

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-215687

DDID 2686 FDS: GA GR Phase 1 - Case Summary  
and Application Page Changes

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Taylor Fitzhugh
	Reviewed By	[individual(s) from build and test teams that reviewed document]

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DRAFT

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# 1 OVERVIEW

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This SCR will add functionality for the display of the new automated General Assistance/General Relief program.

## 1.1 Current Design

The CalSAWS system is designed to automate the rules for Los Angeles County's implementation of the General Assistance/General Relief program (GA/GR) as well as the automation and monitoring of their GROW program. The CalWIN system currently uses a different set of rules for each county and currently does not support the employment services programs within its system.

## 1.2 Requests

Create a separate General Assistance/General Relief program to support the automation of eligibility determinations. This program will be available to the 18 counties using the CalWIN system at the time of release. The counties supported by the C-IV system will be able to opt into using the new program at a later time.

## 1.3 Overview of Recommendations

1. Add the ability to create and track a General Assistance/General Relief program application.
2. Update the program dropdowns and displays to filter the correct General Assistance/General Relief program based on the program supported by the county of the logged in user.

## 1.4 Assumptions

1. EDBC Rules, Batch processes, and reports for the new program will be added and modified in future SCRs.
2. Manual EDBC will be unavailable for the new program and will be added in a future SCR.
3. Data collection and employment services pages related to the General Assistance/General Relief program will be modified in a set of future SCRs.
4. Los Angeles County will continue to use the existing 'GA' program code for the General Assistance/General Relief program and will not use the new program code 'GR' that is being added for the automated General Assistance/General Relief solution applicable to the CalWIN counties.
5. Standard event creation logic will be applied to the new General Assistance/General Relief program.

## 2 RECOMMENDATIONS

---

### 2.1 Add a system property to disable GA/GR functionality

#### 2.1.1 Overview

The GA/GR functionality will be implemented in waves and will not be required until other counties outside of LA have been migrated. The functionality will be disabled to prevent impacts to the LA GR workflow until the migration of the CalWIN counties.

#### 2.1.2 Description of Changes

Add a new system property that will allow all General Assistance/ General Relief functionality related to the new 'GR' program code to be activated and deactivated. This will be deactivated by default. The functionality shall be activated in a future effort at the time of CalWIN go live.

### 2.2 Add the new General Assistance/General Relief program

#### 2.2.1 Description of Change

Add the new General Assistance/General Relief program. Reference Appendix item A for a list of reference table values. These values are the default values and are subject to change based on implementation needs. This program will only be available for the following counties, by default:

1. Alameda
2. Contra Costa
3. Fresno
4. Orange
5. Placer
6. Sacramento
7. San Diego
8. San Francisco
9. San Luis Obispo
10. San Mateo
11. Santa Barbara
12. Santa Clara
13. Santa Cruz
14. Solano
15. Sonoma
16. Tulare
17. Ventura
18. Yolo

## 2.3 Case Summary

### 2.3.1 Overview

The Case Summary page is the landing page when accessing a case. Each program and person that is present on the case will be displayed with their status based on the view date. This page will be modified to allow the user to view and access the new General Assistance/General Relief program.

