section appears below the "Individual Demographics" section. This section displays data reflecting the fields on the "Customer Information – Household Status, Relationship, and Pregnancy pages for all household members, excluding deceased, duplicate, and hidden persons.

a) The information about each household member is listed in a table with the following columns:

- i) Name – this column contains entries reflecting the concatenated “Last Name” and “First Name” field values for each household member from the Household Status page in the following format:

[Last Name], [First Name]

The household members will be sorted by the Name column alphabetically.

- ii) Date of Birth - this column contains entries reflecting the “Date of Birth” field value on each household member’s person record found in their Customer Information – Individual Demographics page.
- iii) Gender - this column contains entries reflecting the “Gender” field value on each household member’s person record found in their Customer Information – Individual Demographics page.
- iv) Relationship – this column contains entries reflecting the “Relationship” field on the Relationship Detail for each member of the household for whom this information is available all with respect to the person whom the OCAT Referral is created for.
- v) Pregnancy Status – this column displays entries reflecting the existence of an active pregnancy record for each member of the household. If there is an active pregnancy record for the person (meaning the expected due date field value is a future date), then the value for this table entry is “Yes”. Otherwise, the value is “No”.
- vi) Due Date – this column displays entries reflecting the “Due Date:” field on the pregnancy record of each household member, in the format [MM/DD/YYYY]. This field will only display a value if the “Pregnancy Status” entry for the row has a value of “Yes”. Otherwise this value is blank.

▼ Pregnancy	
Pregnant: Yes	Due Date: 12/31/2019

2.2.9 – OCAT Referral Detail Page Pregnancy Information Section

6) The “Pregnancy” section appears below the “Additional Household Members” section. This section reflects the data elements on the Customer Information - Pregnancy Detail page for the person.

- a) There is one row of text fields containing the following elements
 - i) Pregnant – this field value reflects the existence of an active pregnancy record for the person whom the OCAT Referral is created for. If an active pregnancy record exists for the person, this field value is “Yes”. Otherwise, the value displays “No”.

- ii) Due Date – this field will only be populated if the value for the previous field, "Pregnant" is "Yes". If a pregnancy record exists for the person, this field displays the value reflecting the "Due Date:" field value on the pregnancy record for the person.

Other Program Benefits			
OCAT Benefit Type		Amount or Value of Services	
CalFresh		204.00	
CalWORKs		550.03	
CAPI		106.00	
Child Care		442.00	
Child Support		1,000.00	
Housing		1,000.00	
State Disability Insurance (SDI)		0.00	
Student Scholarships and Grants		750.00	
Supplemental Social Security	0.00		
Transportation	0.00		
Unemployment	750.00		
Veterans	1,150.00		
Other	0.00		

Type	Amount
Awards/Scholarships	250.00
Grants, Loans - Needs Based	250.00
Grants, Loans - Non Needs Based	250.00

Receiving Medi-Cal or Covered CA: No	Receiving SSI: Yes
Received CalWORKs In This County or Other County Before: Yes	If Yes, Which County Did You Move From? Alpine

2.2.10 – OCAT Referral Detail Page Other Program Benefits Section

- 7) The "Other Program Benefits" section appears below the "Pregnancy" section. This section displays the programs and amounts reflecting the data in the "Issuance" and "Income" detail pages in Customer Information.
 - a) All available benefit types and their corresponding amounts for the person are displayed in a table with the columns as follows, and will display a zero amount even if the individual does not have that benefit:
 - i) OCAT Benefit Type – this column displays all of the following Benefits as displayed in OCAT:
 - (1) CalFresh - if the case has an active CalFresh program as of the system date, amount or value of services column reflects the amount of the latest issuance (in issued status). If there are multiple issuances for the benefit month corresponding to the latest issuance then the amount is the sum of the

issuances for the month excluding Disaster CalFresh supplements and replacement benefits.

- (2) CAPI - if the case has an active CAPI program as of the system date, amount or value of services column reflects the amount of the latest issuance (in issued status). If there are multiple issuances for the benefit month corresponding to the latest issuance then the amount is the sum of the issuances for the month excluding replacement benefits.
- (3) CalWORKs - if the case has an active CalWORKs program as of the system date, amount or value of services column reflects the amount of the latest issuance (in issued status). If there are multiple issuances for the benefit month corresponding to the latest issuance then the amount is the sum of the issuances for the month excluding replacement benefits.
- (4) Child Care - If the case has an active Child Care program as of the system date, amount or value of services column reflects the Issuance (or sum of Issuances if there is more than one) for C-IV for the prior month or sum of the APP auth amounts for the prior month for LRS as of the system date.
- (5) Child Support – mapped to the following income types in the Systems. The income amount value as of the OCAT referral date will be used in determining the Amount or Value of Services.
 - (a) Child Support – Through LCSA
 - (b) Child & Spousal Support – Through LCSA
 - (c) Child Support – Direct
 - (d) Child Support – Excess
- (6) Housing – mapped to the following income types in the Systems. The income amount value as of the OCAT referral date will be used in determining the Amount or Value of Services.
 - (a) Housing - Earned
 - (b) Housing - Unearned
- (7) State Disability (SDI) - The amount or value of services column reflects the amount of SDI Income as of the OCAT referral date.
- (8) Student Scholarships and Grants – mapped to the following income types in the Systems. The income amount value as of the OCAT referral date will be used in determining the Amount or Value of Services.
 - (a) Grants, Loans – Needs Based
 - (b) Grants, Loans – Non Needs Based
 - (c) Awards/Scholarships
- (9) Supplemental Social Security – mapped to the following income types in the Systems. The income amount value as of the OCAT referral date will be used in determining the Amount or Value of Services.

- (a) Social Security Retirement
- (b) Social Security Disability
- (c) Social Security Survivors
- (10) Transportation – the amount or value of services column reflects the sum of the issuances tied to the need category of transportation for Welfare-to-Work. In CalSAWS, the REP issuances is reflected in this value as well. This reflects the current month's issuances if they exist, otherwise, the previous month's issuances.
- (11) Unemployment – mapped to the following income types in the Systems. The income amount value as of the OCAT referral date will be used in determining the Amount or Value of Services.
 - (a) UIB Stimulus Payment
 - (b) Disaster Unemployment Assistance – DUA
 - (c) UIB
- (12) Veterans – mapped to the following income types in the Systems. The income amount value as of the OCAT referral date will be used in determining the Amount or Value of Services.
 - (a) Disability - Partial
 - (b) Disabled Survivor Benefits
 - (c) GI Bill – Non-Educational
 - (d) GI Bill – Educational
 - (e) VEAP
 - (f) Student Services Program
 - (g) Aid and Attendance
 - (h) Disability - Total
 - (i) Survivor Benefits
 - (j) Work Therapy
- (13) Other - mapped to Other
- ii) Amount of Value of Services – this column appears to the right of the “OCAT Benefit Type” column. The entries in this column is the sum of the income types when it is mapped to more than one income type. The hover-over tool tips allow the user to view the breakdown of Benefit types mapped to each OCAT Benefit Type by mouse-hovering over each Amount value.
 - (1) The tool tip displays a table with two columns. The header of the first column is “Type”, and the second column header is “Amount”.
 - (a) Type – this column contains the C-IV and CalSAWS Benefit types mapped above for each OCAT benefit type. The entries are sorted based on alphabetical order of this column.
 - (b) Amount – this column contains the amount for each benefit type in the C-IV and CalSAWS systems.
- b) Below the Benefits and Amounts Table, there are two rows of text fields displaying non-numerical information related to Other Program Benefits

- i) The first row contains the following:
 - (1) Receiving Medi-Cal or Covered CA – this field reflects the existence of an active Medi-Cal program or the existence of a Cash Based Medi-Cal Program on which the person is receiving benefits, as of the OCAT Referral Date. Otherwise, the value is “No”. This does not factor in Covered CA.
Note: CalWORKs, CAPI, RCA and SSI/SSP can have a Cash Based Medi-Cal component.
 - (2) Receiving SSI – This reflects the value of “Gets SSI” or “Gets SSI/SSP” in the Other Program Assistance detail page. If either value is “Yes”, then this field value will display “Yes”.
- ii) The second row contains the following:
 - (1) Received CalWORKs In This County or Other County Before – This field value is always “Yes”.
 - (2) If Yes, Which County Did You Come From? - If the person has an incoming ICT in Complete status from the last 6 months prior to OCAT Referral Date, the value for this field is the name of the county where the OCAT person received CalWORKs most recently, including possibly the current county. If there is no ICT from the last 6 months, display **the current county**.

Expenses																		
OCAT Expense Type	Expense Amount																	
Alimony	500.00																	
Child Care	500.00																	
Child Support	500.00																	
Housing	1,750.00																	
Medical Bills	500.00																	
Student Loans	500.00																	
Utilities	450.00																	
Other	250.00																	
Bank Account Exists:	Homeless:																	
Yes	No																	
		<table border="1"> <thead> <tr> <th>Type</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Association/Mandatory Fees</td> <td>250.00</td> </tr> <tr> <td>Home Insurance</td> <td>250.00</td> </tr> <tr> <td>Home Taxes</td> <td>250.00</td> </tr> <tr> <td>Mortgage</td> <td>250.00</td> </tr> <tr> <td>Rent</td> <td>250.00</td> </tr> <tr> <td>Room</td> <td>250.00</td> </tr> <tr> <td>Room and Board</td> <td>250.00</td> </tr> </tbody> </table>	Type	Amount	Association/Mandatory Fees	250.00	Home Insurance	250.00	Home Taxes	250.00	Mortgage	250.00	Rent	250.00	Room	250.00	Room and Board	250.00
Type	Amount																	
Association/Mandatory Fees	250.00																	
Home Insurance	250.00																	
Home Taxes	250.00																	
Mortgage	250.00																	
Rent	250.00																	
Room	250.00																	
Room and Board	250.00																	

2.2.11 – OCAT Referral Detail Page Expenses Section

- 8) The “Expenses” section appears below the “Other Program Benefits” section. This section displays information about the person’s expenses, bank accounts, and living arrangement.
 - a) There is a table with two columns to display the OCAT-defined expense types and amounts aggregated from C-IV and CalSAWS Expense types

based on fields in the "Payments and Debt" records. Current Expenses will be sent. The table columns are as follows:

- i) OCAT Expense Type – This column displays the following expense types as shown in OCAT. Some of the OCAT Expense Types are mapped to one or more C-IV and CalSAWS Expense Types.
 - (1) Alimony – mapped to the following C-IV and CalSAWS Expense Types:
 - (a) Spousal Support – Court Ordered
 - (b) Alimony
 - (2) Child Care – mapped to the following C-IV and CalSAWS Expense Types:
 - (a) School Dependent Care Expense
 - (b) Dependent Care
 - (3) Child Support – mapped to the following C-IV and CalSAWS Expense Types:
 - (a) Child Support - Court Ordered
 - (b) Child Support - Obligated Arrears
 - (4) Housing – mapped to the following C-IV and CalSAWS Expense Types:
 - (a) Rent
 - (b) Mortgage
 - (c) Home Taxes
 - (d) Home Insurance
 - (e) Association/Mandatory Fees
 - (f) Room and Board
 - (g) Room
 - (5) Medical Bills – mapped to the following C-IV and CalSAWS Expense Types:
 - (a) Health Insurance Premiums
 - (b) Medical Expenses Paid Out of Pocket Not Reimbursed
 - (6) Student Loans – mapped to the following C-IV and CalSAWS Expense Types:
 - (a) Insurance Premiums on Student Loans
 - (b) Student Loan Interest
 - (7) Utilities – mapped to the following C-IV and CalSAWS Expense Types:
 - (a) Gas
 - (b) Electricity
 - (c) Water
 - (d) Telephone
 - (e) Heating and Cooking Fuel (Propane, Wood)
 - (f) Flat Rate Utility Payments
 - (g) Garbage/Trash Collection Fees
 - (h) Utility Installation Costs
 - (i) Utility Allowance

Note: Utility Allowance will display the current value as of the system date.

