CalSAWS

California Statewide Automated Welfare System

Design Document

CA-51740

DDCR 5091: Lobby Management Customer Lobby Monitoring System

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CalSAWS	DOCUMENT APPROVAL HISTORY	
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04/09/2020	1.0	Initial	Erika Kusnadi-Cerezo
11/12/2020	2.0	Design Clarification. Security Udpates (Section 2.6.5 and 2.6.6) was updated to reflect correct Rights to Group mapping and also added a new Security Group Information remove	Erika Kusnadi-Cerezo
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		Center based on how the status got updated.	

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1 OVERVIEW

The Lobby Monitoring system allows county offices to call up customers by using a visual and audio support system on dedicated monitors in their lobbies. The county may also use the lobby monitors to displays alerts and promotions.

1.1 Current Design

The C-IV system allows county offices to call up customers by using visual and audio support system on dedicated monitors in their county offices lobbies. This is achieved by adding additional functionalities in message center and the Reception Log Detail page along with creating a Lobby Monitor page that allows users to view or update the Lobby Monitor for each office. These specific functionalities currently do not exist in the LRS/CalSAWS system.

1.2 Requests

Update the LRS/CalSAWS system so that it can communicate to the dedicated lobby monitors in each county offices that will allow the workers to call up customers by using a visual and audio support systems.

1.3 Overview of Recommendations

1. Update the Reception Log (Reception Log List page and the Reception Log Detail page) pop up window to allow users the ability to maximize the application window.
2. Update the Reception Log Detail page to allow workers to update the reception log status to Lobby Monitor Call.
3. Update Message Center to allow workers to update the reception log status to Lobby Monitor Call.
4. Create a new page that will allow county workers to manage the county office's lobby monitors and ability to call up customers by using a visual and audio support system.

1.4 Assumptions

1. Reception Log pop up window (Reception Log List page and the Reception Log Detail page) will continue to open to the existing size that the LRS/CalSAWS system currently have set.
2. Hide From Monitor functionality will continue to function as it does currently.
3. Fields that are not mentioned will retain existing functionality unless mentioned in the description of changes.
4. Changes to the Los Angeles Lobby Check-In Application to accommodate the new Lobby Monitor functionality will not be included as part of this SCR.

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2 RECOMMENDATIONS

Update the LRS/CalSAWS system to have the ability to maximize the Reception Log pop up window and the ability to communicate to the participants within the county offices that have a dedicated lobby monitor. This will allow the workers to call up the customers by using a visual and audio support system via these dedicated monitors.

2.1 Reception Log List/Detail Pop-up Window

2.1.1 Overview

Update the Reception Log List/Detail pop-up window that will allow users the ability to maximize the application window.

2.1.2 Reception Log List/Detail Pop-up Window Mockup

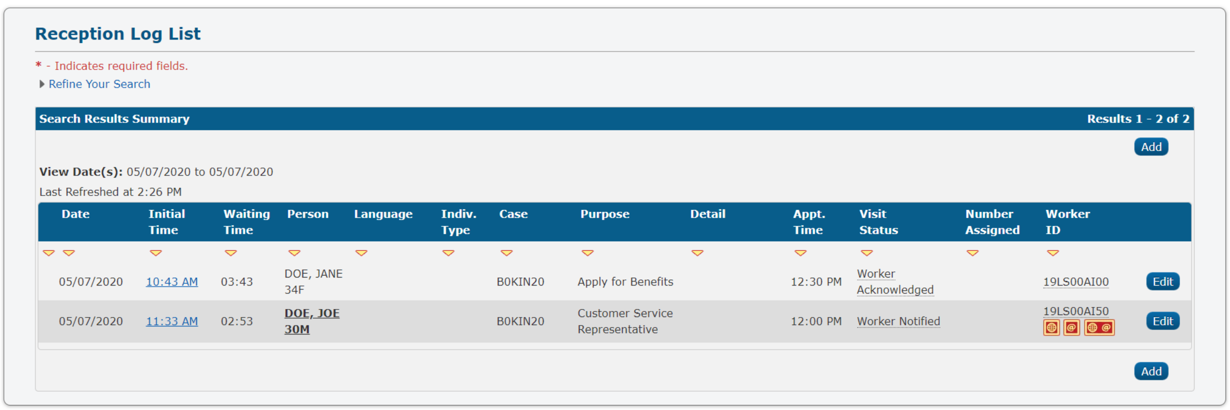

Figure 2.1.1 – Reception Log List page

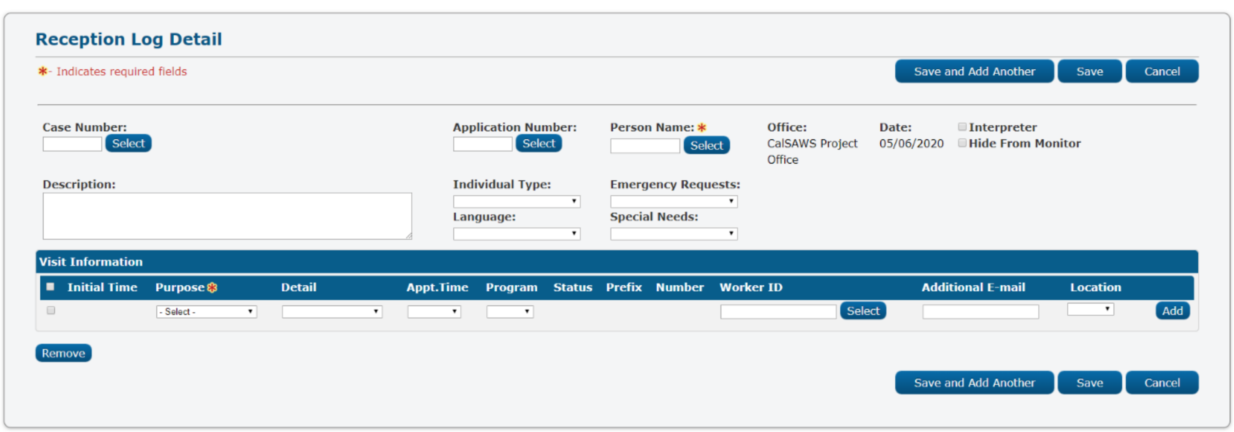

Figure 2.1.2 – Reception Log Detail page

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2.1.3 Description of Changes

1. Update the Reception Log List/Detail pop-up window to allow users to maximize and minimize the Reception Log List/Detail pop-up window as shown on Figure 2.1.1 and Figure 2.1.2.
2. Update Reception Log List to return 'Lobby Monitor Call' status on the Search Results Summary block when the 'Customer Status' field is set to 'All' or 'Waiting To Be Seen'.

Note: Reception Log pop up window (Reception Log List page and the Reception Log Detail page) will continue to open to the existing size that the LRS/CalSAWS system currently have set.

2.1.4 Page Location

- **Reception Log Link located on the LRS Homepage**

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 Reception Log Detail page

2.2.1 Overview

Update the Reception Log Detail page to allow workers to update the reception log status to Lobby Monitor Call and a new field titled "Location".

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2.2.2 Reception Log Detail page Mockup

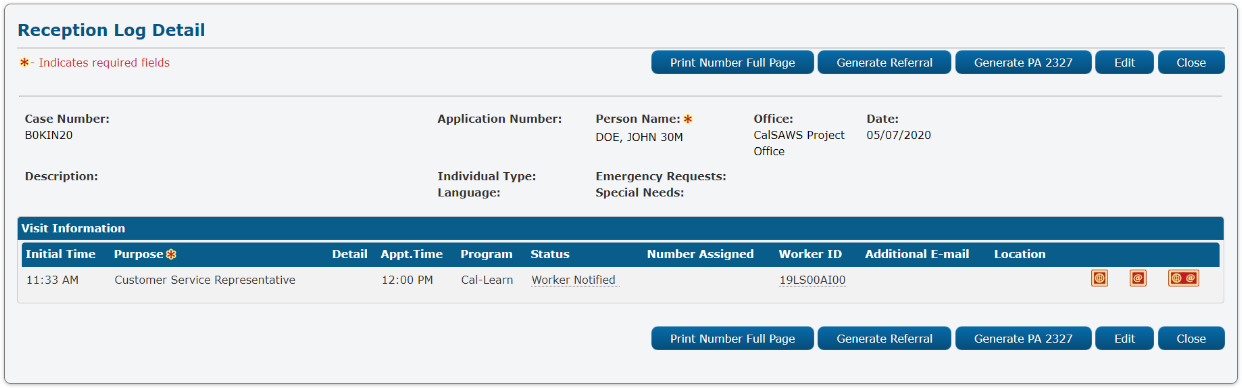

Figure 2.2.1 – Reception Log Detail Page 'View' Mode

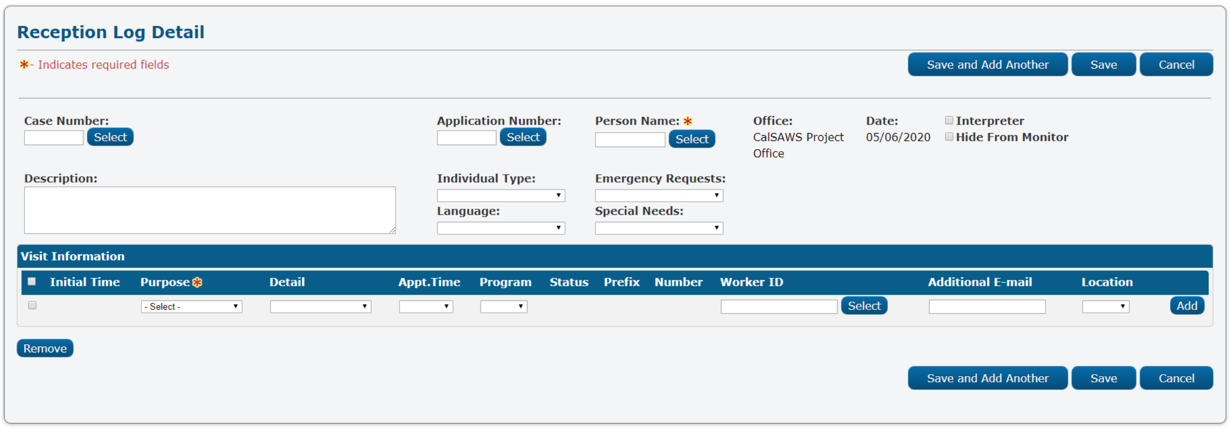

Figure 2.2.2 – Reception Log Detail Page 'Create' Mode with office set up with 'Location' information.

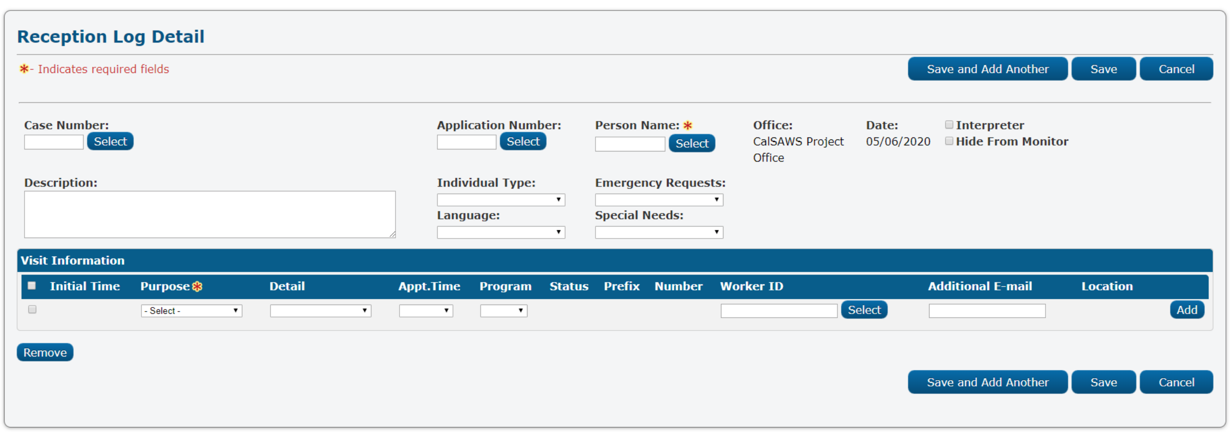

Figure 2.2.3 – Reception Log Detail Page 'Create' Mode without office set up with 'Location' information.

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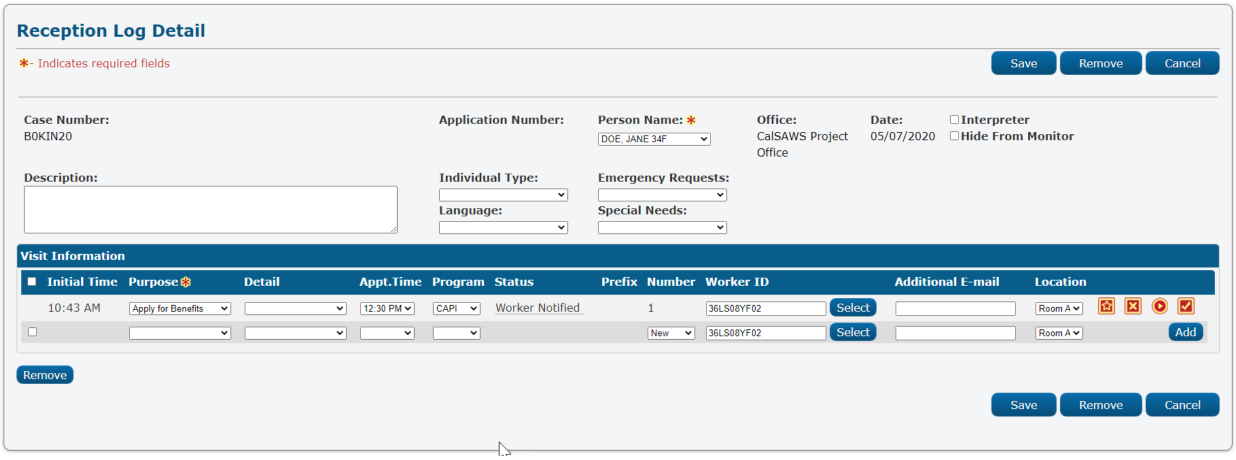


Figure 2.2.4 – Reception Log Detail Page ‘Edit’ Mode with office set up with ‘Location’ information.

