

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-206347

Update NOA Logic for SAR 2

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/20/20	1.0	Initial Creation	Connor Gorry

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1 Overview

Per ACL 18-114 FFY 2019, "The [Income Reporting Threshold] (IRT) must be provided to the CalWORKs AU using the SAR 2 or AR 2 [Forms] as appropriate upon approval of application *and at any time the AU's IRT changes during the payment period.*"

This LRS/CalSAWS-specific SCR will update the NOA logic to generate the SAR 2 when the CW IRT changes on the CalWORKs Program, at intake, and at redetermination.

Note: This change solely focuses on Form generation. This SCR will not be updating the SAR 2 to the newest state version. The SAR 2 will be updated to the latest state version with SCR CA-202463.

1.1 Current Design

Currently in LRS/CalSAWS, the AR 2 SAR Form generates for CalWORKs cases with a reporting type AR/CO when when there is no CalFresh reporting type, and any of the following conditions occur:

1. At intake
2. At redetermination
3. When reporting type is changed to AR/CO
4. When CW IRT is changed

The SAR 2 Forms is generated only for CF cases when:

1. CF case event status is Approved, Retro Rescind Approved (Denial) or Rescind Approved (Denial)
2. CF IRT Indicator changes

Because the current logic SAR 2 is written in a way that looks for an instance of CalFresh program type, the SAR 2 is triggered for both CF-only and CW/CF programs with a CF IRT change.

However, at present the SAR 2 does not generate for a CW-only program or Refugee Cash Assistance (RCA) programs when the CW IRT changes, at intake, and at redetermination. This has meant that an additional DCR has been required on an ongoing basis to send the SAR 2 when the CW IRT has changed (with an SSA COLA, for instance).

This change will align LRS/CalSAWS with the referenced policy by updating the generation logic for the SAR 2 to automatically generate for CalWORKs-only and Refugee Cash Assistance program cases.

1.2 Requests

The SAR 2 should automatically generate for CW and RCA programs when the CW IRT changes.

1.3 Overview of Recommendations

1. Update Form Generation triggers for the SAR 2.

1.4 Assumptions

1. This change will only alter Form Generation of the SAR 2. Any content or population change of the SAR 2 Form XDP will require a separate SCR.
2. CalWORKs participants with reporting type AR/CO will continue to receive the AR 2 SAR when the CW IRT changes, and will not receive the SAR 2.
3. Because SAR 2 in LRS/CalSAWS currently populates with CF, CW, and CW/CF programs, Form Population will not need to be updated to facilitate this change.
4. The SAR 2 will continue generate as a nightly batch in LRS/CalSAWS (unlike C-IV, in which the Form generates through EDBC).
5. The SAR 2 Form's existing generation conditions for CalFresh and CalWORKs/CalFresh programs will continue. Any existing CalFresh functionality will not be altered with this change.
6. This change will not alter any scheduling or methodology of the CW or CF IRT change – only the form generation that triggers from it.

2 Recommendations

2.1 Update Form Generation for SAR 2

2.1.1 Overview

Currently the SAR 2 generates for CF and CF/CW programs when the CF IRT is changed. This recommendation will add a similar functionality for cases with the CalWORKs-only program – to generate the SAR 2 whenever the CW IRT changes.

State Form: SAR 2

Current Programs: CF, CW/CF, RCA

Current Forms Category: Forms

Existing Languages:

English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Filipino/Tagalog, Vietnamese

1.1.2 Updates to Form Generation

Update the batch job PB19R539 to match CF generation for the SAR 2 for the CalWORKs-only and RCA Programs for Active Cases when the reporting type is not Annual reporting, and any of the following conditions are met:

1. CW case event status is Approved, Retro Rescind Approved (Denial) or Rescind Approved (Denial)
2. The CW/RCA IRT Indicator changes.

Note: Form generation for the SAR 2 will leverage existing CW IRT functionality. There will be no changes to the IRT scheduling or logic as a part of this effort. The SAR 2 should only be generated for CW programs that do not have a reporting type of Annual Reporting, as CW Participants with an Annual Reporting type will continue to receive the AR 2 SAR when the CW IRT changes.

New Program Generation: Yes

The SAR 2 will generate for CW-only and RCA cases (and continue to generate for CW/CF cases) when the CW IRT changes. The SAR 2 will continue to generate for CF-only cases and for CW/CF cases when the CF IRT changes.

Updates to Attached Form(s): No

3 Supporting Documents

Ref. #	Document	Functional Area	Description	Attachment
1	SAR 2 (3/15)	CF, CW, CW/CF	Blank PDF Template of the SAR 2 (3/15) that is currently used in the LRS/CalSAWS.	 SAR 2 (3/15)

4 Requirements

Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3	<p>The LRS/CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <p>...</p> <p>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</p> <p>...</p> <p>n. COLA notices;</p>	<p>This change will automate the generation of the SAR 2 Reporting form in the case that there is a change to the Income Reporting Threshold.</p> <p>This will, in turn, mean that the SAR 2 is appropriately generated after a Cost of Living Adjustment that changes the CalWORKs IRT.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-209404 | CIV-104574

ACL 19-59 Revise DFA 358F and DFA 358S

DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By Greg Deogracia
	Reviewed By Akria Moriguchi, Christine Alavilla, Claudia Pinto, Himanshu Jain, Justin Dobbs, Madhuri Salunke, Ravneet Bhatia

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
	1.0	Initial Release of the Design Document Containing Report Modifications.	Greg Deogracia

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1 OVERVIEW

The California Department of Social Services (CDSS) has released requirements (ACL 19-59) to modify the annual *CalFresh Participants by Race/Ethnicity Federal-Only and Combined Households* (DFA 358F) and *CalFresh Participants by Race/Ethnicity State-Only Households* (DFA 358S) reports. The CF 358F and CF 358S reports will collect data each year on households that participate in CalFresh during the month of July.

1.1 Current Design

The DFA 358F and DFA 358S run annually in August for July report month and report CalFresh Participants by Race/Ethnicity.

1.2 Requests

Modify the DFA 358F and DFA 358S report to comply with ACL 19-59.

1. Rename the DFA 358F to CF 358F with a title of Participant by Race/Ethnicity, Sexual Orientation and Gender Identity, Federal-Only and Combined Households.
2. Rename the DFA 358S to CF 358S with a title of Participant by Race/Ethnicity, Sexual Orientation and Gender Identity, State-Only and Combined Households.
3. Add new section and Column C to report on Sexual Orientation and Gender Identity.

1.3 Overview of Recommendations

1. Rename the DFA 358F and revise title to CF 358F.
2. Rename the DFA 358S and revise title to CF 358S.
3. Add new Lines (lines 6 and 7) and Column C to both reports to report Sexual Orientation and Gender Identity (SOGI) information per the report layout in ACL 19-59.
4. Update the detailed backup worksheets to include data points for Sexual Orientation and Gender Identity (SOGI) information.

1.4 Assumptions

1. Excel reports implemented via RTF Data can exceed 65,500 rows under presentation restrictions but not exceed 1.2 million rows.

2. The data set size of any one Excel report worksheet will not exceed 65,500 rows.
3. SCR CA-209709/CIV-104703 ABCD 350, will be implemented by July 2020 to introduce "Decline to State" option for SOGI questions.

2 RECOMMENDATIONS

2.1 Modify the CF 358 F and CF 358 S Report

CalFresh Participant by Race/Ethnicity, Sexual Orientation and Gender Identity Federal-Only and Combined Households CF 358F							
Automated Form Updated: 07/24/19							
COUNTY NAME				VERSION Initial	REPORT MONTH		REPORT YEAR 2020
Number of Federal-Only and Combined Households participating in CalFresh during July by race and sex/ethnicity.							
Race	A. Number of Household Contacts by Race			B. Number of Hispanic or Latino Household Contacts Reported in A. by Race			
	PA Households	NA Households	TOTAL Households	PA Households	NA Households	TOTAL Households	
1. Household Contacts Who Marked Only One Race							
American Indian or Alaska Native	1	2	3	0	4	5	6
Asian Categories	7	8	9	0	10	11	12
Asian Indian	13	14	15	0	16	17	18
Cambodian	19	20	21	0	22	23	24
Chinese	25	26	27	0	28	29	30
Japanese	31	32	33	0	34	35	36
Filipino	37	38	39	0	40	41	42
Korean	43	44	45	0	46	47	48
Laotian	49	50	51	0	52	53	54
Vietnamese	55	56	57	0	58	59	60
Other Asian (not included above)	61	62	63	0	64	65	66
Reporting More Than One Asian Group	67	68	69	0	70	71	72
Black or African American	73	74	75	0	76	77	78
Native Hawaiian or Other Pacific Islander	79	80	81	0	82	83	84
Native Hawaiian	85	86	87	0	88	89	90
Guamanian	91	92	93	0	94	95	96
Samoan	97	98	99	0	100	101	102
Other Pacific Islander (not included above)	103	104	105	0	106	107	108
Reporting More than one Native Hawaiian or	109	110	111	0	112	113	114
White	115	116	117	0	118	119	120
2. Household Contacts Who Marked Two Races							
American Indian or Alaska Native and White	121	122	123	0	124	125	126
Asian and White	127	128	129	0	130	131	132
Black or African American and White	133	134	135	0	136	137	138
American Indian or Alaska Native and Black or	139	140	141	0	142	143	144
3. Other—Household Contacts Who Chose Racial Combinations Not Included Above							
Reporting Race(s) Not Included Above	145	146	147	0	148	149	150
4. Nonreporting Household Contacts Where Worker Unable to Make Race Determination							
Worker Unable to Determine Race	151	152	153	0	154	155	156
5. Totals	157	158	159	0	160	161	162
C. Number of Household Contacts by Sexual Orientation and Gender Identity							
Sexual Orientation and Gender Identity						TOTAL Households	
6. The sexual orientation that household contacts marked							
Straight/heterosexual						163	
Gay or lesbian						164	
Bisexual						165	
Queer						166	
Another sexual orientation						167	
Unknown						168	
Decline to state						169	
7. The gender identity that household contacts marked							
Female						170	
Male						171	
Transgender: male to female						172	
Transgender: female to male						173	
Non-Binary (neither male nor female)						174	
Another gender identity						175	
Unknown						176	
Decline to state						176	
COMMENTS							
Revised Report Explanation							
CONTACT PERSON				TELEPHONE		EXTENSION	
JOB TITLE/CLASSIFICATION				EMAIL			
SUPERVISOR				TELEPHONE		EXTENSION	
JOB TITLE/CLASSIFICATION				EMAIL			
						DATE SUBMITTED	

Figure 2.2.1 – Sheet 1 358 F Summary Mockup

CF 358 F Detailed Backup Report

Los Angeles
Run Date: 07/2019

A. Number of Household Contacts by Race - PA

A. PA Total	0	
A. NA Total	0	
A. Total	0	
Total		0

Race	Gender Identity	Sexual Orientation	Case Number	Case Name	Primary Applicant	Worker Number

Figure 2.2.2 – Sheet 2 358 F Worksheet

CF 358 F Detailed Backup Report

Los Angeles
Run Date: 07/2019

A. Number of Household Contacts by Race - NA

A. PA Total	0	
A. NA Total	0	
A. Total	0	
Total		0

Race	Gender Identity	Sexual Orientation	Case Number	Case Name	Primary Applicant	Worker Number

Figure 2.2.3 – Sheet 3 358 F Worksheet

CF 358 F Detailed Backup Report

Los Angeles
Run Date: 07/2019

B. Number of Hispanic or Latino Household Contacts Reported in A. by Race

B. PA Total	0	
B. NA Total	0	
B. Total	0	
Total		0

Race	Gender Identity	Sexual Orientation	Case Number	Case Name	Primary Applicant	Worker Number

Figure 2.2.4 – Sheet 4 358 F Worksheet

CF 358 F Detailed Backup Report

Los Angeles
Run Date: 07/2019

B. Number of Hispanic or Latino Household Contacts Reported in A. by Race

B. PA Total	0	
B. NA Total	0	
B. Total	0	
Total		0

Race	Gender Identity	Sexual Orientation	Case Number	Case Name	Primary Applicant	Worker Number

Figure 2.2.5 – Sheet 5 358 F Worksheet

CalFresh Participant by Race/Ethnicity, Sexual Orientation and Gender Identity State-Only and Combined Households CF 358S											
1	DOWNLOAD REPORT FORM FROM:										
2	https://www.cdss.ca.gov/inforesources/Research-and-Data/Report-Form-and-Instructions										
3	EMAIL US FOR QUESTIONS ABOUT THE FORM OR INSTRUCTIONS:										
4	admCF358FS@dss.ca.gov										
5	EMAIL US FOR TECHNICAL SUPPORT QUESTIONS:										
6	admdssdcfts@dss.ca.gov										
7	Automated Form Updated: 07/24/19										
8	COUNTY NAME	VERSION	REPORT MONTH	REPORT YEAR							
9		Initial		2020							
10	Number of Federal-Only and Combined Household participating in CalFresh during July by race and ethnicity category.										
11	Race	A. Number of Household Contacts by Race			B. Number of Hispanic or Latino Household Contacts Reported in A. by Race						
12		PA Households	NA Households	TOTAL Households	PA Households	NA Households	TOTAL Households				
13	1. Household Contacts Who Marked Only One Race										
14	American Indian or Alaska Native	1	2	3	0	4	5	6	0	0	
15	Asian Categories	7	8	9	0	10	11	12	0	0	
16	Asian Indian	13	14	15	0	16	17	18	0	0	
17	Cambodian	19	20	21	0	22	23	24	0	0	
18	Chinese	25	26	27	0	28	29	30	0	0	
19	Japanese	31	32	33	0	34	35	36	0	0	
20	Filipino	37	38	39	0	40	41	42	0	0	
21	Korean	43	44	45	0	46	47	48	0	0	
22	Laotian	49	50	51	0	52	53	54	0	0	
23	Vietnamese	55	56	57	0	58	59	60	0	0	
24	Other Asian (not included above)	61	62	63	0	64	65	66	0	0	
25	Reporting More Than One Asian Group	67	68	69	0	70	71	72	0	0	
26	Black or African American	73	74	75	0	76	77	78	0	0	
27	Native Hawaiian or Other Pacific Islander	79	80	81	0	82	83	84	0	0	
28	Native Hawaiian	85	86	87	0	88	89	90	0	0	
29	Guamanian	91	92	93	0	94	95	96	0	0	
30	Samoan	97	98	99	0	100	101	102	0	0	
31	Other Pacific Islander (not included above)	103	104	105	0	106	107	108	0	0	
32	Reporting More than one Native Hawaiian or	109	110	111	0	112	113	114	0	0	
33	White	115	116	117	0	118	119	120	0	0	
34	2. Household Contacts Who Marked Two Races										
35	American Indian or Alaska Native and White	121	122	123	0	124	125	126	0	0	
36	Asian and White	127	128	129	0	130	131	132	0	0	
37	Black or African American and White	133	134	135	0	136	137	138	0	0	
38	American Indian or Alaska Native and Black or	139	140	141	0	142	143	144	0	0	
39	3. Other--Household Contacts Who Chose Racial Combinations Not Included Above										
40	Reporting Race(s) Not Included Above	145	146	147	0	148	149	150	0	0	
41	4. Nonreporting Household Contacts Where Worker Unable to Make Race Determination										
42	Worker Unable to Determine Race	151	152	153	0	154	155	156	0	0	
43	5. Totals	157	158	159	0	160	161	162	0	0	
44	Sexual Orientation and Gender Identity	C. Number of Household Contacts by Sexual Orientation and Gender Identity									
45		+							TOTAL Households		
46	6. The sexual orientation that household contacts marked										
47	Straight/heterosexual								163		
48	Gay or lesbian								164		
49	Bisexual								165		
50	Queer								166		
51	Another sexual orientation								167		
52	Unknown								168		
53	Decline to state								169		
54	7. The gender identity that household contacts marked										
55	Female								170		
56	Male								171		
57	Transgender: male to female								172		
58	Transgender: female to male								173		
59	Non-Binary (neither male nor female)								174		
60	Another gender identity								175		
61	Unknown								176		
62	Decline to state								176		
63	COMMENTS										
64											
65	Revised Report Explanation										
66											
67	CONTACT PERSON			TELEPHONE			EXTENSION				
68											
69	JOB TITLE/CLASSIFICATION			EMAIL							
70											
71	SUPERVISOR			TELEPHONE			EXTENSION				
72											
73	JOB TITLE/CLASSIFICATION			EMAIL							
74											
75				DATE SUBMITTED							
76											

Figure 2.2.6 – CF 358 358 S Summary Mockup

The screenshot shows an Excel spreadsheet titled "CF 358 S Detailed Backup Report". The report is for "Los Angeles" and "Date: 07/2019". It displays "A. Number of Household Contacts by Race – PA". The summary table shows 0 for A. PA Total, 0 for A. NA Total, and 0 for A. Total. The main data table has columns for Race, Gender Identity, Sexual Orientation, Case Number, Case Name, Primary Applicant, and Worker Number. The "Total" row shows 0 for the Worker Number column. The worksheet tab is labeled "A. PA".