- (8) Other - mapped to "Other"

- ii) Expense Amount – this column displays the aggregated amount of C-IV and CalSAWS expense types utilizing the above mapping to correspond with the OCAT Expense Type. The expense amount dollar values will have a tool tip feature that displays a table breakdown of the individual expense types and amounts that were aggregated into the total OCAT Expense Amount. **The types will be ordered alphabetically.** This tool tip will appear when the user mouse-hovers over the dollar amount value in each row which has a mapping as noted above.
- b) Below the Expenses and Amounts Table, there is a row of text fields displaying non-numerical data about the person's expenses as follows:
 - i) Bank Account Exists – this field value reflects the existence of a Liquid Property Record with a Type of "Checking Account" or "Savings Account" found in the Customer Information – Property page. If either type of liquid property exists, for the OCAT person, with a blank "end date" field value, then this field value displays "Yes". Otherwise, the field value displays "No".
 - ii) Homeless – this field value reflects the existence of a Living Arrangements record with a type of "Homeless" for the OCAT person found in the Customer Information – Living Arrangements page. If this type of record exists with a "departure date" after the current date, this field displays a value of "Yes". Otherwise the value displayed is "No".

▼ Military/Veterans		
Enlistment Date	Discharge Date	Branch
04/01/1998	02/01/2002	Army
05/01/2005	04/30/2008	Navy
01/01/2010	01/01/2013	Air Force

Honorable Discharge:
No

2.2.12 – OCAT Referral Detail Page Military/Veterans Section

- 9) The "Military/Veterans" section appears below the "Expenses" section. This section contains all available information related to the person's military experience and veterans record for all military branches.
 - a) There is a table listing any military records with a type of "self" available in the "Military/Veterans" page in CalSAWS, or the "Veterans" page in C-IV, within "Customer Information". In CalSAWS, only military/veterans records with a type of "military/veteran" are displayed in this list. In C-IV, only records with a relationship type of "self" are displayed in this list. The table columns are as follows:

- i) Enlistment Date – the table entries in this column reflects the “Enlistment Date” field value for each military record. The format is MM/DD/YYYY. The table is sorted based on this column, in ascending chronological order.
 - ii) Discharge Date – the table entries in this column reflects the “Discharge Date” field for each military record. The format is MM/DD/YYYY.
 - iii) Branch – the table entries in this column reflects the value of the “Branch” field in each military record for the person. In CalSAWS this value is available, but in C-IV this information is not collected, so for OCAT Referrals in C-IV the entries in this column are blank.
- b) There is a text Yes/No field below the military record table as follows:
- i) Honorable Discharge – this is a text field. If at least one military record for the person has a value of “Yes”, and no other records have a value of “No” for the “Honorable Discharge” field, this field displays “Yes”. If any of the military records have an “Honorable Discharge” value of “No” the value displayed is “No”. If this value is blank on all military records for the person, this field value is blank (null).

▼ Employment History		
Employment 1		
Employer: Dunphy Real Estate Company	Address: 3071 EARLMAR DRIVE, LOS ANGELES, CA 90064	Contact: Phil Dunphy
Phone Number: (323)245-9957	Job Title: Administrative Assistant	Date Hired: 02/01/2019
Termination Date:	Hours/Week: 10	Hourly Wage: 13.00
Employment 2		
Employer: Closets Closets Closets Inc.	Address: 309 N ROBERTSON BLVD, BEVERLY HILLS, CA 90211	Contact: Claire Dunphy
Phone Number: (323)185-4522	Job Title: Assistant Manager	Date Hired: 01/01/2018
Termination Date: 12/01/2018	Hours/Week: 30	Hourly Wage: 15.50

2.2.13 – OCAT Referral Detail Page Employment History Section

10) The “Employment History” section appears below the “Military/Veterans” section. This section displays information about the person’s employment records. The employment records shown are limited to those having a “Termination Date” within the last 2 years, or any active employment (blank “Termination Date”) regardless of hired date. The order of employment records is as follows:

- (1) First, list active employment records (blank "Termination Date") in descending chronological order, regardless of "hired date".
- (2) Inactive employment records ("Termination Date" field is populated) in descending chronological order, limited to those with a "Termination Date" within the last two years.

Each employment record will have its own section titled "Employment [#]" the "#" in the title will be a serialized number starting from "1". E.g., the most recent employment record is titled: "Employment 1", the record preceding the most recent is "Employment 2", and so on. The information displayed in each employment record section is as follows:

- ii) The first row displays the following three fields:
 - (1) Employer – the value of this field reflects the value of the "Employer" field in the "Employer Information" section of the Employment Detail Page.
 - (2) Address - In CalSAWS, the value of this field reflects the concatenated "Address", "City", "State" and "ZIP Code" fields found in the Employer Information section of the Employment Detail for each employment record. In C-IV this value reflects the "Address" field in each employment record.
 - (3) Contact - the value of this field reflects the value of the "Contact" field in the Employer Information Section of the Employment Detail page for each employment record.
- iii) The second row displays the following three fields:
 - (1) Phone Number - the value of this field reflects the value of the "Phone Number" field in the Employer Information Section of the Employment Detail page for each employment record. This value will be blank in C-IV since there is no data collected for this.
 - (2) Job Title - the value of this field reflects the value of the "Job Title" field in the Job Information Section of the Employment Detail page for each employment record.
 - (3) Date Hired - the value of this field reflects the value of the "Date Hired" field in the Job Information Section of the Employment Detail page for each employment record.
- iv) The third row displays the following three fields:
 - (1) Termination Date - the value of this field reflects the value of the "Termination Date" field in the Job Information Section of the Employment Detail page for each employment record.
 - (2) Hours/Week - the value of this field reflects the value of the most recent "Hours/Week" entry in the table in the Status Information Section of the Employment Detail page for each employment record.
 - (3) Hourly Wage - the value of this field reflects the value of the most recent "Hourly Wage" entry in the table in the Status

Information Section of the Employment Detail page for each employment record.

▼ Status History			
Status	Status Date	Status Reason	Initiated By
Sent	10/31/2019 12:10 PM		249544
Pending	10/31/2019 12:00 PM		515132

Close

2.2.14 – OCAT Referral Detail Page Status History Section Sent Status

▼ Status History			
Status	Status Date	Status Reason	Initiated By
Error	12/01/2019 12:10 PM	Outgoing – One or more outgoing fields could not be processed	542656
Sent	10/31/2019 12:10 PM		542656
Pending	10/31/2019 12:00 PM		515132

Close

2.2.15 – OCAT Referral Detail Page Status History Section Error Status

▼ Status History		
Status	Status Date	Initiated By
Pending	10/31/2019 11:10 AM	515132

Send OCAT

Cancel

2.2.15 – OCAT Referral Detail Page Status History Section Without a Transaction ID

▼ Status History			
Status	Status Date	Status Reason	Initiated By
Completed	10/31/2019 12:10 PM		542656
Sent	10/31/2019 12:10 PM		515132
Pending	10/31/2019 12:00 PM		515132

View ASR

Close

2.2.15 – OCAT Referral Detail Page Status History Section

Completed Status

11) The “Status History” section appears below the “Employment History” section. This section displays a history of all statuses and timestamps for each status change since the OCAT Referral was created.

a) There is a table with the following column headers:

- i) Status – The entries in this column reflect the current and previous statuses of the OCAT referral. It is sorted by descending chronological order.
- ii) Status Date – values in this column display the date and time when the OCAT Referral changed to the status on the corresponding row.

(1) The timestamp format is as follows: MM/DD/YYYY HH:MM AM/PM

iii) Status Reason – the value in this column should only display when the OCAT Referral is in Error Status.

(1) The information displayed reflects the error details received via the interface, or via an internal error. The errors that can occur to cause an Error status are codes 400, 401, 404, 405, 422, 500, and 503. More information about these codes can be found in 2.4.3.4 and 2.5.3.3.

Note: Codes 200 and 201 will not result in an Error Status.

(a) The Status Reason will begin with ‘Outgoing’ if the error occurred while sending the information to OCAT or ‘Incoming’ if the error occurred while receiving information from OCAT.

(b) If the error code is 422 the Status Reason will be the following:

(i) [Outgoing/Incoming] – One or more [outgoing/incoming] fields could not be processed

(c) If the error code is not 422, the Status Reason will be the following.

(i) [Outgoing/Incoming] – A transmission error occurred while sending the transaction

iv) Initiated By – the value in this column displays the worker information of the worker who caused the status change for each row, or the web service staff ID, in case of an Error. Upon clicking this hyperlinked value, the user is directed to the “**Worker** Detail” page for the worker.

2.2.2 Page Location

- **Global: Empl. Services**

- **Local: Appraisal, Case Summary**
- **Task: OCAT (appears after Employment option)**

2.2.3 Security Updates

These Security Rights and Security Groups will not be added in the systems with this enhancement. A future enhancement will implement these changes.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
OCATReferralDetailView	Right to view the OCAT Referral Detail Page	OCAT View OCAT Edit
OCATReferralDetailEdit	Right to edit the OCAT Referral Detail Page	OCAT Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
OCAT View	Ability to view OCAT referrals and view recommendations	Employment Services Staff, Employment Services Supervisor, Employment Services Contracted Staff, Employment Services Contracted Supervisor
OCAT Edit	Ability to view and edit OCAT referrals and view recommendations	Employment Services Staff, Employment Services Supervisor, Employment Services Contracted Staff, Employment Services

		Contracted Supervisor
--	--	-----------------------

2.2.4 Page Mapping

Add page mapping for all fields displaying on the page.

2.2.5 Page Validation

Cancel – Date of Birth is required to Send the OCAT.

- Triggered when the Date of Birth is blank and the Send OCAT button is pressed.

2.2.6 Page Usage/Data Volume Impacts

2.3 OCAT Response Detail Page

2.3.1 Overview

The OCAT Response Detail Page will be a new page that displays the data received from OCAT via the interface in response to the transmission of an OCAT Referral. The user will be able to navigate to this screen by clicking any available “Recommendation” button on the OCAT Referral List page for an OCAT Referral in “Completed” status.

2.3.2 Description of Changes

OCAT Referral Detail

Request Information		
County: Los Angeles	Worker ID: 19DP605Y0G	Case Number: L002AE5
OCAT Referral Date: 10/31/2019	Status: Completed	Transaction ID: C345676523

Figure 2.3.1 – OCAT Response Detail Page Request Information Section

- 1) The action buttons display at the top of the OCAT Response Detail Page. The buttons identically display above the "Request Information" section, and below the "Recommendations" section. Buttons are aligned right.
 - a. "View ASR" button - directs the user to view the ASR Form received via the OCAT interface.
 - b. "Close" button - directs the user back to the OCAT Referral List page.
- 2) The "Request Information" section appears below the action buttons. This section displays the information unique to the specific interface transaction between the Systems and OCAT.
 - a. This section contains the following data elements reflect the fields in the Request Information section of the OCAT Referral Detail in "Completed" status which has a matching "Transaction ID":
 - i. The first row contains the following fields:
 1. County
 2. Worker ID
 3. Case Number
 - ii. The second row contains the following fields:
 1. OCAT Referral Date
 2. Status
 3. Transaction ID

Potential Barriers	
Barrier 1	
Barrier Category: Emotional and Mental Health	Barrier Type: Emotional and Mental Health Challenge
Barrier Description: Individual is suffering from mental illness and receiving no treatment.	
Barrier 2	
Barrier Category: Child Care and Parenting	Barrier Type: No Child Care Provided for Child
Barrier Description: Individual is not dedicating enough time to childcare due to job duties and other family responsibilities	

Figure 2.3.2 – OCAT Response Detail Page Potential Barriers Section

- 3) The "Potential Barriers" section appears below the "Request Information" section. This section displays the Barriers identified in the OCAT Appraisal and transmitted to CalSAWS and C-IV via the interface. Within this section is at least one barrier record section. There can be multiple Barriers. The first Barrier section will be titled "Barrier 1", the second will be titled "Barrier 2" and will appear below Barrier 1. The third barrier displays under "Barrier 3" below Barrier 2, etc. The "Barrier #" section contains the following rows:
 - a. The first row contains the following fields:

- i. Barrier Category – this information reflects the information received from OCAT
- ii. Barrier Type - this information reflects the information received from OCAT
- b. The second row contains the following field:
 - i. Barrier Description – this information reflects the information received from OCAT

▼ Recommendations

Recommendation 1

<p>Recommendation Domain: WTW Exemption, Exception, and Program Waiver Evaluation</p> <p>Recommendation Type: Emotional and Mental Health Challenge</p> <p>Referral Accepted: Yes</p>	<p>Recommendation Category: Emotional and Mental Health</p> <p>Recommendation Description: Individual Requires immediate psychiatric evaluation and assistance.</p> <p>Action Plan: Refer to Emotional and Mental Health Treatment. Follow up in 30 Days.</p>
--	--

Recommendation 2

<p>Recommendation Domain: Family Stabilization Evaluation</p> <p>Recommendation Type: No Child Care Provided for Child</p> <p>Referral Accepted: No</p>	<p>Recommendation Category: Child Care and Parenting</p> <p>Recommendation Description: Individual requires assistance in caring for children due to job duties, and other family obligations</p> <p>Action Plan: Refer to Child Care assistance program or agency.</p>
--	--

View ASR
Close

Figure 2.3.3 – OCAT Response Detail Page Recommendations Section

4) The “Recommendations” section appears below the “Potential Barriers” section. This section displays the Recommendations identified in the OCAT Appraisal and transmitted to C-IV and CalSAWS via the interface. Within this section will be at least one recommendation record section. There can be multiple recommendations. The first Recommendation section will be titled “Recommendation 1”, the second will be titled “Recommendation 2” and will appear below Recommendation 1. The third recommendation displays under

- “Recommendation 3” below Recommendation 2, etc. The “Recommendation #” section contains the following rows:
- a. The first row contains the following fields:
 - i. Recommendation Domain - this information reflects the information received from OCAT
 - ii. Recommendation Category - this information reflects the information received from OCAT
 - b. The second row contains the following fields:
 - i. Recommendation Type – this information reflects the information received from OCAT
 - ii. Recommendation Description – this information reflects the information received from OCAT
 - c. The third row contains the following fields:
 - i. Referral Accepted – this information reflects the information received from OCAT
 - ii. Action Plan - this information reflects the information received from OCAT

2.3.3 Page Location

- **Global: Empl. Services**
- **Local: Appraisal, Case Summary**
- **Task: OCAT (appears after Employment option)**

2.3.4 Security Updates

These Security Rights and Security Groups will not be added in the systems with this enhancement. A future enhancement will implement these changes.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
OCATRecommendations DetailView	Right to view the OCAT Recommendations Detail Page	OCAT View, OCAT Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
OCAT View	Ability to view OCAT referrals and view recommendations	Employment Services Staff, Employment Services

Security Group	Group Description	Group to Role Mapping
		Contracted Staff, Employment Services Contracted Supervisor, Employment Services Supervisor
OCAT Edit	Ability to view and edit OCAT referrals and view recommendations	Employment Services Staff, Employment Services Supervisor, Employment Services Contracted Staff, Employment Services Contracted Supervisor

2.3.5 Page Mapping

Add page mapping for all fields displaying on the page.

2.3.6 Page Usage/Data Volume Impacts

2.4 SAWS to OCAT Outbound Interface

2.4.1 Overview

The Systems send specific data to OCAT when the user clicks the 'Send to OCAT' button. The data is collected and sent through a REST web service 'on demand' by the user. This data is gathered from the fields outlined in the online design.

2.4.2 Description of Change

1. The following data elements are collected and sent to OCAT.
 - a. Nesting Element Name column: Nesting Elements group elements together that may be repeated if there are multiple records for that group of fields within the Nesting Element Start and End elements.
 - b. Data Element Name column: These data element names identify each data element to be sent to OCAT.
 - c. Format\Logic\Values column: This defines where the data is coming from, any special logic for the data, any set values, and any special formatting.
 - d. Max Length: The max length of the data values that are sent to OCAT.
 - e. Description: Additional notes about the data element.
 - f. Outbound Data Element Specifications:



Outbound Data
Elements Specification

2. The following code tables are the Cambria specified codes that will be sent to OCAT. All other codes will use the existing CalSAWS and C-IV codes:
 - a. Payment Frequency Type Code *NOTE: The Systems does not track this beyond hourly so there are not equivalent codes listed for this set of codes.

Cambria Code	Description
PF_HR	Hour
PF_DAY	Day
PF_WK	Week
PF_BW	BiWeek
PF_MO	Month
PF_BM	BiMonthly

PF_YR	Year
-------	------

b. Address Type Code

Cambria Code	Description	The Systems Equivalent Code
AD_RS	Residential	PH
AD_MA	Mailing	ML

c. Benefits Type Code *NOTE: These codes are Cambria OCAT specific codes. The Systems codes are combined to make up the Cambria OCAT codes as specified in 'The Systems Equivalent Code' column.

Cambria Code	Description	The Systems Equivalent Code
CC	Child Care	n/a
CH	Child Support	Cat 186 – Codes: B4, B5, 12, 13
CP	CAPI	n/a
CW	CalWORKs	n/a
FS	CalFresh	n/a
HB	Housing	Cat 186 – Codes: 96, 97
SD	State Disability	Cat 186 – Codes: 24
SSG	Student Scholarship/Grants	Cat 186 – Codes: 76, 77, B7
SSS	Supplemental Social Security	Cat 186 – Codes: 72, 71, 73
TR	Transportation	n/a
UE	Unemployment	Cat 186 – Codes: C6, B9, 79
VT	Veterans	Cat 186 – Codes: 83, 82, A10, A11, A12, 84, 81, A2, 25, 86
ON	Other Non-monetary Government Benefits	n/a

d. Payments Type Code *NOTE: These codes are Cambria OCAT specific codes. The Systems codes are combined to make up the Cambria OCAT codes as specified in 'The Systems Equivalent Code' column.

Cambria Code	Description	The Systems Equivalent Code
PT_AL	Alimony	Cat 198 – Codes: 54, 77
PT_CL	Car Loan	n/a

PT_CC	Child Care	Cat 198 – Codes: 06, 40
PT_CS	Child Support	Cat 198 – Codes: 27, 59
PT_CD	Credit Card Debt	n/a
PT_GD	Gambling Debt	n/a
PT_HS	Housing	Cat 198 – Codes: 10, 11, 12, 13, 14, 25, 26
PT_MB	Medical Bills	Cat 198 – Codes: 34, 42
PT_SL	Student Loans	Cat 198 – Codes: 07, 62
PT_SD	Student Loans (Defaulted)	n/a
PT_UT	Utilities	Cat 198 – Codes: 15, 16, 17, 18, 19, 20, 21, 22, 39
PT_OT	Other	Cat 198 – Codes: 63

2.4.3 Data Validation and Error Handling

1. Connection Timeout: While The Systems are trying to connect to OCAT, a connection timeout will occur if the connection is not established within the following 'tries' and 'minutes':
 - a. If no connection is established at the end of the 5 minutes or after 20 retries, change the OCAT Referral Transaction Status from 'Pending' to 'Error'.
 - b. Planned OCAT Outage: During a planned outage, the transactions would be put on hold on the interface level waiting to be sent to OCAT. After the planned outage, the transactions would be sent to OCAT.
2. Return Data Layout: The following layout specification will be sent back from OCAT to The Systems to provide a successful transmission message or any error codes related to an unsuccessful transmission:

#	JSON Name	Format	Required	Specifications
1	transactionId	String	Y	Transaction ID that was sent to OCAT
2	message	String	Y	To include string describing any incompatible fields that could not be accepted, not including missing or incompatible required fields
3	errors	Array	N	*Nested Start Section
4	fieldName	String	N	json fieldName from the payload
5	type	String	N	Indicating the type of error, "Required", "Invalid", "Other"
6	description	String	N	Text describing the error message in detail. For example it may say

				"Field firstName is required" Or "Field ssn has invalid format"
7	errors	Nested Section End	N	*Nested End Section

3. Error and Success Codes: The following error and Success codes will be sent through the file from OCAT to The Systems.

Code #	Description	Error Payload? (Error Nested Section Populated)
200	OK – Success	No
201	OK – New resource has been created with possible exceptions	Yes
400	Bad Request – The request was invalid. (Http error code; syntax error)	No
401	Unauthorized – The request requires User authentication	No
404	Not found – There is no resource behind the URI	No
405	Method not allowed; request used the wrong method	No
422	Unprocessable Entity – Should be used if the server cannot process the entity, e.g., if mandatory fields are missing in the payload.	Yes
500	Internal Server Error	No
503	Potential network traffic issues	No

2.4.4 Execution Frequency

Real time when the user clicks the "Send OCAT" button.

2.4.5 Key Scheduling Dependencies

N/A

2.4.6 Counties Impacted

All CalSAWS and C-IV Counties.

2.4.7 Data Volume/Performance

N/A

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 OCAT to SAWS Inbound Interface

2.5.1 Overview

OCAT will send specific data to The Systems when the user completes the appraisal in the OCAT system. The data and a PDF will be compiled and sent through a web service 'on demand' by the user. This data will be populated into the fields outlined in the online design.

2.5.2 Description of Change

1. The following data elements will be sent from OCAT to The Systems.
 - a. Nesting Element Name column: Nesting Elements group elements together that may be repeated if there are multiple records for that group of fields within the Nesting Element Start and End elements.
 - b. Incoming Data Element Name column: These data element names identify each data element being sent from OCAT.
 - c. Incoming Format\Logic\Values column: This defines the code value relationship, any special logic for the data, and any special formatting coming from OCAT.
 - d. Data Type: This column specifies the data type of the incoming data element.
 - e. Max Length: The max length of the data values that will be sent from OCAT.
 - f. Required: This column specifies if the data element is required to be received by The Systems.
 - g. Description: Additional notes about the data element.
 - h. Inbound Data Element Specifications:



Inbound Data
Elements Specifications

2. The following tables are the code values sent in the incoming webservice.
 - a. Recommendation Domain Type

Code	Description
------	-------------

RD_FSE	Family Stabilization Evaluation
RD_WEB	Recommendations (Work, Education, and/or Barrier Removal)
RD_WTW	WTW Exemption, Exception, and Program Waiver Evaluation

b. Barrier Category

Code	Description
RC_CCP	Child Care and Parenting
RC_DEM	Demographic
RC_DAS	Domestic Abuse - Safety
RC_ELN	Education / Learning Needs
RC_EMH	Emotional and Mental Health
RC_EML	Employment / Legal
RC_GEH	General Health
RC_HUS	Housing
RC_SUU	Substance Use
RC_TOC	Transportation and/or Child Care

c. Barrier Type

Code	Description
RT_NCC	No Child Care Provided for Child
RT_FMI	Financial Management Issues
RT_PRC	Potential Domestic Abuse / Related Conflicts Issues
RT_PSV	Potential Human Trafficking / Sexual Exploitation Victim