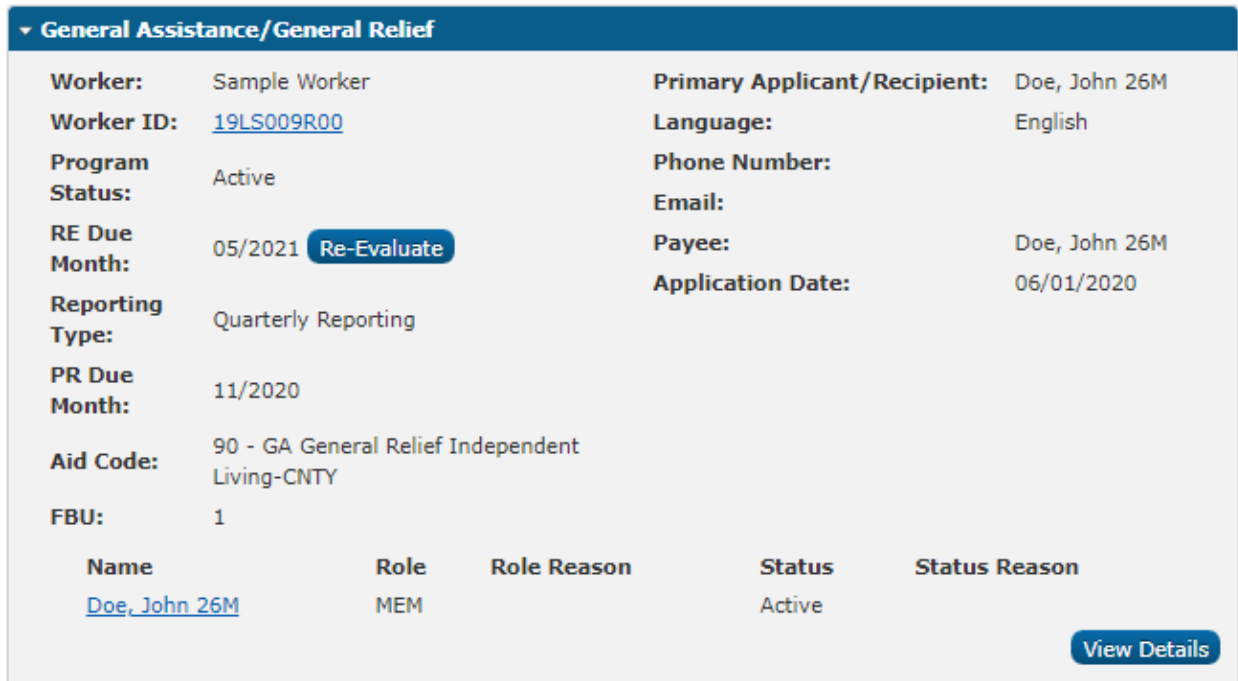
### 2.3.2 Case Summary Mockup



▼ General Assistance/General Relief

Program Begins on: 01/01/2021

Figure 2.3.2.1 – General Assistance/ General Relief (Month prior to BDA)



▼ General Assistance/General Relief

<b>Worker:</b>	Sample Worker	<b>Primary Applicant/Recipient:</b>	Doe, John 26M
<b>Worker ID:</b>	<a href="#">19LS009R00</a>	<b>Language:</b>	English
<b>Program Status:</b>	Active	<b>Phone Number:</b>	
<b>RE Due Month:</b>	05/2021 <a href="#">Re-Evaluate</a>	<b>Email:</b>	
<b>Reporting Type:</b>	Quarterly Reporting	<b>Payee:</b>	Doe, John 26M
<b>PR Due Month:</b>	11/2020	<b>Application Date:</b>	06/01/2020
<b>Aid Code:</b>	90 - GA General Relief Independent Living-CNTY		
<b>FBU:</b>	1		

Name	Role	Role Reason	Status	Status Reason
<a href="#">Doe, John 26M</a>	MEM		Active	

[View Details](#)

Figure 2.3.2.2 – General Assistance/ General Relief (Active/Denied/Ineligible)



▼ **General Assistance/General Relief**

<b>Worker:</b>	Sample Worker	<b>Primary Applicant/Recipient:</b>	Doe, John 26M
<b>Worker ID:</b>	<a href="#">19LS009R00</a>	<b>Language:</b>	English
<b>Program Status:</b>	Pending	<b>Phone Number:</b>	
<b>Aid Code:</b>		<b>Email:</b>	
<b>FBU:</b>	1	<b>Payee:</b>	Doe, John 26M
		<b>Application Date:</b>	01/01/2021

Name	Role	Role Reason	Status	Status Reason
<a href="#">Doe, John 26M</a>	MEM		Pending	

[View Details](#)

**Figure 2.3.2.3 – General Assistance/ General Relief (Pending)**

▼ **General Assistance/General Relief**

<b>Worker:</b>		<b>Primary Applicant/Recipient:</b>	Doe, John 26M
<b>Worker ID:</b>		<b>Language:</b>	English
<b>Program Status:</b>	Discontinued	<b>Phone Number:</b>	
<b>Discontinued Date:</b>	05/01/2021	<b>Email:</b>	
<b>RE Due Month:</b>	01/01/2022	<b>Payee:</b>	Doe, John 26M
<b>PR Due Month:</b>	04/01/2021	<b>Application Date:</b>	01/01/2021

**Aid Code:**

**FBU:** 1

Name	Role	Role Reason	Status	Status Reason
<a href="#">Doe, John 26M</a>	MEM		Discontinued	

[View Details](#)

**Figure 2.3.2.4 – General Assistance/ General Relief (Discontinued)**

### 2.3.3 Description of Changes

1. When the view date is on or after the application date of the program, but prior to the BDA, the block will display the field "Program Begins On". This field will display the BDA.
2. Add a section for the General Assistance/General Relief program. These blocks will display only for a date on or after the program's application date. When the view date is on or after the program's Beginning Date of Aid (BDA), the blocks will display with the following fields:
  - a. Worker: The name of the Staff assigned to the position that is assigned to the program.

- b. Worker ID: The Identifier for the position. This field will be a hyperlink to the Worker Detail page for the selected position. When no staff is assigned to the position, this field will be blank.
- c. Program Status: The status of the program on the given View Date.
- d. Discontinued Date: The date the program was Discontinued. This field will only display when the status of the program is discontinued.
- e. Aid Code: The aid code associated with the program.
- f. FBU: The Family Budget Unit for the program.
- g. Primary Applicant/Recipient: The primary applicant of the program on the given view date.
- h. Language: The spoken Language of the primary Applicant.
- i. Phone Number: The main phone number for the primary Applicant.
- j. Email: The email of the primary applicant.
- k. Payee: The Payee of the program on the given view date.
- l. Application Date: The date of the application associated to the status as of the given view date.
- m. Name: This field will list the names of all participants on the program. Each person will have their name displayed in a single row. Each name will be a hyperlink to the Program Person History page for the program person selected, if the user has the 'PersonHistoryView' right associated to their profile.
- n. RE Due Month: The month that the user's redetermination is due. This field will only display when there is a RE date that covers the given month.
- o. Re-Evaluate: This button will clear the root questions and allow the user to recreate them to receive an adjusted input flow based on their new information.
- p. Reporting Type: The type of periodic reporting required by the program. This value will be determined by the county based on county. The specific reporting types for each county will be added in a future SCR associated with the customer reporting logic.
- q. PR Due Month: The month of the next periodic reporting due month based on the View Date, RE Due Date and the reporting type. This field will only display when a RE Date exists for the current program application.
- r. Role: The Role code of the program person at the given view date.
- s. Role Reason: The Reason the role was assigned at the given view date.
- t. Status: The status of the participant in the program at the given view date.
- u. Status Reason: The status reason of the participant's program status at the given view date.