Figure 2.2.7 – A. PA 358 S Worksheet

The screenshot shows an Excel spreadsheet titled "CF 358 S Detailed Backup Report". The report is for "Los Angeles" and "Date: 07/2019". It displays "A. Number of Household Contacts by Race – NA". The summary table shows 0 for A. PA Total, 0 for A. NA Total, and 0 for A. Total. The main data table has columns for Race, Gender Identity, Sexual Orientation, Case Number, Case Name, Primary Applicant, and Worker Number. The "Total" row shows 0 for the Worker Number column. The worksheet tab is labeled "A. NA".

Figure 2.2.8 – A. NA 358 S Worksheet

The screenshot shows an Excel spreadsheet titled "CF 358 S Detailed Backup Report". The report is for "Los Angeles" and "Date: 07/2019". It displays "B. Number of Hispanic or Latino Household Contacts Reported in A. by Race". The summary table shows 0 for B. PA Total, 0 for B. NA Total, and 0 for B. Total. The main data table has columns for Race, Gender Identity, Sexual Orientation, Case Number, Case Name, Primary Applicant, and Worker Number. The "Total" row shows 0 for the Worker Number column. The worksheet tab is labeled "B. PA".

Figure 2.2.9 – B. PA 358 S Worksheet

The screenshot shows an Excel spreadsheet titled "CF 358 S Detailed Backup Report". The report is for "Los Angeles" and "Date: 07/2019". It displays "B. Number of Hispanic or Latino Household Contacts Reported in A. by Race". The summary table shows 0 for B. PA Total, 0 for B. NA Total, and 0 for B. Total. The main data table has columns for Race, Gender Identity, Sexual Orientation, Case Number, Case Name, Primary Applicant, and Worker Number. The "Total" row shows 0 for the Worker Number column. The worksheet tab is labeled "B. NA".

Figure 2.2.10 – B. NA 358 S Worksheet

2.1.1 Description of Change

1. **C-IV Only:** development shall convert the DFA 358F to the RTF reporting structure as used with the current LRS/CalSAWS DFA 358F.
2. Rename the DFA 358F and revise title to CF 358F.
 - a. Historical versions of the DFA 358F shall remain available.
3. Rename the DFA 358S and revise title to CF 358S.
 - a. Historical versions of the DFA 358S shall remain available.
4. The CF 358F and CF 358S Summary page has been fully revamped to reflect the content of ACL No. 19-59.
 - a. Add Number of Households participating in CalFresh during July by sexual orientation and gender identity [Column grouping "C"]
 - i. Item 6, Column grouping "C": Enter the total number of household contacts who selected a sexual orientation. [Cells 163 to 169].
 - ii. Item 7, Column grouping "C": Enter the total number of household contacts who selected a gender identity. [Cells 170 to 176]
5. All Final CF 358F and CF 358S Reports shall display the appropriate system logo design as designated for respective LRS/CalSAWS and C-IV generated reports.
6. For each detailed backup worksheet of both CF 358F and CF 358S, add the following two columns to the right of the "Race" column to display "Gender Identity" and "Sexual Orientation". Reference the attached report mockup for a layout example and column placement:

Column Name	Column Description
Gender Identity	This column will display the Gender Identity of the Primary Applicant. Possible values for this column are: <ul style="list-style-type: none"> • Female • Male • Another Gender Identity • Transgender: Male to Female

	<ul style="list-style-type: none"> • Transgender: Female to Male • Non Binary (neither male nor female) • Decline to State <p>If the Gender Identity data point does not exist for the primary applicant, this column will be blank.</p>
Sexual Orientation	<p>This column will display the Sexual Orientation of the Primary Applicant. Possible values for this column are:</p> <ul style="list-style-type: none"> • Another Sexual Orientation • Bisexual • Gay or Lesbian • Queer • Straight or Heterosexual • Decline to State • Unknown <p>If the Sexual Orientation data point does not exist for the primary applicant, this column will be blank.</p>

Figure 2.1.1.2 – SOGI Information

7. Introduce logic to populate Section C, Lines 6 (Sexual Orientation – cells 163 through 169) and 7 (Gender Identity – cells 170 through 176) of the CF 358F and CF 358S:

Gender Identity

Line	Criteria
Female	The Gender Identity of the primary applicant is 'Female'
Male	The Gender Identity of the primary applicant is 'Male'
Transgender: male to female	The Gender Identity of the primary applicant is 'Transgender: Male to Female'
Transgender: female to male	The Gender Identity of the primary applicant is 'Transgender: Female to Male'
Non-Binary (neither male or female)	The Gender Identity of the primary applicant is 'Non Binary (neither male nor female)'
Another gender identity	The Gender Identity of the primary applicant is 'Another Gender Identity'
Decline to state	The Gender Identity of the primary applicant is 'Decline to State'
Unknown	The Gender Identity of the primary applicant has not been entered into the automated system

***Note;** This line has been added to the report template, which is not in the currently published report instructions. CDSS clarified via CRPC #2179 that an "Unknown" line will be added to the report and published with an ACL before the report is generated in 2020

Figure 2.2.1.3 – Gender Identity

Sexual Orientation

Line	Criteria
Straight/heterosexual	The Sexual Orientation of the primary applicant is 'Straight or Heterosexual'
Gay or lesbian	The Sexual Orientation of the primary applicant is 'Gay or Lesbian'
Bisexual	The Sexual Orientation of the primary applicant is 'Bisexual'
Queer	The Sexual Orientation of the primary applicant is 'Queer'
Another sexual orientation	The Sexual Orientation of the primary applicant is 'Another Sexual Orientation'
Unknown	The Sexual Orientation of the primary applicant is 'Unknown' OR The Sexual Orientation of the primary applicant has not been entered into the automated system
Decline to state	The Sexual Orientation of the primary applicant is 'Decline to State'

Figure 2.2.1.4 – Sexual Orientation

- 8. **LRS/CalSAWS only; CF 358 S:** Remove the following two columns from all of the detailed backup worksheets (TABS; A. PA, A. NA, B. PA, B. NA); Office and Unit.

A. Number of household contacts by race - PA						
A. PA Total						
A. NA Total						
A. Total			Total			
Race	Case Number	Case Name	Primary Applicant	Worker Number	Office	Unit

Figure 2.1.1.1 – Column Removal

2.1.2 Report Location

- **Global Navigation:** Reports
- **Local:** Scheduled
- **Task:** State
- **Report Search:** CF 358F
or
CF 358S

2.1.3 Counties Impacted

All LRS/CalSAWS and C-IV counties.

3 SUPPORTING DOCUMENTS

This section includes any supporting documents for the design as an imbedded document.

Number	Functional Area	Description	Attachment
1	Reports	CF 358 F - Mockup	 CF 358 F - Mockup.xlsx
2	Reports	CF 358 S - Mockup	 CF 358 S - Mockup.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.2	The LRS shall produce reports that provide the detail LRS Data that will be used to complete the reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	This SCR is enhancing the existing reports as needed by the counties.

4.2 Migration Requirements

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

5 MIGRATION IMPACTS

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

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-209709 | CIV-104703

ACL 19-75 Revisions to ABCD 350

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Greg Deogracia
	Reviewed By	Balakumar Murthy, Claudia Pinto, Christine Altavilla, Dana Peterson, Ron Quinn, Howard Suksanti, Justin Dobbs, Madhuri Salunkhe, Michael Wu, Sarah Cox, Tina Tran

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/31/2020	1.0	Initial Release of the Design Document Containing Report Modifications.	Greg Deogracia
1/31/2020	1.0	Added Interface recommendations.	Howard Suksanti

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1 OVERVIEW

The California Department of Social Services (CDSS) has released requirements (ACL 19-75) to modify the Annual Recipient Report On CalWORKs, Foster Care, Social Services, Non-Assistance CalFresh, Welfare-to-Work, Refugee Cash Assistance and the Cash Assistance Program For Immigrants ABCD 350. This document outlines the recommended automation changes to comply with the ACL.

1.1 Current Design

The ABCD 350 report is automated to run annually, in August for the July report month providing statistical information on the ethnic origin and primary language, of recipients of CalWORKs, Foster Care (FC), Social Services, Non-Assistance CalFresh (NACF), Welfare-to-Work (WTW), Refugee Cash Assistance (RCA), and the Cash Assistance Program for Immigrants (CAPI).

1.2 Requests

ACL 19-75 revises the ABCD 350 report to include Sexual Orientation and Gender Identity (SOGI) information allowing CDSS to report SOGI data to the Legislature in accordance with state and federal law. The ACL also revises the WTW populations to no longer equal the enrollees line item (Line 1) on the WTW 25(two parent) and WTW 25A (All Other families) reports. The total (WTW) cases now equals line items WTW Sanctions (Item 3A), Unduplicated Individuals (Item 30), Noncompliance (Item 31), and Good Cause (Item 32).

Modify the ABCD 350 report to comply with ACL 19-75.

1.3 Overview of Recommendations

1. Add "Decline to State" as a selection for the Sexual Orientation and Gender Identity (SOGI) questions.
2. Modify MEDS Interface jobs to suppress SOGI Data Element (DE) when the value is "Decline to State".
3. Modify the ABCD 350 report per ACL 19-75, which includes adding SOGI sections within the report.

1.4 Assumptions

1. No Impact to other reports.
2. Excel reports implemented via RTF Data can exceed 65,500 rows under presentation restrictions but not exceed 1.2 million rows.

3. "Decline to State" is not a valid SOGI option in the Electronic Health Information Transfer (eHIT) schema with CalHEERS and therefore will not be communicated to CalHEERS.
4. "Decline to State" is not a valid SOGI option in the Electronic Inter-county Transfer (eICT) schema and therefore will not be communicated in the eICT transaction.

2 RECOMMENDATIONS

2.1 Individual Demographics Detail

2.1.1 Overview

The Individual Demographics Detail page has dropdowns for the optional Sexual Orientation and Gender Identity questions. The dropdown options come from Codes Tables CT524 & CT523.

Add "Decline to State" as an option for both dropdowns.

2.1.2 Description of Changes

1. Add "Decline to State" as a selection for the Sexual Orientation and Gender Identity (SOGI) questions.
 - a. Add "Decline to State" as an option in the Sexual Orientation dropdown (Add to Codes Table CT524).
 - b. Add "Decline to State" as an option in the Gender Identity dropdown (Add to Codes Table CT523).

2.1.3 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Non-Financial > Individual Demographics**

2.1.4 Page Usage/Data Volume Impacts

N/A

2.2 Modify MEDS Interface jobs to suppress SOGI Data Element (DE) when the value is "Decline to State"

2.2.1 Overview

SOGI Information is sent to MEDS in various MEDS transactions as optional fields.

The new "Decline to State" value is not available in MEDS system based on the current MEDS Manual document. As part of this SCR, the below mentioned MEDS Interface jobs will be modified to exclude SOGI Data Elements when the field value is "Decline to State".

MEDS SOGI Data Elements:

- DE 2051 – Beneficiary Gender Identity
- DE 2053 – Sexual Orientation

2.2.2 Description of Change

Modify below MEDS Interface transactions to exclude DE 2051 or DE 2053 when the field value is "Decline to State". The data element will not appear in the outbound file.

- a. AP18 – Report a Pending Application
 - i. Daily AP18 (Job name – POXXE400).
 - ii. Approaching RE AP18 (Job name – POXXE423).
 - iii. Initiated by Worker AP18 (Job name – POXXE424).
- b. AP19 - Citizenship Status/Identity Verification
 - i. Job name: POXXE435-Request Vital Stat
 - ii. Job name: POXXE436-Update Vital Stat
 - iii. Job name: POXXE437-Remove Vital Stat
- c. AP34 – Update Pending Application Data (Job name - POXXE401).
- d. EW05 – Change County of Responsibility (Job name - POXXE406).
- e. EW12 – Update Client Information (Job name - POXXE408).
- f. EW20 - Add New Eligibility/Update Eligibility Within a County (Job name - POXXE409).

2.2.3 Execution Frequency

No Change.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

All Counties.

2.2.6 Data Volume/Performance

N/A.

2.2.7 Failure Procedure/Operational Instructions

The Batch Operations Support Team will evaluate errors, diagnose the issue and work with the appropriate teams to resolve the failure.