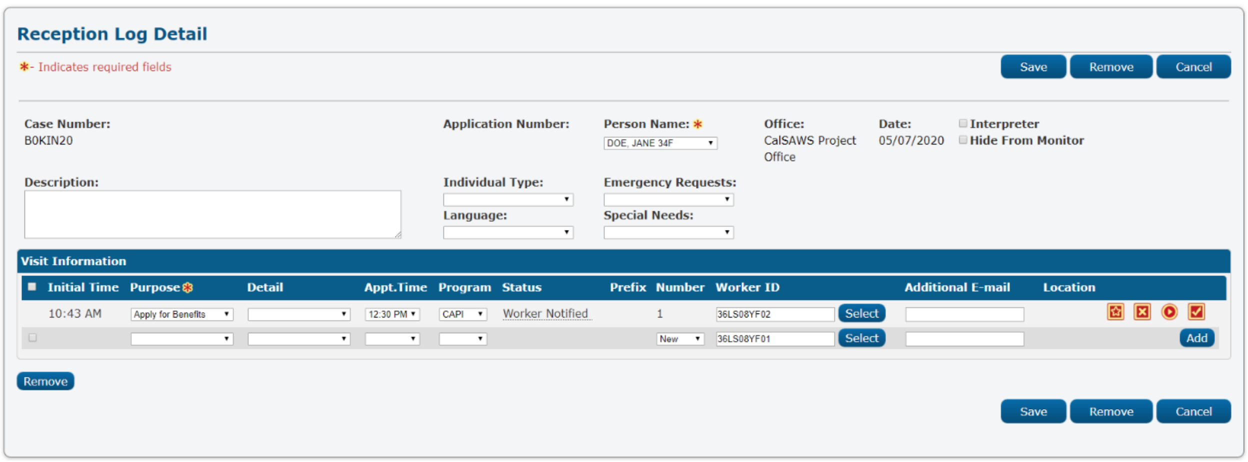
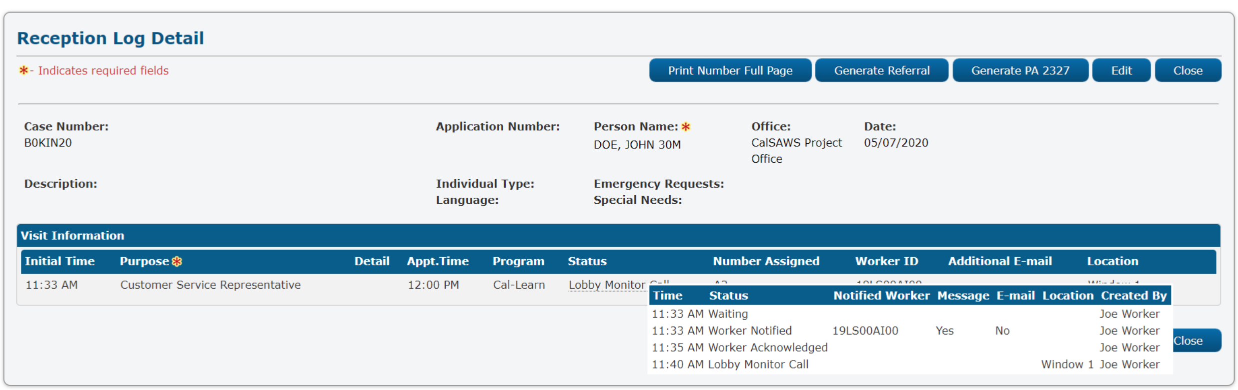


Figure 2.2.5 – Reception Log Detail Page ‘Edit’ Mode without office set up with ‘Location’ information.



~~Figure 2.2.6 – Reception Log Detail Page ‘Status’ Tool Tip.~~

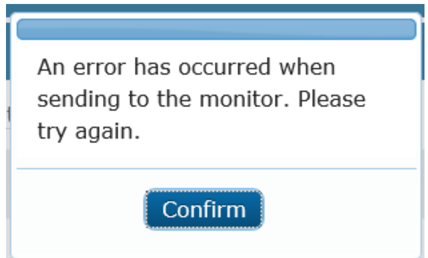


Figure 2.2.6 – Error pop up when not able to communicate to Lobby Monitor.

2.2.3 Description of Changes

1. Update the required icon on the 'Purpose' column to match all the other required icons.
2. Update the Reception Log Detail page with a new Column titled 'Location' as shown in Figure 2.2.1 through Figure 2.2.5
    a. Value under the 'Location' drop down field will be based on the information that is inputted in the 'Reception Locations' section in the 'Lobby Monitor Detail' page (please see section 2.6 for further information).
    b. The new column titled 'Location' will not have a location drop down (as shown on Figure 2.2.3 and Figure 2.2.5) if the office is not set up with 'Location' information through the Lobby Monitor Detail page (see Section 2.6 of this design document for details on the new Lobby Monitor pages).
    c. The new column titled 'Location' will display with a list of location(s) (as shown on Figure 2.2.2 and Figure 2.2.4) that the visit can take place within the office. This applies only to office(s) where 'Location' information through the Lobby Monitor Detail page is set up (see Section 2.6 of this design document for details on the new Lobby Monitor pages).
        i. Drop down value for 'Location' will display 'blank' followed by the list of 'location' information inputted from the Lobby Monitor Detail page in alphabetical order.
            1. The last location that was selected will be set as the default so the worker will not have to reset their location each time, they call a customer.
    ~~d. Update tool tip for the 'Status' field to include the 'Location' column (as shown on Figure 2.2.6) for office(s) that have 'Location' information set up through the Lobby Monitor detail page (see Section 2.6 of this design document for details on the new Lobby Monitor pages.~~
        ~~i. A new status will appear on the tooltip every time a worker clicks the 'Monitor Call' icon with the associated 'Location' information.~~
        ~~ii. 'Location' will not display on the tool tip if the office did not set up 'Location' information through the Lobby~~

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~~Monitor Detail page (see Section 2.6 of this design document for details on the new Lobby Monitor pages).~~

Note: ~~Tool tip for Status column should display the same way in both the Reception Log List and the Reception Log Detail page.~~

3. Add a new icon titled 'Monitor Call' icon as shown on Figure 2.2.2 and Figure 2.2.3.
    a. The 'Monitor Call Icon' will not display if the office does not have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this design document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system).
    b. For offices that have 'Location' information set up , the 'Monitor Call' icon will display after the reception log entry has been created, it will be visible when the Reception Log Detail is in 'Edit' mode, and it'll be the first icon listed right next to the 'Location' drop down field.
        i. Once the 'Monitor Call' icon is clicked, the icon will display darker so that the worker will know that it's been clicked.
        ii. Once the location is selected and the 'Monitor Call' icon is click, upon clicking the 'Save' button the reception log entry status will be updated to 'Lobby Monitor Call' status.
        iii. If the worker clicks on the 'Monitor Call' icon again and save it, another status will be logged and will display as another row in tooltip.
        iv. The 'Monitor Call' icon will no longer display once the worker clicks the 'X' icon (No Response), 'Play' icon (Meeting Started), or the 'Check Mark' icon (Complete) (see Section 2.6 of this design document for details on the new Lobby Monitor pages).

            Note: This applies if any of the above icons are clicked through Message Center as well.

        Note: (Please see Appendix section for more information on how the Monitor Call should behave based on the status of the Reception Log record).
    c. If the 'Hide from Monitor' option is selected while creating the Reception Log Entry, the 'Monitor Call' icon will not appear next to those Reception Log visits or on the Message Center.
        i. The 'Hide from Monitor' option will apply to all visits associated to the Reception Log Entry.
4. Create an error message pop-up window to display when the 'Monitor Call' icon is clicked from Reception Log Detail page as shown on Figure 2.2.7.

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a. Error Message Pop-Up window will display when LRS/CalSAWS system is not able to send the information to the Lobby Monitor after clicking the 'Monitor Call' icon.
    i. Error Message pop-up will display the following message along with a 'Confirm' button at the bottom of the window:
        1. "An error has occurred when sending to the monitor. Please try again."
        2. Clicking the 'Confirm' button will close the error message pop-up window.

b. Reception Log record status will not be updated to 'Lobby Monitor Call' status.

5. Add the following validation to the Reception Log Detail page:
    a. "Location – Field is required when selecting Monitor Call. Please select a value."
        i. This validation will display when the worker tries to save the Reception Log entry with the 'Monitor Call' icon selected and no 'Location' value selected.
        ii. This validation will apply if the Location is set up through the Lobby Monitor Detail page.

2.2.4 Page Location

- **Reception Log Link located on the LRS Homepage**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update Page Mapping to accommodate the new icon along with the new column titled 'Location'.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Message Center

2.3.1 Overview

Update Message Center with the ability for workers to update the Reception Log record status to 'Lobby Monitor Call' and update the 'Location' information through Message Center.

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2.3.2 Message Center Mockup

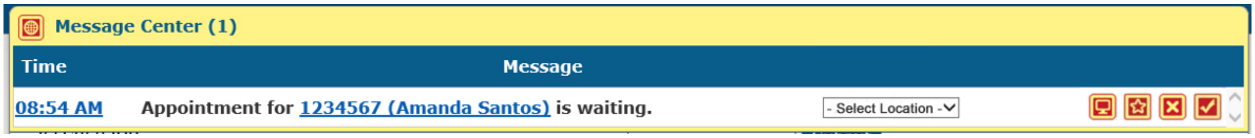

Figure 2.3.1 – Message Center for offices that have 'Location' information setup

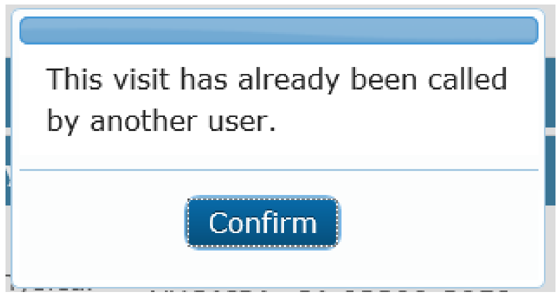

Figure 2.3.2 – Message Center error pop-up window

2.3.3 Description of Changes

1. Update the background color for Message Center from Pink to Yellow as shown on Figure 2.3.1.
2. Update Message Center to display a 'Location' drop down field and a 'Monitor Call' icon as shown on Figure 2.3.1
   a. Add a 'Location' drop down field to Message Center for offices that have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this Design Document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system).
      i. 'Location' drops down field will display the same information as the 'Location' drop down field in Reception Log.
         1. 'Location' drop down field will display the list of locations inputted on the 'Lobby Monitor Detail' page in alphabetical order.
         2. It will default to the first location on the list or the last location used by the worker.
      ii. For offices that do not have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this Design Document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system) the 'Location' drop down field will not display in Message Center.
   b. Add a 'Monitor Call' icon to Message Center that can update the reception log entry to 'Lobby Monitor Call' status.
      i. Once the 'Monitor Call' icon is clicked, the associated reception log record will be updated to 'Lobby Monitor Call' status.

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        ii. The 'Monitor Call' icon will no longer display once the worker click the 'X' icon (No Response), 'Play' icon (Meeting Started), or the 'Check Mark' icon (Complete).
        iii. 'Monitor Call' icon will not display if the office does not have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this Design Document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system).
        Note: This apply if any of the above icons are click through Reception Log Detail page.

    Note: (Please see Appendix section for more information on how the Monitor Call should behave based on the status of the Reception Log record).

3. Create an error message pop-up window from Message Center that will display as shown on Figure 2.3.2
    a. The error message pop-up window will display when two different workers are trying to update the reception log entry status to 'Lobby Monitor Call' simultaneously (one from Message Center and the other from Reception Log) by clicking the 'Monitor Call' icon.
    b. Error Message pop-up window will display the following message along with a 'Confirm' button at the bottom of the window.
        i. 'This visit has already been called by another user.'
        ii. Clicking the 'Confirm' button will close the error message pop-up window.
4. Create an error message pop-up window to display when the 'Monitor Call' icon is clicked from Message Center as shown on Figure 2.2.7.
    a. Error Message Pop-Up window will display when LRS/CalSAWS system is not able to send the information to the Lobby Monitor after clicking the 'Monitor Call' icon.
        i. Error Message pop-up will display the following message along with a 'Confirm' button at the bottom of the window:
            1. "An error has occurred when sending to the monitor. Please try again."
            2. Clicking the 'Confirm' button will close the error message pop-up window.
    b. Reception Log record status will not be updated to 'Lobby Monitor Call' status.

2.3.4 Page Location

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

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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 Lobby Management

2.4.1 Overview

Add a new collapsible task bar called 'Lobby Management' under the Global Navigation 'Admin Tools' and Local Navigation 'Office Admin' and create a new Lobby Monitor page and child pages.

2.4.2 Lobby Management Mockup

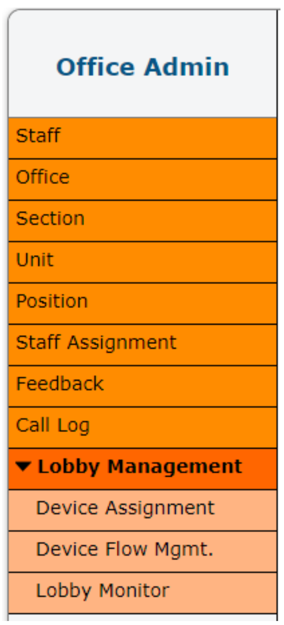

Figure 2.4.1 – New Lobby Management Task Bar

2.4.3 Description of Changes

1. Create a new collapsible task navigation section called 'Lobby Management' under the Global Navigation 'Admin Tools' and Local Navigation 'Office Admin' as shown on Figure 2.4.1.

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a. The ‘Lobby Management’ navigation will only display for workers that have security rights to access the ‘Device Assignment’ page, ‘Device Flow Mgmt.’ page or ~~and~~ ‘Lobby Monitor’ page.
    i. The ‘Lobby Management’ collapsible navigation task will default to open when user navigate to the Office Admin page.

2.4.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management**

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 Lobby Monitor Search page

2.5.1 Overview

Create a new page titled ‘Lobby Monitor Search’ page that will allow workers to search for an office within their county in order to update the Lobby Monitor for that specific office. The ‘Lobby Monitor Search’ page will allow workers to search by ‘Office ID’, ‘Office Name’ and ‘Office Type’.

2.5.2 Lobby Monitor Search Mockup

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Lobby Monitor Search

Search

Office ID: | Office Name: | Office Type:

Results per Page: 25 Search

Search Results Summary — **Results 1 - 25 of 105**

1 2 3 4 5 Next

Office ID	Office Name	Office Type	
01	SB TAD 01/WTW/Child Care/PID	District	Edit
02	SB TAD 02/WTW/Child Care/PID	District	Edit
03	Yucca Valley TAD/WTW/Child Care/PID	District	Edit
04	Redlands TAD/WTW/Child Care/WIA/FC/PID	District	Edit
05	VV hospital TAD	Outstation	Edit
06	Barstow TAD/WTW/Child Care/PID	District	Edit
07	SB TAD 07/WTW/Child Care/PID	District	Edit
08	Hesperia TAD/WTW/Child Care/PID/Resource	District	Edit
09	Fontana TAD/WTW/Child Care/PID	District	Edit
10	Needles TAD/WTW/Child Care/CFS/DAAS/PID	District	Edit
11	Hesperia Alternative Education WTW	Outstation	Edit
12	Big Bear WTW	Outstation	Edit
13	NO LONGER USED	District	Edit
14	Waterman Gardens WTW	Outstation	Edit
15	Ontario TAD/WTW/Child Care/PID	District	Edit
16	SB HSS ITSD/ C-IV/ Personnel	District	Edit
17	Arrowhead Regional Medical Center	Outstation	Edit
18	Victorville TAD/WTW/Child Care/PID	District	Edit
19	Colton TAD/WTW/Child Care/FC/PID.	District	Edit
20	SB PID/Appeals/CORU	District	Edit
21	Bear Valley Comm. Hospital TAD	Outstation	Edit
22	SB Emmerton Elementary School TAD	Outstation	Edit
23	Fontana Public Health Clinic TAD	Outstation	Edit
24	Yucaipa TAD/WTW/Child Care/WIA/PID	District	Edit
25	Rancho Cucamonga TAD/WTW/Child Care/PID	District	Edit

1 2 3 4 5 Next

This Type 1 page took 3.08 seconds to load.