- v. View Details: This button will navigate to the General Assistance/General Relief Detail page for the associated program.
3. When the system date is within the RE Due month, the program header will display as a yellow banner with the following text, “[Anticipated program termination for the following month]”.

### 2.3.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

### 2.3.5 Security Updates

N/A

### 2.3.6 Page Mapping

Add page mappings for new fields that do not have page mappings.

### 2.3.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

## 2.4 Program Detail

### 2.4.1 Overview

The Program Detail page is used to select new programs to add to the case. Currently, if a General Assistance/General Relief program is selected in a county that does not support the General Assistance/General Relief program, then a validation message is thrown to prevent the program from being added. This functionality will be modified to only display programs that are available within the county of the logged in user.

### 2.4.2 Program Detail Mockup

#### Program Detail

---

\*- Indicates required fields

Select Program: \*

General Assistance/General Relief ▼ Go

Figure 2.4.2.1 – Program Detail

### 2.4.3 Description of Changes

Update the Select Program dropdown to allow the user to only see the programs available within their county. This limitation will also be applied to all other program dropdowns within the system. Please refer to Appendix item B for a list of additional pages that will require an update to filter the program dropdowns based on county.

Note: Existing logic in all program fields will continue to apply. The restriction of programs based on county will be an additional restriction and not a replacement.

### 2.4.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** New Program

### 2.4.5 Security Updates

N/A

### 2.4.6 Page Mapping

No new page mappings are required.

### 2.4.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

## 2.5 New/Reapplication Detail

### 2.5.1 Overview

The New/Reapplication Detail page is used to add or reopen a program for an existing case. The display for this page will be specified for the General Assistance/General Relief program.

## 2.5.2 New/Reapplication Detail Mockup

### New / Reapplication Detail

\*- Indicates required fields

Save and Return Cancel

<b>View Date:</b> 01/01/2021	<b>Program Type:</b> General Assistance/General Relief		
<b>Primary: *</b> - Select -	<b>Application Date: *</b> <input type="text"/>	<b>Requested BDA: *</b> <input type="text"/>	<b>Source: *</b> - Select -

Name*	DOB	Role	Role Reason	Status	Status Reason
<input type="checkbox"/> John Doe	11/25/1960				

Save and Return Cancel

Figure 2.5.2.1 – New/Reapplication Detail

### 2.5.3 Description of Changes

1. Allow the creation and reapplication of the new General Assistance/General Relief program. Standard page validations for the existing General Assistance/General Relief program will continue to apply to the new General Assistance/General Relief.

### 2.5.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** New Program

### 2.5.5 Security Updates

N/A

### 2.5.6 Page Mapping

No new page mappings for the existing page.

### 2.5.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

## 2.6 General Assistance/General Relief Detail

### 2.6.1 Overview

The General Assistance/General Relief Detail page will be the main view page for the General Assistance/General Relief program. This page will show a collection of detailed information for the program and its participants at a specific date.

### 2.6.2 General Assistance/General Relief Mockup

#### General Assistance/General Relief Detail

\* - Indicates required fields

[View History](#)
[Issuance Method](#)
[Edit](#)
[Close](#)

**Date: \***  
01/01/2021

Program Information		
<b>Status: *</b> Active	<b>Status Reason:</b>	<b>Source: *</b> In Person
<b>Application Date: *</b> 01/01/2021	<b>RE Begin Month:</b> 01/2021	<b>RE Due Month: *</b> 12/2021
<b>Reporting Type:</b> Quarterly Reporting	<b>PR Due Month:</b> 04/2021	
<b>Automatically Reassign When Activated:</b> No		
<b>Sub-Program Type:</b> CAAP		

Administrative Roles			
Name	Administrative Role	Begin Date	End Date
Doe, John 27M	Primary Applicant/Recipient	01/01/2021	
Doe, John 27M	Payee	01/01/2021	

Program Persons				
Name	Role	Role Reason	Status	Status Reason
<a href="#">Doe, John 27M</a>	MEM		Active	

Secondary Assignment
Worker

[View History](#)
[Issuance Method](#)
[Edit](#)
[Close](#)

Figure 2.6.2.1 – General Assistance/General Relief Detail (View Mode - Active)

## General Assistance/General Relief Detail

\*- Indicates required fields

View History

Save and Return

Cancel

Date: \*

01/01/2021



View Date

### Program Information

Status: \*

Active

Status Reason:

Source: \*

In Person

Application Date: \*

01/01/2021

Edit

RE Begin Month:

01/2021

RE Due Month: \*

12/2021



Reporting Type:

Quarterly Reporting

PR Due Month:

04/2021

Automatically Reassign When Activated:

No

Sub-Program Type:

CAAP

### Administrative Roles

Name	Administrative Role	Begin Date	End Date
Doe, John 27M	Primary Applicant/Recipient	01/01/2021	
Doe, John 27M	Payee	01/01/2021	

### Program Persons

Name	Role	Role Reason	Status	Status Reason
<a href="#">Doe, John 27M</a>	MEM		Active	

### Secondary Assignment

Worker

Select

View History

Save and Return

Cancel

Figure 2.6.2.2 – General Assistance/General Relief (Edit Mode - Active)

## General Assistance/General Relief Detail

\*- Indicates required fields

View History

Issuance Method

Edit

Close

Date: \*

01/01/2021

### Program Information

Status: \*

Pending

Status Reason:

Source: \*

In Person

Application Date: \*

01/01/2021

Sub-Program Type:

CAAP

### Administrative Roles

Name	Administrative Role	Begin Date	End Date
Doe, John 27M	Primary Applicant/Recipient	01/01/2021	
Doe, John 27M	Payee	01/01/2021	

### Program Persons

Name	Role	Role Reason	Status	Status Reason
<a href="#">Doe, John 27M</a>	MEM		Pending	

### Secondary Assignment

Worker

View History

Issuance Method

Edit

Close

Figure 2.6.2.3 – General Assistance/General Relief (View Mode - Pending)



## General Assistance/General Relief Detail

\* - Indicates required fields

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

**Date: \***  
 [View Date](#)

**Program Information**

<b>Status: *</b> Pending	<b>Status Reason:</b>	<b>Source: *</b> YBN
<b>Application Date: *</b> 11/20/2019 <a href="#">Edit</a>		
<b>Automatically Reassign When Activated:</b> <input type="text" value="No"/>		

**Administrative Roles**

Name	Administrative Role	Begin Date	End Date	
Doe, John 27M	Primary Applicant/Recipient	09/01/2018		<a href="#">Edit</a>
Doe, John 27M	Payee	09/01/2018		<a href="#">Edit</a>
				<a href="#">Add</a>

**Program Persons**

Name	Role	Role Reason	Status	Status Reason	
<a href="#">Doe, John 27M</a>	MEM		Pending		<a href="#">Edit</a>

**Secondary Assignment**

**Worker**

[Select](#)

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

Figure 2.6.2.4 – General Assistance/General Relief (Edit Mode - Pending)

## General Assistance/General Relief Detail

\*- Indicates required fields

View History

Issuance Method

Edit

Close

Date: \*

01/01/2021

### Program Information

Status: \*

Denied

Status Reason:

Source: \*

In Person

Application Date: \*

01/01/2021

Sub-Program Type:

CAAP

### Administrative Roles

Name	Administrative Role	Begin Date	End Date
Doe, John 27M	Primary Applicant/Recipient	01/01/2021	
Doe, John 27M	Payee	01/01/2021	

### Program Persons

Name	Role	Role Reason	Status	Status Reason
<a href="#">Doe, John 27M</a>	MEM		Denied	

### Secondary Assignment

Worker

View History

Issuance Method

Edit

Close

Figure 2.6.2.5 – General Assistance/General Relief (View Mode - Denied)

## General Assistance/General Relief Detail

\*- Indicates required fields

Date: \*

01/01/2021

**Program Information**

Status: \* Status Reason: Source: \*

Denied

Application Date: \*

01/01/2021

Sub-Program Type:

**Administrative Roles**

Name	Administrative Role	Begin Date	End Date
Doe, John 27M	Primary Applicant/Recipient	01/01/2021	
Doe, John 27M	Payee	01/01/2021	

**Program Persons**

Name	Role	Role Reason	Status	Status Reason
<a href="#">Doe, John 27M</a>	MEM		Denied	

**Secondary Assignment**

Worker

**Figure 2.6.2.6 – General Assistance/General Relief (Edit Mode - Denied)**

### 2.6.3 Description of Changes

1. View History button: This button will navigate the worker to the General Assistance/General Relief History page.
2. Edit button: This button will refresh the page in 'Edit' mode. This button is only available in 'View' mode.
3. Close button: This button will navigate the worker to the Case Summary page. This button is only available in 'View' mode.
4. Save and Return button: Saves the changes that have been made to the General Assistance/General Relief Detail page and will navigate the worker to the Case Summary page. This button is only available in 'Edit' mode.
5. Cancel button: Returns the worker to the Case Summary page. This button is only available in 'Edit' mode.