2.3 Modify the ABCD 350 Report

Annual Recipient Report on CalWORKS, Foster Care (FC), Social Services, Non-Assistance CalFresh (NACF), Welfare-to-Work (WTV), Refugee Cash Assistance (RCA), and the Cash Assistance Program for Immigrants (CAPI) ABCD 350 (07/19)																						
2. DOWNLOAD REPORT FORM FROM: 3. https://www.cdss.ca.gov/Information/Research-and-Data/Report-Form-and-Instructions 4. EMAIL US FOR QUESTIONS ABOUT THE FORM OR INSTRUCTIONS: 5. abcd350@cdss.ca.gov 6. EMAIL US FOR TECHNICAL SUPPORT QUESTIONS: 7. abcd350@cdss.ca.gov											Automated Form Updated: 10/17/19											
8. COUNTY NAME											VERSION	REPORT MONTH	REPORT YEAR									
											Initial		2020									
											NUMBER OF CASES											
											CalWORKS		WTV									
											Two Parent	Zero Parent	All (Other) Families	TANF Timed Out	Safety Net/Fleeing Felony/Loag-Term Sanction	FC	Social Services (Title XX)	NACF	Two Parent	All (Other) Families	RCA	CAPI
PART A. ETHNIC ORIGIN																						
14	White	18	35	52	63	56	103	120	137	154	171	188										
15	Hispanic	2	19	36	53	70	87	104	121	138	155	172										
16	Black	3	20	37	54	71	88	105	122	139	156	173										
17	(Other) Asian or Pacific	4	21	38	55	72	89	106	123	140	157	174										
18	American Indian or Alaska	5	22	39	56	73	90	107	124	141	158	175										
19	Filipino	6	23	40	57	74	91	108	125	142	159	176										
20	Chinese	7	24	41	58	75	92	109	126	143	160	177										
21	Cambodian	8	25	42	59	76	93	110	127	144	161	178										
22	Japanese	9	26	43	60	77	94	111	128	145	162	179										
23	Korean	10	27	44	61	78	95	112	129	146	163	180										
24	Samoa	11	28	45	62	79	96	113	130	147	164	181										
25	Asian Indian	12	29	46	63	80	97	114	131	148	165	182										
26	Hawaiian	13	30	47	64	81	98	115	132	149	166	183										
27	Gaomonian	14	31	48	65	82	99	116	133	150	167	184										
28	Laotian	15	32	49	66	83	100	117	134	151	168	185										
29	Vietnamese	16	33	50	67	84	101	118	135	152	169	186										
30	Not Available	17	34	51	68	85	102	119	136	153	170	187										
31	Part A. Total	205	206	207	208	209	210	211	212	213	214	215										
PART B. PRIMARY LANGUAGE SPOKEN																						
32	American Sign	217	247	277	307	337	367	397	427	457	487	517										
33	Spanish	218	248	278	308	338	368	398	428	458	488	518										
34	Cantonese	219	249	279	309	339	369	399	429	459	489	519										
35	Japanese	220	250	280	310	340	370	400	430	460	490	520										
36	Korean	221	251	281	311	341	371	401	431	461	491	521										
37	Tegalog	222	252	282	312	342	372	402	432	462	492	522										
38	(Other) Non-English	223	253	283	313	343	373	403	433	463	493	523										
39	English	224	254	284	314	344	374	404	434	464	494	524										
40	(Other) Sign Language	225	255	285	315	345	375	405	435	465	495	525										
41	Mandarin	226	256	286	316	346	376	406	436	466	496	526										
42	(Other) Chinese Languages	227	257	287	317	347	377	407	437	467	497	527										
43	Cambodian	228	258	288	318	348	378	408	438	468	498	528										
44	Armenian	229	259	289	319	349	379	409	439	469	499	529										
45	Bosnian	230	260	290	320	350	380	410	440	470	500	530										
46	Malay	231	261	291	321	351	381	411	441	471	501	531										
47	Hmong	232	262	292	322	352	382	412	442	472	502	532										
48	Lev	233	263	293	323	353	383	413	443	473	503	533										
49	Turkish	234	264	294	324	354	384	414	444	474	504	534										
50	Hebrew	235	265	295	325	355	385	415	445	475	505	535										
51	French	236	266	296	326	356	386	416	446	476	506	536										
52	Polish	237	267	297	327	357	387	417	447	477	507	537										
53	Russian	238	268	298	328	358	388	418	448	478	508	538										
54	Portuguese	239	269	299	329	359	389	419	449	479	509	539										
55	Italian	240	270	300	330	360	390	420	450	480	510	540										
56	Arabic	241	271	301	331	361	391	421	451	481	511	541										
57	Samoa	242	272	302	332	362	392	422	452	482	512	542										
58	Thai	243	273	303	333	363	393	423	453	483	513	543										
59	Farsi	244	274	304	334	364	394	424	454	484	514	544										
60	Vietnamese	245	275	305	335	365	395	425	455	485	515	545										
61	Not Available	246	276	306	336	366	396	426	456	486	516	546										
62	Part B. Total	378	379	380	381	382	383	384	385	386	387	388										
PART C. GENDER IDENTITY																						
63	Female	583	596	603	610	617	624	638	645	652	659	666										
64	Male	590	597	604	611	618	625	632	639	646	653	660										
65	Transgender: male to female	591	598	605	612	619	626	633	640	647	654	661										
66	Transgender: female to male	592	599	606	613	620	627	634	641	648	655	662										
67	Non-Binary (either male or female)	593	600	607	614	621	628	635	642	649	656	663										
68	Another gender identity	594	601	608	615	622	629	636	643	650	657	664										
69	Unknown	595	602	609	616	623	630	637	644	651	658	665										
70	Declines to state	596	603	610	617	624	631	638	645	652	659	666										
71	Part C. Total	674	675	676	677	678	679	680	681	682	683	684										
PART D. SEXUAL ORIENTATION																						
72	Straight/heterosexual	687	692	697	702	707	712	717	722	727	732	737										
73	Gay or lesbian	688	693	698	703	708	713	718	723	728	733	738										
74	Bisexual	689	694	699	704	709	714	719	724	729	734	739										
75	Queer	690	695	700	705	710	715	720	725	730	735	740										
76	Another sexual orientation	691	696	701	706	711	716	721	726	731	736	741										
77	Unknown	692	697	702	707	712	717	722	727	732	737	742										
78	Declines to state	693	698	703	708	713	718	723	728	733	738	743										
79	Part D. Total	743	744	745	746	747	748	749	750	751	752	753										
COMMENTS																						
80	(Other) Non-English Explanation: CalWORKS																					
81	(Other) Non-English Explanation: Foster Care																					
82	(Other) Non-English Explanation: Social Services (Title XX)																					
83	(Other) Non-English Explanation: Non-Assistance CalFresh																					
84	(Other) Non-English Explanation: Welfare-to-Work																					
85	(Other) Non-English Explanation: Refugee Cash Assistance																					
86	(Other) Non-English Explanation: Cash Assistance Program for Immigrants																					
87	Revised Report Explanation																					
88																						
89																						
90																						
91																						
92																						
93																						
94																						
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108																						
109																						
110																						

Figure 2.2.1 – ABCD 350 - Sheet 1 Summary Mockup

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ABCD 350 Detailed Report									
Los Angeles									
Run Date: AUG-26-19 08:15 PM									
Date: 07/2019									
CalWORKs – Two Parent									
									ABCD 350
Ethnic Total									Total
Language Total									Total
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID	

Figure 2.2.2 – ABCD 350 - Sheet 2 Worksheet

ABCD 350 Detailed Report									
Los Angeles									
Run Date: AUG-26-19 08:15 PM									
Date: 07/2019									
CalWORKs – Zero Parent									
									ABCD 350
Ethnic Total									Total
Language Total									Total
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID	

Figure 2.2.3 – ABCD 350 - Sheet 3 Worksheet

ABCD 350 Detailed Report									
Los Angeles									
Run Date: AUG-26-19 08:15 PM									
Date: 07/2019									
CalWORKs – All Other Families									
									ABCD 350
Ethnic Total									Total
Language Total									Total
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID	

Figure 2.2.4 – ABCD 350 - Sheet 4 Worksheet

ABCD 350 Detailed Report									
Los Angeles									
Run Date: AUG-26-19 08:15 PM									
Date: 07/2019									
CalWORKs – TANF Timed-Out Cases									
									ABCD 350
Ethnic Total									Total
Language Total									Total
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID	

Figure 2.2.5 – ABCD 350 - Sheet 5 Worksheet

ABCD 350 Detailed Report									
Los Angeles									
Run Date: AUG-26-19 08:15 PM									
Date: 07/2019									
CalWORKs - Long Term Sanction/Safety-Net/Fleeing Felon Cases									
									ABCD 350
Ethnic Total									
Language Total									
									Total
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID	

Figure 2.2.6 – ABCD 350 - Sheet 6 Worksheet

ABCD 350 Detailed Report									
Los Angeles									
Run Date: AUG-26-19 08:15 PM									
Date: 07/2019									
Foster Care									
									ABCD 350
Ethnic Total									
Language Total									
									Total
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID	

Figure 2.2.7 – ABCD 350 - Sheet 7 Worksheet

ABCD 350 Detailed Report									
Los Angeles									
Run Date: AUG-26-19 08:15 PM									
Date: 07/2019									
NACF									
									ABCD 350
Ethnic Total									
Language Total									
									Total
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Category	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID

Figure 2.2.8 – ABCD 350 - Sheet 8 Worksheet

ABCD 350 Detailed Report									
Los Angeles									
Run Date: AUG-26-19 08:15 PM									
Date: 07/2019									
WTW – Two Parent									
									ABCD 350
Ethnic Total									
Language Total									
									Total
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID	

Figure 2.2.9 – ABCD 350 - Sheet 9 Worksheet

 ABCD 350 Detailed Report																													
Los Angeles																													
Run Date: AUG-26-19 08:15 PM																													
Date: 07/2019																													
WTW - All Other Families																													
									ABCD 350																				
<table border="1"> <tr> <td>Ethnic Total</td> <td colspan="9"></td> </tr> <tr> <td>Language Total</td> <td colspan="9"></td> </tr> </table>										Ethnic Total										Language Total									
Ethnic Total																													
Language Total																													
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Total																													
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID																					

Figure 2.2.10 – ABCD 350 - Sheet 10 Worksheet

 ABCD 350 Detailed Report																													
Los Angeles																													
Run Date: AUG-26-19 08:15 PM																													
Date: 07/2019																													
RCA																													
									ABCD 350																				
<table border="1"> <tr> <td>Ethnic Total</td> <td colspan="9"></td> </tr> <tr> <td>Language Total</td> <td colspan="9"></td> </tr> </table>										Ethnic Total										Language Total									
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Total																													
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID																					

Figure 2.2.11 – ABCD 350 - Sheet 11 Worksheet

 ABCD 350 Detailed Report																													
Los Angeles																													
Run Date: AUG-26-19 08:15 PM																													
Date: 07/2019																													
CAPI																													
									ABCD 350																				
<table border="1"> <tr> <td>Ethnic Total</td> <td colspan="9"></td> </tr> <tr> <td>Language Total</td> <td colspan="9"></td> </tr> </table>										Ethnic Total										Language Total									
Ethnic Total																													
Language Total																													
<table border="1"> <tr> <td align="right" colspan="10">Total</td> </tr> </table>										Total																			
Total																													
Ethnic Origin	Language	Gender Identity	Sexual Orientation	Case Number	Aid Code	Case Name	Primary Applicant	Worker ID																					

Figure 2.2.12 – ABCD 350 - Sheet 12 Worksheet

2.3.1 Description of Change

1. **C-IV Only:** Convert the report layout to support populations greater than 65,000 rows per worksheet (RTF format). The ABCD 350 within LRS/CalSAWS is already in a RTF format; this recommendation will align the layouts in both C-IV and LRS/CalSAWS.

Note: Final Reports shall display appropriate LOGO design as designated for LRS/CalSAWS and C-IV generated reports.

2. Update the Summary worksheet (Sheet1) layout per the attached ABCD 350 mockup in the Supporting Documents Section.
3. **LRS/CalSAWS Only:** Update CalWorks Worksheet title to; CalWORKs - Long Term Sanction/Safety-Net/Fleeing Felon Cases
4. Update NAFS Worksheet title to; NACF.
5. Introduce logic to populate Parts C (Gender Identity) and D (Sexual Orientation) of the ABCD 350:

Important Note: Totals for corresponding columns on Part A, Part B, Part C and Part D of the ABCD 350 must ALL be equal.

a. Part C (Gender Identity)

Line	Criteria
Female	The Gender Identity of the primary applicant is "Female"
Male	The Gender Identity of the primary applicant is "Male"
Transgender: male to female	The Gender Identity of the primary applicant is "Transgender: Male to Female"
Transgender: female to male	The Gender Identity of the primary applicant is "Transgender: Female to Male"
Non-Binary (neither male or female)	The Gender Identity of the primary applicant is "Non Binary (neither male nor female)"
Another gender identity	The Gender Identity of the primary applicant is "Another Gender Identity"
Decline to state	The Gender Identity of the primary applicant is "Decline to State"

Unknown	<p>The Gender Identity of the primary applicant has not been entered into the automated system</p> <p>*Note; This line has been added to the report template, which is not in the currently published report instructions. CDSS clarified via CRPC #2179 that an "Unknown" line will be added to the report and published with an ACL before the report is generated in 2020</p>
---------	---

Note: This section will not be populated for the Foster Care column (cells 624 through 630 and cell 678)

b. Part D (Sexual Orientation)

Line	Criteria
Straight/heterosexual	The Sexual Orientation of the primary applicant is "Straight or Heterosexual"
Gay or lesbian	The Sexual Orientation of the primary applicant is "Gay or Lesbian"
Bisexual	The Sexual Orientation of the primary applicant is "Bisexual"
Queer	The Sexual Orientation of the primary applicant is "Queer"
Another sexual orientation	The Sexual Orientation of the primary applicant is "Another Sexual Orientation"
Unknown	<p>The Sexual Orientation of the primary applicant is "Unknown"</p> <p>OR</p> <p>The Sexual Orientation of the primary applicant has not been entered into the automated system</p>
Decline to state	The Sexual Orientation of the primary applicant is "Decline to State"

Note: This section will not be populated for the Foster Care column (cells 720 through 726 and cell 774)

6. Add the following 2 columns to the right of the “Language” column in detailed worksheets 2 through 12 of the ABCD 350 template:

Column Name	Column Description
Gender Identity	<p>This column will display the Gender Identity of the Primary Applicant. Possible values for this column are:</p> <ul style="list-style-type: none"> • Female • Male • Another Gender Identity • Transgender: Male to Female • Transgender: Female to Male • Non Binary (neither male nor female) • Decline to State <p>If the Gender Identity data point does not exist for the primary applicant, this column will be blank.</p>
Sexual Orientation	<p>This column will display the Sexual Orientation of the Primary Applicant. Possible values for this column are:</p> <ul style="list-style-type: none"> • Another Sexual Orientation • Bisexual • Gay or Lesbian • Queer • Straight or Heterosexual • Decline to State • Unknown <p>If the Sexual Orientation data point does not exist for the primary applicant, this column will be blank.</p>

Reference the Supporting Documents section for report layout and column placement.

7. Update the WTW populations included in the WTW Two Parent and WTW All (Other) Families columns of the ABCD 350:
- a. The WTW Two Parent column is equal to the populations in Lines 3a (WTW Sanctions), 30 (Unduplicated Individuals), 31 (Noncompliance) and 32 (Good Cause) on the WTW 25A.
 - b. The WTW All (Other) Families column is equal to the populations in Lines 3a (WTW Sanctions), 30 (Unduplicated Individuals), 31 (Noncompliance) and 32 (Good Cause) on the WTW 25.