Figure 2.5.1 – Lobby Monitor Search page

2.5.3 Description of Changes

1. Create a new page titled 'Lobby Monitor Search' page as shown on Figure 2.5.1.
    a. The page will have a search section containing the following fields:
        i. Office ID

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            1. This will be an editable text field.
        ii. Office Name
            1. This will be an editable text field
        iii. Office Type
            1. This will be a drop down field that will list the different office types that is available for the associated county.
                a. Value will be listed in alphabetical order.
            2. Drop down field will default to blank.
    b. Clicking the 'Search' button will update the 'Search Results Summary' section with the result based on the information inputted from the following fields 'Office ID', 'Office Name' or 'Office Type'.
    c. The 'Lobby Monitor Search' page will have 4 different columns under the 'Search Results Summary' section.
        i. First column will be titled 'Office ID'
            1. This column will hold an identification number used by the county and will comprise part of the Worker ID.
            2. The identification number will be a hyperlink that will navigate the worker to the 'Lobby Monitor Detail' page in view mode for that specific office.
        ii. Second column will be titled 'Office Name'
            1. This column will be a descriptive text capturing the name of a physical office location.
        iii. Third column will be titled 'Office Type'
            1. This column will capture the type of office. It may have the following values: Outstation, Regional, Main etc.
        iv. Fourth column will be an 'Edit' button.
            1. Clicking the 'Edit' button will take the worker to the 'Lobby Monitor Detail' page in 'edit' mode for that specific office.
            2. 'Edit' button will be hidden for workers that does not have the proper security right.
    d. The Search Result Summary will default to be in order of 'Office ID' in ascending numerical order.
        i. Worker will need to click on the downward arrow that display in each column in order to sort the result accordingly.
    e. The 'Lobby Monitor Search' page will automatically load with a list of all the offices that is available for the county they are accessing.

Note: Chrome is the preferred browser to use for the Lobby Monitor pages to work properly.

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2.5.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**
  - **The new 'Lobby Monitor' task item will appear in the 'Lobby Management' collapsible task navigation section below the 'Device Flow Mgmt.' task item. Clicking the 'Lobby Monitor' task item will take the worker to the 'Lobby Monitor Search' page.**
  - **Users will need proper security rights to see the 'Lobby Monitor' task item.**

2.5.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LobbyMonitorView	View Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail	Lobby Monitor View and Lobby Monitor Edit
LobbyMonitorEdit	View and Edit Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Lobby Monitor Edit	View and Edit the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail pages.	See Security Matrix
Lobby Monitor View	View the Lobby Monitor Search,Lobby Monitor Detail pages and Office Promotion Detail pages	See Security Matrix

2.5.6 Page Mapping

Create new Page Mapping for the Lobby Monitor Search page.

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2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Lobby Monitor Detail page

2.6.1 Overview

Create a new page titled 'Lobby Monitor Detail' page that will contain all the elements that will control the Customer Facing Lobby Monitor for the specified office. This will include Reception Log Locations, Custom Header, News Alerts, Designed Promotions, Office Promotion and Customer Dashboard Link.

2.6.2 Lobby Monitor Detail Mockup

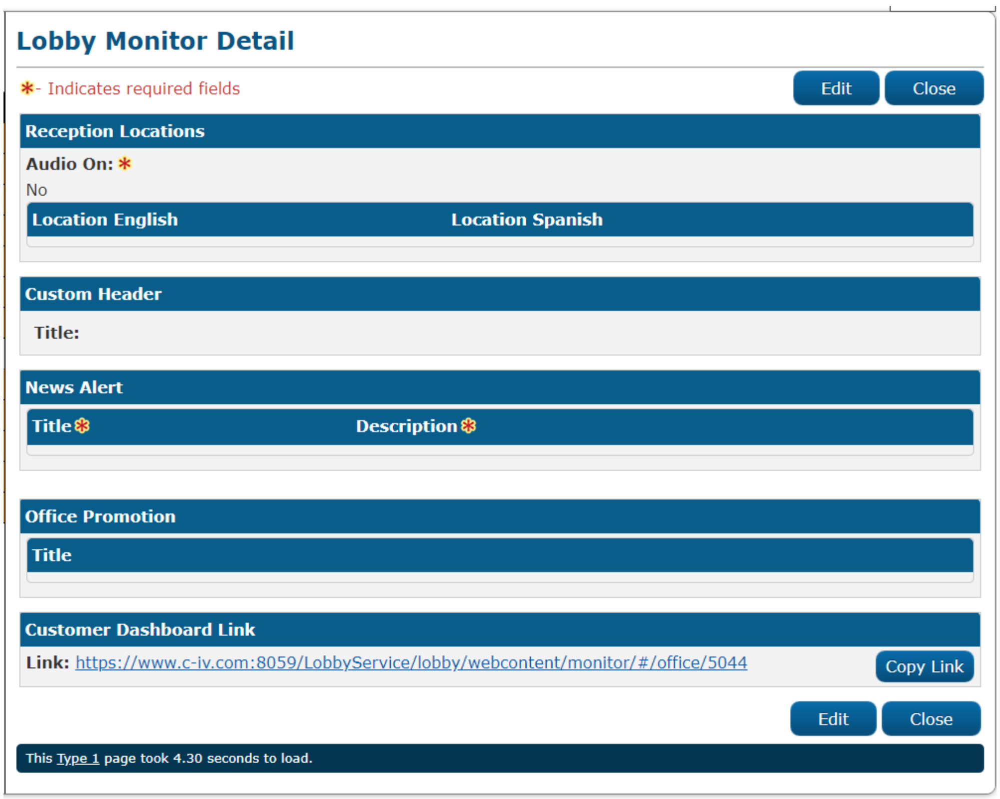

Figure 2.6.1 – Lobby Monitor Detail page View Mode (LA and CalWIN counties)

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Lobby Monitor Detail

*- Indicates required fields

Edit Close

Reception Locations

Audio On: *

No

Location English	Location Spanish

Custom Header

Title:

News Alert

Title *	Description *

Designed Promotions

C4Yourself

Visit C4Yourself.com for easy access to

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- Applications
- Renewals
- Upload documents
- Receive notifications
- Check messages
- Report changes
- View announcements
- View documents
- And much more!

Display English Version:
Yes
Display Spanish Version:
Yes

Mobile App

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- Real Time EBT balances
- Upload and view documents
- Receive notifications
- Check messages
- Find an office near you
- And much more!

Available now at
Google Play and Apple Stores.

Display English Version:
Yes
Display Spanish Version:
Yes

IVR

Call our Interactive Voice Response (IVR) System

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For 24/7 access to:

- Benefit information
- Program status
- Requesting forms
- Worker contact information
- Office hours & locations
- And much more!

Display English Version:
Yes
Display Spanish Version:
Yes

Office Promotion

Title

Customer Dashboard Link

Link: https://www.c-iv.com:8059/LobbyService/lobby/webcontent/monitor/#/office/5044 Copy Link

Edit Close

This Type 1 page took 4.30 seconds to load.

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Figure 2.6.2 – Lobby Monitor Detail page View Mode (CIV Counties)

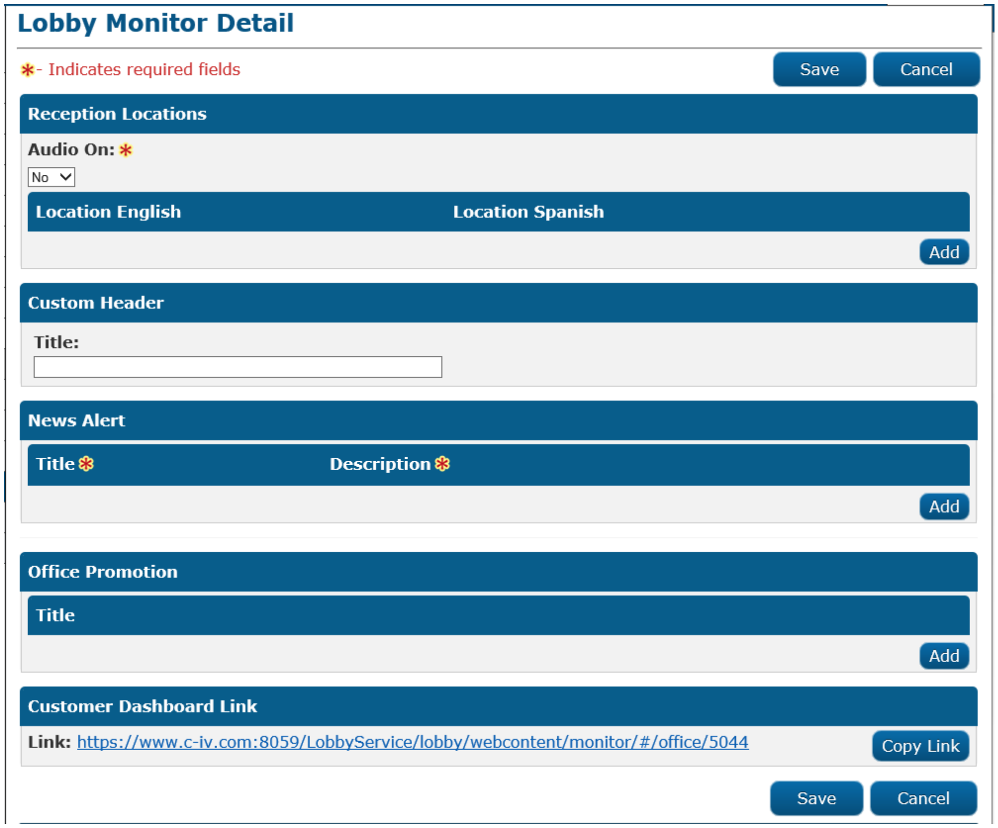

Figure 2.6.3 – Lobby Monitor Detail page Edit Mode (LA and CalWIN counties)

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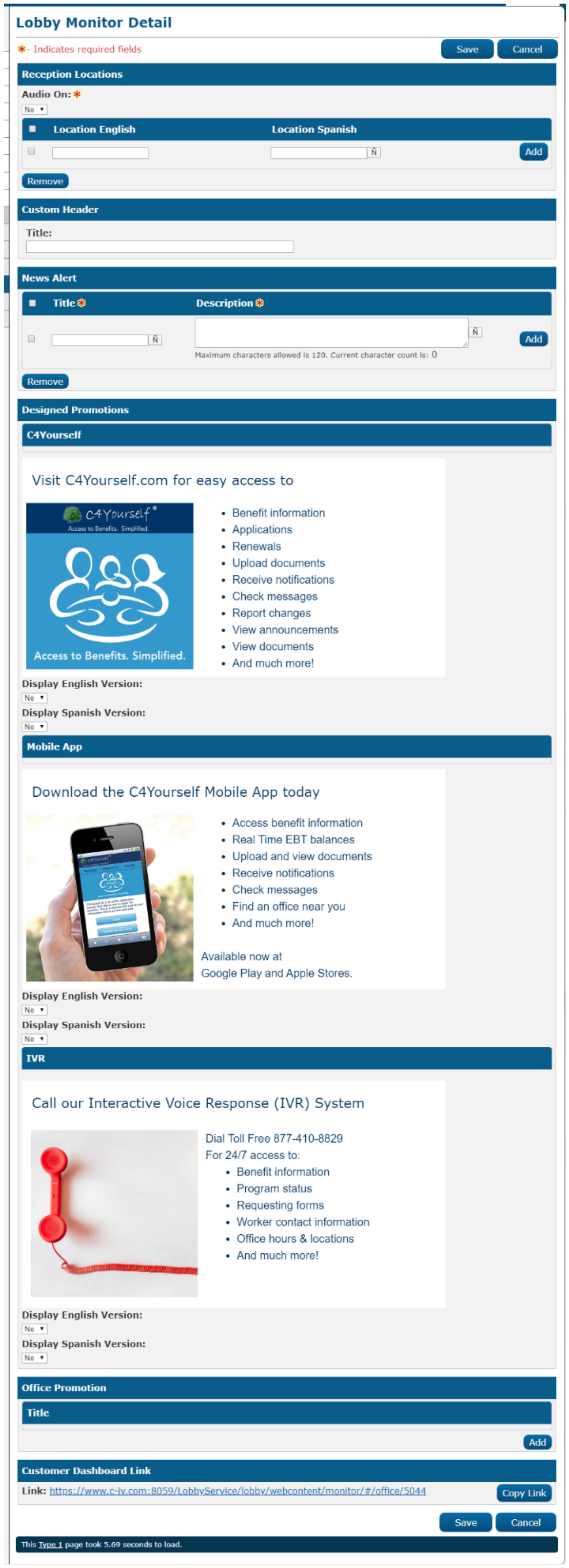
Lobby Monitor Detail
*- Indicates required fields
Save
Cancel
Reception Locations
Audio On: *
No
Location English
Location Spanish
Add
Remove
Custom Header
Title:
News Alert
Title
Description
Add
Maximum characters allowed is 120. Current character count is: 0
Remove
Designed Promotions
C4Yourself
Visit C4Yourself.com for easy access to
C4Yourself
Access to Benefits. Simplified.
Access to Benefits. Simplified.
Benefit information
Applications
Renewals
Upload documents
Receive notifications
Check messages
Report changes
View announcements
View documents
And much more!
Display English Version:
No
Display Spanish Version:
No
Mobile App
Download the C4Yourself Mobile App today
Access benefit information
Real Time EBT balances
Upload and view documents
Receive notifications
Check messages
Find an office near you
And much more!
Available now at
Google Play and Apple Stores.
Display English Version:
No
Display Spanish Version:
No
IVR
Call our Interactive Voice Response (IVR) System
Dial Toll Free 877-410-8829
For 24/7 access to:
Benefit information
Program status
Requesting forms
Worker contact information
Office hours & locations
And much more!
Display English Version:
No
Display Spanish Version:
No
Office Promotion
Title
Add
Customer Dashboard Link
Link: https://www.c-iv.com:8059/LobbyService/lobby/webcontent/monitor/#/office/5044
Copy Link
Save
Cancel
This Type 1 page took 5.69 seconds to load.