6. Date: Date which will be used to retrieve information for the page. The application that has a status as of the Date will have its information displayed. This is a required field.
  - a. View Date button: Pressing this button will refresh the page with the program information as of the Date. This button is only available in 'Create'/'Edit' mode.
7. Program Information Section
  - a. Status: Status of the program as of the Date. This field is required.
  - b. Status Reason: Reason for the value displayed in the Status column.
  - c. Source: Source of the Application that is tied to the Status as of the Date. This field is required.
  - d. Application Date: Date of Application for the application that is tied to the Status as of the Date. This field is required.
    - i. Edit button: Pressing this button will navigate the worker to the Application Detail page.
  - e. Automatically Reassign When Activated: This field will be a Yes/No dropdown that will let the current case be reassigned through an overnight batch job after being Activated through EDBC.
  - f. Reporting Type: This field will display the reporting type associated to the program based on the current view date. This field will only display for an Active, Ineligible, or Discontinued Status.
  - g. PR Due Month: This field will display the due date of the periodic report. This field will only display when there is a valid RE Due Month
  - h. RE Begin Month: This field will display the RE Begin Month for the application based on the current view date. This field will only display when a RE period has been established.
  - i. RE Due Month: This field will display the due month for the Redetermination forms for the program. This field will only display when a RE period has been established.
  - j. Sub-Program Type: This field will display the sub-program type for the General Assistance/General Relief program for each county. This field will only display if a county has a Sub-Program Type available for their General Assistance/General Relief program. At the time of implementation, only San Francisco County will have options available. The options are as follows:
    - i. Age Exempt
    - ii. CAAP
    - iii. Cash Aid Link to Medical
    - iv. General Assistance/General Relief
    - v. Personal Assisted Employment Services
    - vi. SSI Pending
  - k. Issuance Method – This button will navigate the user to the Issuance Method Detail page in view mode.
8. Administrative Roles section
  - a. Name - Name of the person assigned to the Administrative Roles as of the Date.
  - b. Administrative Role: Administrative Role that is assigned to the person in the Name column.

- c. Begin Date: Date that the person in the Name column was assigned to the Administrative Role.
  - d. End Date: Date that the person in the Name column ended the Administrative Role.
  - e. Edit button: Navigate the worker to the Administrative Role Detail page in 'Edit' mode. This button is only available in 'Create'/'Edit' mode.
  - f. Add button - Navigate the worker to the Administrative Role Detail page in 'Create' mode. This button is only available in 'Create'/'Edit' mode.
9. Program Person section
- a. Name: Name of the Program Person. This field will be a hyperlink that navigates the user to the General Assistance/General Relief Person Detail page in view mode.
  - b. Role: Role of the Person as of the Date.
  - c. Role Reason: Reason for the value displayed in the Role column.
  - d. Status: Status of the Person as of the Date.
  - e. Status Reason: Reason for the value displayed in the Status column.
  - f. Edit button: Navigates the worker to the General Assistance/General Relief Person Detail page in 'Edit' mode. This button is only available in 'Create'/'Edit' mode.
  - g. Rescind button: Navigates the worker to the Rescind Detail page. This button is only available in 'Create'/'Edit' mode.
  - h. Reapply button: Navigates the worker to the New/Reapplication detail page. This button is only available in 'Create'/'Edit' mode.
  - i. Add button: Navigates the worker to the General Assistance/General Relief Person Detail page in 'Create' mode. This button is only available in 'Create'/'Edit' mode.
10. Secondary Worker Assignment section
- a. Worker: Name of the Worker that is assigned as a secondary assignment. Clicking on the Worker will navigate the worker to the Worker Detail page.
    - i. Select button: Pressing button will navigate the worker to the Select Worker page to find a worker for the secondary assignment. This button is only available in 'Create'/'Edit' mode.
    - ii. Remove button: Pressing the button will Remove the secondary assignment. This button is only available in 'Create'/'Edit' mode.

#### 2.6.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

#### 2.6.5 Security Updates

N/A

### 2.6.6 Page Mapping

Add page mappings for new page.

### 2.6.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

## 2.7 Administrative Role Detail

### 2.7.1 Overview

The Administrative Role Detail page is used to assign administrative roles to the program such as Payee and Primary applicant. This page will be updated to have unique options for the new General Assistance/General Relief program.

### 2.7.2 Administrative Detail Mockup



#### Administrative Role Detail

\*- Indicates required fields

Save and Return Cancel

**Administrative Role: \***  
- Select -

**Name: \***  
- Select -

**Begin Month: \***   **End Month:**  

Save and Return Cancel

This Type\_1 page took 0.13 seconds to load.

Figure 2.7.2.1 – Administrative Role Detail

#### Administrative Role Detail



\*- Indicates required fields

Save and Return Cancel

**Administrative Role: \***  
Payee

**Payee Sub-Type: \***  
- Select -

**Name: \***  
- Select -

**Begin Month: \***   **End Month:**  

Save and Return Cancel

This Type\_1 page took 0.15 seconds to load.

Figure 2.7.2.2 – Administrative Role Detail (Payee Selected)

### 2.7.3 Description of Changes

Update the Administrative Role field to display the following options when the program type is the new General Assistance/General Relief program:

- a. Payee
- b. Primary Applicant/ Recipient

Note: All existing page logic tied to these fields will continue to apply.

### 2.7.4 Page Location

- **Global:** Case Summary
- **Local:** Case Summary
- **Task:** Case Summary

### 2.7.5 Security Updates

N/A

### 2.7.6 Page Mapping

No new page mappings for the existing page

### 2.7.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

## 2.8 Rescind Detail

### 2.8.1 Overview

The Rescind Detail page is used to reopen denied and discontinued programs. Each program has a unique set of rescind reasons based on the date and status of the program being rescinded.