2.3.2 Report Location

Global: Reports
Local: Scheduled
Task: State
Title: ABCD 350

2.3.3 Counties Impacted

All LRS/CalSAWS and C-IV counties

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	ABCD 350 Mockup	 ABCD 350 - Mockup.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.2	The LRS shall produce reports that provide the detail LRS Data that will be used to complete the reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	This SCR is enhancing the existing reports as needed by the counties.

4.2 Migration Requirements

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

5 MIGRATION IMPACTS

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

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-212039 | CIV-105722

Update the Self Service Portal (YBN/C4Y) and Corresponding Mobile Application (DPSS/C4Y) downtime message.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03.20.2020	1.0	Initial	Erika Kusnadi-Cerezo, Tiffany Cheung

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1 OVERVIEW

The Self Service Portals (YourBenefitsNow! [YBN] and C4Yourself) and their corresponding mobile applications (Department of Public Social Services [DPSS] Mobile Application and C4Yourself Mobile Application) are applications that participants can use to apply for and view benefits.

1.1 Current Design

Currently when the YourBenefitsNow! (YBN) website, the Department of Public Social Services (DPSS) Mobile Application, C4Yourself website and the C4Yourself Mobile Application is down for maintenance these applications will not be available for use by the participants during the downtime period. During this time a static message will display to inform participants that the application is not available to be used, but it does not provide additional resources that is available during the downtime period.

Currently the YBN website, DPSS Mobile Application, C4Yourself website and C4Yourself Mobile Application display the following static messages:

YBN website: "YourBenefitsNow! is down for maintenance. Please try again later."

DPSS Mobile App: "System Maintenance. The DPSS Mobile App is currently down for system maintenance. Please try again later. We are sorry for the inconvenience. Need Help? Contact Us YBN_Webmaster@dpss.lacounty.gov"

C4Yourself website: "C4Yourself Unavailable. C4Yourself is currently unavailable. Please try again later."

C4Yourself Mobile Application: "Due to technical difficulties, we are unable to process your request now. Please try later."

Note: When the YourBenefitsNow! (YBN) website is down, the Department of Public Social Services (DPSS) Mobile Application will be down as well. However, when the C4Yourself website is down, it does not mean the C4Yourself Mobile Application is down as well and vice versa. The C4Yourself website and the C4Yourself Mobile Application are not dependent on each other.

1.2 Requests

Update the Self Service Portals (YourBenefitsNow! [YBN] website and C4Yourself website), their corresponding Mobile Applications (Department of Public Social Services [DPSS] Mobile Application and C4Yourself Mobile Application) downtime static messages, and the external CalSAWS Website (CalSAWS.org) to include more information that can provide participants with additional resources that are still available during the outage period.

1.3 Overview of Recommendations

1. Update the YourBenefitsNow! (YBN) website, C4Yourself website and Department of Public Social Services Mobile Application (DPSS) Mobile

Application downtime static message to include the following websites to provide participants with additional resources and their counties contact information.

- a. CalSAWS Resource page
 - b. Covered California website
 - c. CalFresh website
 - d. EBT website
2. Update the C4Yourself Mobile Application downtime static message to direct participants to the C4Yourself website during the downtime period since the website will be available for the participants to use.
 3. Update the external CalSAWS Website (CalSAWS.org) Resource page to provide participants with known system outage times, additional resources and their counties' contact information.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 YourBenefitsNow! (YBN) downtime static page

2.1.1 Overview

The message on YourBenefitsNow! (YBN) downtime static page will be updated to incorporate alternative public assistance sites that are available for participants to use for additional information during the downtime period.

2.1.2 YourBenefitsNow! (YBN) downtime static page Mockup

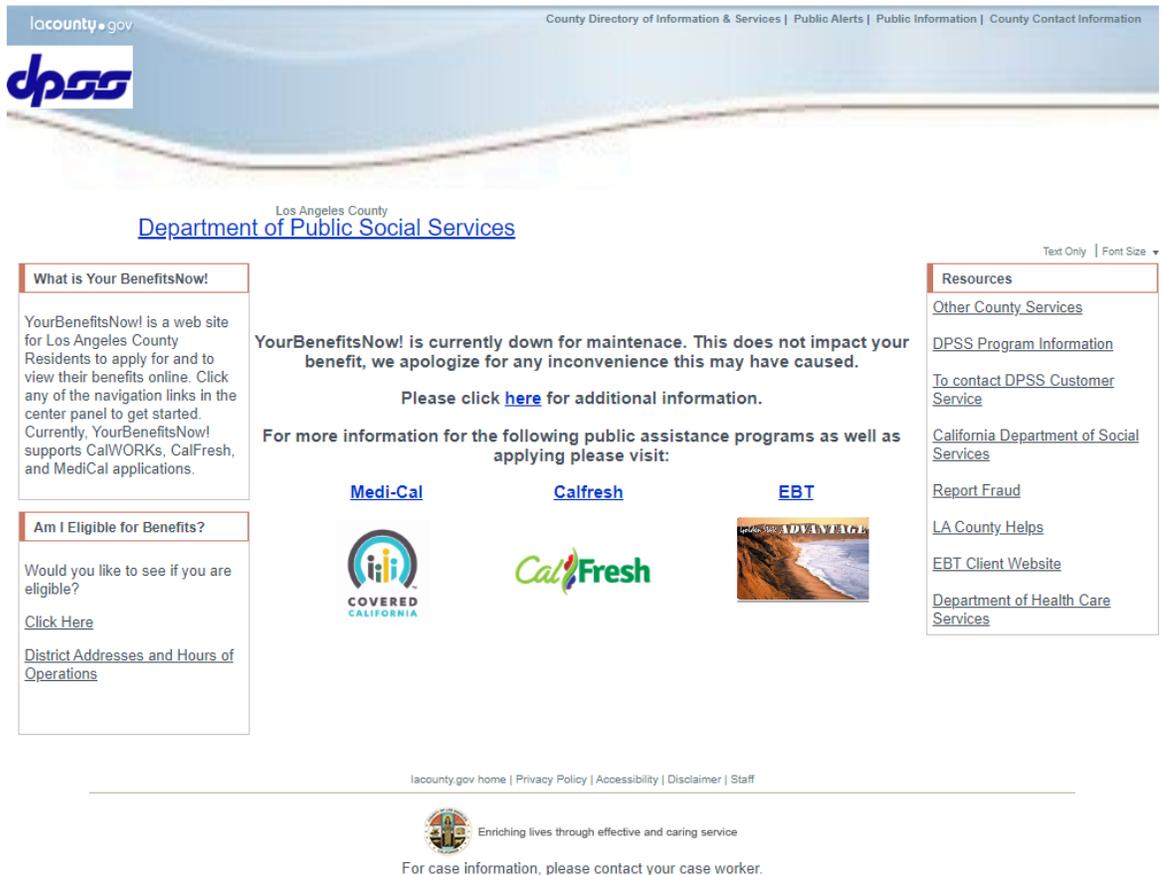


Figure 2.1.1 – YourBenefitsNow! (YBN) downtime static page Mockup

2.1.3 Description of Changes

1. Update the YourBenefitsNow!(YBN) downtime static page as shown on Figure 2.1.1
 - a. Update the existing YBN downtime static message from "YourBenefitsNow! is down for maintenance. Please try again

later” to “YourBenefitsNow! is currently down for maintenance. This does not impact your benefit, we apologize for any inconvenience this may have caused.

Please click [here](#) for additional information.

For more information for the following public assistance programs as well as applying please visit:

[Medi-Cal](#) [CalFresh](#) [EBT](#)".

- i. [here](#) will be a hyperlink that will take the participants to the CalSAWS Resources page
 1. CalSAWS Resources website:
<https://www.calsaws.org/resources/>
 - ii. [Medi-Cal](#) will be a hyperlink that will take the participants to the Covered California website
 1. Covered California Logo (Appendix section Figure 4.1.1) will display underneath the Medi-Cal hyperlink.
 2. Covered California website:
<https://www.coveredca.com>
 - iii. [CalFresh](#) will be a hyperlink that will take the participants to the CalFresh website
 1. CalFresh logo (Appendix section Figure 4.1.2) will display underneath the CalFresh hyperlink.
 2. CalFresh website: <https://www.getcalfresh.org>
 - iv. [EBT](#) will be a hyperlink that will take the participants to the EBT log in portal
 1. Picture of EBT card (Appendix section Figure 4.1.2) will display underneath the EBT hyperlink.
 2. EBT log in portal website:
<http://www.ebtproject.ca.gov/>
- b. Update the “Resources” box on the right hand side
- i. “Department of health care services” to be updated to “Department of Health Care Services”.
 - ii. Create a link titled “To Contact DPSS Customer Service”
 1. This hyperlink will take the user to the DPSS Customer Service Center information.
 - a. Website:
http://dpss.lacounty.gov/wps/portal/dpss/main/about-us/customer-service-center!/ut/p/b1/04_SjzQONjA1NjY3MzfXj9CPykssy0xPLMnMz0vMAfGjzOLdDAwM3P2dgo0MXM0cDRz9g70MQy28DYMDzYAKIIEU-la5GXgGGRr7OrmbG1mEGRLS76UflZ6TnwS0Klw_Ck0xpllgBQY4gKOBvp9Hfm6qfm5UjkV2I

okiapsgteodl4d5l2djqs80smtfl1o2x0ywMDBHT0JTMkdMRjAwQU9QQktKVIEwS0c2/

- c. Update the “For Case Information, please contact your case worker.” message located at the bottom of the page to “For case information, please contact your case worker.”
- d. Add the “Am I Eligible for Benefits?” box along with all associated links that’s located to the left side of the YBN website to the static downtime static page.

2.1.4 Page Location

YourBenefitsNow! downtime static page

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Department of Public Social Services Mobile App downtime static pop-up

2.2.1 Overview

The message on the Department of Public Social Services (DPSS) mobile application downtime static pop-up will be updated to incorporate alternative public assistance sites that are available for participants to use for additional information during the downtime period.

2.2.2 Department of Public Social Services (DPSS) Mobile App downtime static pop-up Mockup

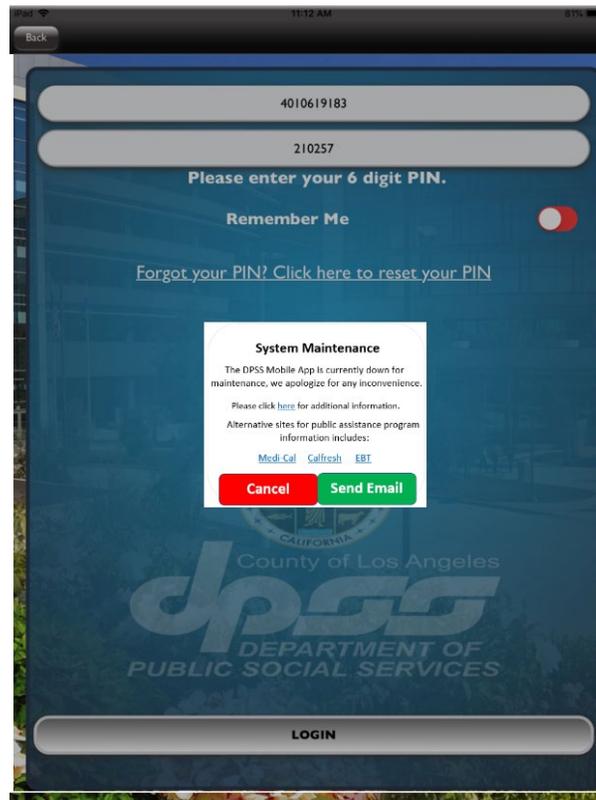


Figure 2.2.1 – Department of Public Social Services (DPSS) Mobile App downtime static pop-up Mockup

2.2.3 Description of Changes

1. Update the DPSS Mobile App downtime static pop-up as shown on Figure 2.2.1
 - a. Update the existing DPSS Mobile APP downtime static pop-up message from “System Maintenance The DPSS Mobile APP is currently down for system maintenance. Please try again later. We are sorry for the inconvenience. Need Help? Contact us YBN_Webmaster@dps.lacounty.gov” to “System Maintenance The DPSS Mobile App is currently down for maintenance, we apologize for any inconvenience. Please click [here](#) for additional information. Alternative sites for public assistance program information include: [Medi-Cal](#) [CalFresh](#) [EBT](#)”.
 - i. When the participants click on the [here](#) hyperlink, it will navigate to the CalSAWS resource website on the browser window.
 1. CalSAWS Resources website:
<https://www.calsaws.org/resources/>

- ii. When the participants click on the [Medi-Cal](#) hyperlink, it will navigate to the Covered California website on the browser window.
 - 1. Covered California website: <https://www.coveredca.com>
- iii. When the participants click on the [CalFresh](#) hyperlink, it will navigate to the CalFresh website on the browser window.
 - 1. CalFresh website: <https://www.getcalfresh.org>
- iv. When the participants click on the [EBT](#) hyperlink, it will navigate to the EBT log in portal website on the browser window.
 - 1. EBT log in portal website: <http://www.ebtproject.ca.gov/>

2.2.4 Page Location

Department of Public Social Services mobile application downtime static pop-up

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

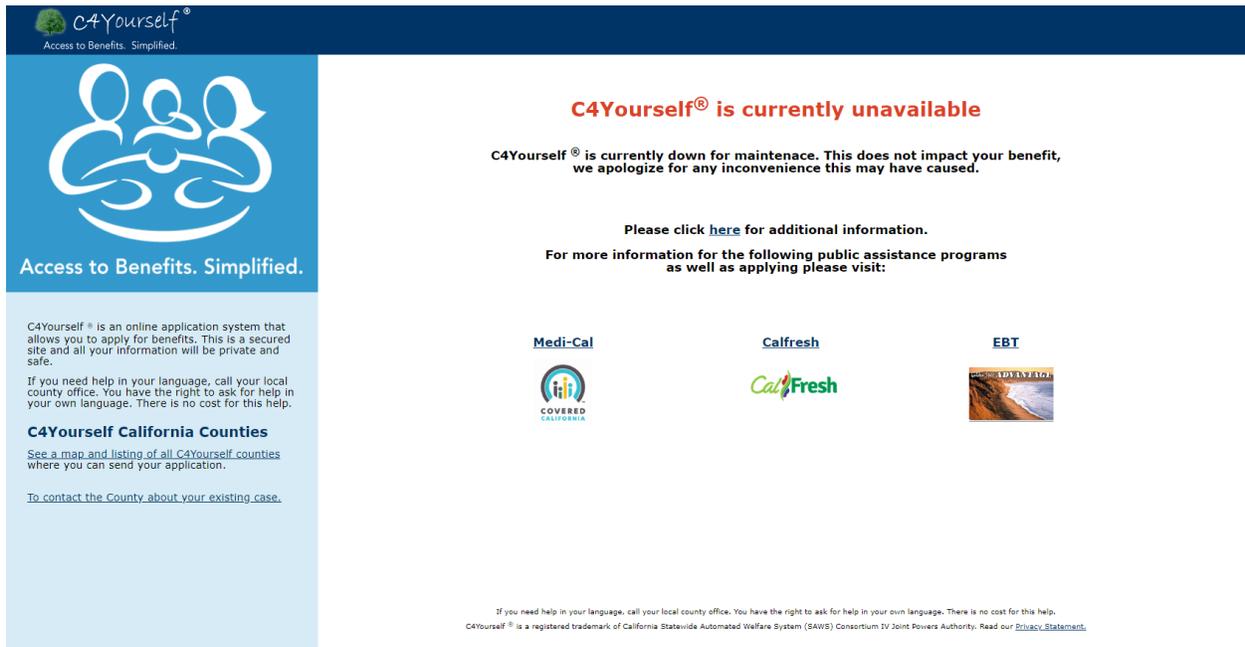
N/A

2.3 C4Yourself Website

2.3.1 Overview

The message on C4Yourself downtime static page will be updated to incorporate alternative public assistance sites that are available for participants to use for additional information during the downtime period.