Figure 2.6.4 – Lobby Monitor Detail page Edit Mode (CIV Counties)

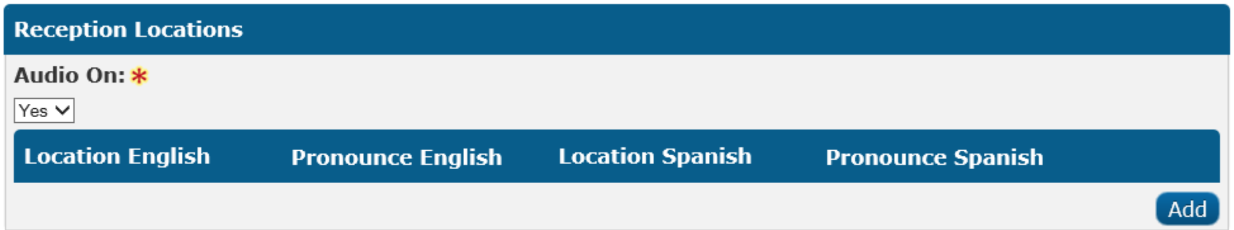

Figure 2.6.5 – Reception Locations Audio On field set to 'Yes' with no 'Location' added

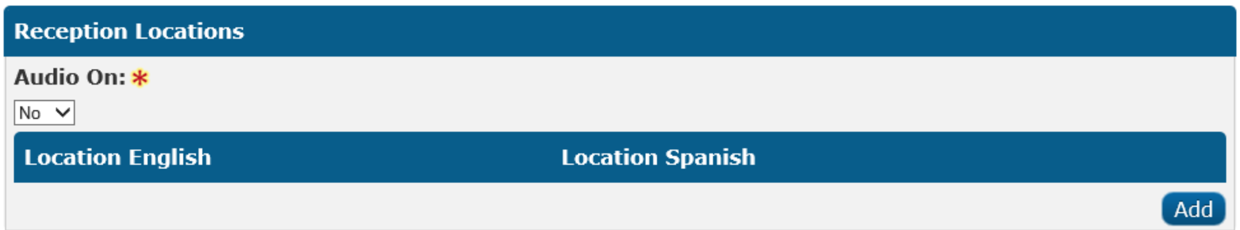

Figure 2.6.6 – Reception Locations Audio On field set to 'No' with no 'Location' added

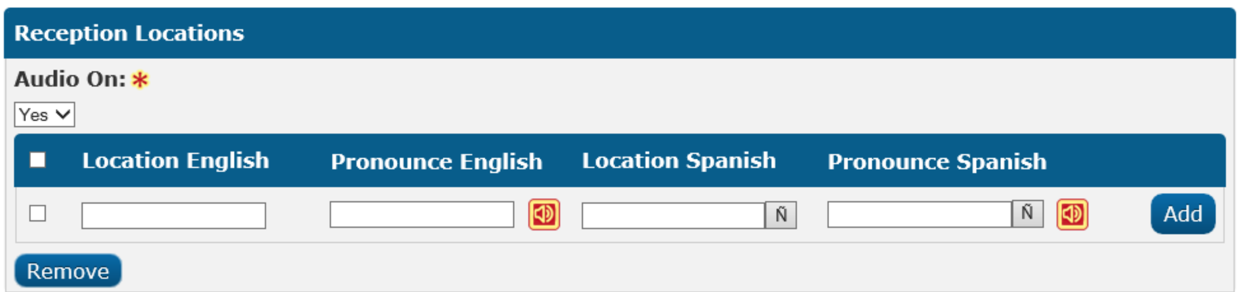

Figure 2.6.7 – Reception Locations Audio On field set to 'Yes' with 'Location' added

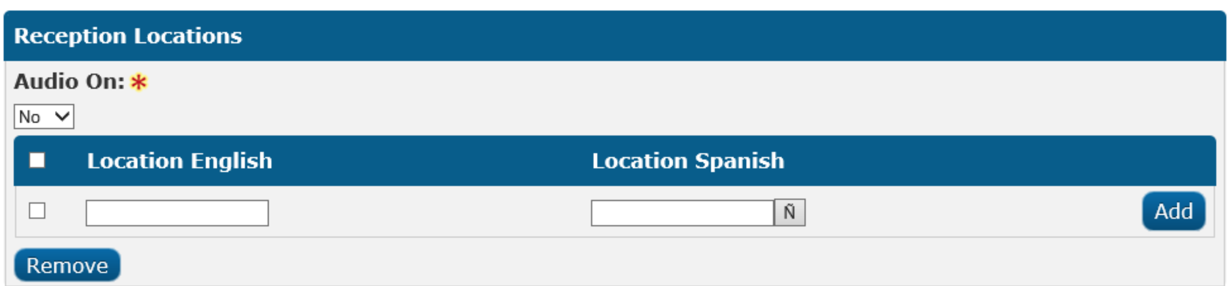

Figure 2.6.8 – Reception Locations Audio On field set to 'No' with 'Location' added

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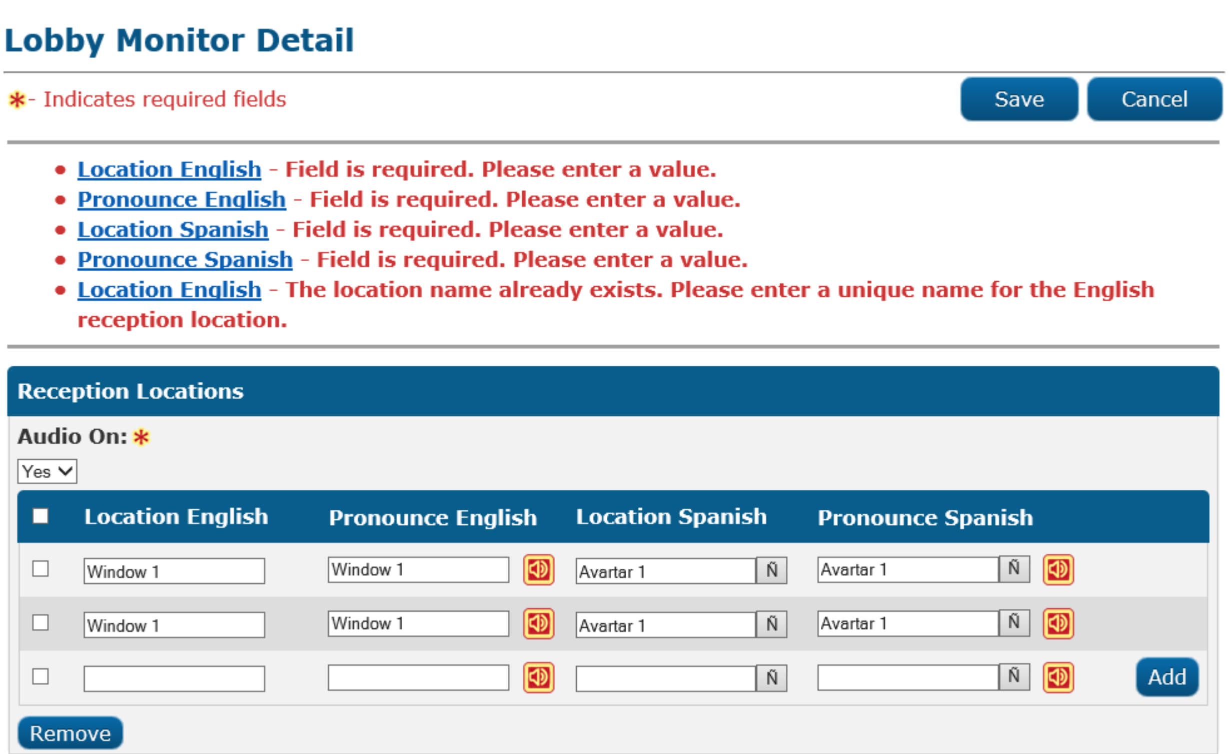

Figure 2.6.9 – Reception Locations Audio On field set to 'Yes' with 'Location' added validations.

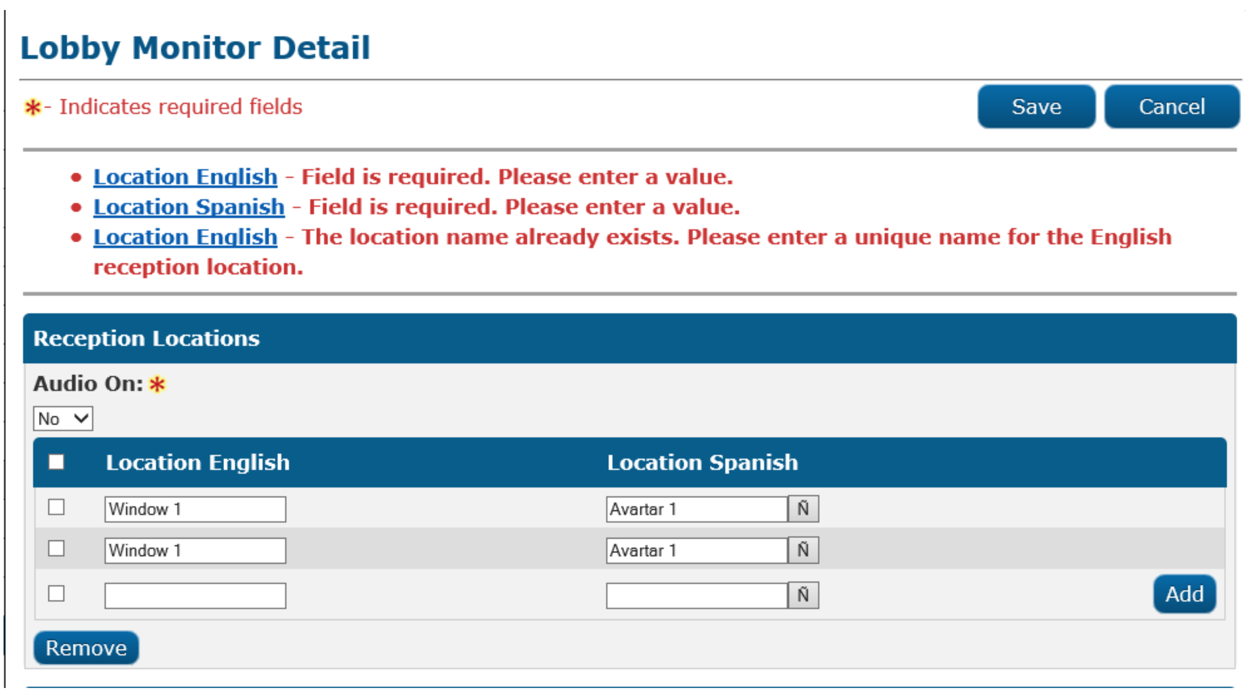

Figure 2.6.10 – Reception Locations Audio On field set to 'No' with 'Location' added validations.

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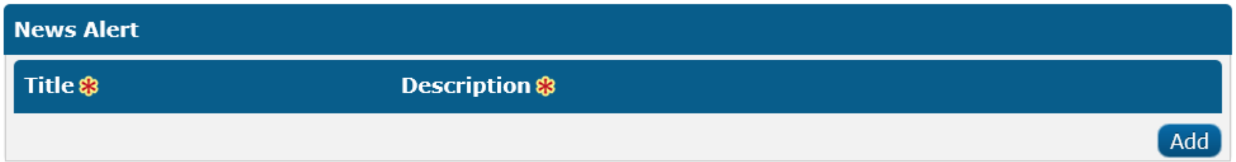

Figure 2.6.11 –No custom News Alert added

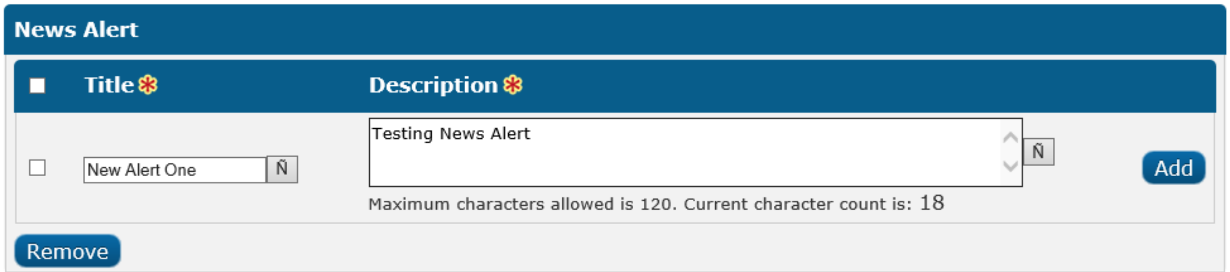

Figure 2.6.12 – Customer News Alert added

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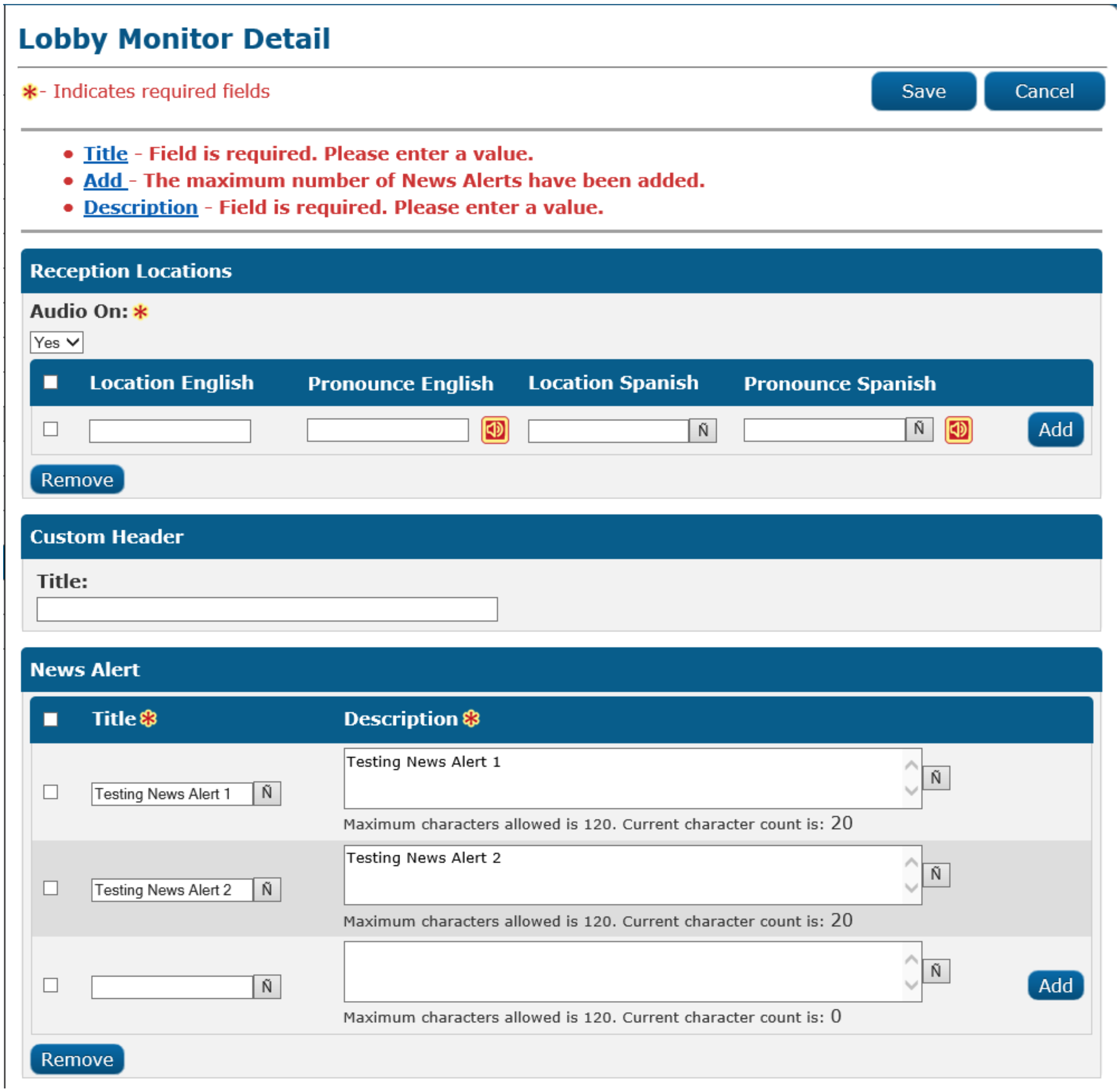

Figure 2.6.13 – Custom News Alert added validations

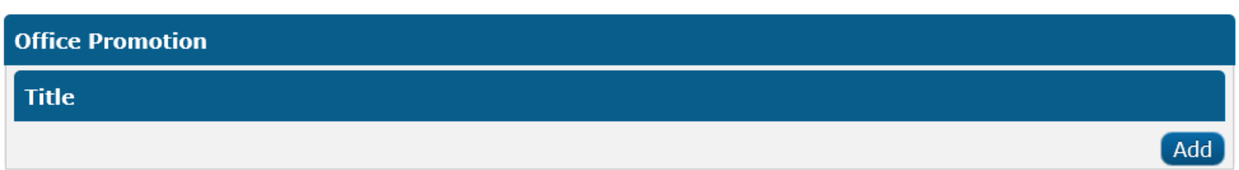

Figure 2.6.14 – No Custom Office Promotion Added

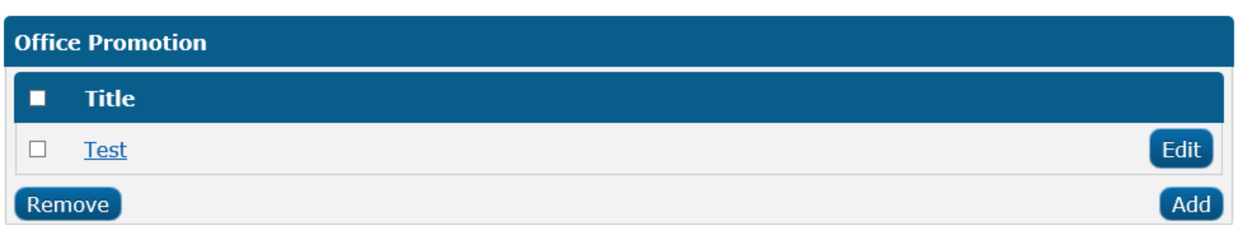

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Figure 2.6.15 – With Custom Office Promotion Added