RT_PRO	Potential Victim of Domestic Abuse/Related Conflicts/Other Safety Concerns
RT_PRH	Potential Victim of Domestic Abuse/Related Conflicts/Other Safety Concerns/Human Trafficking
RT_HCR	May Have Health Concern Based on Select Responses to the Learning Needs Questions
RT_LDR	May Have Learning Disabilities Based on Select Responses to the Learning Needs Questions
RT_LDS	May Have Learning Disability Based on the Learning Needs Screening Score
RT_NHD	No High School Diploma or Equivalent and Client is More Than or Equal to 20 Years Old
RT_SIP	Potential SIP
RT EMC	Emotional and Mental Health Challenge
RT_CPP	Criminal Record and/or on Parole or Probation
RT_CWN	Currently Working and Needs Assistance
RT_UCD	Upcoming Court Date
RT_HAL	Health Concern
RT_UNH	Unstable Housing
RT_USO	Utility Shut Off
RT_ADA	May Have An Alcohol or Drug Addiction
RT_NSS	Need for Supportive Services

d. Recommendations Category

Code	Description
RC_CCP	Child Care and Parenting
RC_DEM	Demographic

RC_DAS	Domestic Abuse - Safety
RC_ELN	Education / Learning Needs
RC_EMH	Emotional and Mental Health
RC_EML	Employment / Legal
RC_GEH	General Health
RC_HUS	Housing
RC_SUU	Substance Use
RC_TOC	Transportation and/or Child Care
RC_PRG	Pregnancy

e. Recommendation Type

Code	Description
RT_NCC	No Child Care Provided for Child
RT_CHO	Child Disability, Health, or Other Need
RT_PCG	Providing Care Giving Services
RT_FMI	Financial Management Issues
RT_PRC	Potential Domestic Abuse / Related Conflicts Issues
RT_PSV	Potential Human Trafficking / Sexual Exploitation Victim
RT_PRO	Potential Victim of Domestic Abuse/Related Conflicts/Other Safety Concerns
RT_PRH	Potential Victim of Domestic Abuse/Related Conflicts/Other Safety Concerns/Human Trafficking
RT_NHD	No High School Diploma or Equivalent and Client is More Than or Equal to 20 Years Old

RT_SIP	Potential SIP
RT_EMG	Emotional and Mental Health Challenge
RT_CPP	Criminal Record and/or on Parole or Probation
RT_CWN	Currently Working and Needs Assistance
RT_UCD	Upcoming Court Date
RT_HAL	Health Concern
RT_UNH	Unstable Housing
RT_USO	Utility Shut Off
RT_ADA	May Have An Alcohol or Drug Addiction
RT_NSS	Need for Supportive Services
RT_CMP	Client May Be Pregnant
RT_HCR	May Have Health Concern Based on Select Responses to the Learning Needs Questions
RT_LDR	May Have Learning Disabilities Based on Select Responses to the Learning Needs Questions
RT_LDS	May Have Learning Disability Based on the Learning Needs Screening Score

2.5.3 Data Validation and Error Handling

1. **Inbound Validation:** The following data will be validated during the **inbound** process through the web service into The Systems to determine if the **inbound** record will proceed or provide an error:
 - a. **Inbound Record Validations:**
 - i. **Transaction ID = Existing Transaction ID in The Systems**
 - ii. **Interview Status (From The Systems Transaction Record) = 'Sent'**
 1. **The Systems will accept and update the status only if the latest status for the transaction is 'sent'.**

If the latest status is anything other than 'Sent', a corresponding error message will be sent.

- iii. Interview Status (From the Inbound Data Record) = 'Cancelled' or 'Completed'
 - iv. The Following Data Element code values match a valid code from their source code table in The Systems:
 - 1. Data Element: 'barrierCategory' = 'Barrier Category' codes.
 - 2. Data Element: 'barrierType' = 'Barrier Type' codes
 - 3. Data Element: 'domain' = 'Recommendation Domain Type' codes.
 - 4. Data Element: 'category' = 'Recommendations Category' codes.
 - 5. Data Element: 'type' = 'Recommendation Type' codes.
 - 6. Data Element 'acceptance' = 'True', 'False'
 - v. Data Element 'asrBASE' has a PDF attached IF the inbound 'interviewStatus' = 'Completed'
- b. If any of the above validations do not pass, an error is to be sent back to OCAT and the OCAT Referral Transaction Status in The Systems will be changed to "Error".
2. Return Data Layout: The following layout specification will be sent back from The Systems to OCAT to provide a successful transmission message or any error codes related to an unsuccessful transmission:

#	JSON Name	Format	Required	Specifications
1	transactionId	String	Y	Transaction ID that was sent to OCAT
2	message	String	Y	To include string describing any incompatible fields that could not be accepted, not including missing or incompatible required fields
3	errors	Array	N	*Nested Start Section
4	fieldName	String	N	json fieldName from the payload
5	type	String	N	Indicating the type of error. "Required", "Invalid", "Other"
6	description	String	N	Text describing the error message in detail. For example it may say "Field firstName is required" Or "Field ssn has invalid format"
7	errors	Nested Section End	N	*Nested End Section

3. Error and Success Codes: The following error and Success codes will be sent through the file from The Systems to OCAT.

Code #	Description	Error Payload? (Error Nested Section Populated)
200	OK – Success	No
201	OK – New resource has been created with possible exceptions	Yes
400	Bad Request – The request was invalid. (Http error code; syntax error)	No
401	Unauthorized – The request requires User authentication	No
404	Not found – There is no resource behind the URI	No
405	Method not allowed; request used the wrong method	No
422	Unprocessable Entity – Should be used if the server cannot process the entity, e.g., if mandatory fields are missing in the payload.	Yes
500	Internal Server Error	No
503	Potential network traffic issues	No

2.5.4 Execution Frequency

Real time when the user completes the OCAT from the OCAT software.

2.5.5 Key Scheduling Dependencies

N/A

2.5.6 Counties Impacted

All CalSAWS and C-IV Counties.

2.5.7 Data Volume/Performance

N/A

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...)

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch Design	OCAT to SAWS Cambria Interface Specifications	 04. OCAT to SAWS Interface Specificati
2	Batch Design	SAWS to OCAT Cambria Specifications	 05. SAWS to OCAT Interface Specificati

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

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

6 OUTREACH

Separate SCRs will be created in C-IV and CalSAWS for training and job aid updates.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA 208155 C-IV 103989 CFL 1819-49 Create new Pay
Codes for CalWORKs Home Visit Program (HVP)

Table of Contents

1	Overview	5
1.1	Current Design	5
1.2	Requests	5
1.3	Overview of Recommendations	5
1.4	Assumptions	Error! Bookmark not defined.
2	Recommendations	6
2.1	Need Detail.....	7
2.1.1	Overview	7
2.1.2	Need Detail Mockup.....	7
2.1.3	Description of Changes	10
2.1.4	Page Location	13
2.1.5	Security Updates.....	13
2.1.6	Page Mapping	13
2.1.7	Page Usage/Data Volume Impacts	13
2.2	Service Arrangement Detail	14
2.2.1	Overview	14
2.2.2	Service Arrangement Detail Mockup	15
2.2.3	Description of Changes	17
2.2.4	Page Location	18
2.2.5	Security Updates.....	18
2.2.6	Page Mapping	18
2.2.7	Page Usage/Data Volume Impacts	18
2.3	Payment Request Detail	18
2.3.1	Overview	18
2.3.2	Payment Request Detail Mockup	19
2.3.3	Description of Changes	20
2.3.4	Page Location	23
2.3.5	Security Updates.....	23
2.3.6	Page Mapping	23
2.3.7	Page Usage/Data Volume Impacts	23
2.4	Counties Interface Testing	26
2.4.1	Overview	28

2.4.2	Description of Changes	28
3	Supporting Documents	29
4	Requirements	30
4.1	Project Requirements	30
4.2	Migration Requirements	30
5	Migration Impacts.....	30
6	Outreach.....	31
7	Appendix.....	31

1 OVERVIEW

1.1 Current Design

There are currently no Need categories of 'Home Visit Program (HVP) ' on the Need Detail page.

1.2 Requests

To track Home Visit Program (HVP) needs and payments in the system, the following new Need categories with need types under them will be added to the Need Detail page.

1.3 Assumptions

1. The worker is responsible for determining eligibility for the HVP component. If the worker determines a household to be eligible where the CalWORKs program is discontinued and is therefore unable to issue payments through the C-IV/ LRS system, such payments should be made externally and then entered into the system at a later date for claiming purposes.
2. As needs are person level data elements, they will appear on all cases associated to the person.
3. Fields not mentioned in the Description of Changes sections, will not be updated.
4. A new page to document HVP eligibility will be created as part of SCR CA 208265 C-IV 104042 which will allow a worker to enter information for the HVP component. This will include associated HVP case persons and additional information to track the program.
5. Primary Applicant on WTW/REP is considered the Payee for the HVP services.
6. The need for HVP can be created for a child, but the Payments will be issued to the Primary Applicant on CalWORKs, Cal-learn, WTW or REP.
7. The need for HVP can be created for a child, but the Valuables will be issued to the Primary Applicant on CalWORKs, Cal-learn, WTW or REP.
8. Activities are NOT required for the user to be eligible for HVP, however workers can link existing activities to the Service Arrangement if needed on the Service Arrangement Detail page.
9. Eligibility for HVP services will be determined by an Active record for the household on the Home Visit Program List page (to be added with SCR CA 208265 C-IV 104042)
10. The 'Issuance Method' drop-down will have EBT, Warrant and Direct Deposit as selectable choices with Direct deposit being available in LRS only if the issuance method on the parent program is Direct deposit.
11. The same functionality listed in Section 2.5 for Valuables also applies when issuing Vouchers for HVP. Voucher functionality currently only exists in C-IV.

12. References to REP in this document only apply to the LRS system.
13. On the Valuable request detail page, pay code field is a required field (red asterisk) for all non CalWORKS programs .
14. In LRS, pay code is always a required field on the Payment request detail page.

1.4 Overview of Recommendations

To track 'Home Visit Program (HVP)' needs and payments in the system, the following new Need categories and subsequent Need Types under them will be added:

1. Home Visit Program (HVP)
 - a. Academic or Instructional Services
 - b. Child Care
 - c. Early Learning Interaction Activity
 - d. English as Second Language
 - e. Housing Support
 - f. Immigration Legal Services
 - g. Infant and Child Nutrition Services
 - h. Infant and Toddler Health Care
 - i. Intimate Partner Violence Services
 - j. Mental Health Services
 - k. Other Service
 - l. Prenatal Care
 - m. Substance Abuse Services
 - n. Workforce Readiness Services

2. Home Visit Program (HVP) – Transportation
 - a. 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: Tap Card is only available in LRS system.

3. Add the following Home Visit Program (HVP) pay codes:
 - a. HVP Fed Direct Costs
 - b. HVP Non-Fed Direct Costs

- c. HVP Non-MOE Direct Costs
- d. HVP Fed Child Care – Unemployed
- e. HVP Non-Fed Child Care – Unemployed
- f. HVP Non-MOE Child Care – Unemployed
- g. HVP Fed Child Care - Employed
- h. HVP Non-Fed Child Care – Employed
- i. HVP Non-MOE Child Care - Employed

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 Home Visit Program (HVP).

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 FOA
- Home Visit Program (HVP)
- Home Visit Program(HVP)-Transportation
- Dependent Care
- Diversion Services
- Education/Job Training
- 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 0.39 seconds to load.

Figure 2.1.1 – New Need Categories

Need Detail

*- Indicates required fields

Save and Return

Cancel

Name: *

Category: *

Begin Date: *

Description:

Status: *

Type: *

- Select -
- Academic or instructional services
- Child care
- Early learning /interaction activity
- English as second language
- Housing Support
- Immigration legal services
- Infant and child nutrition services
- Infant and toddler health care
- Intimate partner violence services
- Mental health services
- Other
- Prenatal care
- Substance abuse services
- Workforce readiness services

Save and Return

Cancel

This Type_1 page took 0.36 seconds to load.

Figure 2.1.2 – New Need Types – Home Visit Program (HVP)

Need Detail

*- Indicates required fields

Save and Return

Cancel

Name: *

Category: *

Home Visit Program (HVP)-Transportation

Begin Date: *

01/17/2020

Description:

Status: *

- Select -

Type: *

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

Status Reason: *

- Select -

Save and Return

Cancel

This Type 1 page took 0.37 seconds to load.

