CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214893

DDID 1628

Task Management

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/16/2020	1.0	Initial Revision	Justin Dobbs

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1 OVERVIEW

This design outlines modifications to migrate a population of existing C-IV System Automated Tasks into the LRS/CalSAWS System. The attributes defined for each Automated Action within this design document will be initially set up as default values based on the current logic available in the source C-IV System. The Automated Actions defined in this document will be configured to support all 58 counties.

1.1 Current Design

CA-214928 for DDID 34 introduces the Automated Action framework to the LRS/CalSAWS System. This framework allows a level of configurability of automated tasks by the counties. The C-IV System includes a set of automated tasks through the Automated Action framework that do not exist in the LRS/CalSAWS System.

1.2 Requests

Migrate a population of C-IV System automated tasks into the LRS/CalSAWS System. This population is limited to automated tasks that do not currently exist in the LRS/CalSAWS System. Common automated tasks will be addressed with DDID 1629, which converts LRS/CalSAWS automated tasks into the Automated Action framework.

1.3 Overview of Recommendations

1. Migrate a population of the C-IV System Automated Action settings for automated tasks into LRS/CalSAWS System.

1.4 Assumptions

1. SCRs CA-214927 and CA-214928 related to DDID 34 have set up the underlying data model and front-end Automated Action pages to support Automated Action processing.
2. Not all batch processes require modifications to be configured to run for 58 counties. The Automated Actions defined in this document that do not have a recommendation to modify the batch process to be 58 county friendly will function for 58 counties natively or DDID 1787 has already accounted for the migration of C-IV System specific batch processes into the LRS/CalSAWS System.

2 RECOMMENDATIONS

This section will outline recommendations to migrate a population of C-IV System Automated Action tasks into the LRS/CalSAWS System.

2.1 Migrate a set of C-IV System Automated Tasks into the LRS/CalSAWS System

2.1.1 Overview

The Automated Action framework allows county users a level of configurability for automated task generation. For example, the county can choose to deactivate a specific automated task within their county outside of the project enhancement process. They also can define attributes such as Task Type, Task Sub-Type, the due dates and initial assignment information for the resulting tasks through the Automated Action Detail page. (Reference CA-214928 – DDID 34 for the specifics of the Automated Action pages).

This section outlines the modifications required to support a population of migrated C-IV System automated tasks in the Automated Action framework in the LRS/CalSAWS System.

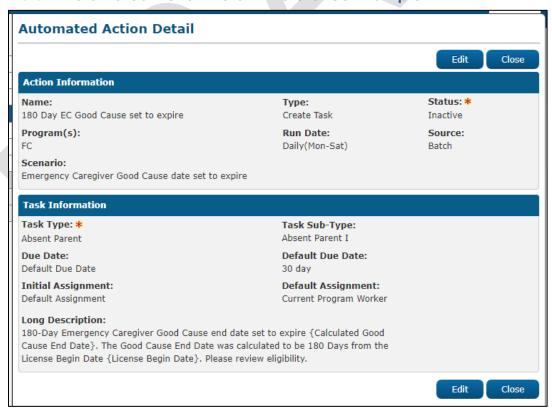### 2.1.2 Automated Action Detail – Reference Example

Figure 2.1.1 – Automated Action Detail

2.1.3 Description of Changes

Migrate the following C-IV System automated tasks into the LRS/CalSAWS System. (Please reference the Automated Action Detail page in Figure 2.1.1 for display of the Action Information and Task Information attributes.)

Technical: For LA and the CalWIN counties, the Status will initially be Inactive with a blank Task Type and Task Sub-Type. This is because each county can set a custom Task Type for each Automated Action. If Los Angeles or a CalWIN county decides to Activate one of these Automated Actions, the page validation will require that the county also select a Task Type to be used. As for the C-IV county entries, the Automated Action information will become available through the Automated Action pages with conversion as each county will have the ability to change configurations up until cutover into LRS/CalSAWS.

Attribute values such as "Program(s)" and "Run Date" are based on the attribute values available in the existing C-IV System Automated Action configurations.

1. WTW Recipient: Reached 23rd Month
   a. Action Information
      i. Name: WTW Recipient: Reached 23rd Month
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): WT
      v. Run Date: 1st day of each month(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: An active WTW recipient has reached their 23 month mark. The WTW recipient is approaching the 24 month WTW time limit. Review for appropriate action.

   b. Task Information
      i. Task Type: BLANK
      ii. Task Sub-Type: BLANK
      iii. Due Date: Default Due Date
      iv. Default Due Date: 10 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: Person with CIN {CIN Number} is in WTW month 23. This person did not receive a WTW 46/WTW 44 due to not having a scheduled WTW 24-Month Interview between the 10th and last day of {MM/YYYY}. Please schedule a WTW 24-Month Interview and send a WTW 46 and WTW 44.

c. Update LRS/CalSAWS to run a batch process on the 1st day of each month to trigger the Automated Action for WTW recipients who have reached the 23rd Time Limit Month and a WTW 46 form has not been sent out signifying the WTW 24-Month appointment has been scheduled. Reference Section 2.1.2.