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Lobby Monitor Detail
*- Indicates required fields
Save
Cancel
• Add - Office Promotions are pending removal, please click the Save button prior to adding new promotions.
Reception Locations
Audio On: *
Yes
Location English
Pronounce English
Location Spanish
Pronounce Spanish
Add
Custom Header
Title:
News Alert
Title *
Description *
Add
Designed Promotions
C4Yourself
Visit C4Yourself.com for easy access to
c4Yourself
Access to Benefits. Simplified.
Access to Benefits. Simplified.
• Benefit information
• Applications
• Renewals
• Upload documents
• Receive notifications
• Check messages
• Report changes
• View announcements
• View documents
• And much more!
Display English Version:
Yes
Display Spanish Version:
Yes
Mobile App
Download the C4Yourself Mobile App today
• Access benefit information
• Real Time EBT balances
• Upload and view documents
• Receive notifications
• Check messages
• Find an office near you
• And much more!
Available now at
Google Play and Apple Stores.
Display English Version:
Yes
Display Spanish Version:
Yes
IVR
Call our Interactive Voice Response (IVR) System
Dial Toll Free 877-410-8829
For 24/7 access to:
• Benefit information
• Program status
• Requesting forms
• Worker contact information
• Office hours & locations
• And much more!
Display English Version:
Yes
Display Spanish Version:
Yes
Office Promotion
Title
Testing
Edit
Testing 2
Edit
Remove
Add
Customer Dashboard Link
Link: http://:/LobbyService/lobby/webcontent/monitor/#/office/5044
Copy Link
Save
Cancel

Figure 2.6.16 – Office Promotion custom validation

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Lobby Monitor Detail

*- Indicates required fields

Save | Cancel

- Add - You have reached the maximum number of Office Promotions.

Reception Locations

Audio On: *

Yes

Location English	Pronounce English	Location Spanish	Pronounce Spanish

Add

Custom Header

Title:

News Alert

Title *	Description *

Add

Designed Promotions

C4Yourself

Visit C4Yourself.com for easy access to

- Benefit information
- Applications
- Renewals
- Upload documents
- Receive notifications
- Check messages
- Report changes
- View announcements
- View documents
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

Mobile App

Download the C4Yourself Mobile App today

- Access benefit information
- Real Time EBT balances
- Upload and view documents
- Receive notifications
- Check messages
- Find an office near you
- And much more!

Available now at
Google Play and Apple Stores.

Display English Version:

Yes

Display Spanish Version:

Yes

IVR

Call our Interactive Voice Response (IVR) System

Dial Toll Free 877-410-8829
For 24/7 access to:

- Benefit information
- Program status
- Requesting forms
- Worker contact information
- Office hours & locations
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

Office Promotion

	Title	
☐	Testing	Edit
☐	Testing 2	Edit
☐	Testing 3	Edit

Remove | Add

Customer Dashboard Link

Link: http://:/LobbyService/lobby/webcontent/monitor/#/office/5044 Copy Link

Save | Cancel

This Type 1 page took 10.07 seconds to load.

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Figure 2.6.17 – Office Promotion custom validation

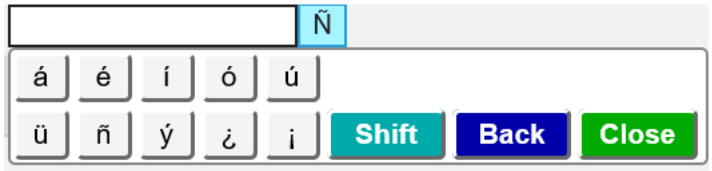

Figure 2.6.18 – Spanish keypad to allow Spanish Characters

2.6.3 Description of Changes

1. Create a new page titled ‘Lobby Monitor Detail’ page as shown on Figure 2.6.1 through Figure 2.6.4 that is accessible through the ‘Lobby Monitor Search’ page by either clicking on the ‘Office ID’ hyperlink (‘View’ mode) or clicking on the ‘Edit’ button (‘Edit’ mode).
    a. The ‘Lobby Monitor Detail’ page will have the following fields:
        i. Create a section titled ‘Reception Locations’ as shown on Figure 2.6.5 through Figure 2.6.10.
            1. The ‘Reception Locations’ section will have the following:
                a. A required drop down field titled ‘Audio On:’ and will default to ‘No’ and will have the following options:
                    i. Yes
                    ii. No
                b. A dynamic subsection that will display based on value that is set in the ‘Audio On:’ drop down field.
                    i. If the ‘Audio On:’ drop down field is set to ‘No’ the subsection will have 2 different columns as shown on Figure 2.6.6 and an ‘Add’ button.
                        1. First Column will be titled ‘Location English’.
                        2. Second Column will be titled ‘Location Spanish’.
                        3. Clicking the ‘Add’ button will refresh the page and the subsection will now display 3 columns, an ‘Add’ button and a ‘Remove’ button as shown on Figure 2.6.8
                            a. The system will refresh and add an additional row that will allow the worker to add additional Location in

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both English and Spanish every time the user click the 'Add' button.

b. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button on the 'Lobby Monitor Detail' page for the information to be updated.
c. First column will be a 'check box'.
d. Second column will be titled 'Location English'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
e. Third column will be titled 'Location Spanish'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. There will be a 'Ñ' icon right

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next to the editable text field and clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.

iii. There will be a tool tip that will display 'Open the keypad'.

ii. If the 'Audio On:' drop down field is set to 'Yes' the subsection will have 4 different columns as shown on Figure 2.6.5 and an 'Add' button.

1. First column will be titled 'Location English'.
2. Second column will be titled 'Pronounce English'.
3. Third column will be titled 'Location Spanish'.
4. Fourth column will be titled 'Pronounce Spanish'.
5. Clicking the 'Add' button will refresh the page and the subsection will now display 5 columns, an 'Add' button and a 'Remove' button as shown on Figure 2.6.7
    a. The system will refresh and add an additional row that will allow the worker to add additional Location and Pronunciation in both English and Spanish every time the user click the 'Add' button.
    b. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button

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on the ‘Lobby Monitor Detail’ page for the information to be updated.

c. First column will be a ‘check box’.
d. Second column will be titled ‘Location English’.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
e. Third column will be titled ‘Pronounce English’.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. Text entered in this column will remain even if the ‘Audio On’ field is changed to ‘No’.
    iii. Next to the editable text field there will be an ‘Audio’ icon.

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iv. Clicking on the 'Audio' icon will let the worker preview what the Audio will sound like when calling the locations in English.

    Note: Audio functionality will only work if the LRS/CalSAWS application is open using Chrome.

f. Fourth column will be titled 'Location Spanish'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. There will be a 'Ñ' icon right next to the editable text field.
    iii. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
    iv. There will be a tool tip that will

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display ‘Open the keypad’.

g. Fifth column will be titled ‘Pronounce Spanish’.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. Text entered in this column will remain even if the ‘Audio On’ field is changed to ‘No’.
    iii. There will be a ‘Ñ’ icon right next to the editable text field.
    iv. Clicking on the ‘Ñ’ icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
    v. There will be a tool tip that will display ‘Open the keypad’.
    vi. Next to the ‘Ñ’ icon there will be an ‘Audio’ icon.
    vii. Clicking on the ‘Audio’ icon will let the worker

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preview what the Audio will sound like when calling the locations in Spanish.
Note: Audio functionality will only work if the LRS/CalSAWS application is open using Chrome.

c. Add the following custom validation for the 'Reception Locations' section as shown on Figure 2.6.9 and Figure 2.6.10.
    i. "<u>Location English</u> – The Location name already exists. Please enter a unique name for the English reception location."
        1. This validation will be trigger when the worker clicks the 'Save' button on the 'Lobby Monitor Detail 'page and the Location English field have more than 1 unique name.
    ii. "<u>Location English</u> – Field is required. Please enter a value."
        1. This validation will be trigger when the worker clicks the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Location English' editable text field.
    iii. "<u>Location Spanish</u> – Field is required. Please enter a value."
        1. This validation will be trigger when the worker clicks the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Location Spanish' editable text field.
    iv. "<u>Pronounce English</u> – Field is required. Please enter a value."
        1. This validation will be trigger if the 'Audio On' field is set to

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'Yes' and the worker click the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Pronounce English' editable text field.

v. "<u>Pronounce Spanish</u> – Field is required. Please enter a value."
    1. This validation will be trigger if the 'Audio On' field is set to 'Yes' and the worker click the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Pronounce Spanish' editable text field.

2. Information entered under the 'Reception Locations' will not be saved until the worker click the 'Save' button on the 'Lobby Monitor Detail' page.

ii. Create a section titled 'Custom Header' as shown on Figure 2.6.1through Figure 2.6.4.
    1. The 'Custom Header' section will have an editable text field titled 'Title:'.
        a. Editable field will have a maximum 80 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
        b. Only one Custom Header can be created.
        c. Custom Header information will not be saved until the worker click the 'Save' button on the 'Lobby Monitor Detail' page.

iii. Create a section titled 'News Alert' as shown on Figure 2.6.11 through Figure 2.6.13.
    1. The 'News Alert' section will have two columns and an 'Add' button as shown on Figure 2.6.11.
        a. First column will be titled 'Title' and will be required.
        b. Second column will be titled 'Description' and will be required.
        c. Clicking the 'Add' button will refresh the page and the 'News Alert' section will now have threes columns, an 'Add' button and a 'Remove' button as shown on figure 2.6.12.
            i. The system will refresh and add an additional row that will allow the worker to add additional News Alert

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every time the user click the ‘Add’ button.

ii. Clicking the ‘Remove’ button will remove the row right away but the worker will need to click the ‘Save’ button on the ‘Lobby Monitor Detail’ page for the information to be updated.

iii. First column will be a ‘check box’.

iv. Second column will be titled ‘Title’ and will be a required field.
   1. This column will have an editable text field and have a 30 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
   2. There will be a ‘Ñ’ icon right next to the editable text field.
      a. Clicking on the ‘Ñ’ icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
      b. There will be a tool tip that will display ‘Open the keypad’.

v. Third column will be titled ‘Description’ and will be a required field.
   1. This column will have an editable text field and have a 120 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
   2. There will be a ‘Ñ’ icon right next to the editable text field.
      a. Clicking on the ‘Ñ’ icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.19.
      b. There will be a tool tip that will display ‘Open the keypad’.

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3. Underneath the editable text field it will display a character tracking. This will track the number of characters entered in this field.
    a. Character tracking will have the following language: "Maximum characters allowed is 120. Current character count is: 0"
        i. It will start with 0 but will increase as the amount of characters entered in the field increases.

2. The 'News Alert' section can have a maximum of three custom News Alert.
3. Add the following validations as shown on Figure 2.6.13.
    a. "Add – The maximum number of News Alert have been added."
        i. This validation will be trigger when a worker clicks the 'Add' button under the 'News Alert' section when there's already three custom News Alert.
4. Custom News Alert information will not be saved until the worker click the 'Save' button on the 'Lobby Monitor Detail' page.

iv. Create a section titled 'Designed Promotions' as shown on Figure 2.6.1 through Figure 2.6.4 that will display for C-IV counties offices only.
    1. Create three subsections for the 'Design Promotions' section.
        a. First subsection will be titled 'C4Yourself' and will display a custom promotion as shown on Figure 2.6.2 and Figure 2.6.4 and two drop down fields. Custom promotion will be available in Spanish as well.
            i. Custom promotion will be titled 'Visit C4Yourself.com for easy access to'.
                1. Title in Spanish: 'Visite C4Yourself.com para acceder fácilmente a'
            ii. Custom promotion will have the following descriptions:

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1. It will display the C4Yourself image.
2. It will list the following information in bullet points and in the order as listed below:
    a. Benefit information
        i. Spanish: ‘Información de beneficios’
    b. Applications
        i. Spanish: ‘Solicitudes’
    c. Renewals
        i. Spanish: ‘Renovación’
    d. Upload documents
        i. Spanish: ‘Subir documentos’
    e. Receive notifications
        i. Spanish: ‘Recibir notificaciones’
    f. Check messages
        i. Spanish: ‘Revisar mensajes’
    g. Report changes
        i. Spanish: ‘Reportar cambios’
    h. View announcements
        i. Spanish: ‘Ver anuncios’
    i. View documents
        i. Spanish: ‘Ver documentos’
    j. And much more!
        i. Spanish: ‘y mucho más!

iii. The two drop down fields will have the following titles:
1. First drop down field will be titled ‘Display English Version’.
    a. This field will have two different drop down values and it will be listed in the following order:
        i. ‘No’

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ii. 'Yes'

b. It will default to 'No'.

2. Second drop down field will be titled 'Display Spanish Version'.
    a. This field will have two different drop down values and it will be listed in the following order:
        i. 'No'
        ii. 'Yes'
    b. It will default to 'No'.

b. Second subsection will be titled 'Mobile App' and will display a custom promotion as shown on Figure 2.6.2 and Figure 2.6.4 and two drop down fields. Custom promotion will be available in Spanish as well.
    i. Custom promotion will be titled 'Download the C4Yourself Mobile App today'.
        1. Title in Spanish: 'Descargue hoy la aplicación móvil de C4Yourself'
    ii. Custom promotion will have the following descriptions:
        1. It will display an image of a cell phone.
        2. It will list the following information in bullet points and in the order as listed below:
            a. Access benefit information
                i. Spanish: 'Acceder la información sobre sus beneficios'
            b. Real Time EBT balances
                i. Spanish: 'Saldos de EBT'
            c. Upload and view documents
                i. Spanish: 'Cargar y ver documentos'

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d. Receive notifications
   i. Spanish: 'Recibir notificaciones'
e. Check messages
   i. Spanish: 'Revisar mensajes'
f. Find an office near you
   i. Spanish: 'Encontrar una oficina cerca de usted'
g. And much more!
   i. Spanish: 'y mucho más!