2.3.2 C4Yourself Downtime Static Page Mockup



The mockup shows a website layout for a downtime notice. At the top left is the C4Yourself logo with the tagline 'Access to Benefits. Simplified.' Below this is a large blue graphic with a white icon of three stylized figures. To the right, a red heading states 'C4Yourself® is currently unavailable'. Below this, a black text block explains the downtime and includes a link for more information. Further down, three logos are displayed: Medi-Cal, CalFresh, and EBT. At the bottom, a small disclaimer text is visible.

C4Yourself® is currently unavailable

C4Yourself® is currently down for maintenance. This does not impact your benefit, we apologize for any inconvenience this may have caused.

Please click [here](#) for additional information.

For more information for the following public assistance programs as well as applying please visit:

Medi-Cal **CalFresh** **EBT**

If you need help in your language, call your local county office. You have the right to ask for help in your own language. There is no cost for this help. C4Yourself® is a registered trademark of California Statewide Automated Welfare System (SAWS) Consortium TV Joint Powers Authority. Read our [Privacy Statement](#).

Figure 2.3.1 – C4Yourself Downtime Static page Mockup



C4Yourself®

Access to Benefits. Simplified.

California Counties

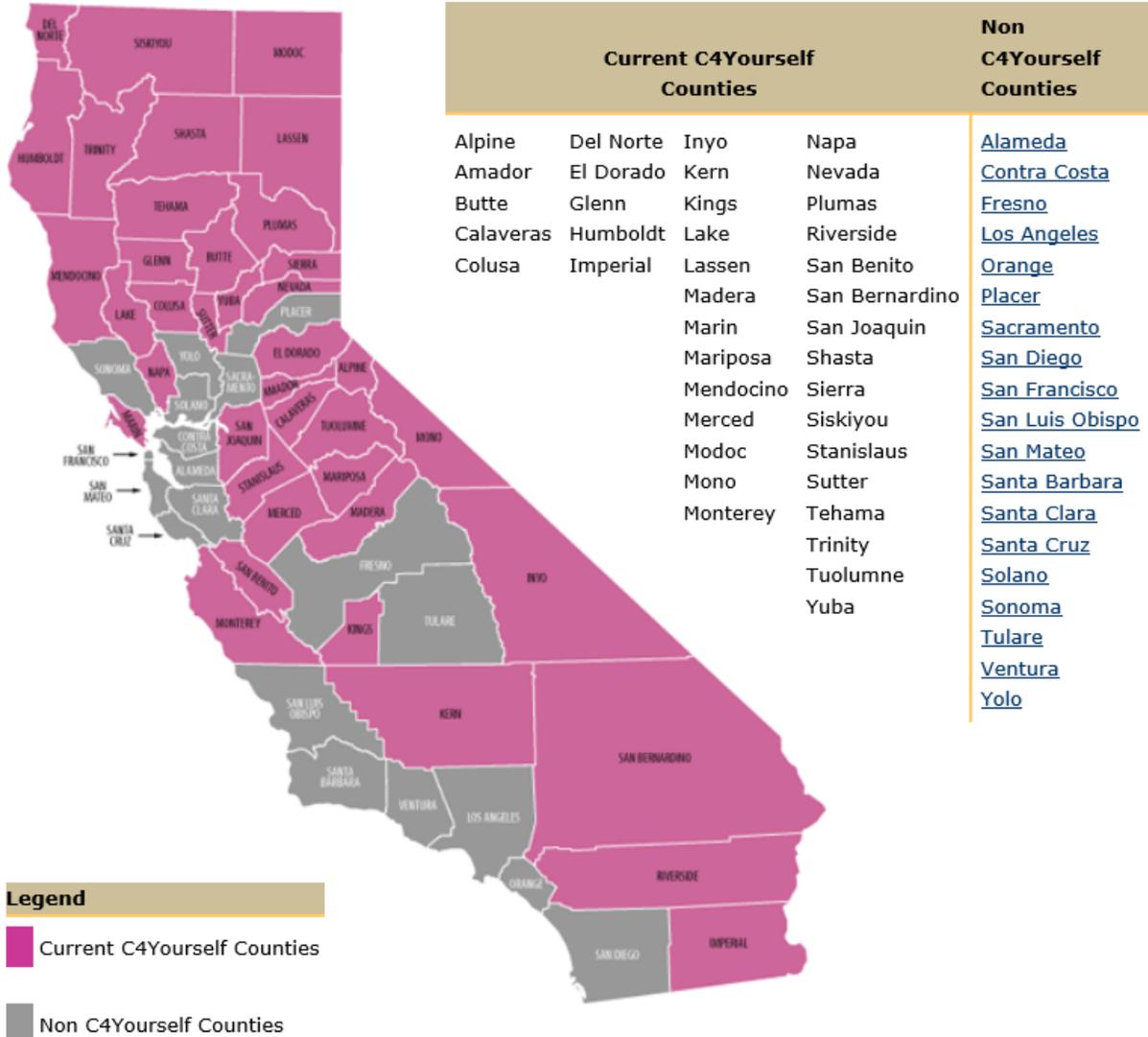


Figure 2.3.2 – C4Yourself California Counties Mockup

If you wish to contact the county about your existing case, call:

- Alpine**
<http://www.alpinecountyca.gov/>
(877)410-8801
- Amador**
<http://www.co.amador.ca.us/>
(877)410-8802
- Butte**
<https://www.buttecounty.net/>
(877)410-8803
- Calaveras**
<http://calaverasgov.us/>
(877)410-8804
- Colusa**
<http://www.countyofcolusa.org/>
(877)410-8805
- Del Norte**
<http://www.co.del-norte.ca.us/>
(877)410-8806
- El Dorado**
<https://www.edgov.us/>
(877)410-8807
- Glenn**
<http://www.countyofglenn.net/>
(877)410-8808
- Humboldt**
<http://humboldtgov.org/>
(877)410-8809
- Imperial**
<http://www.co.imperial.ca.us/>
(877)410-8810
- Inyo**
<http://www.inyocounty.us/>
(877)410-8811
- Kern**
<http://www.co.kern.ca.us/>
(877)410-8812
- Kings**
<http://www.countyofkings.com/>
(877)410-8813
- Lake**
<http://www.co.lake.ca.us/>
(877)410-8814
- Lassen**
<http://www.co.lassen.ca.us/>
(877)410-8815
- Madera**
<http://www.madera-county.com/>
(877)410-8816
- Marin**
<http://www.marincounty.org/>
(877)410-8817
- Mariposa**
<https://www.mariposacounty.org/>
(877)410-8818
- Mendocino**
<http://www.co.mendocino.ca.us/>
(877)410-8819
- Merced**
<http://www.co.merced.ca.us/>
(877)410-8820
- Modoc**
<http://www.co.modoc.ca.us/>
(877)410-8821
- Mono**
<http://www.monocounty.ca.gov/>
(877)410-8822
- Monterey**
<http://www.co.monterey.ca.us/>
(877)410-8823
- Napa**
<http://www.countyofnapa.org/>
(877)410-8824
- Nevada**
<http://www.mynevadacounty.com/>
(877)410-8825
- Plumas**
<http://www.plumascounty.us/>
(877)410-8826
- Riverside**
<http://www.countyofriverside.us/>
(877)410-8827
- San Benito**
<http://www.cosb.us/>
(877)410-8828
- San Bernardino**
<http://www.sbcounty.gov/>
(877)410-8829
- San Joaquin**
<http://www.sjgov.org/>
(877)652-0730
- Shasta**
<http://www.co.shasta.ca.us/>
(877)652-0731
- Sierra**
<http://www.sierracounty.ca.gov/>
(877)652-0732
- Siskiyou**
<http://www.co.siskiyou.ca.us/>
(877)652-0733
- Stanislaus**
<http://www.stancounty.com/>
(877)652-0734
- Sutter**
<https://www.co.sutter.ca.us/>
(877)652-0735
- Tehama**
<http://www.co.tehama.ca.us/>
(877)652-0736
- Trinity**
<http://www.trinitycounty.org/>
(877)652-0737
- Tuolumne**
<http://www.tuolumnecounty.ca.gov/>
(877)652-0738
- Yuba**
<http://www.co.yuba.ca.us/>
(877)652-0739

Figure 2.3.3 – C4Yourself contact information for Mockup

2.3.3 Description of Changes

- 1) Update the C4Yourself downtime static page as shown on Figure 2.3.1
 - a) Update the existing downtime message on the downtime static page to “C4Yourself® is currently unavailable
C4Yourself® is currently down for maintenance. This does not impact your benefit, we apologize for any inconvenience this may have caused. Please click [here](#) additional information. For more information for the following public assistance programs as well as applying please visit:
[Medi-Cal CalFresh EBT](#)”.
 - i) [CalSAWS](#) will be a hyperlink that will take the participants to the CalSAWS Resources page
 - (1) CalSAWS Resources website:
<https://www.calsaws.org/resources/>
 - ii) [Medi-Cal](#) will be a hyperlink that will take the participants to the Covered California website
 - (1) Covered California Logo (Appendix section Figure 4.1.1) will display underneath the Medi-Cal hyperlink.
 - (2) Covered California website: <https://www.coveredca.com>
 - iii) [CalFresh](#) will be a hyperlink that will take the participants to the CalFresh website
 - (1) CalFresh logo (Appendix section Figure 4.1.2) will display underneath the CalFresh hyperlink.
 - (2) CalFresh website: <https://www.getcalfresh.org>
 - iv) [EBT](#) will be a hyperlink that will take the participants to the EBT log in portal
 - (1) Picture of EBT card (Appendix section Figure 4.1.2) will display underneath the EBT hyperlink.
 - (2) EBT log in portal website: <http://www.ebtproject.ca.gov/>
- 2) Create a static page of <https://c4yourself.com/c4yourself/counties.jsp> as shown on Figure 2.3.2
this will allow users to view the list of the C4Yourself counties even when C4Yourself is down.
 - a) Update the existing “[Click here](#) for a map and listing of all C4Yourself counties where you can send your application.” to “[See a map and listing of all C4Yourself counties](#) where you can send your application.” that is located on the left hand side of the existing downtime static page.
- 3) Create a static page of <https://c4yourself.com/c4yourself/ivrContact.jsp> as shown on Figure 2.3.3 this will allow user to view the contact information for the counties.

- a) This will be a hyperlink title "[To contact the County about your existing case.](#)" this will be added to the left hand side under the "[See a map and listing of all C4Yourself counties](#) where you can send your application."

2.3.4 Page Location

C4Yourself downtime static page

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 C4Yourself Mobile Application

2.4.1 Overview

The message on the C4Yourself mobile application downtime static pop-up will be updated to direct participants to the C4Yourself website during the downtime period for the mobile application.

2.4.2 C4Yourself Mobile App downtime static pop-up Mockup

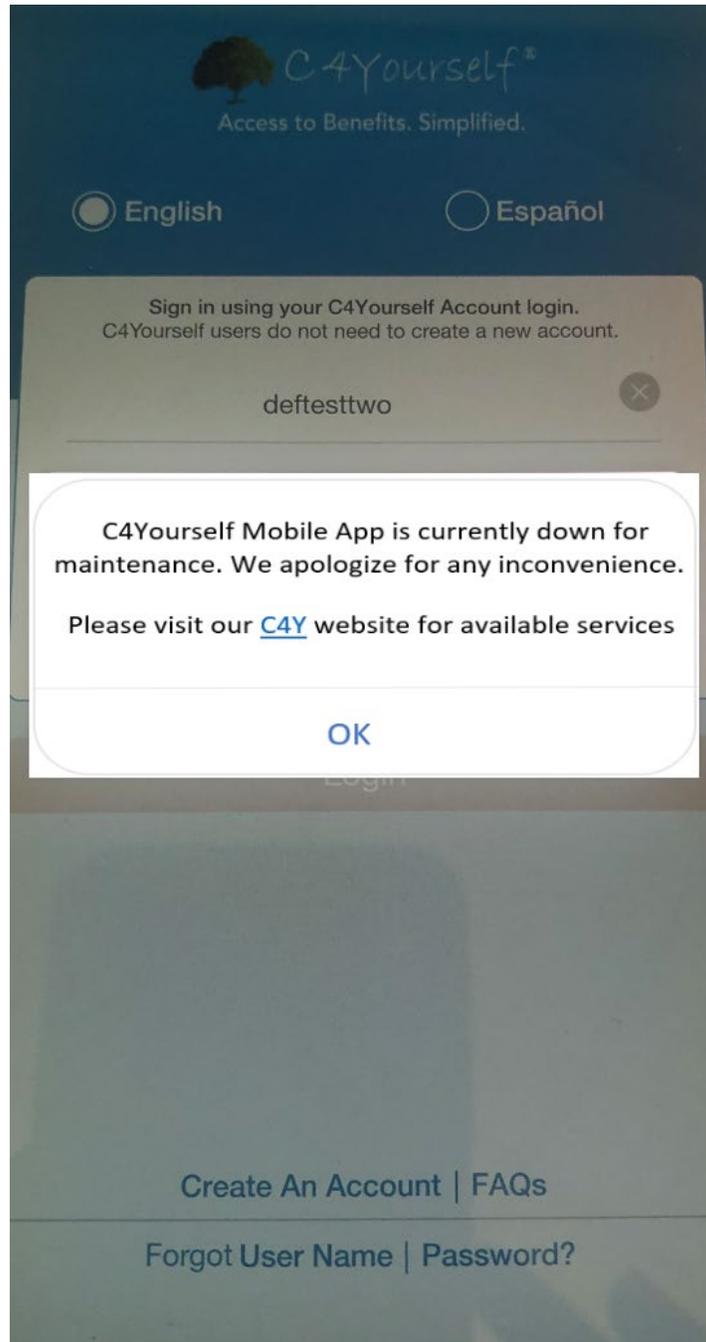


Figure 2.4.1 – C4Yourself Mobile App downtime static pop-up Mockup

2.4.3 Description of Changes

1. Update the C4Yourself Mobile Application downtime static pop-up as shown on Figure 2.4.1
 - a. Update the existing C4Yourself Mobile App downtime static pop-up message from “Due to technical difficulties, we are

unable to process your request now. Please try later.” to “C4Yourself Mobile App is currently down for maintenance. We apologize for any inconvenience. Please visit our [C4Y](#) website for available services.