## 2.8.2 Rescind Detail Mockup

### Rescind Detail

\*- Indicates required fields

Save and Return

Cancel

**View Date:**

01/21/2021

**Program Type:**

General Assistance/General Relief

**Program Application Date:**

01/01/2021

**Rescind Reason: \***

- Select -

#### Select Effective Date to Rescind \*

Effective Date: 01/01/2021

Name	DOB	Role	Role Reason	Application Date	Status End Date
John Doe	11/23/1993	MEM		01/01/2021	

Save and Return

Cancel

Figure 2.8.2.1 – Rescind Detail

### 2.8.3 Description of Changes

1. Display the following options when rescinding a Denied status for the new General Assistance/General Relief program.
  - a. Admin Decision
  - b. Erroneous Disc/Deny
  - c. Good Cause
  - d. Other
  - e. Rescind Disc/Deny
2. Display the following options when rescinding a Discontinued status for the new General Assistance/General Relief program.
  - a. Admin Decision
  - b. Erroneous Disc/Deny
  - c. Good Cause
  - d. Other
  - e. Periodic Reporting
  - f. PR - County Error
  - g. PR - Mental/Physical Condition
  - h. PR - Other Extenuating Circumstance
  - i. Rescind Disc/Deny

### 2.8.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary



## 2.8.5 Security Updates

N/A

## 2.8.6 Page Mapping

No page Mappings Required.

## 2.8.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

## 2.9 General Assistance/General Relief Person Detail

### 2.9.1 Overview

The General Assistance/General Relief Person Detail page will display detailed information for the General Assistance/General Relief program person.

### 2.9.2 General Assistance/General Relief Person Detail Mockup

#### General Assistance/General Relief Person Detail

\*- Indicates required fields

Edit Close

Recipient Information	
Name: *	
Doe, John 26M	

Application Detail	
Application Date: *	Beginning Date Of Aid: *
06/01/2020	06/01/2020

Edit Close

Figure 2.9.2.1 – General Assistance/General Relief Person Detail (View Mode)

## General Assistance/General Relief Person Detail

\*- Indicates required fields

Save and Return Cancel

**Recipient Information**

Name: \*  
Doe, John 26M

**Application Detail**

Application Date: \* 06/01/2020 Beginning Date Of Aid: \* 06/01/2020

Edit

Save and Return Cancel

Figure 2.9.2.2 – General Assistance/General Relief Person Detail (Edit Mode)

## General Assistance/General Relief Person Detail

\*- Indicates required fields

Save and Return Cancel

**Recipient Information**

Name: \*  
- Select -  
Doe, Jane 25F

**Application Detail**

Application Date: \* Beginning Date Of Aid: \*

Save and Return Cancel

Figure 2.9.2.3 – General Assistance/General Relief Person Detail (Create Mode)

### 2.9.3 Description of Changes

1. Display the Recipient Information section with the name field. The Name will display in the format: "Last Name, First Name AgeGender". This field will be a multi select dropdown in Create Mode.
2. Display the Application Detail Section with the following fields
  - a. Application Date: The Date of the person's application for the status related to the view month from the General Assistance/General Relief Detail page. This field will only be editable in Create Mode. This field will have the standard Date constraint and calendar icon, when editable.
  - b. Beginning Date of Aid: The BDA of the person's application for the status related to the view month from the General Assistance/General Relief Detail page. This field will only be editable in Create Mode. This field will have the standard Date constraint and calendar icon, when editable.

- c. Edit: This button will navigate the user to the Application Detail page in Edit Mode. This button will only display in Edit mode.
3. Display the following buttons at the top and bottom of the page:
  - a. Cancel: This button will only display in Create and Edit Mode. This button will navigate the user to the General Assistance/General Relief Detail page.
  - b. Close: This button will only display in View Mode. This button will navigate the user to the General Assistance/General Relief Detail page.
  - c. Edit: This button will only display in View Mode. This button will reload the General Assistance/General Relief Person Detail page in Edit Mode.
  - d. Remove: This button will only display in Edit Mode. This button will remove the program person from the General Assistance/General Relief program and navigate the user to the General Assistance/General Relief Detail page.
  - e. Save and Return: This button will commit any changes that have been made on the page and navigate the user to the General Assistance/General Relief Detail page. This button will only appear in Create and Edit modes.

#### 2.9.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

#### 2.9.5 Security Updates

N/A

#### 2.9.6 Page Mapping

Add page mappings for the new page

#### 2.9.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

### 2.10 Position Detail

#### 2.10.1 Overview

The Position Detail page is used to record information to help regulate the worker's access, capabilities and caseload capacity. This page contains a section for programs that a worker can be automatically assigned to that will be updated to include the new General Assistance/General Relief program.

## 2.10.2 Position Detail Mockup

Program(s)		
<input type="checkbox"/> AAP	<input type="checkbox"/> CAPI	<input type="checkbox"/> CFET
<input type="checkbox"/> Cal-Learn	<input type="checkbox"/> CalFresh	<input type="checkbox"/> CalWORKs
<input type="checkbox"/> Child Care	<input type="checkbox"/> Disaster CalFresh	<input type="checkbox"/> Diversion
<input type="checkbox"/> Foster Care	<input type="checkbox"/> GROW	<input type="checkbox"/> General Assistance (Managed)
<input type="checkbox"/> General Assistance/General Relief	<input type="checkbox"/> Homeless - Perm	<input type="checkbox"/> Homeless - Temp
<input type="checkbox"/> Immediate Need	<input type="checkbox"/> Kin-GAP	<input type="checkbox"/> Medi-Cal
<input type="checkbox"/> Nutrition Benefit	<input type="checkbox"/> RCA	<input type="checkbox"/> REP
<input type="checkbox"/> Welfare to Work		

Figure 2.10.2.1 – Position Detail (Program(s) Section)

### 2.10.3 Description of Changes

Update the Program(s) section to only display programs that are available within the county.