2. WTW Recipient: Reached 22nd Month
   a. Action Information
      i. Name: WTW Recipient: Reached 22nd Month
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): WT
      v. Run Date: 1st day of each month(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: An active WTW recipient has reached their 22 month mark. The WTW recipient is approaching the 24 month WTW time limit. Review for appropriate action.

   b. Task Information
      i. Task Type: BLANK
      ii. Task Sub-Type: BLANK
      iii. Due Date: Default Due Date
      iv. Default Due Date: 25 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: Person with CIN {CIN Number} is in WTW month 22. Please schedule a WTW 24-Month Interview between the 10th day and last day of {MM/YYYY}.

   c. Update LRS/CalSAWS to run a batch process on the 1st day of each month to trigger the Automated Action for WTW recipients who have reached the 22nd Time Limit Month. Reference Section 2.1.2.

3. WTW Recipient: Reached 21st Month
   a. Action Information
      i. Name: WTW Recipient: Reached 21st Month
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): WT
      v. Run Date: 1st day of each month(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: An active WTW recipient has reached their 21 month mark. The WTW recipient is approaching the 24 month WTW time limit.

   b. Task Information

i. Task Type: BLANK
ii. Task Sub-Type: BLANK
iii. Due Date: Default Due Date
iv. Default Due Date: 10 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Person with CIN {CIN Number} is in WTW month 21. Please take the appropriate action.

c. Update LRS/CalSAWS to trigger the Automated Action for Los Angeles county when a WTW recipient reaches the 21-month mark. DDID 571 will trigger the Automated Action for the additional 57 counties by migrating the PIXXE811 batch job from the C-IV System.

4. CalFresh Documents: Translation
   a. Action Information
      i. Name: CalFresh Documents: Translation
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CF
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: New documents have been created for the CalFresh program and have not been sent. Review documents for translation.

   b. Task Information
      i. Task Type: BLANK
      ii. Task Sub-Type: BLANK
      iii. Due Date: Default Due Date
      iv. Default Due Date: 10 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: {document_count} documents have been created since {created_on_date} for {program_type} on case number {case_number} which require further translation in order to be sent. Please review Distributed Documents to finalize translation.

   c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A130 to run on a daily basis and evaluate information for all 58 counties. Batch job PB00A130 is currently available in the LRS/System but it is not currently scheduled to run.

5. CalWORKs Child: Age 18 Verify Graduation
   a. Action Information
      i. Name: CalWORKs Child: Age 18 Verify Graduation
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CW
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: An active CalWORKs child is turning 18. Verify the graduation date for the member.

   b. Task Information
      i. Task Type: BLANK
      ii. Task Sub-Type: BLANK
      iii. Due Date: Default Due Date
      iv. Default Due Date: 10 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: Verify HS graduation date for {person name}

   c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A107 to run on a daily basis and evaluate information for all 58 counties. Batch job PB00A107 is currently available in the LRS/System but it is not currently scheduled to run.

6. CalWORKs Discontinued: Review WTW
   a. Action Information
      i. Name: CalWORKs Discontinued: Review WTW
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CW, WT
      v. Run Date: 4th day of each month(Mon-Fri)
      vi. Source: Batch
      vii. Scenario: The CalWORKs program has been discontinued for an active person. Further review of Welfare to Work programs is required.

   b. Task Information
      i. Task Type: BLANK
      ii. Task Sub-Type: BLANK
      iii. Due Date: Default Due Date
      iv. Default Due Date: Next business day
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker

       vii. Long Description: CalWORKs program discontinued as of {Date}. Review Welfare to Work.

  c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A103 to run on the 4th day of each month and evaluate information for all 58 counties. Batch job PB00A103 is currently available in the LRS/System but it is not currently scheduled to run.

7. CalWORKs Member: Age 60 Timed Out
  a. Action Information
    i. Name: CalWORKs Member: Age 60 Timed Out
    ii. Type: Create Task
    iii. Status: Inactive
    iv. Program(s): CW
    v. Run Date: 2nd day of each month(Mon-Fri)
    vi. Source: Batch
    vii. Scenario: The CalWORKs program has been discontinued for an active person. Further review of Welfare to Work programs is required.

  b. Task Information
    i. Task Type: BLANK
    ii. Task Sub-Type: BLANK
    iii. Due Date: Default Due Date
    iv. Default Due Date: Last day of next month after batch date
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: Review case for possible Extender for {person_name}, who is Timed Out and will turn 60.

  c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A129 to run on the 2nd day of each month and evaluate information for all 58 counties. Batch job PB00A129 is currently available in the LRS/System but it is not currently scheduled to run.