- i. [C4Y](#) will be a hyperlink that will take the participants to the C4Yourself website

- 1. C4Yourself website:

- <https://c4yourself.com/c4yourself/index.jsp>

2.4.4 Page Location

C4Yourself mobile application downtime static pop-up

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 CalSAWS.org Resources page

2.5.1 Overview

The Resources page on the external CalSAWS Website (CalSAWS.org) will be updated to include an “Outages” section to incorporate alternative public assistance sites that are available for participants to use, counties’ contact information, and known system outage durations.

2.5.2 Resources Page on CalSAWS Website Mockup

CalSAWS [News](#) [Meetings](#) [Release Notes](#) [Procurement](#) [Resources](#) [Careers](#) [About Us](#) [Ask CalSAWS](#)

Resources

As a public resource to the community, the links below relate to benefits, healthcare, legal counseling, family assistance, employment/education, and general resources. Please explore the sites below to learn more.

Outages

Current System Outages

  **Full C4Yourself Outage – Wednesday, March 25, 2020 at 8:00PM until 10:00PM**
During this period, users will be unable to access the C4Y application.

Alternative sites for information include:
[Medi-Cal: Covered California](#)
[CalFresh: GetCalFresh](#)
[EBT General Information: EBT Project](#)
[EBT Account Login: EBT CardHolder Portal](#)

Apply by Phone:
What County are you applying with? (during business hours)

IVR Contact Number: 866-613-3777
This county is currently accepting new applications.

Scheduled System Outages

 **Full YBN Outage – Friday, April 3, 2020 at 6:00AM until 11:00AM**
During this period, users will be unable to access the YBN application.

 **Full C4Yourself Outage – Wednesday, April 8, 2020 at 1:00PM until 3:00PM**
During this period, users will be unable to access the C4Y application.

Figure 2.5.1 – Resources Page on CalSAWS Website Mockup (Web Version)

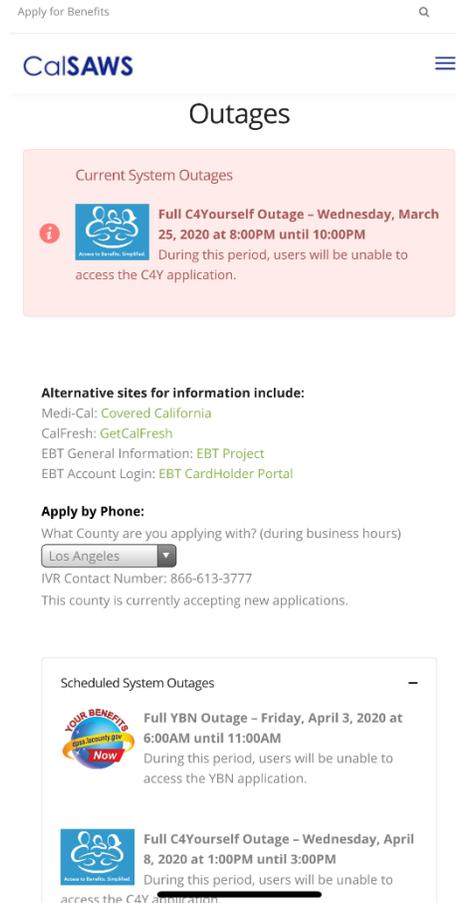


Figure 2.5.2 – Resources Page on CalSAWS Website Mockup (Mobile Version)

2.5.3 Description of Changes

1. Update the existing Resources page on the CalSAWS Website (CalSAWS.org) to include an “Outages” section.
 - a. Add a “Current System Outages” box to inform participants about any YBN or C4Yourself system outages that are currently happening (this section will only display if there is a current outage to the YBN or C4Yourself website). This box will display the YBN/C4Y logos (Appendix section Figure 4.1.4 and 4.1.5), date, duration, and if the users will/will not be able to access the application during the outage.
 - b. Include the following links as alternative public assistance sites for information:
 - i. <https://www.coveredca.com/>
 - ii. <https://www.getcalfresh.org/>
 - iii. <http://www.ebtproject.ca.gov/>
 - iv. <https://www.ebt.ca.gov/cardholder/>
 - c. Include section for participants who are applying by phone with the corresponding IVR Contact Number.

- i. This will include a drop down field that will list LA County and all the C-IV Counties. The corresponding IVR contact number will be displayed based on the County that is selected.
- d. Add a "Scheduled System Outages" box to inform participants about any scheduled YBN or C4Yourself system outages that are planned for a future date. This box will automatically be "opened" showing all the details, if there are any known outages scheduled for the near future. Otherwise, the box will remain "closed". The box will display the YBN/C4Y logos (Appendix section Figure 4.1.4 and 4.1.5), date, duration, and if the users will/will not be able to access the application during the outage.

2.5.4 Page Location

CalSAWS Website - Resources page (www.calsaws.org/resources/)

~~2.5.6~~2.5.5 Security Updates

N/A

~~2.5.7~~2.5.6 Page Mapping

N/A

~~2.5.8~~2.5.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.27.1.25	The LRS shall, upon completion of an application for benefits, route the information to the appropriate Local Office Site for processing.	Participants are provided information to appropriate public resources during the downtime period.

4 APPENDIX



Figure 4.1.1 – Covered California Logo



Figure 4.1.2 – CalFresh Logo

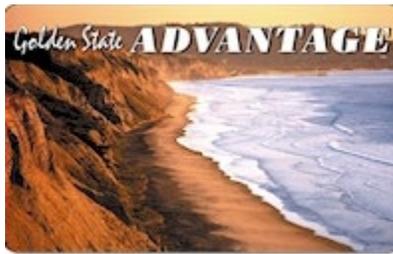


Figure 4.1.3 – EBT card picture



Figure 4.1.4 – YBN Logo



Figure 4.1.5 – C4Yourself Logo



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

DRAFT

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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

DRAFT

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

Service Type Description	Total *

Status History *

Status	Status Reason	Status Date

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:

2. Date	Date will be Service Arrangement Period From date 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 from Template Repository.	Arial Font 10	N	Y	Y
3. Program Checkbox	Program will be from Service Arrangement Program Type Will populate if Approval 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. Item	Will Populate <Need Type> For example: Books 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

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	<p>Will Populate <Need Type> For example: Books</p> <p>Will populate if Denied 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>	Arial Font 10	N	Y	Y
6. Other Checkbox	<p>Checked when there is status reason under Service Need Status Detail</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>	Arial Font 10	N	Y	Y
7. Other	<p>Reason will be Service Need status reason</p> <p>Will populate if Other 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</p>	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

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

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

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

There are 37 updated variable populations.

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.

When approved for FS or HVP transportation the NA 820 will prepopulate the following sections (See Supporting Documents # 1 for population):

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.

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 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
28 rate
 X 29 per 30
 = \$ 31

32 your car's mileage
33 rate
 X 34 per 35
 X 36 miles
 = \$ 37

38 parking 40
 = \$ 39 month school term other

41 other: 42
43 rate
 X 44 per 45
 = \$ 46

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

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

- viii. Family Stabilization- Transportation
- ix. 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 823 through Service arrangement detail page.

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

There are 5 updated variable populations in NA 821.

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

DRAFT

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

- 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 Checkbox	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.

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

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213170

Add CalSAWS Analytics Dashboard Landing
Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mayuri Srinivas
	Reviewed By	Justin Dobbs, Ravneet Bhatia, Dennis Kong, Lisa Chea, Gokul Suresh

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/10/2020	1.0	Original	Mayuri Srinivas

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1 OVERVIEW

A Business Intelligence Report Search page within LRS/CalSAWS will facilitate user access and searches for reports and dashboards within the analytics tool. Such a page will support the analytics re-platform effort as portions of Business Intelligence dashboards are moved to the new analytics tool. The enhancements recommended within this document outline the menu navigation and search page functionality.

1.1 Current Design

The LRS/CalSAWS system allows access to Business Intelligence via the “Business Intelligence” local navigation option beneath the global “Reports” navigation option. Clicking ‘Business Intelligence’ opens a new tab within the browser, which includes all subsequent navigation options within Business Intelligence.

1.2 Requests

To provide a consistent experience within the LRS/CalSAWS System, introduce a Business Intelligence Online page within the LRS/CalSAWS application to connect the user to the desired report, whether it be in Business Intelligence or elsewhere.

1.3 Overview of Recommendations

Change the Reports – Business Intelligence page to display direct links to the corresponding dashboards in a categorized manner. This update is to improve the flow to access each dashboard report that exists in the system along with new reports that are created. The user will navigate from the Reports tab to the Business Intelligence tab and will then see all the different categories of reports in the Task Navigation bar of the new Business Intelligence Report Search page.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Business Intelligence- Report Search

2.1.1 Overview

The Business Intelligence local navigation option will be modified to direct the user to a new Business Intelligence Reports section within the LRS/CalSAWS system. This section will contain navigation options to replace the initial navigation available within the current Business Intelligence landing page. Under each of the navigation tabs, links will be displayed to take the user to the specific report needed.

2.1.2 Mockup

LRS
Los Angeles
PROD

Journal Help Resources Page Mapping Images Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units **Reports** Client Corresp. Admin Tools

Welcome, !

Worker ID: 19AS00009T Case Number: Submit

On Request 05, 2020
Scheduled

Business Intelligence 1

Announcements

Type	Date
Release 20.02.19-Release Notes	LRS
Release Note Report	LRS

LRS Quick Links

[Reception Log](#)

My Tasks

My Schedule

My New Assignments

My Reminders Due Date

LRS Business Intelligence 2

[DPSSTATS Data Warehouse Homepage](#)

This Type_1 page took 1.95 seconds to load.

Figure 2.1.2.1- Home Page Navigation

Business Intelligence

Scorecards

DPSSTATS

Reception Log

Statistical Summary Analysis

Real Time Task Management

Operations Reports

Child Welfare Programs

STATS

Report Search

▼ Refine Your Search

Title:

Category:

▼

Results per Page: 50 Search

Search Results Summary
Results 1 - 42 of 42

Title	Category
▼	▼
MEDS Alerts	Alerts
MEDS Alerts Statistics	Alerts
Application Processing	CalFresh
Application Processing Timeliness	CalFresh
Applications Received	CalFresh
Caseload Management	CalFresh
Pending Applications	CalFresh
Recertifications	CalFresh
Applications Processing	General Relief
Applications Received	General Relief
Caseload Management	General Relief
Disability Assessments	General Relief
GR Aided Caseload	General Relief
GR Sanctions by Category	General Relief
GROW	General Relief
GROW Customer Activities	General Relief
Newly Approved Aided Person	General Relief
Pending Applications	General Relief

Figure 2.1.2.3- Business Intelligence – Report Search

2.1.3 Description of Changes

1. Implement a Business Intelligence Report Search page that will be accessible at Global: Reports Local: Business Intelligence (1) or Homepage (2): "DPSSTATS Data Warehouse Homepage" as follows, reference Figure 2.1.2.1:
 - a. Create a Task Navigation menu to reflect the report navigation available within Business Intelligence (prior to this enhancement). Reference Table 2.1.3.1 below.
 - i. The default Task Navigation will be 'DPSSTATS'
 - b. An expandable 'Refine Your Search' arrow will drop a section down to display 'Title:' on the left and 'Category:' on the right.
 - i. The 'Title:' section is an autocomplete field that can be used to search for a specific report title.
 1. Autocomplete suggests report titles based on user-entered characters entered into the Title field that match up with a portion of the text within each report title. Autocomplete will search any part of

the title for the characters entered- not just the beginning of the title.

For Example: Within the DPSSTATS Task Navigation, If the word "Application" is entered into the Title field, the refined list of report titles will include both the "Pending Applications" and "Application Processing".

2. For the autocomplete to start providing choices, it needs 0 characters to be typed in. If the Title field is clicked on by the user, the dropdown will automatically populate with all report titles available.
 - ii. The 'Category:' section of the 'Refine Your Search' is a dropdown list showing all the categories available within the particular Task Navigation option. Reference Supporting Documents-1 and Table 2.1.3.1 below

Note: One or more report links will be available within each "Category" in the following table. Please reference Supporting Documents-1 for the specific reports listed in each category.

Task Navigation Title	Category	Security Role
Scorecards	<ul style="list-style-type: none"> • DPSSTATS Scorecard 	<ul style="list-style-type: none"> • BI Consumer Role • BI Administrator Role • BI Author Role • BI Super Role
DPSSTATS Default Landing Page	<ul style="list-style-type: none"> • Alerts • CalFresh • General Relief • Caseload History • CalWORKS • Welfare to Work • Managed Personnel • Medi-Cal • QA • SSI/SSP • WFP&I • Your Benefits Now 	<ul style="list-style-type: none"> • BI Consumer Role • BI Administrator Role • BI Author Role • BI Super Role
Reception Log	<ul style="list-style-type: none"> • Reception Log 	<ul style="list-style-type: none"> • BI Consumer Role • BI Administrator Role

		<ul style="list-style-type: none"> • BI Author Role • BI Super Role
Statistical Summary Analysis	<ul style="list-style-type: none"> • Active Caseload • Program Assignment • Graphs • DPSS at a Glance • Application Processing • Pending Applications • Terminations • Caseload Characteristics • Medi-Cal Renewal • Performance Measures 	<ul style="list-style-type: none"> • BI Consumer Role • BI Administrator Role • BI Author Role • BI Super Role
Real Time Task Management	<ul style="list-style-type: none"> • Task Management 	<ul style="list-style-type: none"> • BI Consumer Role • BI Administrator Role • BI Author Role • BI Super Role
Operations Reports	<ul style="list-style-type: none"> • WTW/REP • CalFresh • IEVS 	<ul style="list-style-type: none"> • BI Consumer Role • BI Administrator Role • BI Author Role • BI Super Role
Child Welfare Programs STATS	<ul style="list-style-type: none"> • Alerts • Foster Care • Kin-Gap • Medi-Cal • AAP • Work Order 	<ul style="list-style-type: none"> • CWS BI Consumer Role • CWS BI Vendor Exception Role • BI Administrator Role • BI Author Role • BI Super User
Child Welfare Programs STATS	<ul style="list-style-type: none"> • Placement Vendor Exception Report 	<ul style="list-style-type: none"> • CWS BI Vendor Exception Role • BI Administrator Role • BI Author Role • BI Super User

Table 2.1.3.1- Business Intelligence Categories

- iii. The 'Results per Page' section in the 'Refine Your Search' box will display the choices: 25, 50, 75, 100 to select the number of results to be shown on the page.
- iv. The 'Search Results Summary' section will update to show the amount of reports to be shown for that page based on the choice selected by user.
- v. The default selection will be '25'.
- c. Under the 'Title' and 'Category' section, the red arrow will organize the list of reports available by alphabetical order

- i. If the arrow is clicked again, organize the reports available in descending alphabetical order and vice versa.
- d. Under the 'Title' section within the 'Search Results Summary', each report will be displayed as a hyperlink with the title of the report. Each hyperlink will navigate to each corresponding report. Reference Supporting Documents-1.
 - i. The corresponding category will be listed next to the title of the report
 - ii. If the end user does not have the appropriate security to access a report, the title of the report will be displayed as text only without a hyperlink.