Figure 2.1.3 – Home Visit Program (HVP)-Transportation

2.1.3 Description of Changes

To track Home Visit Program (HVP)) needs and payments in the system, the following a new Need categories and subsequent Need Types under them will be added:

1. Home Visit Program (HVP)
 - a. Academic or Instructional Services
 - b. Child Care
 - c. Early Learning Interaction Activity
 - d. English as Second Language
 - e. Housing Support
 - f. Immigration Legal Services
 - g. Infant and Child Nutrition Services
 - h. Infant and Toddler Health Care
 - i. Intimate Partner Violence Services
 - j. Mental Health Services
 - k. Other Service
 - l. Prenatal Care
 - m. Substance Abuse Services
 - n. Workforce Readiness Services

2. Home Visit Program (HVP) – Transportation
 - j. Tap Card
 - k. Campus Parking
 - l. Bus pass – No Valid Month
 - m. Bus Pass – Valid Month
 - n. Bus Ticket
 - o. Bus Token
 - p. Gas Card
 - q. Imprest Cash
 - r. Transportation

NOTE: Tap Card is only available in LRS system.

3. 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 'Home Visit Program (HVP) will be CalWORKS, Cal-Learn and Welfare to Work.
 - **LRS/CalSAWS only:** The allowed programs for Need Category of 'Home Visit Program (HVP) will be CalWORKS, Cal-Learn, Welfare to Work and REP.

LRS Only:

1. Add a Need Category of "Home Visit Program (HVP)" and the following Need Types under it as mentioned below. This will allow a service arrangement to be created.
 - Academic or Instructional Services
 - Early Learning/Interaction Activity
 - English as Second Language
 - Housing Support
 - Immigration Legal Services
 - Infant and Child Nutrition Services
 - Infant and Toddler Health Care
 - Intimate Partner Violence Services
 - Prenatal Care
 - Workforce Readiness Services
 - Substance Abuse Services (Existing)
 - Mental Health Services (Existing)
 - Child Care (Existing)
 - Other (Existing)

2. Add a Need Category of "Home Visit Program (HVP) - Transportation" and the following existing Need Types under it as mentioned below. This will allow a service arrangement to be created:
 - Tap Card
 - Campus Parking
 - Bus Pass - No Valid Month
 - Bus Pass - Valid Month
 - Bus Ticket
 - Bus Token
 - Gas Card
 - Imprest Cash
 - Transportation

C-IV Only:

1. Add a Need Category of "Home Visit Program (HVP)" and the following Need Types under it as mentioned below. This will allow a service arrangement to be created.
 - Academic or Instructional Services
 - Early Learning/Interaction Activity
 - English as Second Language
 - Housing Support
 - Immigration Legal Services
 - Infant and Child Nutrition Services
 - Infant and Toddler Health Care

- Intimate Partner Violence Services
- Prenatal Care
- Workforce Readiness Services
- Substance Abuse Services (Existing)
- Mental Health Services (Existing)
- Child Care (Existing)
- Other (Existing)

2. Add a Need Category of ""Home Visit Program (HVP)- 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

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 Home Visit Program (HVP) 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 Home Visit Program (HVP).

2.2.2 Service Arrangement Detail Mockup

Service Arrangement Detail

Need *

Type	Name	Category	Begin Date
<input type="radio"/> Substance abuse services	Person, 001	Home Visit Program (HVP)	01/04/2020

Activities

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

Arrangement Details

Arrangement Period: *
From: To:

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

Employed: *

Additional Payee:

Service Type Description **Total ***

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

Status History *

Status	Status Reason	Status Date
<input type="text"/>	<input type="text"/>	01/20/2020 <input type="button" value="Calendar"/>

Comments:

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"/> Substance Abuse Services		Home Visit Program (HVP)	01/17/2020

Activities

Type	Status	Begin Date	End Date

Select

Arrangement Details

Arrangement Period: *

From: To:

Program Type: *

CalWORKs

Aid Code: *

35 - CW-Two Parent (Fed)

Voucher: *

Yes

Voucher Type: *

Voucher

Payee: *

CalWORKs Payee

Employed: *

No

Payee Name:

Patterson, Raquel

Payee Address:

806119146 Main St

LOS BANOS CA, 93635-3140

Service Type Description

Total *

Status History *

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

Comments:

Images

Save and Return

Cancel

This Type 1 page took 0.80 seconds to load.

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, Cal-Learn and 'Welfare to Work' for the Need Category of Home Visit Program (HVP).

LRS Only:

- The 'Program Type' drop down will contain CalWORKs, Cal-Learn, 'Welfare to Work' and 'REP' for the Need Category of Home Visit Program (HVP).

2. The 'Aid Code' field will default to the aid code of CalWORKs 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.

3. Modify page logic to not validate for Activities for need categories for any of the following:

- Home Visit Program (HVP)
- Home Visit Program (HVP) – Transportation

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 Home Visit Program (HVP) or Home Visit Program (HVP) – Transportation when the status of the Payee on CalWORKs/WTW/REP/Cal-Learn is NOT Active, Non-Comp, Good Cause or Exempt. The validation message will say:

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

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

3. The 'Service Type Description' field will be dependent on the need types. If the need type can be issued as a valuable, the Service type description will display the available valuable types.

4. 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 Home Visit Program (HVP) 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 HVP 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 Home Visit Program (HVP) services.

Note:

1. Home Visit Program (HVP) services can be issued when one of the following is true

- i. WTW/REP program status is Active, Non-Compliance, Good Cause or Exempt.
- ii. CalWORKs program status is Active
- iii. Cal-Learn program status is Active or Exempt.

2.3.2 Payment Request Detail Mockup

Payment Request Detail

* - Indicates required fields Save Cancel

Service Arrangement ID: **Payment Request Number:**

Service Arrangement Details

Payee Name: <input type="text"/>	Case Name: Case Name	Case Number: 0438575
Program: CalWORKs	Funding Source:	Aid Code: 35 - CW-Two Parent (Fed)
Need Category: Home Visit Program (HVP)	Need Type: Substance Abuse Services	Voucher Number:
Service Type:	Employed: No	

Requested Amount: * **Adjusted Amount:** 100.00

Status: * Awaiting Approval **Service Month: *** **Issuance Method: ***

Pay Code:
 *
HVP NFE *
HVP NME *
HVP FE CC UE *
HVP NFE CC UE *
HVP NME CC UE *
HVP FE CC EM *
HVP NFE CC EM *
HVP NME CC EM *

Creation Date:
Immediacy: *

Invoice Number:
Purchase Order Number:

Save Cancel

This Type 1 page took 1.10 seconds to load.

Figure 2.3.1 – Creating Payment Request (C-IV)

Payment Request Detail

* - Indicates required fields

Service Arrangement ID: 000000000 **Payment Request Number:**

Service Arrangement Details

Payee Name: PERSON 01	Case Name: Case Name	Case Number: 0000000
Program: CalWORKs	Funding Source:	Aid Code: 3F - CW-Safety Net/Felon/WTW Sanct- Two Parent
Need Category: Home Visit Program (HVP)	Need Type: Substance abuse services	Voucher Number:
Service Type:	Employed: No	

Requested Amount: * <input type="text" value="0.00"/>	Adjusted Amount: 0.00	Advanced: * <input type="button" value="Yes"/>	Service Arrangement Requested Amount: 1,000.00
Status: * Awaiting Approval	Service Month: * <input type="button" value="- Select -"/>	Issuance Method: * <input type="button" value="Warrant"/>	Service Arrangement Remaining Amount: 1000.00
Pay Code: * <div style="border: 1px solid black; padding: 2px;"> <input type="text"/> <ul style="list-style-type: none"> HVP FE HVP NFE HVP NFE HVP NME HVP FE CC UE HVP NFE CC UE HVP NME CC UE HVP FE CC EM HVP NFE CC EM HVP NME CC EM </div>	Receipt Verification Date: <input type="text"/>	Receipt Amount: <input type="text"/>	Level of Approval Required:
	Creation Date: <input type="text"/>	Invoice Number: <input type="text"/>	
	Immediacy: * <input type="button" value="Routine"/>	Purchase Order Number: <input type="text"/>	

This [Type 1](#) page took 0.49 seconds to load.

Figure 2.3.2 – Creating Payment Request (LRS)

2.3.3 Description of Changes

1. Add the following Home Visit Program (HVP) pay codes:
 - j. HVP Fed Direct Costs
 - k. HVP Non-Fed Direct Costs
 - l. HVP Non-MOE Direct Costs
 - m. HVP Fed Child Care – Unemployed
 - n. HVP Non-Fed Child Care – Unemployed

- o. HVP Non-MOE Child Care – Unemployed
 - p. HVP Fed Child Care - Employed
 - q. HVP Non-Fed Child Care – Employed
 - r. HVP Non-MOE Child Care - Employed
2. Add new fund codes in the system to store the accounting string information for Home Visit Program (HVP).
 3. Add the values in the 'Claim Based On Paycode' column in Category 623 (Pay Code) to allow Home Visit Program (HVP) pay codes to be used for claiming. The payment amount will be claimed based on the Federal Indicator on the pay code. Update County code in CT 623 to "No" for counties opting out of HVP
 4. **C-IV Only:** The Home Visit Program (HVP) pay codes will now be available to CalWORKs, Cal-Learn and 'Welfare to Work'. Please see spreadsheet "HVP_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 Home Visit Program (HVP).
 For ex. If a Need Category of 'Home Visit Program (HVP)' 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.
 5. The 'Issuance Method' drop down will have EBT, warrant and Direct Deposit (LRS only) as selectable choices.
 6. When selecting the Approve button on the Payment Request Detail page, if the Need Category is "Home Visit Program (HVP)" or " Home Visit Program (HVP)- Transportation" and one of the following is NOT true:
 - i. the program is CalWORKS, and CalWORKS is Active
or
 - ii. the program is WTW and WTW is Active, Non-Comp, Good Cause or Exempt
or
 - iii. the program is Cal-Learn and Cal-Learn is Active or Exempt
 then display the Validation Message:
 "Cannot approve Payment Request for this Service Arrangement. CalWORKS/Cal-Learn/WTW/REP Program for Home Visit Needs must be Active, Non-Comp, Good Cause, or Exempt during the Service Month."
 7. **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 Home Visit Program (HVP) and program code is WTW or Cal-Learn. Pay code field is not a required field and no validation is thrown if the Need Category is Home Visit Program (HVP) and program code is CalWORKS

Note: C-IV: If the program is CalWORKS or Cal-Learn, the default issuance method on the Payment request Detail page will be the same as that of CalWORKS or Cal-Learn. 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'.

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.

2.3.4 Batch Changes

1. The Nightly Payment Request Sweep will be updated for Home Visit program (HVP), Home Visit Program (HVP)-Transportation payment requests to pick CalWORKs/Cal-Learn/WTW/REP/ program in Active, Non-Comp, Exempt or Good Cause status.

2.3.5 Level of Approval (LRS Only):

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

- o 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).
 - o 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 Home Visit program (HVP) as described in the document "IssuanceThresholdLimits_LRS" under **Section 3 Supporting Documents**.

2.3.6 Validations:

LRS:

Field	Validation	Message
Approve	Custom	Cannot approve Payment Request for this Service Arrangement. CalWORKs/Cal-Learn/WTW/REP Program for Home Visit Program Needs must be Active, Non-Comp, Good Cause or Exempt during the Service Month.

C-IV:

Field	Validation	Message
Approve	Custom	Cannot approve Payment Request for this Service Arrangement. CalWORKs/Cal-Learn/WTW Program for Home Visit Program Needs must be Active, Non-Comp, Good Cause or Exempt during the Service Month.

2.3.7 Page Location

Global: Fiscal

Local: Payment Requests

Task: Payment Request Search

2.3.8 Security Updates

No change.

2.3.9 Page Mapping

No change.

2.3.10 Page Usage/Data Volume Impacts

Approximately 2000 records are estimated to be created monthly for HVP 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)

2.4.1 Overview

When creating a Voucher for Home Visit Program (HVP), the pay codes need to be selectable on the page. This section will describe the update to allow the Home Visit Program (HVP) pay codes to be selectable on the Valuables Request Detail page.