3. It will display the following message:
   a. First line: 'Available now at'
      i. Spanish: 'Disponible ahora en'
   b. Second line: 'Google Play and Apple Stores.'
      i. Spanish: 'Google Play y tiendas de Apple.'

iii. The two drop down fields will have the following titles:
   1. First drop down field will be titled 'Display English Version'.
      a. This field will have two different drop down values and it will be listed in the following order:
         i. 'No'
         ii. 'Yes'
      b. It will default to 'No'.
   2. Second drop down field will be title 'Display Spanish Version'.
      a. This field will have two different drop down values and it will be listed in the following order:
         i. 'No'

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            ii. ‘Yes’
        b. It will default to ‘No’.
c. Third subsection will be titled ‘IVR and will display a custom promotion as shown on Figure 2.6.2 and Figure 2.6.4 and two drop down fields. Custom promotion will also be available in Spanish.
    i. Custom promotion will be titled ‘Call our Interactive Voice Response (IVR) System’.
        1. Title in Spanish: ‘Llame a nuestro Sistema de Respuesta de Voz Interactive (IVR)
    ii. Custom promotion will have the following descriptions:
        1. It will display an image of a phone.
        2. It will display the following message: ‘Dial Toll Free [IVR number] For 24/7 access to:’
            a. Spanish: ‘Marque el número gratuito [IVR number] para el acceso 24/7 a:’
            b. The [IVR number] will be specific to the IVR phone number for each county. This will apply for both the English and Spanish version of the promotion.
        3. It will list the following information in bullet points and in the order as listed below:
            a. Benefit information
                i. Spanish: ‘Información de beneficios’
            b. Program status
                i. Spanish: ‘Estado del programa’
            c. Requesting form
                i. Spanish: ‘Solicitud de formularios’

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d. Worker contact information
   i. Spanish: 'Información de contacto del trabajador'
e. Office hours & Locations
   i. Spanish: 'Horario de oficina y ubicaciones'
f. And much more!
   i. Spanish: 'y mucho más!'

iii. The two drop down fields will have the following titles:
   1. First drop down field will be titled 'Display English Version'.
      a. This field will have two different drop down values and it will be listed in the following order:
         i. 'No'
         ii. 'Yes'
      b. It will default to 'No'.
   2. Second drop down field will be title 'Display Spanish Version'.
      a. This field will have two different drop down values and it will be listed in the following order:
         i. 'No'
         ii. 'Yes'
      b. It will default to 'No'.

2. The 'Designed Promotions' section will be hidden for offices in Los Angeles County and offices in CalWIN Counties. The 'Lobby Monitor Detail' page will look like Figure 2.6.1 and Figure 2.6.3.

v. Create a section titled 'Office Promotion' as shown on Figure 2.6.14 through Figure 2.6.17.
   1. Create a subsection titled 'Title' along with an 'Add' button as show on Figure 2.6.14.
      a. Clicking the 'Add' button will navigate the worker to the 'Office Promotion Detail'

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page in 'Create' mode (see section 2.7 for further information).

2. The 'Office Promotion' section can have a maximum of three custom Office Promotion.
    a. When an office promotion has been saved through the 'Office Promotion Detail' page, the 'Office Promotion' subsection will have 2 columns, an and a 'Remove' button as shown on Figure 2.6.18.
        i. Column 1 will have a 'check box'.
        ii. Column 2 will be titled 'Title'.
            1. It will display the text that's been inputted in the 'Title' field on the 'Office Promotion Detail' (Figure 2.7.1) page as a hyperlink.
                a. Clicking the hyperlink will navigate the worker to the 'Office Promotion Detail' page in 'View' mode.
            2. It will display an 'Edit' button.
                a. Clicking on the 'Edit' button will navigate the worker to the 'Office Promotion Detail' page in 'Edit' mode.
    b. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button on the 'Lobby Monitor Detail' page for the information to be updated.
    c. Create a custom validation as shown on Figure 2.6.16 and Figure 2.6.17.
        i. <u>Add</u> – You have reached the maximum number of Office Promotions.
            1. This validation will display when a user clicks the 'Add' button after three office promotions has been added.
        ii. <u>Add</u> – Office Promotions are pending removal, please click the Save button prior to adding new promotions.
            1. This validation will display when there's 3 custom office

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promotions and they checked off one or more of the custom office promotion and click the 'Remove' button and then click the 'Add' button.

vi. Create a section titled 'Customer Dashboard Link' as shown on Figure 2.6.1 through Figure 2.6.4.
   1. 'Customer Dashboard Link' section will display the following
      a. Link: 'Office hyperlink'
         i. 'Office hyperlink' will be a unique hyperlink for each office.
         ii. Clicking the hyperlink will navigate the user to the customer facing Lobby Monitor System (see section 2.8 for more information).
      b. 'Copy Link' button.
         i. Clicking on the button will copy the hyperlink.

Note: Chrome is the preferred browser to use for the Lobby Monitor pages to work properly.

2.6.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**

2.6.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LobbyMonitorEdit	View and Edit Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit,
LobbyMonitorRemove	View and Edit Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit, Information Remove

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LobbyMonitorView	View the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail.	Lobby Monitor View, Lobby Monitor Edit, Information Remove

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Lobby Monitor Edit	View and Edit the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail pages.	See Security Matrix
Lobby Monitor View	View the Lobby Monitor Search, Lobby Monitor Detail pages and Office Promotion pages	See Security Matrix
Information Remove	Remove information from lists across data collection pages	Eligiibility Supervisor, Regional Call Center Supervisor, System Administrator

2.6.6 Page Mapping

Create new Page Mapping for the Lobby Monitor Detail page

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Office Promotion Detail

2.7.1 Overview

Create a new page titled 'Office Promotion Detail' that will contain all the elements that will allow users to create their own office promotion that will display on the Customer Facing Lobby Monitor for the specified office.

2.7.2 Office Promotion Detail Mockup

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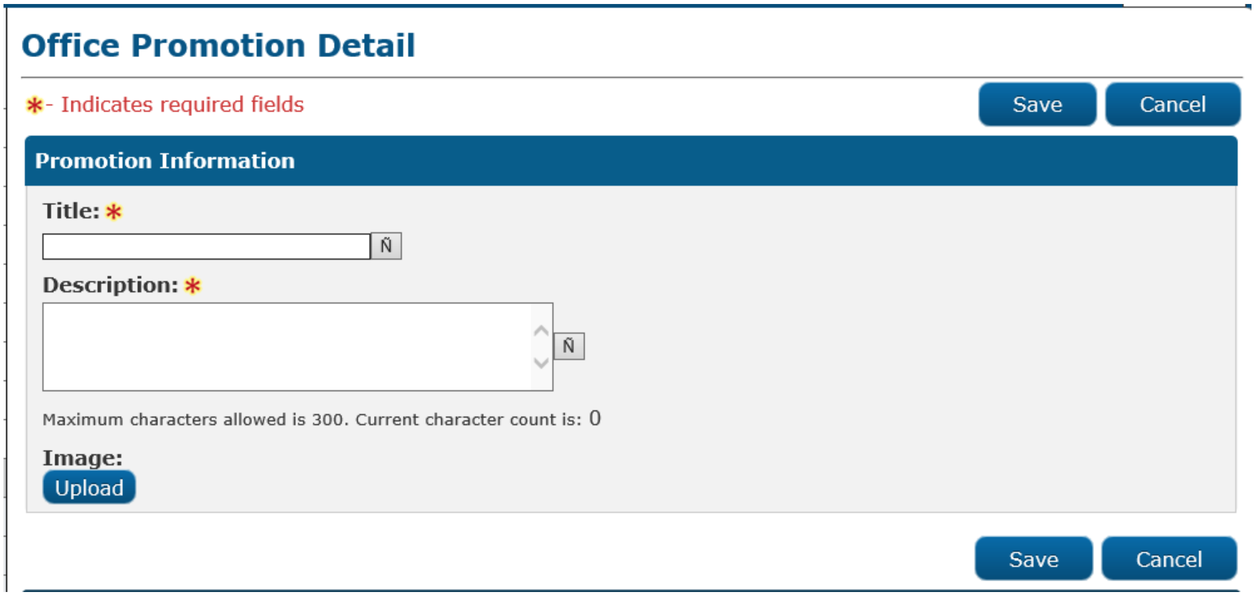

Figure 2.7.1 – Office Promotion 'Create' mode

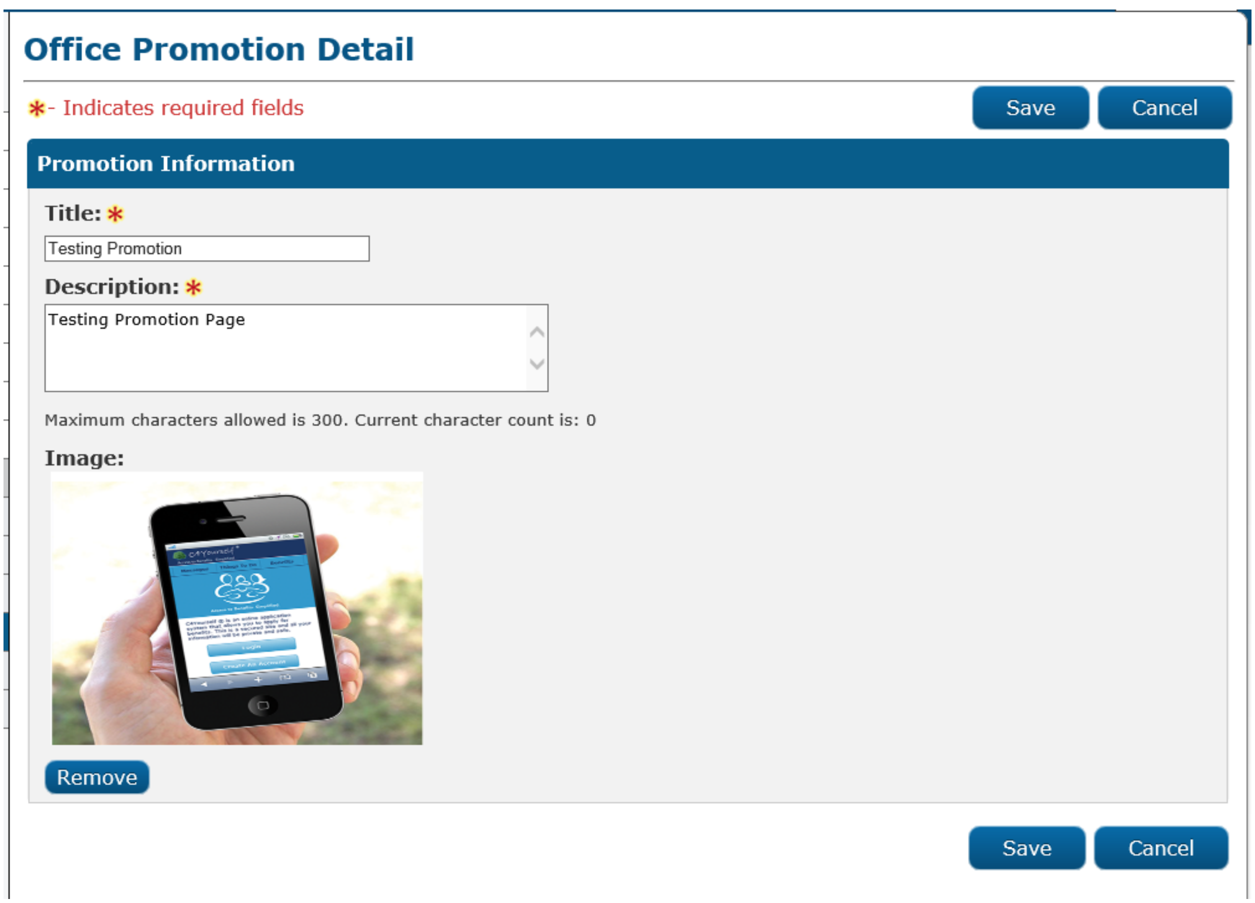

Figure 2.7.2 – Office Promotion 'Edit' mode.

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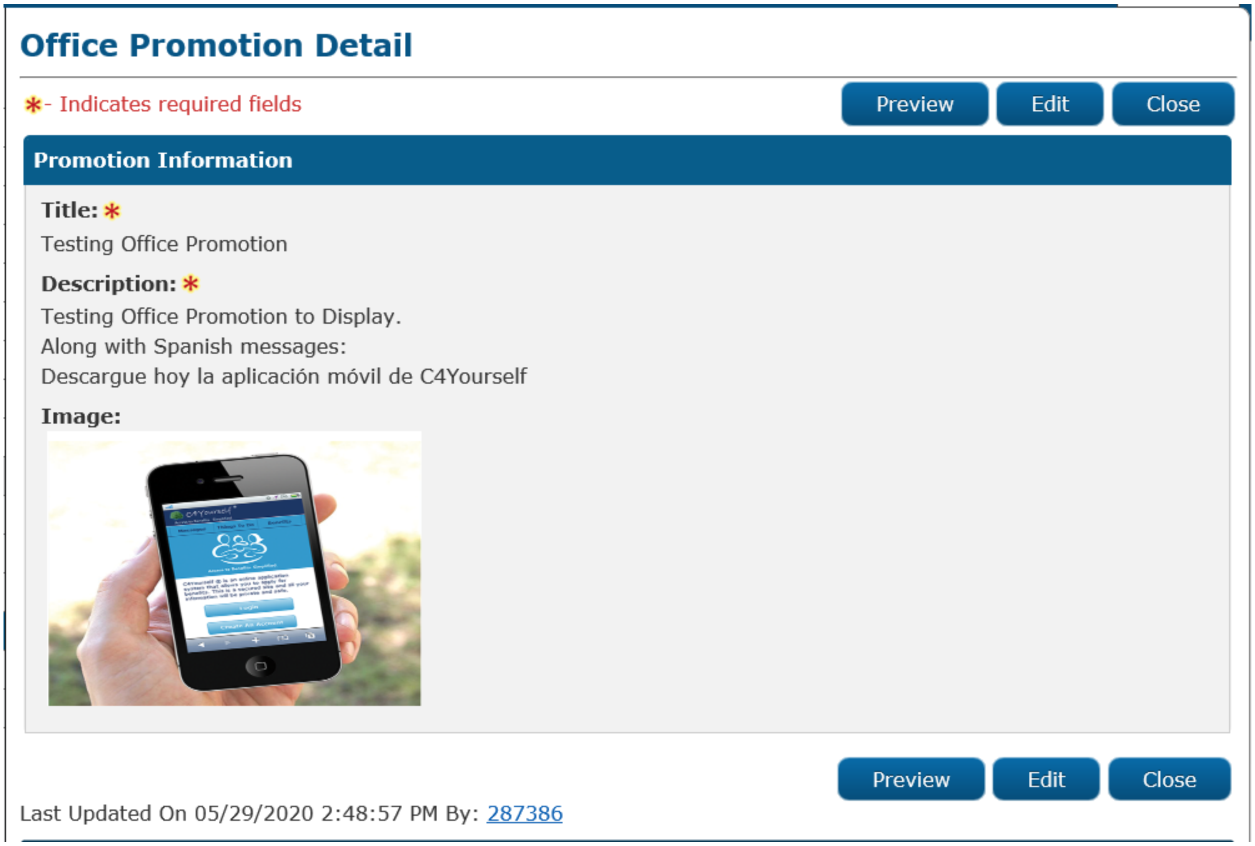

Office Promotion Detail

*- Indicates required fields

Preview Edit Close

Promotion Information

Title: *

Testing Office Promotion

Description: *

Testing Office Promotion to Display.
Along with Spanish messages:
Descargue hoy la aplicación móvil de C4Yourself

Image:

Preview Edit Close

Last Updated On 05/29/2020 2:48:57 PM By: 287386

Figure 2.7.3 – Office Promotion 'View' mode.