For example, If the user profile for account "A" does not contain the 'CWS BI Consumer Role' security role, then the 'Child Welfare Program STATS' Task Navigation option will not be displayed. Similarly, if the same account, "A", also does not contain the 'CWS BI Vendor Exception Role' security role, then within the 'Child Welfare Program STATS' Task Navigation, reports with a Category value of 'Placement Vendor Exception Report' will display as text only without a hyperlink.

- e. Under the 'Category' section, the category of each report will be displayed as text, refer to Supporting Documents-1 and Table 2.1.3.1.
- f. The link on the Home Page, refer to (2) on Figure 2.1.2.1, will directly lead to the new DPSSTATS Task Navigation tab on the new Report Search page.
- g. When a link to a report is clicked on, it will open a separate, adjacent tab depending on the platform of the report opened.

For example, if a report is clicked on that is an OBIEE report, it will open a new tab next to the Report Search tab on the browser. If a report is clicked on that is a Qlik report, it will open in another new tab next to the Report Search tab within the browser. If another OBIEE report is clicked on, it will refresh the existing tab with the OBIEE report and will load the new report. At most, there will only be two new tabs possible at once.

2.1.4 Page Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task:**

- Scorecards
- DPSSTATS
- Reception Log
- Statistical Summary Analysis
- Real Time Task Management
- Operations Reports
- Child Welfare Programs STATS

DPSSTATS is the default Task Navigation.

2.1.5 Security Updates

The LRS/CalSAWS application uses a collection of security rights that are associated to a user profile to determine the appropriate portions of the system that an end user will have access to. Security rights are associated to user accounts via the assignment of Security Roles and Security Groups by a Local Security Administrator in the county.

Security within Business Intelligence is evaluated at the Security Role level only. The following changes will modify the current Business Intelligence Security Roles to contain appropriate Security Group and Security Right names for consistency. These consistent security rights are required to facilitate the functionality of the new Business Intelligence Report Search page, which will include logic to display a report name as text or a hyperlink based on the security rights within a user profile. The following modifications will be transparent to the end users and will not impact user accounts with current access to Business Intelligence.

1. Remove the "CWS BI Consumer" Security Group from the "CWS BI Vendor Exception Role" Security Role.
2. Remove the "Release Note Report" Security Group from the "BI Administrator Role" "BI Author Role," and "BI Consumer Role"
3. Remove the "Release Note Report" Security Group from the following Security Roles:
 - BI Administrator
 - BI Author
 - BI Consumer
4. Introduce the following Security Rights and Security Groups (reference the attached Security Matrix for additional information):

Security Rights

Security Right	Right Description	Right to Group Mapping
CWSBIConsumer	Business Intelligence-Report Search	CWS BI Consumer
CWSBIVendorException	Business Intelligence-Report Search	CWS BI Vendor Exception
BIAdministrator	Business Intelligence-Report Search	BI Administrator
BIAuthor	Business Intelligence-Report Search	BI Author
BIConsumer	Business Intelligence-Report Search	BI Consumer
BISuperUser	Business Intelligence-Report Search	BI Super User

Security Groups

Security Group	Group Description	Group to Role Mapping
CWS BI Consumer	Gives the worker the ability to view Child Welfare Programs STATS dashboards excluding the Placement Vendor Exception Report	<ul style="list-style-type: none"> • CWS BI Consumer Role • View Only
CWS BI Vendor Exception	Gives the worker the ability to view the Placement Vendor Exception Report	<ul style="list-style-type: none"> • CWS BI Vendor Exception Role • View Only
BI Administrator	Full Business Intelligence dashboard access including management of access, caching and logging	<ul style="list-style-type: none"> • BI Administrator Role • View Only
BI Author	Business Intelligence dashboard access	<ul style="list-style-type: none"> • BI Author Role • View Only

Security Group	Group Description	Group to Role Mapping
	including building custom reports	
BI Consumer	Gives the worker the ability to view dashboards excluding CWS dashboards	<ul style="list-style-type: none"> • BI Consumer Role • View Only
BI Super User	Full Business Intelligence dashboard access	<ul style="list-style-type: none"> • BI Super User • View Only

2.1.6 Page Mapping

Create Page mapping for the new page.

2.1.7 Page Usage/Data Volume Impacts

On average in LRS/CalSAWS within the Los Angeles county, the 'Reports: Business Intelligence' link is clicked between 70 to 80 times per week day.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Description of Changes	Spreadsheet of all the available reports corresponding to task navigation page and category. Includes links to the actual reports.	 ReportsMapping.xlsx
2	Security Matrix	Spreadsheet of the changes to security roles, groups, and rights	 ReportsSecurityMatrix.xlsx
3	Security Updates	Spreadsheet of the breakdown of security for each Task Navigation tab	 ReportsSecurityMapping.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.1.5	The LRS shall allow COUNTY-specified Users the online ability to generate reports.	Implementing configurable Business Intelligence Report Search page to allow users to generate reports

4.2 Migration Requirements

N/A

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A

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

6 OUTREACH

N/A

7 APPENDIX

The following original Business Intelligence page maps directly to the Task Navigation options of the new Business Intelligence Report Search page.

The screenshot displays the LRS Business Intelligence dashboard. On the left, there is a sidebar with the County of Los Angeles logo and a text box explaining the DPSTATS Data Warehouse. The main area features a grid of report categories, each with an icon and a brief description:

- Scorecards**: Scorecards for measuring district performance across multiple functional areas for the Bureau of Workforce Services, GAIN, and Medi-Cal.
- DPSTATS**: Analytics and operational reports for application & caseload processing.
- Reception Log**: Real time reporting that gives individuals the ability to view the total number of participants waiting by district office and supervisorial district.
- Statistical Summary Analysis**: Analytical reports for: Active Caseload, Application Processing and Terminations.
- Real Time Task Management**: These reports display data regarding Task Management.
- Operational Reports**: Analytics Dashboard/reports for LRS Operations.
- Child Welfare Programs STATS**: Analytics and operational Child Welfare Program reports for application & caseload processing.

Figure 7.1- Business Intelligence Original Page

The following original Business Intelligence page is an example of the reports that are available within 'DPSSTATS'. This is an example of how reports will be displayed on the new Business Intelligence Report Search page within the Task Navigation of DPSSTATS.

The screenshot shows the 'DPSSTATS Table of Contents' page. It features a header with the 'dps' logo and 'Business Intelligence' text. Below the header is a navigation bar with 'DPSSTATS' on the left. The main content area is titled 'DPSSTATS Table of Contents' and is organized into four vertical columns, each containing a list of report links under various category headers.

Alerts	Caseload History	Medi-Cal	SSI/SSP
<ul style="list-style-type: none"> MEDs Alerts MEDs Alerts Statistics 	<ul style="list-style-type: none"> Summary 	<ul style="list-style-type: none"> Application Processing Application Processing Timeliness 	<ul style="list-style-type: none"> Approvals
<ul style="list-style-type: none"> CalFresh Application Processing Application Processing Timeliness Applications Received Caseload Management Pending Applications Recertifications 	<ul style="list-style-type: none"> CalWORKs Application Processing Applications Received Caseload Management Pending Applications Redeterminations Specialized Supportive Services 	<ul style="list-style-type: none"> Applications Received Caseload Management Newly Approved Aided Person Pending Applications Re-Evaluation QA Errors 	<ul style="list-style-type: none"> WFP&I Child Care Investigations Your Benefits Now Application Processing Applications Received
<ul style="list-style-type: none"> General Relief Application Processing Applications Received Caseload Management Disability Assessments GR Aided Caseload GR Sanctions by Category GROW GROW Customer Activities Newly Approved Aided Person Pending Applications 	<ul style="list-style-type: none"> Welfare to Work Caseload Management Participants Not In An Activity Unassigned Pool Managed Personnel Managed Personnel 		

Figure 7.2- DPSSTATS Original Layout Example

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213672

Standardize Account Number Format for Text
Campaigns

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Michael Barillas
	Reviewed By	Steve Hancock; Dana Petersen; Howard Suksanti; Balakumar Murthy; Himanshu Jain;

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/11/2020	1.0	Initial Draft	Michael Barillas

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1 OVERVIEW

Currently when LRS/CalSAWS notifies a customer via text message, a file containing customer contact information is generated and sent to interface partner 'Information Technology Division' (ITD). ITD then sends an LRS/CalSAWS provided message to the customer's phone number.

The file format for all text campaigns are 'Phone Number', 'Text Message', 'First Name', 'Last Name', and 'Account Number'. Account number generation is not consistent between text campaigns. Modify the Outbound Text 'Account Number' to be consistent.

ITD sends the 'Account Number' field in the Inbound Text file in the same format as received from the Outbound text file from the LRS/CalSAWS file. The Inbound Text Reader fetches files from the LRS/CalSAWS FTP server and determines validity using the LRS/CalSAWS interface file definition. If valid, the Inbound Text Reader Job then processes the record and creates a journal entry. The Inbound Text Reader Job requires a Case Number extracted from the Account Number field in order to create the journal entry. Modify the Inbound Text Reader File Definition to accept a 9 character 'Account Number'. Modify the Inbound Text Reader Job to parse the Case Number from the 'Account Number'.

1.1 Current Design

File format for all text campaigns are 'Phone Number', 'Text Message', 'First Name', 'Last Name', and 'Account Number'. Text campaigns do not have a standardized 'Account Number' format.

The following Outbound Text campaigns' 'Account Number' are comprised of 'Language Code' and 'Case Number':

- GROW Appointment SMS
- SAR7 Not Received SMS
- GROW Paperless SMS
- GEAR Paperless SMS
- GR QR7 Due Month SMS
- GR NSA Exp Txt Rmdr
- GROW Non Compliance SMS
- GR Non Compliance SMS
- Paperless SMS
- QR7 Not Received SMS
- Upload Verification SMS
- GR/GROW Paperless SMS

The following Outbound Text campaigns' Account Number are comprised of 'Appointment Date', 'Language Code', 'District', 'EW File Number', 'Case Number' and 'Cycle'

- SAR7 Rescind/Restoration
- SAR7 Sent/Reminder
- SAR7 Processed
- SAR7 Confirm Receipt

- SAR7 Incomplete

The Inbound Text Reader fetches files from the LRS/CalSAWS FTP server and stores them in the Outbound Text campaign's designated directory for validation check. During validation, validity will be determined if the inbound file matches the LRS/CalSAWS interface file definition. If the file is determined to be valid, the file will continue to be processed, otherwise the LRS/CalSAWS system will log an exception and end the batch job. If valid, the Inbound Text Reader Job then reads the 'Result Message' field in the record and creates a journal entry.

ITD sends the Account Number field in the Inbound Text file in the same format as received from the Outbound text file from the LRS/CalSAWS file. The Inbound Text Reader Job requires a Case Number extracted from the Account Number field in order to create the journal entry. Because the outbound text layouts are inconsistent, the Inbound text file received from ITD includes the same inconsistencies and causes the Inbound Text Reader job to fail.

1.2 Requests

Modify the outbound SAR7 campaigns to adhere to the existing standard text layout that specifies the 'Account Number' field as 'Language Code' and 'Case Number'.

Modify the Inbound Text Reader File Definition to accept a 9 character 'Account Number'.

Modify the Inbound Text Reader Job to parse the Case Number from the 'Account Number'.

1.3 Overview of Recommendations

1. Modify 'Account Number' generation for Outbound Campaigns SAR7 Rescind/Restoration, SAR7 Sent/Reminder, SAR7 Processed, SAR7 Confirm Receipt and SAR7 Incomplete.
2. Modify the Inbound Text Reader File Definition to accept a 9 character 'Account Number'.
3. Modify the Inbound Text Reader Job to parse the Case Number from the 'Account Number'.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

Modify the outbound SAR7 campaigns to adhere to the existing standard text layout that specifies the 'Account Number' field as 'Language Code' and 'Case Number'. Modify the Inbound Text Reader File Definition to accept a 9 character 'Account Number'. Modify the Inbound Text Reader Job to parse the Case Number from the 'Account Number'.

2.1 Modify Account Number Format for Text Campaigns

2.1.1 Overview

Modify the account number format for Text Campaigns '220 - SAR7 Received', '226 - SAR7 Incomplete', '237 - SAR7 Sent', '238 - SAR7 Rescind/Restoration', '239 - SAR7 Processed' to adhere to the new standardized format.

Campaign Number	Campaign Name	Batch Job Number
220	SAR7 Received	PO19C1302
226	SAR7 Incomplete	PO19C1303
237	SAR7 Sent	PO19C1301
238	SAR7 Rescind/Restoration	PO19C1304
239	SAR7 Processed	PO19C1305

2.1.2 Description of Change

Modify Batch Jobs 'PO19C1304', 'PO19C1301', 'PO19C1305', 'PO19C1302', and 'PO19C1303' to generate the Account Number in the format below.

Account Number (9) = {Language (2)} + {Case Number (7)}

Field Name	Field Description	Length
Language	The primary language of the person	2
Case Number	Case Number of the participant	7

2.1.3 Execution Frequency

No Change

2.1.4 Key Scheduling Dependencies

No Change

2.1.5 Counties Impacted

Los Angeles County

2.1.6 Data Volume/Performance

N/A

2.1.7 Interface Partner

Information Technology Division (ITD)

2.1.8 Failure Procedure/Operational Instructions

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

2.2 Modify Inbound Text Reader File Definition

2.2.1 Overview

Modify Batch Job 'PI19C1197' file definition to adhere to the new standard file format.

2.2.2 Description of Change

New Inbound Text Reader Definition

Field Name	Field Description	Type	Length
Phone 1	The message/cell phone number of the participant	Alpha Numeric	10
Text Message	Message given to the participant	Alpha Numeric	139

First Name	First name of the participant	Alpha Numeric	50
Last Name	Last name of the participant	Alpha Numeric	50
Account Number	Number comprised of Language Code(2) + Case Number(7)	Alpha Numeric	9
Result Message	Text message result	Alpha Numeric	20
Time Stamp	The time stamp in MM/DD/YYYY HH:MM:SS [AM/PM]	Alpha Numeric	22

2.2.3 Execution Frequency

No Change

2.2.4 Key Scheduling Dependencies

No Change

2.2.5 Counties Impacted

Los Angeles County

2.2.6 Data Volume/Performance

N/A

2.2.7 Interface Partner

Information Technology Division (ITD)

2.2.8 Failure Procedure/Operational Instructions

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

2.3 Modify Inbound Text Reader – Parse Case Number

2.3.1 Overview

Modify the Inbound Text Reader to parse the 'Case Number' from the Inbound file's 'Account Number' field.

Field Name	Field Description	Type	Length
Phone 1	The message/cell phone number of the participant	Alpha Numeric	10
Text Message	Message given to the participant	Alpha Numeric	139
First Name	First name of the participant	Alpha Numeric	50
Last Name	Last name of the participant	Alpha Numeric	50
Account Number	Number comprised of Language Code(2) + Case Number(7)	Alpha Numeric	9
Result Message	Text message result	Alpha Numeric	20
Time Stamp	The time stamp in MM/DD/YYYY HH:MM:SS [AM/PM]	Alpha Numeric	22

2.3.2 Description of Change

Modify Batch Job 'PI19C1197' to parse the 'Case Number' from the 'Account Number' field. 'Case Number' parsed from the 'Account Number' is to be used for the existing Journal Entry instead of the current 'Account Number'. Account Number is comprised of Language Code(2) plus Case Number(7).