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: 808748292	Case Name: Case Name	Case Number: 0438575
Payee Name: [Redacted]	Program: CalWORKs	Aid Code: 35 - CW-Two Parent (Fed)
Need Category: Home Visit Program (HVP)	Need Type: Substance Abuse services	Employed: No
Valuable Type: Voucher	Quantity: 1	
Arrangement Period: From: 01/01/2020 To: 01/08/2020		

Financial Information

Pay Code:

- HVP FE
- HVP NFE
- HVP NME
- HVP FE CC UE
- HVP NFE CC UE
- HVP NME CC UE
- HVP FE CC EM
- HVP NFE CC EM
- HVP NME CC EM

Balance Summary

Authorized

Quantity Issued

1

0

Add Valuables

Control Number *

11

Comments:

[Comments text area]

Save and Issue

Cancel

This page took 0.77 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:
 - o Home Visit Program (HVP)
 - o Home Visit Program (HVP) - Transportation

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 HVP 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 "Home Visit Program (HVP) - Transportation", the pay codes need to be selectable on the page. This section will describe the update to allow the Home Visit Program (HVP) pay codes to be selectable on the Valuables Request Detail page.

2.5.2 Valuables Detail Mockup

Valuable Request Detail

* - Indicates required fields

Save and Issue

Cancel

Valuable Request ID:

Service Arrangement Details

Service Arrangement ID:

[808748293](#)

Case Name:

Case Name

Case Number:

0438575

Payee Name:

Program:

Welfare to Work

Aid Code:

35 - CW-Two Parent (Fed)

Need Category:

Home Visit program(HVP)-Transportation

Need Type:

Bus Pass - No Valid Month

Employed:

No

Valuable Type:

31 day unlimited local and intercity \$60

Quantity:

1

Arrangement Period:

From: 01/01/2020 To: 01/08/2020

Financial Information

Pay Code: *

HVP FE
HVP NFE
HVP NME
HVP FE CC UE
HVP NFE CC UE
HVP NME CC UE
HVP FE CC EM
HVP NFE CC EM
HVP NME CC EM

Balance Summary

Authorized

Quantity Issued

1

0

Add Valuables

Add

Comments:

Save and Issue

Cancel

This [Type 1](#) page took 0.64 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 Home Visit program (HVP) pay codes when the Need Category is:
 - o Home Visit Program (HVP) – Transportation

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 Home Visit Program (HVP) 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
- San Bernardino Outbound Warrant Print file

- Merced FIRMS file
- Riverside OASIS 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 > 2020 > SCR 103989. Los Angeles County test file will be uploaded to eCAPS test FTP servers.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Fiscal	HVP Pay Codes and fund codes	 HVP_PayCodes_FundCodesV1.xlsx
2	Fiscal	Issuance threshold limits and levels of Approval - LRS	 IssuanceThresholdLimits_LRS.xls
3	Fiscal	Auditor Controller-C-IV	 4.1.3 Auditor Controller Outbound

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 Home Visit Program (HVP)

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.

SCR CA-213861 (Release TBD) will make the Pay Code field non-mandatory on the Payment Request Detail page.

6 OUTREACH

N/A

7 APPENDIX

Existing Validations on Payment Request Detail Page for LRS:

Field	Validation	Message
Requested Amount	Custom	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">• Cannot be created and approved by a same worker• Supervisor and Deputy approval cannot be the same worker
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	Provide another mailing address, choose direct deposit, or select an alternate cardholder.

	direct deposit, or select an alternate cardholder.	
Save and Copy	Custom	Duplicate payment request found.

Existing Validations on Payment Request Detail Page for C-IV:

Field	Validation	Message
Requested Amount	Custom	The Adjusted Amount exceeds the remaining amount authorized on the Service Arrangement.
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.



Design Document

SCR CA-212411 CIV-105913– Updates to
Generation of NA 823 and NA 820 for FS, HSP
and HVP



DOCUMENT APPROVAL HISTORY

Prepared By	Jamie Ng
Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/27/2020	1.0	Initial Revision	Jamie Ng
3/9/2020	1.1	Revision based on comments from the Committee	Nithya Chereddy
3/30/2020	1.2	Content Revision 1: Updated Section 2.3.3, 2.4.3	Jamie Ng

DRAFT

Table of Contents

1	Overview	5
1.1	Current Design	5
1.2	Requests	6
1.3	Overview of Recommendations	7
1.4	Assumptions	8
2	Recommendations	9
2.1	Update to NA 823 Recommendation.....	8
2.1.1	Overview	8
2.1.2	Updates to Form Generation	8
2.1.3	Updates to Form Variable Generation	8
2.2	Update to NA 820 Recommendation.....	9
2.2.1	Overview	9
2.2.2	Updates to Form Generation	9
2.2.3	Updates to Form Variable Generation	9
2.3	Update to NA 821 Recommendation.....	10
2.3.1	Overview	10
2.3.2	Updates to Form Generation	9
2.3.2	Updates to Form Variable Generation	10
2.4	Updates to PB19R1958 batch (NA 823)	10
2.4.1	Overview	10
2.4.2	Descriptions of Change	10
2.4.3	Execution Frequency	10
2.4.4	Key Scheduling Dependencies.....	10
2.4.5	Counties Impacted	10
2.4.6	Data Volume/ Performance.....	10
2.4.7	Failure Procedure / Operational Instructions	10
2.5	Updates to PB19R1957 batch (NA 820)	10
2.5.1	Overview	10
2.5.2	Descriptions of Change	10
2.5.3	Execution Frequency	10
2.5.4	Key Scheduling Dependencies.....	10
2.5.5	Counties Impacted	10

2.5.6 Data Volume/ Performance.....10
2.5.7 Failure Procedure / Operational Instructions10
3 Supporting Documents30
4 Requirements11
4.1 Project Requirements31
4.2 Migration Requirements.....31
5 Migration Impacts.....32
6 Outreach.....33
7 Appendix.....34

DRAFT

1 OVERVIEW

ACL 19-42 states all clients participating in a WTW activity, including those with and without a WTW plan, may be eligible for the full array of CalWORKs WTW supportive services:

- Child care,
- Transportation,
- Ancillary services, and
- Diaper assistance for qualifying children in the home to participate in CalWORKs Home Visiting Program (HVP) and other activities including Welfare to Work, REP and Cal-Learn.

With the implementation of SCR CA-206249/CIV-101674 (Diaper Benefit Functionality Phase I), users can generate NA 823 when manually issuing diaper allowance.

In SCR CA-205441, new FS (Family Stabilization) and HSP (Housing Support Program) need categories are added and in SCR CA-208155 new HVP (Home visiting program) need category is added.

This document describes changes needed to issue FS (Family stabilization), HSP (Housing Support Program) and HVP (Home visiting Program) related payments in addition to changes already implemented.

1.1 Current Design

Currently, in LRS/CalSAWS, the NA 823 batch job generates the form only for 'Ancillary – Work Related', 'Ancillary – Education' and the NA 820 batch job generates the form for Transportation.

In C-IV, the NA 823 generates from the Service Arrangement Detail page for 'Ancillary – Work Related' or 'Ancillary – Education' and the NA 820 or NA 821 generates for Transportation.

NA 823 does not generate for FS (Family Stabilization), HSP (Housing Support Program) and HVP (Home visiting program) need categories and NA 820/NA 821 does not generate for FS (Family Stabilization) Transportation and Home Visiting Program transportation categories.

Current Design:

	LRS/CalSAWS	C-IV
Ancillary – Work Related	Batch: NA 823 batch sweep will generate forms with approved service arrangement	Online: Generate NA 823 from the Service Arrangement Detail page in a in a separate pop up window when the 'Save and Return' button is clicked
Ancillary – Education		
Transportation	<p>Approval- NA 820 Batch: NA 820 batch sweep will generate forms with approved service arrangement</p> <p>Denial – NA 821 Generate from Template Repository</p>	Online: Generate NA 820 / NA 821 from the Service Arrangement Detail page in a in a separate pop up window when the 'Save and Return' button is clicked.
Diaper allowance	<p>Batch: Daily NA 823 batch sweep will identify participants that are newly qualified for diaper allowance or that will be discontinued from receiving the payment (Implemented with SCR CA-59192 / CIV-100305)</p> <p>Online: User can generate NA 823 manually with 'Generate Form button' (Implemented with SCR CA-203249 / C-IV 101674)</p>	<p>Batch: Daily NA 823 batch sweep will identify participants that are newly qualified for diaper allowance or that will be discontinued from receiving the payment (Implemented with SCR CA-59192 / CIV-100305)</p> <p>Online: Generate NA 823 from the Service Arrangement Detail page in a in a separate pop up window when the 'Save and Return' button is clicked. (Implemented with SCR CA-203249 / C-IV 101674)</p>

1.2 Requests

Update LRS/CalSAWS and C-IV NA 823/NA 820 / NA 821 data populations and batches to be compatible with the new need types for FS (Family Stabilization), HSP (Housing Support Program) and HVP (Home Visiting Program).

To Be Updated:

	LRS/CalSAWS	C-IV
HSP (Housing Support Program)	Update NA 823 to populate new categories. (Section 2.2)	Update NA 823 to populate new categories. (Section 2.2)
HVP (Home Visiting Program)	Update Batch: NA 823 batch sweep will generate forms with approved service arrangement (Section 2.4)	
FS (Family Stabilization)		
FS (Family Stabilization) Transportation	Update NA 820/NA 821 to populate new categories. (Section 2.3/ 2.4)	Update NA 820/NA 821 to populate new types. (Section 2.3/ 2.4)
HVP (Home Visiting) Transportation	Update Batch: NA 820 batch sweep will generate forms with approved service arrangement (Section 2.5)	

Note: Refer to Supporting Document #2 for the Need Categories and Need Types

1.3 Overview of Recommendations – LRS/CalSAWS

1. (LRS-CalSAWS / C-IV) Update the NA 823 / NA 820 / NA 821 population logic to populate the necessary fields when the form is generated and to be compatible with new FS (Family Stabilization), HSP (Housing Support Program) and HVP (Home Visiting Program) need categories.
2. (LRS-CalSAWS) Update current NA 823 batch to produce NA 823 for new FS, HSP and HVP categories.
3. (LRS-CalSAWS) Update current NA 820 batch to produce NA 820 for new FS and HVP categories.

1.4 Assumptions

1. Need categories and types for FS (Family Stabilization) and HSP (Housing Support Program) and HVP are currently in midst of being implemented with SCR CA-205441 (FS/HSP) and CA-208155 (HVP). See Supporting documents #2 for need types in each need category.
2. NA 823 will use same batch used for 'Ancillary – Work Related', 'Ancillary – Education' to generate for FS (Family Stabilization), HSP (Housing Support Program) and HVP (Home Visiting Program) need categories.
3. NA 820 will use same batch used for 'Transportation' to generate for FS (Family Stabilization)-Transportation and HVP (Home Visiting Program)-Transportation need categories.
4. Housing Support Program (HSP) do not have any transportation related need categories and need types.
5. "Generate Form" button will be added to Service Arrangement page to generate for Ancillary (Work related and Education), Transportation, HSP, HVP, FS need categories in subsequent SCR CA-213185.
6. NA 823 form will not generate for CalWORKs program.
7. LRS/CalSAWS: NA 821 will continue to generate through Template Repository.
8. Both Systems will continue to generate NA 823/ NA 820 / NA 821 with the current existing generation conditions.
9. Some wording might get cutoff on NA 823/NA 820 / NA 821 when the words are too long to fit in the fields.
10. LRS will implement C-IV functionality to "Generate NA 823 from the Service Arrangement Detail page in a in a separate pop up window when the 'Save and Return' button is clicked' in SCR CA-51876.
11. Currently, LRS does not generate the NA 823 for Denials online. NA 823 will be generated via template repository in LRS. (will be added with SCR CA-51876), and C-IV does not generate the NA 823 for Discontinuances.
12. Below are existing trigger conditions for C-IV:
 - Generate NA 823 when:
 1. Need Category: Family Stabilization / HSP / HVP
 2. Need is Denied OR Service Arrangement is Approved
 - Generate NA 820 when:
 1. Need Category: Family Stabilization – Transportation / HVP – Transportation
 2. Service Arrangement is Approved
 - Generate NA 821 when:
 1. Need Category: Family Stabilization – Transportation / HVP – Transportation
 2. Need is Denied OR Service Arrangement is Discontinued

2 RECOMMENDATIONS

2.1 Service Arrangement Detail

2.1.1 Overview

Currently, the Service Arrangement detail page allows users to create a service arrangement for a requested supportive service need. If a service arrangement is created for the following need categories and status is Approved, Denied or Discontinued, a form is generated on clicking "Save and Return" to notify the customer.