8. CalWORKs Recipient Approaching TANF Time Limit: 54 Months
  a. Action Information
    i. Name: CalWORKs Recipient Approaching TANF Time Limit: 54 Months
    ii. Type: Create Task
    iii. Status: Inactive
    iv. Program(s): CW
    v. Run Date: 2nd day of each month(Mon-Fri)

  vi. Source: Batch
  vii. Scenario: An active CalWORKs recipient has reached their 54 month mark. The CalWORKs recipient is approaching the 60 month TANF time limit.

 b. Task Information
  i. Task Type: BLANK
  ii. Task Sub-Type: BLANK
  iii. Due Date: Default Due Date
  iv. Default Due Date: 10 days
  v. Initial Assignment: Default Assignment
  vi. Default Assignment: Current Program Worker
  vii. Long Description: Person with CIN {CIN Number} is in TANF month 54. Please take the appropriate action.

 c. Update LRS/CalSAWS to trigger the Automated Action for Los Angeles county when a CalWORKs recipient reaches the 54 month mark. DDID 571 will trigger the Automated Action for the additional 57 counties by migrating the PIXXE811 batch job from the C-IV System.

9. CalWORKs Recipient Approaching TANF Time Limit: 58 Months
 a. Action Information
  i. Name: CalWORKs Recipient Approaching TANF Time Limit: 58 Months
  ii. Type: Create Task
  iii. Status: Inactive
  iv. Program(s): CW
  v. Run Date: 2nd day of each month(Mon-Fri)
  vi. Source: Batch
  vii. Scenario: An active CalWORKs recipient has reached their 58 month mark. The CalWORKs recipient is approaching the 60 month TANF time limit.

 b. Task Information
  i. Task Type: BLANK
  ii. Task Sub-Type: BLANK
  iii. Due Date: Default Due Date
  iv. Default Due Date: 10 days
  v. Initial Assignment: Default Assignment
  vi. Default Assignment: Current Program Worker
  vii. Long Description: Person with CIN {CIN Number} is in TANF month 58. Please take the appropriate action.

 c. Update LRS/CalSAWS to trigger the Automated Action for Los Angeles county when a CalWORKs recipient reaches the 58

month mark. DDID 571 will trigger the Automated Action for the additional 57 counties by migrating the PIXXE811 batch job from the C-IV System.

10. Medi-Cal Deemed Eligible: Age 1 Review Eligibility
    a. Action Information
        i. Name: Medi-Cal Deemed Eligible: Age 1 Review Eligibility
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): MC
        v. Run Date: 1st day of each month(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: An active Medi-Cal child that has been Deemed Eligible is turning 1. Review the child's eligibility for Medi-Cal.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 day cutoff for program
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: DE Child Turns 1 - Check Eligibility

    c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A111 to run on the 1st day of each month and evaluate information for all 58 counties. Batch job PB00A111 is currently available in the LRS/System but it is not currently scheduled to run.

2.2 WTW 22nd/23rd Time Limit Month Task Batch Job

2.2.1 Overview

The WTW 22nd/23rd Time Limit Month Task Batch Job will evaluate for WTW recipients on a monthly basis who have reached the 22nd or 23rd WTW Time Limit month. The batch process will trigger the appropriate Automated Action as defined in Sections 2.1.3.1 and 2.1.3.2.

2.2.2 Description of Change

1. Trigger the WTW Recipient: Reached 23rd Month Automated Action defined in Section 2.1.3.1 for WTW recipients meeting the following criteria:
    a. The WTW recipient has reached 23 months on the WTW 24 Month Time Clock.

b. A WTW 46 form has not been sent to signify that a WTW 24-Month appointment has been scheduled

2. Trigger the WTW Recipient: Reached 22nd Month Automated Action defined in Section 2.1.3.2 for WTW recipients meeting the following criteria:

a. The WTW recipient has reached 22 months on the WTW 24 Month Time Clock.

2.2.3 Execution Frequency

This batch job will run on the first day (Monday through Saturday) of every month.

2.2.4 Key Scheduling Dependencies

None

2.2.5 Counties Impacted

All LRS/CalSAWS Counties are impacted.

2.2.6 Data Volume/Performance

Approximately 4 to 6,000 records will be processed per month across all counties.

2.2.7 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

N/A – No Supporting Documents

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1628	The CONTRACTOR shall migrate the existing C-IV automated tasks, as	- Approximately 22 C-IV automated	This design will migrate a population of C-IV System automated tasks into the

	specified in the "Task Management C-IV Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as migrate current task configurations for 39 C-IV Migration Counties into the CalSAWS Software as default settings for the 39 C-IV Migration Counties.	actions directly overlap with LRS automated tasks. - Support for mapping CalWIN automated tasks to C-IV automated tasks is not included. - Automated tasks included in this DDID would be set to "Inactive" at cutover for CalWIN counties. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 - Attachment 1 Contractor Assumptions Inventory List, worksheet 'C-IV Automated Tasks'	LRS/CalSAWS System as an initial phase of DDID 1628.

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A