2.3.3 Execution Frequency

No Change

2.3.4 Key Scheduling Dependencies

No Change

2.3.5 Counties Impacted

Los Angeles County

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

Information Technology Division (ITD)

2.3.8 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

Account number generation is not consistent between text campaigns. The Outbound Text 'Account Number' will be modified by this SCR to be consistent. The Inbound Text Reader fetches files from the LRS/CalSAWS FTP server and determines validity using the LRS/CalSAWS interface file definition. If valid, the Inbound Text Reader Job then processes the record and creates a journal entry. The Inbound Text Reader Job requires a Case Number extracted from the Account Number field in order to create the journal entry. This SCR will modify the Inbound Text Reader File Definition to accept a 9 character 'Account Number'. This SCR will modify the Inbound Text Reader Job to parse the Case Number from the 'Account Number'.

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.1	The LRS shall provide for the support of system interfaces and integration necessary for the coordination of services with other federal, State, and COUNTY agencies and other external agencies, for the purposes of reducing paperwork, verification of LRS Data, and preventing the duplication of LRS Data entry.	LRS/CalSAWS in this SCR will modify the Outbound Text 'account number' to be consistent. ITD sends the 'Account Number' field in the Inbound Text file in the same format as received from the Outbound text file from the LRS/CalSAWS file. LRS/CalSAWS will be modifying the definition to accept the new standardized 'Account Number' and parse 'Case Number' from the 'Account Number' for Journaling purposes.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214411 | CIV-106686

Reinstate ABAWD Geographical Wavier

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jason Francis
	Reviewed By	Business Analysts, Eligibility Build, Batch Build, Fiscal Build. System Test

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/19/2020	1.0	Initial version	Jason Francis

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1 OVERVIEW

1.1 Current Design

Per ACL 20-18, and implemented in SCRs CA-212650/CIV-106060, ABAWD logic was updated to no longer apply a geographical waiver to 34 C-IV and LRS/CalSAWS counties, effective April 1, 2020. In addition, the Time Limit Sync Job was updated to apply a Discretionary Exemption time limit status for non-exempt ABAWDs in the April 2020 and May 2020 effective months.

1.2 Requests

Per H.R. 6201, all counties are under ABAWD geographical wavier, effective April 1, 2020.

1.3 Overview of Recommendations

1. Reinstate all Counties with ABAWD Geographical Waiver as of April 2020
2. Perform a one-time data change to update affected ABAWD Status Work Requirements to 'Geographically Waived'
3. Perform a one-time data change to update affected ABAWD Time Limits to 'Geographically Waived'

1.4 Assumptions

1. The ABAWD Status determination and Time Limit Status Sync Job will automatically apply the geographical wavier for on-gong changes after the initial data change.

2 RECOMMENDATIONS

2.1 Apply the ABAWD Geographical Waiver to all counties as of April 2020

2.1.1 Overview

The system maintains a list of counties and the time periods in which they qualify for the ABAWD geographical waiver. This list must be updated for the 40 counties that now qualify for that waiver as of April 2020.

2.1.2 Description of Changes

2.1.2.1 Update the 'Counties with ABAWD Geographical Waiver' (CT 2620) to set the following counties as having a wavier as of 04/01/2020:

2.1.2.1.1 Alameda, Alpine, Amador, Butte, Calaveras, Contra Costa, Del Norte, El Dorado, Humboldt, Inyo, Lake, Lassen, Los Angeles, Marin, Mariposa, Mendocino, Mono, Napa, Nevada, Orange, Placer, Riverside, Sacramento, San Benito, San Bernardino, San Diego, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Solano, Sonoma, Tehama, Trinity, Tuolumne, Ventura, Yolo.

Note: The following 18 counties were previously set as having a geographical wavier: Colusa, Fresno, Glenn, Imperial, Kern, Kings, Madera, Merced, Modoc, Monterey, Plumas, San Joaquin, Sierra, Siskiyou, Stanislaus, Sutter, Tulare, Yuba

2.2 One-Time Data Change to Update ABAWD Status Work Requirement from 'Met' or 'Not Met' to 'Geographically Waived'

2.2.1 Overview

Prior to the implementation of this SCR, the ABAWD status for persons in the affected counties tracked whether they have met or have not met the ABAWD work requirement. This work requirement is no longer applicable with the state-wide wavier. This data change will identify those existing ABAWD status records and the system will set the Work Requirement to 'Geographically Waived'. The updated ABAWD determination logic will ensure that ABAWD statuses are set accurately after this data change.

2.2.2 Description of Change

1. Perform a one-time data change to all ABAWD Status records that meet the following conditions:

- a. The status is effective in April 2020 or later
 - b. The ABAWD Work Requirement is one of the following:
 - i. Met
 - ii. Not Met
2. This data change will set the Work Requirement to 'Geographically Waived' as of 4/1/2020.

2.2.3 Estimated Number of Records Impacted/Performance

CalSAWS/LRS: 100,000 records

C-IV: 100,000 records

2.3 One-Time Data Change to Update Non-Exempt / Not Prorated ABAWD Time Limits to 'Geographically Waived'

2.3.1 Overview

Prior to the implementation of this SCR, the ABAWD Time Limit Status Sync Job identified non-exempt ABAWDs that don't meet the work requirement and automatically set a 15% ABAWD Exemption for the April and May 2020 Effective Months. Time Limits in Marin county can have additional statuses. This data change will identify those existing time limit records and the system will set them to Geographically Waived. The existing Time Limit sync job logic will ensure that time limits are set accurately after this data change.

2.3.2 Description of Change

1. Perform a one-time data change to all ABAWD Time Limit records that meet the following conditions:
 - a. The Effective Month is either April 2020 or May 2020
 - b. The Time Limit Status is one of the following:
 - i. 15% ABAWD Exemption
 - ii. Good Cause
 - iii. Met work requirement
 - iv. Did not meet work requirement
 - v. Consecutive Months
 - vi. APP Appeal
2. This data change will set the status to 'Geographically Waived'. This will occur even if the record was created or updated by a user.

2.3.3 Estimated Number of Records Impacted/Performance

CalSAWS/LRS: 235,000 records

C-IV: 220,000 records

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.21	The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes.	The EDBC, ABAWD Status, and Time Limit Detail logic will be updated based on changes to the counties eligible for the ABAWD geographical wavier.
2.16.4.4	The LRS shall include the ability to process a mass update that involves the development of new policy in response to changes in federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	A data change will be applied to update ABAWD Status and ABAWD Time Limit records

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214492

Add new Document Type Value to YBN
Verification Upload

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Chao Guan, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03.02.2020	1.0	Initial	KusnadiE, SuksantiH

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1 OVERVIEW

This System Change Request (SCR) will update the Document Type field to the Verification Upload pages on the Your Benefits Now (YBN) portal so that the ABAWD Exemption Screener Questionnaire can be upload and process in the LRS/CalSAWS system by County workers.

1.1 Current Design

Currently, the YBN portal does not have a specific Document Type dedicated for the ABAWD Exemption Screener Questionnaire. User(s) would need to choose one of the existing value in order to upload the Questionnaire which will lead to the uploaded document to be associated to an incorrect document type.

1.2 Requests

Update the Your Benefits Now (YBN) portal so that the ABAWD Exemption Screener Questionnaire can be uploaded through the YBN portal with correct Document Type so that County workers can process it in the LRS/CalSAWS system appropriately.

Also add a new mapping of the new form between YBN, LRS, EDMS system so the file can be stored in the repository system and a Point of Service Scan (POSS) task can be generated.

1.3 Overview of Recommendations

1. Add a new Document Type value in the Verification Upload pages (the new Document Type will be displayed on all pages that the user can upload a verification document) on the YBN portal for the ABAWD Exemption Screener Questionnaire.
2. Add a new mapping for the new ABAWD Exemption Screener document.

1.4 Assumptions

1. New Document Type will only be added for the YBN portal, no changes or update will be done to the DPSS Mobile App at this time.
2. There will be no impact on ICT process. ABAWD Exemption Screener document will not be transfer as part of the ICT process.
3. There will be no change on how the system assigns POSS task to a worker.
4. ABAWD Exemption Screener document will be scanned in Kofax using POSS or ePOSS batch class for LRS/CalSAWS system to create task.
5. There is no change on the location that the document can be viewed in LRS/CalSAWS application. The document is available at the Global images button and Point of Services page.

2 RECOMMENDATIONS

2.1 YBN Portal - Verification Upload Pages

2.1.1 Overview

The YBN portal allow users/participants to upload verification documents for an existing case or when they are applying for a new program. The Verification Upload pages allows the users/participants to link the uploaded document by specifying the type of document that they are uploading.

2.1.2 Verification Upload Mockup

Verification Upload

To upload documents, please follow the steps below. Individual files cannot exceed 8 megabytes in size and must be a .jpg, .png, .gif, .tif, or .pdf.

* 1. Select Case Number:

* 2. Select a Person:

* 3. Select Program Type:

* 4. Select the documents to upload:

* 5. Select Document Type:

* 6. Select the "Upload Document" button:

Case Number:	Individual Name:	Document Type:	Preview:	Delete:
B02W147	Test User	ABAWD Exemption Screener	Preview	<input type="button" value="X"/>

Once all documents have been uploaded, click the "Submit Documents" button.

Previously Submitted Verification Documents

▼ T02BB47

Submission Date	Number of Images Uploaded
02/28/2020	1

Figure 2.1.1 – Verification Upload

2.1.3 Description of Changes

1. Add a new value to the Document Type field in the YBN portal as shown in Figure 2.1.1.
 - a. New Value to be added to the Document Type drop down field will be titled 'ABAWD Exemption Screener'.
 - i. Document Type drop down field will be listed in alphabetical order.
 - b. New value will display for all Program Type, except for GA/GR Program Type.
 - c. The new 'ABAWD Exemption Screener' will display under the Document Type section when users/participants upload a document with this Document Type prior to submitting the document(s).
 - d. This update is applicable for the following threshold languages:

Language	Document Type
Spanish	Evaluación de la Exención para ABAWD
Armenian	ABAWD ազատման ցանկ
Cambodian	សន្លឹកសំណៅការលើកលែងសម្រាប់កម្មវិធី ABAWD
Chinese	ABAWD 豁免篩選表格
Korean	ABAWD 면제 자격 심사 양식
Russian	Список исключений ABAWD
Tagalog	Kinakailangan sa Pagbubukod ng ABAWD
Vietnamese	Sàng Lọc Miễn Trừ ABAWD

Note: The new 'ABAWD Exemption Screener' will be added to the Document Type field for all pages where users/participants are able to upload a verification document (New application, Case Upload, Form Verification, and CBO/CFO application/case upload).

2.1.4 Page Location

- **Global:**
- **Local:**
- **Task:**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

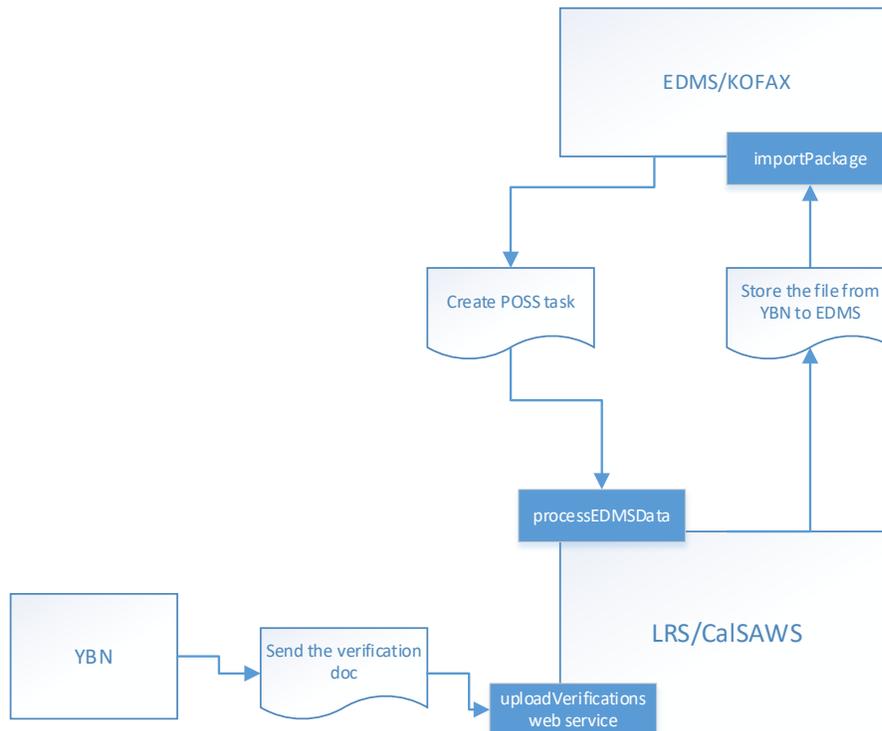
2.2 Add a new mapping for the new ABAWD Exemption Screener document

2.2.1 Overview

When a document is uploaded in YBN portal, there are several web service calls involved to store the file.

Also when a document is scanned through Kofax system, there is a web service call to LRS/CalSAWS to create POSS task and generate a link for a worker to navigate to Electronic Document Management System(EDMS) to view the document.

As part of this SCR, there will be some updates that are needed to create a mapping with the new form that is specific to the new ABAWD Exemption Screener document. LRS/CalSAWS will use this new form to communicate between LRS/CalSAWS, YBN, and Kofax/EDMS systems.



2.2.2 Description of Change

1. Add the new ABAWD Exemption Screener document form code into the Code Category (CT 452 - Image Document Type Code). This code category is used to map the new form specific to the ABAWD Exemption Screener document for communication between YBN, LRS/CalSAWS, and EDMS systems.
2. Add ABAWD Exemption Screener document form code in Code Category (CT 10027 – EDMS Document). This code category is used to map this new form specific to the ABAWD Exemption Screener document for communication between Kofax/EDMS and LRS/CalSAWS systems.

Technical Note: EDMS form ID for the ABAWD Exemption Screener document is CF 377.11E
Form description: CalFresh ABAWD Time Limit Exemption Screening Form.

2.2.3 Execution Frequency

No change.

2.2.4 Key Scheduling Dependencies

N/A.

2.2.5 Counties Impacted

Los Angeles County.

2.2.6 Data Volume/Performance

N/A.

2.2.7 Interface Partner

Kofax, EDMS

2.2.8 Failure Procedure/Operational Instructions

N/A.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.27.1.5	LRS shall expose an interface for the transfer of Data from the Los Angeles Self Service Portal, eliminating the necessity for the applicant to re-enter information.	We are adding a new document type to allow the ABAWD Exemption Screener questionnaire to be uploaded and submitted through the YBN portal.