This section will describe the updates to generate the NA 823, NA 820 and NA 821 forms for the below need categories:

- Family Stabilization
- Home Visit Program (HVP)
- Housing Support program (HSP)
- Family Stabilization- Transportation
- Home Visit Program (HVP)-Transportation

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2.1.2 Service Arrangement Detail Mockup

Service Arrangement Detail

*- Indicates required fields

Images

Save and Return

Cancel

Need *

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

Activities

Type	Status	Begin Date	End Date
Select			

Arrangement Details

Arrangement Period: *

From: To:

Program Type: *

Welfare to Work

Aid Code: *

30 - CW-All Other Families (Fed)

Voucher: *

Yes

Voucher Type: *

Voucher

Payee: *

Same as Customer

Employed: *

Yes

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

This [Type 1](#) page took 0.60 seconds to load.

Figure 2.1.1 – Service Arrangement Detail (C-IV)

2.1.3 Description of Changes

C-IV

1. Update code logic to add the new Need categories listed below to generate NA 823 with existing generation conditions
 - i. Family Stabilization
 - ii. Home Visit Program (HVP)
 - iii. Housing Support program (HSP).

2. Update code logic to add the new Need categories listed below to generate NA 820/NA 821 with existing generation conditions
 - i. Family Stabilization- Transportation
 - ii. Home Visit Program (HVP)-Transportation

2.1.4 Page Location

Global: Employment Services
Local: Supportive Services
Task: Service Arrangements

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 Updates to Form population for NA 823 Form

2.2.1 Overview

NA 823 (Ancillary Expenses Approval/Denial NOA) currently generates via Batch (LRS/CalSAWS) or via the Service Arrangement Detail page (C-IV) for Ancillary Expenses and via Batch (LRS/CalSAWS & C-IV) or via the Service Arrangement

Detail page (LRS/CalSAWS & C-IV) for Diaper Allowance. (See Supporting Documents #1)

State Form: NA 823 (08/2000)

Programs: Welfare to Work, Cal-Learn

New Need Categories:

C-IV:

'Welfare to Work' (HSP, HVP and Family Stabilization)

'Cal-Learn (HVP)

CalSAWS/LRS:

'Welfare to Work' (HSP, HVP and Family Stabilization)

'REP' (HVP, Family Stabilization)

'Cal-Learn, (HVP)

Attached Form(s): NA Back 9 (04/2013)

Forms Category: NOA

Existing Languages:

LRS/CalSAWS: English and Spanish

C-IV: English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

2.2.2 Updates to Form Generation -LRS/CalSAWS & C-IV

Update code logic to add the new Need categories listed below to generate NA 823 with existing generation conditions:

- iii. Family Stabilization
- iv. Home Visit Program (HVP)
- v. Housing Support program (HSP).

C-IV: Refer to 2.1.3 for the generation conditions of NA 823 through Service arrangement detail page.

2.2.3 Updates to Form Variable Population -LRS/CalSAWS & C-IV

There are 6 updated variable populations in approval case and 7 updated variable populations in denied case.

When FS, HSP or HVP Service Arrangement is Approved, the left side of the NA 823 will repopulate as follows:

As of 2, the County has approved your request for payment of the following items needed for your approved

3 Welfare to Work Cal-Learn activity or to get a job:

Item	Cost
<u>4</u>	\$ <u>5</u>
Total	\$ <u>6</u>

The County may continue to pay for work expenses for up to the first 12 months after you have left aid if you have a job. We will pay only if you need it to keep your job and you cannot get the work expenses paid from somewhere else.

Your payments will be: Advanced to you Paid back to you
 Paid to the store Paid to the school Other: _____

The following items you asked for were not approved for payment:

Item	Item
_____	_____
_____	_____

Here's why:

The cost is not necessary because: _____

You do not need _____ for your Welfare to Work Cal-Learn activity or to get a job because: _____

Rules: These rules apply. You may review them at your welfare office: CalWORKs Implementation Guidelines, Sections VII & XII, Welf. & Inst. Code 11323.2, 11323.4, 11322.9

As of _____, the County has denied your request for payment of the following items for your

Welfare to Work Cal-Learn activity or to get a job:

_____	_____
_____	_____
_____	_____

Here's why:

You are not in an approved Welfare to Work Cal-Learn activity.

The cost is not necessary because: _____

You do not need these items for your Welfare to Work Cal-Learn activity or to get a job because: _____

Other: _____

You can call your Welfare to Work/Cal-Learn worker if you think this notice is wrong.

Rules: These rules apply. You may review them at your welfare office: CalWORKs Implementation Guidelines, Sections VII & XII, Welf. & Inst. Code 11323.2, 11323.4, 11322.9

Variable Name	Comments	Population	Formatting	Template Repository Population	Populates with Form Generation	Editable (C-IV only)
1. Approval Checkbox	Checkbox will be checked if the Status of the Service request is approved.	Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case from Template Repository.	Arial Font 10	N	Y	Y

<p>2. Date</p>	<p>Date will be Service Arrangement Period From date</p> <p>Will populate if Approval Checkbox is populated.</p>	<p>Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case from Template Repository.</p>	<p>Arial Font 10</p>	<p>N</p>	<p>Y</p>	<p>Y</p>
<p>3. Program Checkbox</p>	<p>Program will be from Service Arrangement Program Type</p> <p>Will populate if Approval Checkbox is populated.</p> <p>For “REP” program type, populate “Welfare to Work” checkbox</p>	<p>Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.</p>	<p>Arial Font 10</p>	<p>N</p>	<p>Y</p>	<p>Y</p>
<p>4. Item</p>	<p>Will Populate <Need Type> For example: Books</p> <p>Will populate if Approval Checkbox is populated.</p>	<p>Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.</p>	<p>Arial Font 10</p>	<p>N</p>	<p>Y</p>	<p>Y</p>

5. Cost	Amount is total amount of need types entered in Service Arrangement Detail page Will populate if Approval Checkbox is populated.	Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
6. Total	Total Cost of Approved Items will populate when Item& Cost fields are populated Will populate if Approval Checkbox is populated.	. Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y

Variables Requiring Translations: ITEM - Need Type, Spanish (LRS/CalSAWS only)

When the HSP or HVP is Denied, the right side of the NA 823 will prepopulate as follows:

The Form populations will be applicable to C-IV only, until service arrangement detail page and generation form button is added with SCR CA-51876 and CA-213185

		C-IV: Editable when form is generated in the context of a case.				
2. Date	Date will be Need Detail Begin Date Will populate if Denied Checkbox is populated.	Editable when a blank form is generated. Pre- populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
3. Program Checkbox	Program will be from Service Need Program Type Will populate if Denied Checkbox is populated. For "REP" program type, populate "Welfare to Work" checkbox	Editable when a blank form is generated. Pre- populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
4. Need category	Will Populate <Need Category> Will populate if Denied Checkbox is populated.	Editable when a blank form is generated. Pre- populated and static when form is generated via batch. C-IV: Editable when form is generated in	Arial Font 10	N	Y	Y

		the context of a case.				
5. Requested Item	Will Populate <Need Type> For example: Books Will populate if Denied Checkbox is populated.	Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
6. Other Checkbox	Checked when there is status reason under Service Need Status Detail	Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
7. Other	Reason will be Service Need status reason Will populate if Other Checkbox is populated.	Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is	Arial Font 10	N	Y	Y

		generated in the context of a case.				
--	--	-------------------------------------	--	--	--	--

Variables Requiring Translations (LRS/CalSAWS only):

ITEM - Need Type , Spanish

Other – Service Need Status Reason, Spanish

2.3 Updates to NA 820 Form

2.3.1 Overview

NA 820 (Transportation Approval NOA) currently generates via Batch (LRS/CalSAWS) or via the Service Arrangement Detail page (C-IV). It is used to inform the client when they have been approved for a Transportation Expense.

State Form: NA 820 (01/01)

Programs: Welfare to Work, Cal-Learn

New Need Categories:

C-IV:

'Welfare to Work' (HVP – transportation and Family Stabilization -transportation)

'Cal-Learn (HVP – transportation)

CalSAWS/LRS:

'Welfare to Work' (HVP – transportation and Family Stabilization -transportation)

'REP' (HVP – transportation and Family Stabilization -transportation)

'Cal-Learn, (HVP – transportation)

Attached Form(s): NA Back 9 (04/2013)

Forms Category: NOA

Existing Languages:

LRS/CalSAWS: English and Spanish

C-IV: English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

2.3.2 Updates to Form Generation -LRS/CalSAWS & C-IV

Update code logic to add the new Need categories listed below to generate NA 820 with existing generation conditions

1. Family Stabilization- Transportation
2. Home Visit Program (HVP)-Transportation

C-IV: Refer to 2.1.3 for the generation conditions of NA 820 through Service arrangement detail page.

2.3.3 Updates to Form Variable Population -LRS/CalSAWS & C-IV

When the form is generated via Batch in LRS/CalSAWS, the fields are static. When the form is generated via Service Arrangement Detail page in C-IV, the fields are editable.

When it is generated in template repository, no fields are pre-populated, and they will be editable.

In LRS/CalSAWS, when approved for FS or HVP transportation the NA 820 will prepopulate the following sections (See Supporting Documents #1 for population):

As of until , the County has approved your transportation for Welfare to Work Cal-Learn

4 The most we can pay is \$ for a total of miles per .

8 The County has approved \$ per based on public transportation rates.

11 The County has approved bus passes or tickets for a total of per .

14 The County has approved the cost of another form of transportation: for a total of \$ per .

The County will provide you with:
 Welfare to Work Cal-Learn transportation
 The County will only pay for transportation while you are attending your approved Job Welfare to Work
 Cal-Learn activity:

The County may continue to pay for transportation for up to the first 12 months after you have left aid if you have a job. We will pay only if you need it to keep your job and you cannot get the transportation costs from somewhere else.

Your transportation payment limit is figured on this notice. Mileage can be paid only if there is no public transportation available, or it costs the same or less than public transportation. Public transportation is available when it takes two hours or less round trip to get you from your home to your activity on time. You cannot count time to go to and from your child's school or child care. If you drive your car even though public transportation is available, you will be paid at the public transportation rate or the mileage rate, whichever is lower.

Your transportation payments will be Advanced to you Paid back to you Paid to your transportation provider
 Other:

YOU MUST TELL US BEFORE YOU CHANGE YOUR TRANSPORTATION ARRANGEMENTS EXCEPT IN AN EMERGENCY OR WE MAY NOT BE ABLE TO APPROVE AND PAY FOR THE NEW ARRANGEMENTS.

Because your activity is less than 30 days, you will not get another notice telling you when your payments end.

You can call your Welfare to Work/Cal-Learn worker if you think this notice is wrong.

Rules: These rules apply. You may review them at your welfare office: MPP Sections 42-750.112, .2 and .4. Welf. & Inst. Code 11323.2, 11323.4, 11322.9

Questions? Ask your Worker.
State Hearing: If you think this action is wrong, you can ask for a hearing. The back of this page tells you how.

27 public transportation
 rate
 X per
 = \$

32 your car's mileage
 rate
 X per
 X miles
 = \$

38 parking
 = \$ month school term other

41 other:
 rate
 X per
 = \$

NA 820 Approval of Transportation (01/01) REQUIRED – SUBSTITUTE PERMITTED

In C-IV, NA 820 will prepopulate like this: (See Supporting Documents #3 for population)
 Population is same as existing population for transportation. Only regression test is needed for the new types.