### 2.10.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Position

### 2.10.5 Security Updates

N/A

### 2.10.6 Page Mapping

No new page mappings for the existing page

### 2.10.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

## 2.11 Application Registration Summary

### 2.11.1 Overview

The Application Registration Summary page is used to allow workers to enter the SAWS I application information in the system to link to the case. When creating the application, the programs can be selected to apply. The General Relief option will be renamed and repurposed for both General Assistance General Relief programs.

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## 2.11.2 Application Registration Summary Mockup

### Application Registration Summary

\*- Indicates required fields

Save and Return

Source:	App Date: *	01/01/2021	Case Number:		
<input type="text"/>					
App Site:	<input type="text"/>				
Application Number:					
Last Name: *	First Name: *	MI:	Social Security Number:		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Other Names: (Maiden, Nicknames, ETC.)	Gender: *	Date of Birth:			
<input type="text"/>	- Select -	<input type="text"/>			
Home Address:					
Street Number and Name:	Apt#:	City:	County:	State:	ZIP Code:
<input type="text"/>	<input type="text"/>	<input type="text"/>	San Bernardino	CA	<input type="text"/>
Mailing Address: (If different from above.)					
Street Number and Name:	Apt#:	City:	County:	State:	ZIP Code:
<input type="text"/>	<input type="text"/>	<input type="text"/>	San Bernardino	CA	<input type="text"/>
Telephone Numbers:				I want to get information about this application by email.	
Home:	Work/Message:			<input type="text"/>	
<input type="text"/>	<input type="text"/>			I want to get messages about this case by email.	
Cell Phone:					<input type="text"/>
<input type="text"/>					EMAIL Address:
What Programs are you applying for?: *				Do you have a disability and need help applying?	
Cash Aid		Medi-Cal/Health Coverage		Are you homeless?	
<input type="radio"/> CalWORKS	<input type="radio"/> Medi-Cal			<input type="text"/>	
<input type="radio"/> RCA	<input type="radio"/> Minor Consent			Do you want to use the District Office address?	
<input type="radio"/> General Assistance/ General Relief	<input type="radio"/> None			<input type="text"/>	
<input type="radio"/> CAPI					What language do you prefer to read? *
<input type="radio"/> None					English
<input type="checkbox"/> CalFresh					What language do you prefer to speak? *
				English	
				Are you deaf or hard of hearing?	
				<input type="text"/>	

Figure 2.11.2.1 – Application Registration Summary (Main Section)

### 2.11.3 Description of Changes

1. Update the General Relief option under the “What programs are you applying for?” question to be General Assistance/ General Relief.
2. Update the logic to populate either the correct General Assistance/General Relief program code based on county.

#### 2.11.4 Page Location

- **Global:** Case Info
- **Local:** New Application
- **Task:** Application Registration

#### 2.11.5 Security Updates

N/A

#### 2.11.6 Page Mapping

No new page mappings for the existing page.

#### 2.11.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment

## 4 REQUIREMENTS

### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2686	<p>The CONTRACTOR shall integrate the CalWIN GA/GR rules into the CalSAWS Software.</p> <p>The Contractor shall migrate the existing C-IV GA/GR functionality which includes:</p> <ul style="list-style-type: none"> <li>- Creation of a GA/GR (Managed/Non-Managed) case</li> <li>- Ability to select the Issuance Method to EBT, Direct Deposit, or Warrant (check)</li> <li>- Ability to run a Manual EDBC to issue benefits to the customer, landlord or utility vendor</li> <li>- Ability to create a Service Arrangement/Payment Request to issue services / valuables</li> </ul>	<p>Requirement 1:</p> <p>Online:</p> <ol style="list-style-type: none"> <li>1) The Existing GR Program Detail and New/Reapplication Detail pages can be used for program Creation.</li> <li>2) No Updates are required to the workload assignment logic for the new GR Program.</li> <li>3) No More than 10 Non-GR Data Collection will need to be updated with additional elements.</li> </ol> <p>Eligibility:</p> <ol style="list-style-type: none"> <li>1. The existing CalWIN GA/GR rules will be developed in CalSAWS.</li> <li>2. The Forms/NOA will be rendered by DXC using the Correspondence Service. The triggers conditions for the Forms/NOAs</li> </ol>	<p>The General Assistance/General Relief program to be used for automated Eligibility determinations will be added. All EDBC Report, Fiscal and Batch logic will be handled in a future SCR.</p>