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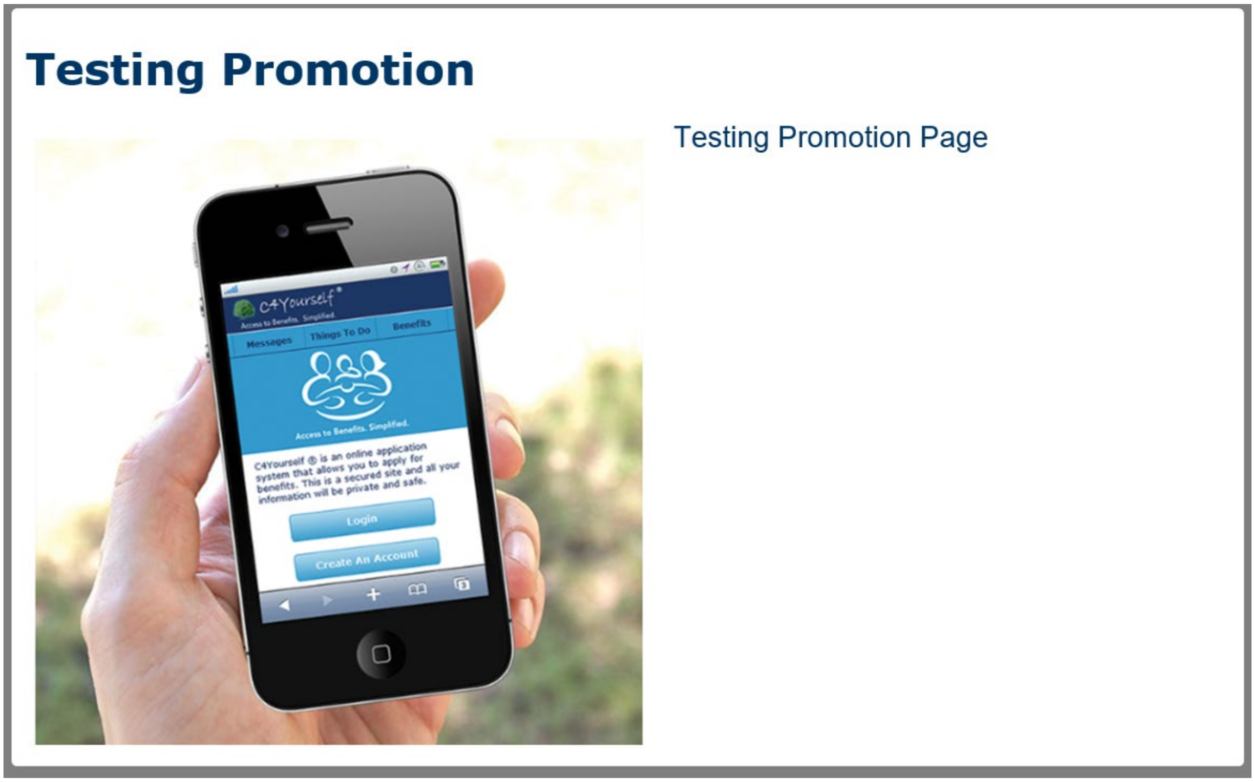

Figure 2.7.4 – Office Promotion 'Preview' window.

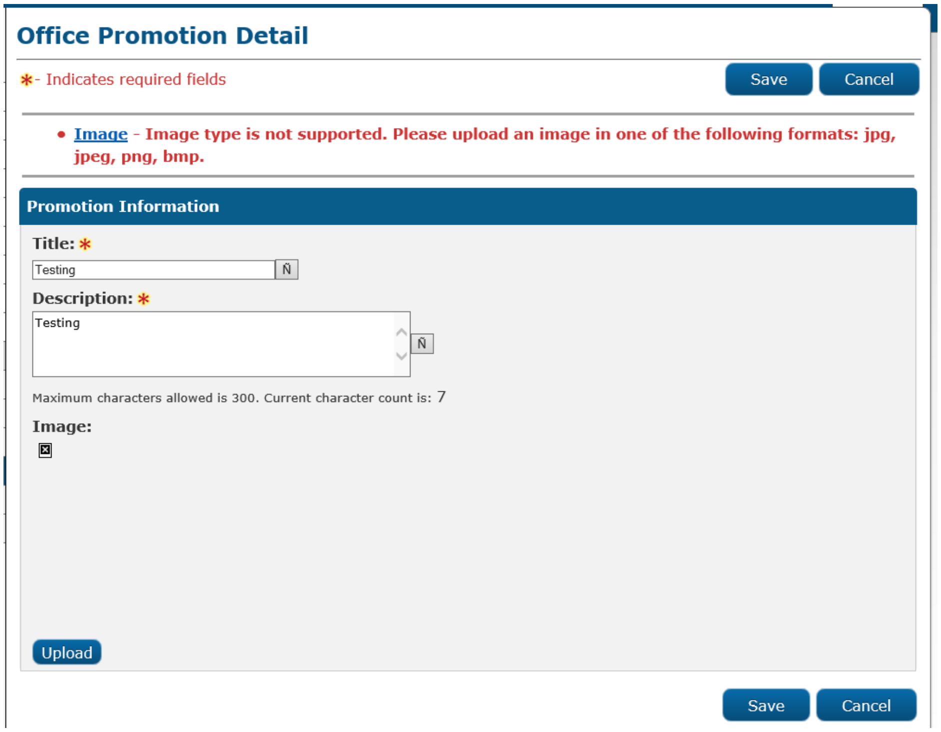

Figure 2.7.5 – Office Promotion validation 1

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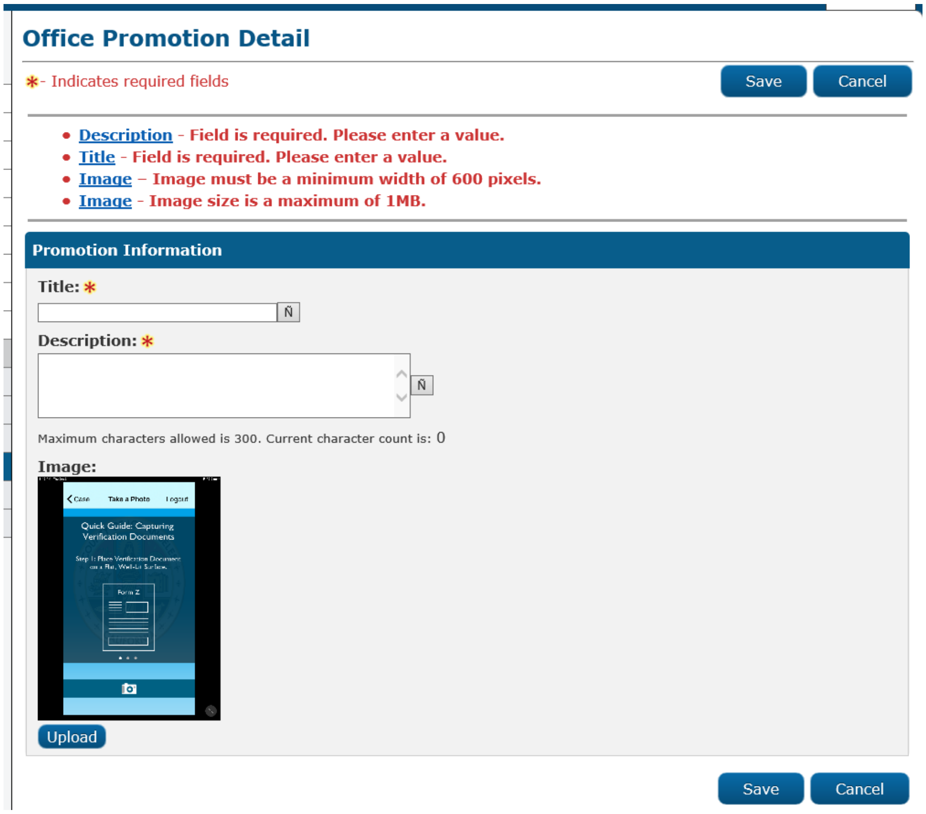

Figure 2.7.6 – Office Promotion validation 2

2.7.3 Description of Changes

1. Create a new page titled 'Office Promotion Detail as shown on Figure 2.7.1 to Figure 2.7.3.
    a. The 'Office Promotion Detail' will have a section titled 'Promotion Information'.
        i. Within the 'Promotion Information' section it will have the following fields.
            1. An editable text field titled 'Title:'
                a. This editable text field will be required and have a maximum characters of 30. Once the maximum characters limit has been reached, no further characters can be inputted.
                    i. There will be a 'Ñ' icon right next to the editable text field.
                        1. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish

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characters as shown on Figure 2.6.18.
    a. There will be a tool tip that will display ‘Open the keypad’.

2. An editable text field titled ‘Description:’
    a. This editable text field will be required and have a maximum characters of 300. Once the maximum characters limit has been reached, no further characters can be inputted.
        i. There will be a ‘Ñ’ icon right next to the editable text field.
            1. Clicking on the ‘Ñ’ icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
                a. There will be a tool tip that will display ‘Open the keypad’.
        ii. Underneath the editable text field it will display a character tracking. This will track the number of characters entered in this field.
                a. Character tracking will have the following language: “Maximum characters allowed is 300. Current character count is: 0
                    i. It will start with 0 but will increase as the amount of characters entered in the field increases.
3. A field to upload an image. This field will be titled ‘Image:’
    a. It will have an ‘Upload’ button.
        i. Clicking the ‘Upload’ button will allow the user to upload an image.
            1. Image width must be a minimum of 600 pixels.
            2. Image size will be a maximum of 1MB.
            3. Image will only be supported for the following file type only:

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        a. jpg
        b. jpeg
        c. png
        d. bmp
4. The ‘Office Promotion Detail’ page in ‘Edit’ mode, will have a ‘Remove’ button when there is an image that was uploaded as shown on Figure 2.7.2.
    a. Clicking the ‘Remove’ button will remove the uploaded image and the ‘Remove’ button will be replace by the ‘Upload’ button.
        i. Clicking the ‘Upload’ button will allow the user to upload an image.
            1. User will need to click ‘Save’ button on the ‘Office Promotion Detail’ page for the new uploaded image to be saved.
            2. User will need to click’ the ‘Save’ button on the ‘Office Promotion Detail’ page and access the page in ‘Edit’ mode again in order to remove the image.

b. The ‘Office Promotion Detail’ page will have a ‘Save’ button, a ‘Cancel’ button, a ‘Preview’ button, an ‘Edit’ button and a ‘Close’ button.
    i. The ‘Save’ button will save the information that the user added under the ‘Promotion Information’ section and will take the user back to the ‘Lobby Monitor Detail’ page.
        1. ‘Save’ button will display when the ‘Office Promotion Detail’ page is in ‘Create’ or ‘Edit’ mode.
    ii. The ‘Cancel’ button’ will discard any changes that was made under the ‘Promotion Information’ section and will take the user back to the ‘Lobby Monitor Detail’ page.
        1. ‘Cancel’ button will display when the ‘Office Promotion Detail’ page is in ‘Create or ‘Edit’ mode.
    iii. The ‘Preview’ button will display when the ‘Office Promotion Detail’ page is in ‘View’ mode.
        1. Clicking the ‘Preview’ button will open a new window and will display what the office promotion will look like based on the information inputted on the ‘Promotion Information’ section as shown on Figure 2.7.4.

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iv. The 'Edit' button will display when the 'Office Promotion Detail' page is in 'View' mode.
    1. Clicking on the 'Edit' button will take the user to the 'Office Promotion Detail' page in 'Edit' mode.

v. The 'Close' button will display when the 'Office Promotion Detail' page is in 'View' mode.
    1. Clicking the 'Close' button will take the user back to the 'Lobby Monitor Detail' page.

c. Create the following custom validations as shown on Figure 2.7.5 and Figure 2.7.6.
   i. '<u>Image</u> – Image type is not supported. Please upload an image in one of the following formats: jpg, jpeg, png, bmp.'
      1. This validation will display when the user clicks the 'Save' button on the 'Office Promotion Detail' page and the uploaded image is not one of the following supported formats: jpg, jpeg, png, bmp.
   ii. '<u>Image</u> – Image must be a minimum width of 600 pixels.'
      1. This validation will display when the user clicks the 'Save' button on the 'Office Promotion Detail' page and the uploaded image does not have a minimum width of 600 pixels.
   iii. '<u>Image</u> – Image size is a maximum of 1MB.'
      1. This validation will display when the user clicks the 'Save' button on the 'Office Promotion Detail' page and the uploaded image have a size greater than 1 MB.

Note: Chrome is the preferred browser to use for the Office Promotion Detail page to work properly.

2.7.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**

2.7.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LobbyMonitorEdit	View and Edit Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit,

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LobbyMonitorRemove	View and Edit Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit, Information Remove
LobbyMonitorView	View the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail.	Lobby Monitor View, Lobby Monitor Edit, Information Remove

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Lobby Monitor Edit	View and Edit the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail pages.	See Security Matrix
Lobby Monitor View	View the Lobby Monitor Search, Lobby Monitor Detail pages and Office Promotion pages	See Security Matrix
Information Remove	Remove information from lists across data collection pages	Eligiibility Supervisor, Regional Call Center Supervisor, System Administrator

2.7.6 Page Mapping

Create a new page mapping for the Office Promotion Detail page.

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 Lobby Monitoring System

2.8.1 Overview

Create a Lobby Monitoring system that will show an animated display in the Lobby Monitoring Screen that will be use by the county offices to

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inform the customer where to go and the ability to display promotions and other pertinent information.