Questions? Ask your Worker

State Hearing: If you think this action is wrong, you can ask for a hearing. The back of this page tells how.

As of 1 until 2, the county has approved your transportation for: Welfare to Work Cal-Learn.

4 The most we can pay is \$ 5 for a total of 6 miles per 7.

18 After the initial 19 miles, the most we can pay is \$ 20 for a total of 21 miles per 22.

8 The County has approved \$ 9 per 10 based on public transportation rates.

11 The County has approved bus passes or tickets for a total of 12 per 13.

14 The County has approved the cost of another form of transportation: 15 for a total of \$ 16 per 17.

The County will provide you with Welfare to Work Cal-Learn Transportation.

The County will only pay for transportation while you are attending your approved Job Welfare to Work Cal-Learn Activity: _____

The County may continue to pay for transportation for up to the first 12 months after you have left aid if you have a job. We will pay only if you need it to keep your job and you cannot get the transportation costs from somewhere else.

Your transportation payment limit is figured on this notice. Mileage can be paid only if there is no public transportation available, or it costs the same or less than public transportation. Public transportation is available when it takes two hours or less round trip to get you from your home to your activity on time. You cannot count time to go to and from your child's school or child care. If you drive your car even though public transportation is available, you will be paid at the public transportation rate or the mileage rate, whichever is lower.

Your transportation payments will be Advanced to you Paid back to you Paid to your transportation provider Other: _____

YOU MUST TELL US BEFORE YOU CHANGE YOUR TRANSPORTATION ARRANGEMENTS EXCEPT IN AN EMERGENCY OR WE MAY NOT BE ABLE TO APPROVE AND PAY FOR THE NEW ARRANGEMENTS.

Because your activity is less than 30 days, you will not get another notice telling you when your payments end. You can call your Welfare to Work/Cal-Learn worker if you think this notice is wrong.

Rules: These rules apply. You may review them at your office: MPP Sections 42-750.112, .2 and .4. Welf. & Inst. Code 11323.2, 11323.4, 11322.9

(05/2003)

27 public transportation

28 rate
 X 29 per 30
 = \$ 31

32 your car's mileage (primary)

33 rate per mile
 X 36 miles
 = \$ 37

23 your car's mileage (secondary)

24 rate per mile
 X 25 miles
 = \$ 26

38 parking 40
 \$ 39 month school term other

41 Other: 42

43 rate
 X 44 per 45
 = \$ 46

2.4 Updates to NA 821 Form

2.4.1 Overview

NA 821 (Transportation Approval/Denial NOA) Form currently generates through the Service Arrangement page. It is used to inform the client when they have been discontinued for a Transportation Expense.

State Form: NA 821 (1/01)

Current Programs: Welfare to Work, Cal-Learn

Programs: Welfare to Work, Cal-Learn

New Need Categories:

C-IV:

'Welfare to Work' (HSP, HVP and Family Stabilization)

'Cal-Learn (HVP)

CalSAWS/LRS:

'Welfare to Work' (HSP, HVP and Family Stabilization)

'REP' (HVP, Family Stabilization)

'Cal-Learn, (HVP)

Attached Form(s): NA Back 9 (04/2013)

Forms Category: NOA

Existing Languages:

LRS/CalSAWS: English and Spanish

C-IV: English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

2.4.2 Updates to Form Generation -LRS/CalSAWS & C-IV

Update code logic to add the new Need categories listed below to generate NA 821 with existing generation conditions

- vi. Family Stabilization- Transportation
- vii. Home Visit Program (HVP)-Transportation

Note:

LRS/CalSAWS generate NA 821 manually via Template Repository.

C-IV - Refer to 2.1.3 for the generation conditions of NA 821 through Service arrangement detail page.

2.4.3 Updates to Form Variable Population -LRS/CalSAWS & C-IV

NA 821 will be populated in C-IV when service arrangement is discontinued or when service need is denied.

When the form is generated via Service Arrangement Detail page in C-IV, the fields are editable.

When it is generated in template repository, no fields are pre-populated, and they will be editable.

When the FS or HVP transportation has been discontinued, the right side of the NA 821 will prepopulate as follows:

The Form populations will be applicable to C-IV only, until service arrangement detail page and generation form button is added with SCR CA-51876 and CA-213185

COUNTY OF LOS ANGELES

STATE OF CALIFORNIA
HEALTH AND HUMAN SERVICES AGENCY
CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

Date: _____
Case Name: _____
Case Number: _____
Worker Name: _____
Worker ID: _____
Worker Phone Number: _____
Customer ID: _____

NOTICE OF ACTION

Questions? Ask your Worker
State Hearing: If you think this action is wrong, you can ask for a hearing. The back of this page tells how.

As of _____ .

The Welfare to Work Cal-Learn transportation:
 payment increase you asked for is denied.

Here's why:

You are already getting as much as the County can pay because:
 the maximum mileage rate is: \$ _____ per _____ .
 public transportation is available.
 Cal-Learn transportation is available.
 Welfare to Work transportation is available.
 _____ transportation is available

You are not in an approved Job Welfare to Work
 Cal-Learn activity.

The transportation you asked for is not needed to attend your approved Welfare to Work Cal-Learn activity:
_____ .

Other: _____

You can call your Welfare to Work/Cal-Learn worker if you think this notice is wrong.

Rules: These rules apply. You may review them at your welfare office: MPP Sections 42-750.112, .2, .4, Welf. & Inst. Code 11323.2, 11323.4, 11322.9

**TEST
USE
ONLY**

As of _____ .

Your transportation payment for Job Welfare to Work
 Cal-Learn will stop.

Here's why:

You are no longer attending an approved
 Job Welfare to Work Cal-Learn activity.

You moved out of this County.

You went off cash aid.

You quit your job.

You have been exempted from participation in
 Welfare to Work Cal-Learn.

You asked that transportation be stopped.

You did not submit your attendance forms for _____ .
If this information is provided by _____ , this proposed action will be stopped.

Other: _____

You can call your Welfare to Work/Cal-Learn worker if you think this notice is wrong.

Rules: These rules apply. You may review them at your welfare office: CalWORKs Implementation Guidelines, Sections VII & XII, Welf. & Inst. Code 11323.2, 11323.4, 11322.9

Variable Name	Comments	Population	Formatting	Template Repository Population	Populates with Form Generation (C-IV) *	Editable
1. Discontinued Checkbox	Checkbox will be checked if the Status of the Service Arrangement is Discontinued	Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
2. Date	Date will be Service Arrangement Period From date Will populate if Discontinued Checkbox is populated.	Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
3. Program Checkbox	Program will be from Service Arrangement Program Type Will populate if Discontinued Checkbox is populated. For "REP" program type, populate "Welfare to Work" checkbox	Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y

4. Other Checkb ox	Checked when there is status reason under Service Arrangement Detail	Editable when a blank form is generated. Pre- populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
5. Other	Reason will be Service Arrangement status reason Will populate if Other Checkbox is populated.	Editable when a blank form is generated. Pre- populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y

Variables Requiring Translations:

Other – Service Arrangement Status Reason, Spanish (LRS/CalSAWS only)

Note: Spanish Translations will be attached to JIRA once available.

*NA 821 is generated in Service Arrangement Page only in C-IV. It does not generate from page in LRS-CalSAWS.

When NA 821 is generated when service need is denied in C-IV, left side of NA 821 is populated as below:

1 As of 2 .
The Welfare to Work 3 Cal-Learn transportation:
 payment 4 increase you asked for is denied.

Here's why:

- You are already getting as much as the County can pay because:
 - the maximum mileage rate is: \$ per .
 - public transportation is available.
 - Cal-Learn transportation is available.
 - Welfare to Work transportation is available.
 - transportation is available
- You are not in an approved Job Welfare to Work Cal-Learn activity.
- The transportation you asked for is not needed to attend your approved Welfare to Work Cal-Learn activity:

Questions? Ask your Worker

State Hearing: If you think this action is wrong, you can ask for a hearing. The back of this page tells how.

As of .

Your transportation payment for Job Welfare to Work Cal-Learn will stop.

Here's why:

- You are no longer attending an approved Job Welfare to Work Cal-Learn activity.
- You moved out of this County.
- You went off cash aid.
- You quit your job.
- You have been exempted from participation in Welfare to Work Cal-Learn.
- You asked that transportation be stopped.
- You did not submit your attendance forms for .
If this information is provided by , this proposed action will be stopped.
- Other:

Variable Name	Comments	Population	Formatting	Template Repository Population	Populates with Form Generation (C-IV) *	Editable
1. Discontinued Checkbox	Checkbox will be checked if the Status of the Service Need is denied	Editable when a blank form is generated. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
2. Date	Date will be Service Need From date Will populate if #1 Checkbox is populated.	Editable when a blank form is generated. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
3. Program Checkbox	Program will be from Program Type Will populate if #1 Checkbox is populated. For "REP" program type, populate "Welfare to Work" checkbox	Editable when a blank form is generated. Pre-populated and static when form is generated via batch. C-IV: Editable when form is generated in the context of a case.	Arial Font 10	N	Y	Y
4 Payment/ Increase checkbox	Checked for Payment or Increase denied.	Editable when a blank form is generated. Not populated in the context of a case	Arial Font 10	N	N	Y

2.5 LRS/CalSAWS only: Updates to PB19R1958 Batch (NA823)

2.5.1 Overview

Currently in LRS/CalSAWS there is an existing batch (PB19R1958) to trigger the NA 823 to inform to the client when the full amount of an ancillary request has been approved/denied for an Ancillary- Education or Work-Related Expenses. The batch will go through and sweep any service arrangement that has been approved .

2.5.2 Descriptions of Change

1. Modify PB19R1958 Batch trigger to add the new Need categories listed below to generate NA 823 with existing generation conditions:
 - There is a need category of FS (Family Stabilization), HSP (Housing Support Program) or HVP (Home Visiting Program).

The batch will trigger NA 823 if above conditions are true even if the form has been manually generated.

2.5.3 Execution Frequency

No Change.

2.5.4 Key Scheduling Dependencies

No Change.

2.5.5 Counties Impacted

Los Angeles County only.

2.5.6 Data Volume/Performance

N/A.

2.5.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution.

2.6 LRS/CalSAWS only: Updates to PB19R1957 Batch (NA820)

2.6.1 Overview

Currently in LRS/CalSAWS there is an existing batch (PB19R1957) to trigger NA 820 to inform to the client when the full amount of a request has been approved/denied for Transportation Expenses. The batch will go through and sweep any service arrangement that has been approved.

2.6.2 Descriptions of Change

Modify PB19R1957 Batch trigger to add the new Need categories listed below to generate NA 820 with existing generation conditions:

- Include additional need categories of FS transportation or HVP transportation.
- The Service Arrangement status is 'Approved'.

The batch will trigger NA 820 if above conditions are true even if the form has been manually generated.

2.6.3 Execution Frequency

No Change.

2.6.4 Key Scheduling Dependencies

No Change.

2.6.5 Counties Impacted

Los Angeles County only.

2.6.6 Data Volume/Performance

N/A.

2.6.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	NA 820 populations	NA 820 Populations.docx
2	Correspondence	FS/HSP/HVP Need categories and need types	Need categories and need types.xlsx
3	Correspondence	NA 820 populations CIV	NA 820 Populations CIV.docx

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4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.6	The LRS shall produce notices, NOAs, forms, letters, stuffers, and flyers, either generated by the LRS or initiated by COUNTY-specified Users, that may be sent to an applicant, participant, caregiver, sponsor, authorized representative, Vendor, landlord, and/or any other public or private individual or agency.	<p>The system change request will:</p> <p>Update current NA 823/ NA 820 batch to produce NA 823 for new FS ,HSP and HVP types.</p> <p>Update the NA 823/ NA 820 / NA 821 population logic to populate the necessary fields when the form is generated and to be compatible with new FS (Family Stabilization), HSP(Housing Support Program) and HVP (Home Visiting Program) need types.</p>

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met

5 MIGRATION IMPACTS

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

DRAFT

DRAFT

DRAFT