		<p>will be developed in CalSAWS.</p> <p>3. The Users will use Run EDBC page to run GA/GR EDBC and authorizes the results like other programs. The Users will navigate to Correspondence page after Authorization to check the existence of a NOA. A NOA hyperlink will be created if EDBC resulted in a NOA. When the User clicks the NOA hyperlink a webservice call will be made to DXC Correspondence Service to render the NOA and return the pdf back to CalSAWS in real time. During this webservice call the entire data related to the case will be transferred. This includes but not limited to Data Collection, Prior Issuances, Address, Assigned worker details</p> <p>4. Override functionality for the EDBC determined by GA/GR service will be available in CalSAWS.</p>	
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		<p>5. Manual EDBC functionality will be available in CalSAWS.</p> <p>6. The new GR solution will have a separate program code in backend so that the existing LA county GR and C-IV Managed/Non-Managed GR programs will not be impacted.</p> <p>7. Preview NOA functionality will not be available for the new GA/GR solution</p> <p>8. This solution will be subject to a different SLA standard due to external NOA service interaction.</p> <p>9. The use case for current CalWIN GA/GR rules, NOAs/Forms triggers and MU triggers will be provided by DXC.</p> <p>10. Based on Use case CalWIN GA/GR rules, NOAs/Forms triggers and Batch Sweeps for MU triggers will be designed and developed in CalSAWS.</p> <p>11. The existing NOA/form templates and</p>	
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		<p>County Admin's ability to create a customizable pdf version for the county will be maintained and updated by DXC in the new solution.</p> <p>Batch/Interface:</p> <ol style="list-style-type: none"> <li>1. Only one web service call will be made to DXC to generate the NOA/Form for GA/GR Participants</li> <li>2. All information to generate correspondence will be provided in one single request</li> <li>3. Web service response will have the generated NOAs/Forms pdf.</li> <li>4. Emulator will be available to get standard NOAs/Forms response for all correspondence request.</li> <li>5. No webservice is required for rules since it will be handled in CalSAWS.</li> <li>6. Estimates for web services is covered in DDID 2319</li> </ol> <p>Fiscal:</p>	
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		<p>1) New GR Program will not be available to C-IV and LRS counties, so county specific interfaces will not need to be updated to exclude these programs.</p> <p>2. Issuance, Adjustment and Claiming logic for GA/GR will be handled in CalSAWS using existing Fiscal framework.</p> <p>Requirement 2: The effort to port the C-IV solution is part of SCR CA 201377</p>	
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## 5 APPENDIX

### A. Program Code Reference Values

<b>Code_Num_Identif</b>	<b>GR</b>
<b>SHORT_DECODE_NAME</b>	<b>General Assistance/General Relief</b>
Program Code	N
Other Assistance Program Code	N
Considered Public Assistance	N
FS Count in Allotment	Y
Multiple Programs Allowed	N
Organization as Payee	Y
Intake Program	N
Report Inter-County Transfer	N
Eligibility EDBC Indicator	N
NOABenefitType	
Caseload Search Indicator	
Intake Redetermination Flag	N
WDTIP Program Codes	
External Programs	Y
Manual EDBC Indicator	N
Redetermination Indicator	N
Recovery Account Indicator	Y
Allow Service Arrangement	
Aid Code Base Program	
Un-Reimbursed Assistance Program Codes	N
SIU Referred Program	Y
RA Uncollectible Status	N
Uncollectible Cash	
IPV Programs	C
Is Application Considered	Y
Time Limits Program	
C4Yourself	
Managed Application	N
EICT	
EICT Programs	
Reception Log Program Codes	GA
RCC Programs	
Call Log Program Codes	General Assistance
LALegacyPgmCodes	
Case Flag Programs	
Receipt Programs	

Program Hierarchy	2
YBN_Outbound	
Job Development Activity	
ES Search Code	
Change Reason Program	
Distinguish between DCFS and DPSS Programs	
Spanish	
Pending Authorization Days To Complete	
Program Code to Display	GR
EBT Stagger Program	
YBN_EW_Communication	
Program Rescission Time Limit	0
Leader Program Name	GA
Authorized Representative	
Program to display online	
Activity Agreement programs	General Assistance/General Relief

- B. Pages with affected program dropdowns
- a. Best Practice Detail
  - b. Best Practice Search
  - c. Call Log Detail
  - d. Care and Maintenance Detail
  - e. Computation Request Detail
  - f. Create QA/QC Batch
  - g. Distributed Documents Search
  - h. Eligibility Non-Compliance List
  - i. Findings Detail
  - j. Fiscal History Search
  - k. Foster care Recovery Account Detail
  - l. Hearing Detail
  - m. Invoice Search
  - n. Money Management List
  - o. Office Detail
  - p. Other Program Assistance Detail
  - q. Pending Authorizations
  - r. Pending Workload Assignment List
  - s. Performance Analysis detail
  - t. Program Detail
  - u. Quality Review Detail
  - v. Receipt Mass Upload Search
  - w. Reception Log Detail
  - x. Recovery Account Detail
  - y. Recovery Account Search
  - z. Recovery Account Workload Inventory
  - aa. Reminders List
  - bb. Report Search

- cc. Select Document
- dd. Service Arrangements List
- ee. Special Investigation Detail
  - ff. Special Investigations Referral
- gg. Standards Detail
- hh. Template Repository Search
  - ii. Unreimbursed Assignment pool
  - jj. Valuable Request Search
- kk. Verification Detail
  - ll. Workload Reassignment Detail

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