2.8.2 Lobby Monitoring System Mockup

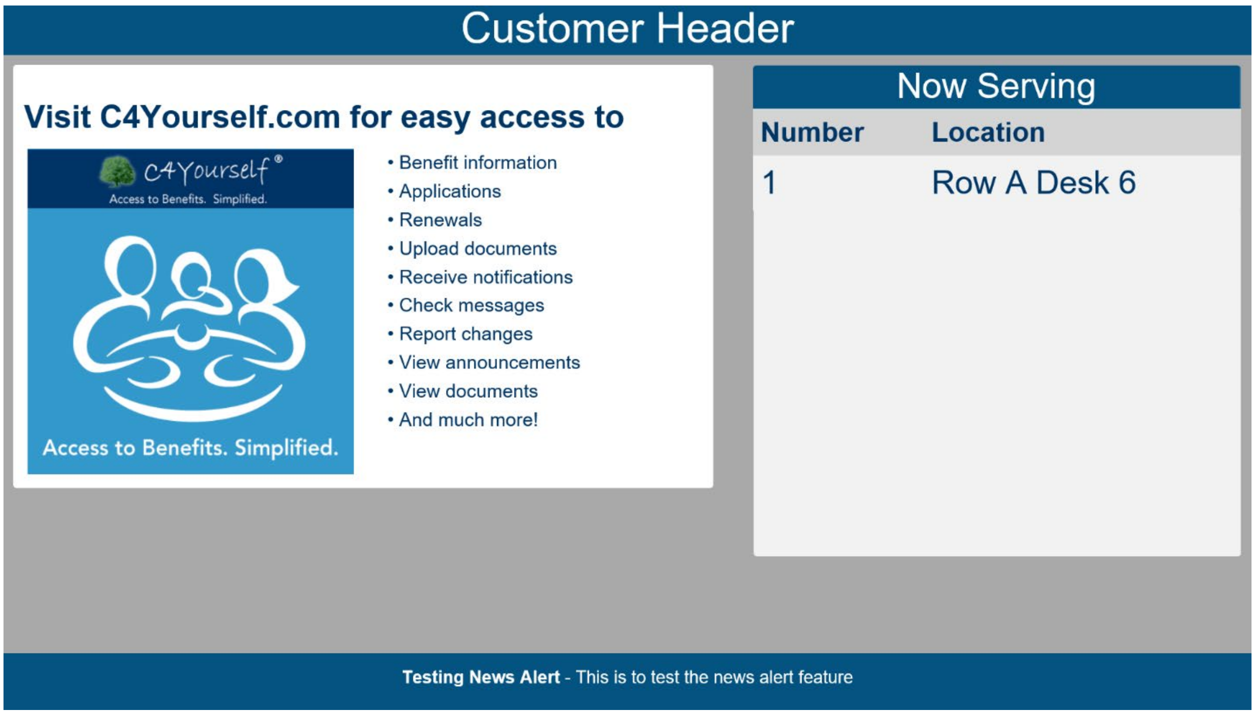

Figure 2.8.1 – Lobby Monitoring System

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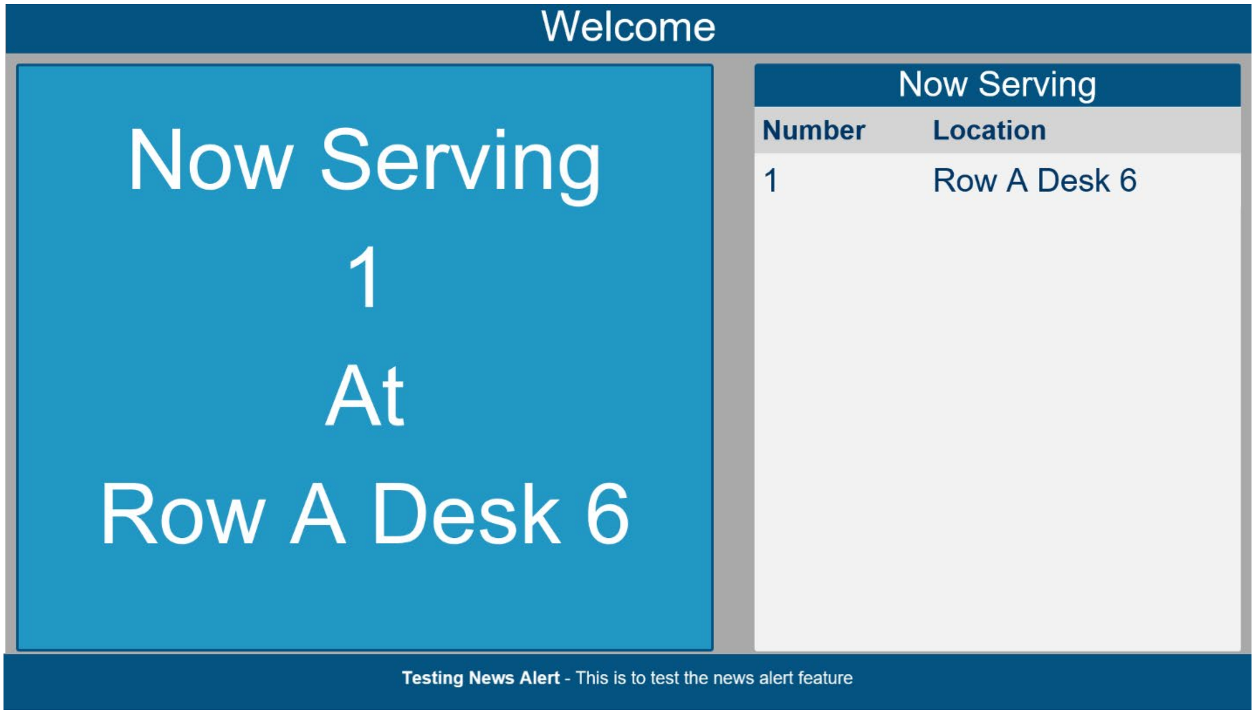

Figure 2.8.2 – Lobby Monitoring System with Number call

2.8.3 Description of Changes

1. Create an animated display to be display as part of the Lobby Monitoring Screen that will show the customers' number and the associated location, along with displaying the office promotion(s) and pertinent information as shown on Figure 2.8.1 and Figure 2.8.2.
    a. Display a 'Custom Header' as part of the Lobby Monitoring Screen.
        i. 'Custom Header' to be located on the top of the Lobby Monitor Screen.
        ii. 'Custom Header' will default to 'Welcome' (as shown on Figure 2.8.2) unless a different value is entered on the Lobby Monitor Detail page under the 'Custom Header' field (as shown on Figure 2.8.1).
    b. Display a list showing the customer's number that was called along with the location they should proceed.
        i. List will be located on the right hand side of the Lobby Monitor Screen and will display the following:
            1. It will have a header titled 'Now Serving'.
            2. Two columns underneath the 'Now Serving' titled.
                a. First column will be titled 'Number'.
                    i. This column will display the 'Number Assigned' information from the Reception Log specific to the

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Reception Log record that was created.

1. This column will display both the ‘Prefix’ and the ‘Number’.

b. Second column will be titled ‘Location’.

i. This column will display the ‘Location’ information that is associated to the ‘Number Assigned’ for the specific Reception Log record.

1. This column will display the Location information that’s chosen from the Reception Log. If the ‘Location’ information is changed in Reception Log, the ‘Location’ information being display will also change accordingly.

ii. Information being listed will display in the Lobby Monitor Screen when the status in the Reception Log record is updated to ‘Lobby Monitor Call’.

iii. Information being listed will no longer display in the Lobby Monitor Screen when the Reception Log record is updated to one of the following statuses:

1. Meeting Started
2. Complete
3. No Response.

Note: For Reception Log entry that have the ‘Hide from Monitor’ field checked off, will not be display on the Monitor.

c. Display ‘Designed Promotions’ and ‘Office Promotion’ on the left hand side of the Lobby Monitor Screen.

i. Both the ‘Designed Promotions’ and ‘Office Promotion’ will display in the same location and it will cycle through.

a. ‘Office Promotion’ being display in the Lobby Monitor will be based on the information that was created in the ‘Office Promotion’ section on the Lobby Monitor Detail page.

i. If there are multiple custom office promotions created, it will cycle through based on the order that is listed on the ‘Lobby Monitor Detail’ page.

2. ‘Designed Promotions’ will cycle through after all the ‘Office Promotion’.

a. ‘Designed Promotions’ being display in the Lobby Monitor will be based on the value

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being set in the 'Designed Promotions' section on the Lobby Monitor Detail page.

i. The 'C4Yourself' designed promotion will display if the 'Display English Version' is set to 'Yes'.
    1. If the 'Display Spanish Version' is set to 'Yes' the Spanish version of the 'C4Yourself' design promotion will display after the English version.

ii. The 'Mobile App' designed promotion will display if the 'Display English Version' is set to 'Yes'.
    1. If the 'Display Spanish Version' is set to 'Yes' the Spanish version of the 'Mobile App' design promotion will display after the English version.

iii. The 'IVR' designed promotion will display if the 'Display English Version' is set to 'Yes'.
    1. If the 'Display Spanish Version' is set to 'Yes' the Spanish version of the 'IVR' design promotion will display after the English version.

b. The order in which the 'Designed Promotions' being cycle through will be as the following when all 3 sections for both the 'Display English Version' and 'Display Spanish Version' is set to 'Yes' on the 'Lobby Monitor Detail' page:

i. C4Yourself
    1. English
    2. Spanish

ii. Mobile App
    1. English
    2. Spanish

iii. IVR
    1. English
    2. Spanish

Note: Designed Promotion will only be available for CIV counties at this time.

d. Display 'News Alert' at the bottom of the Lobby Monitor Screen.

i. If there are more than one 'News Alert' that was created on the 'Lobby Monitor Detail' page it will continue to cycle through at the bottom of the Lobby Monitor Screen.

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            ii. If there are no ‘News Alert’ created on the ‘Lobby Monitor Detail’ page, blue bar will not appear at the bottom of the Lobby Monitor Screen.
        e. Display the customer Number and Associated Location as show on Figure 2.8.2.
            i. Customers Number and Location will display on the left hand side where the ‘Office Promotions/Designed Promotions’ is located.
                1. Customer Number and Location will display in both English and Spanish.
                    a. It will display in Spanish, if there is information that was entered on the ‘Location Spanish’ field on the ‘Lobby Monitor Detail’ page.
                    b. It will display in English first and then in Spanish.
                2. Customer Number and Location will display every time the ‘Monitor Call icon is click through Message Center or Reception Log Detail page.

2. Add an Audio Automation for Number calling as part of the ‘Lobby Monitoring System’.
    a. Audio Automation will allow the system to call numbers out through the Lobby Monitor System and it will be synchronized with the Lobby Monitor Screen. Audio will play when the Lobby Monitor Screen display the Customer Number and Associated Location (see section 2.8.3.1.c).
        i. Audio will call out the Number and the Location information to the associated Reception Log Record.
            1. Audio will be available in both English and Spanish if the ‘Audio On’ field is set to ‘Yes’ under the ‘Reception Locations’ section of the ‘Lobby Monitor Detail’ page.
            2. Audio will play only if the ‘Audio On’ field on the ‘Lobby Monitor Detail’ page is set to ‘Yes’.
            3. Audio will play every time the user clicks on the ‘Monitor Call’ icon either through Message Center or through the Reception Log Detail.
                a. Audio will pronounce the information in English when the English version is display.
                b. Audio will pronounce the information in Spanish when the Spanish version is display.

            Note: If the ‘Audio On’ field is set to ‘No’ on the ‘Lobby Monitor Detail’ page, the Audio will not play even when the user click the ‘Lobby Monitor’ icon through Message Center or Reception Log Detail page.

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Note: Chrome is the preferred browser to use for the Lobby Monitoring pages to work properly.

2.8.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**
    - **Clicking the hyperlink on the 'Customer Dashboard Link' section of the 'Lobby Monitor Detail' page will open a new window for the worker to display the Lobby Monitoring System for the specified office that they are accessing.**

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 Update the Responsive Voice to include API key.

2.9.1 Overview

Lobby Monitor functionality uses a third party vendor 'Responsive Voice' for the functionality to call out number for the Lobby Monitor System. Include an API key to the Lobby Monitor Responsive Voice call.

2.9.2 Description of Change

1. Update the Lobby Monitor Responsive Voice call to include the API key in the LRS/CalSAWS system.

2.9.3 Execution Frequency

N/A

2.9.4 Key Scheduling Dependencies

N/A

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2.9.5 Counties Impacted

N/A

2.9.6 Data Volume/Performance

N/A

2.9.7 Interface Partner

N/A

2.9.8 Failure Procedure/Operational Instructions

N/A

2.10 Create new web services for Lobby Monitor functionality

2.10.1 Overview

Create new web services for the LRS/CalSAWS system for the Lobby Monitor functionality to work and communicate properly.

2.10.2 Description of Change

1. Create web services in the LRS/CalSAWS to support the Lobby Monitor functionality that is being added to the LRS/CalSAWS system. See Supporting Documents Section 1 for Lobby Monitor web services information.
2. Create a new 'Customer Dashboard Link' to correspond to the new web services and unique for each offices.

2.10.3 Execution Frequency

N/A

2.10.4 Key Scheduling Dependencies

N/A

2.10.5 Counties Impacted

N/A

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2.10.6 Data Volume/Performance

N/A

2.10.7 Interface Partner

N/A

2.10.8 Failure Procedure/Operational Instructions

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	List of Web Services that requires to be created in LRS/CalSAWS for the Lobby Monitor functionality.	Attached Document - Lobby Monitor endpoints.xlsx
2	Online	Security Matrix	Attached Document - CA-51740 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.2.1	The LRS shall provide a method of tracking the following contacts via the traffic log: a. Face-to-face contacts; d. Inter-County transfer contacts; e. Traffic in the traditional office setting; f. Outreach User contacts in both fixed and non-fixed locations; g. Non-DPSS COUNTY Users; h. Non-COUNTY agencies; i. General public contacts, including e-Government; and j. Other contacts.	Allows tracking of traffic in the traditional office setting.

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5 APPENDIX

Reception Log Record Status	Behavior
Waiting	'Monitor Call' icon, 'X' icon, 'Check Mark' icon will display in Reception Log. Message Center will not be present for Waiting Status. ~~and Message Center.~~
Worker Notified	'Monitor Call' icon, 'Star' icon, 'X' icon, 'Play' icon, and 'Check Mark' icon will display in Reception Log. The 'Monitor Call' icon, 'Star' icon, 'X' icon and 'Check Mark' icon will display in Message Center.
Worker Acknowledged	'Monitor Call' icon, 'Play' icon, 'X' icon and 'Check Mark' icon will display in both Reception Log and Message Center (this only apply to Message Center if worker updated the status to Worker Acknowledged directly from Message Center). Note: If a worker update the status to Worker Acknowledge from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Lobby Monitor Call	'Monitor Call' icon, 'X' icon, 'Play' icon and 'Check Mark icon will display in both Reception Log and Message Center (this only apply to Message Center if worker updated the status to Lobby Monitor Call directly from Message Center). Note: If a worker update the status to Lobby Monitor Call from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Kiosk Start	No Icons will display in both Reception Log and Message Center.
No Response	No icons will display in both Reception Log and Message Center.
Meeting Started	'Check Mark' icon will display in both Reception Log and Message Center (this only appy to Message Center if worker updated

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	the status to Meeting Started directly from Message Center). Note: If a worker update the status to Meeting Started from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Complete	No icons will display in both Reception Log and Message Center.

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200366

Migration SCR for CCR

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Paul Galloway, Gillian Bendicio, David Wong, Patrick Lombardo, Michael Barillas, Eric Wu, Connor Gorry, William Baretsky
	Reviewed By	Prakash Thota, Ramakrishna Kuchibhotla, Naresh Barsagade, Kapil Santosh, Matthew Warren, Long Nguyen, Eric Chu, Naveen Bhumandla, Priya Sridharan, Raj Devidi, Sunitha Sampathkumar, Shilpa Suddavanda, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/1/2020	.01	Initial Draft	Paul Galloway
9/23/2020	.02	Updated after input from FC Committee	Paul Galloway
10/2/2020	.03	Updated after input from FC Committee: Section 2.7.3 Note; Section 2.9.1; Section 2.10.1; Section 2.10.2 #1.d. and #2.d. validation message text; Section 2.12.2.	Paul Galloway
10/12/20	.04	Updates after input from regions: >Section 2.7.3 #2.d: Corrected fieldname 'Type' to 'Basic Rate'. >Section 2.16.6 changed from "N/A" to statement saying job has not processed any records and should be disabled.	Paul Galloway
11/5/2020	.05	Section 2.11 updated after escalation review to not display validation when SPN is 0000.00.00	Paul Galloway
11/23/2020	.06	Updated field/code table details in: • Migration Impacts • Technical Notes	Brian Munce/ Paul Galloway
11/30/20	.07	Added clarification about how security roles affect display of links in: • Section 2.1.3 • Section 2.2.3 1. d. i.	Gillian Bendicio

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/2/20	1.01	Content Revision 1: • Added "Foster Family Home-Shelter Care" to Auto Regression test Section 2.25.2 Item 2 b. iv. • Updated FC EDBC so SCIs can pay on FFA placements. See highlighted changes in sections 1.1, 1.3, and 2.9. • Added section: 2.26 Client Correspondence - Regression Test SCI FFA NOAs • Clarified validation of non-numeric values in numeric fields in Section 2.3.3 • Corrected reference to 'Back' button to say 'Close' button in two instances in Section 2.3.3	• William Baretsky • Paul Galloway • Connor Gorry • Gillian Bendicio

Table of Contents

1 OVERVIEW

The Continuum of Care Reform (CCR) was implemented in CalSAWS and C-IV through a series of SCR's starting in 2016. To comply with CCR policy changes, updates were made for Foster Care (FC), Kin-GAP (KG), and the Adoption Assistance Program (AAP) in both systems in areas of online data collection, EDBC, the FC Resource Databank, fiscal processes, reports, the DCFS FC Inbound Reader Interface, and Client Correspondence.

1.1 Current Design

- In C-IV the Foster Care Facility Ratios pages were modified to accept new types of sharing ratios for CCR rates, and for the new STRTP placement type.
  In LRS/CalSAWS the Foster Care Facility Ratios pages only display rates for Group Homes and Foster Family Agencies without an option to update them with newer information and types.
- In C-IV the State Program Number (SPN) was moved from the Foster Care License Detail page to the Foster Care Resource Detail page and a Type field (non-ISFC or ISFC) was added. Only certain types can have an ISFC SPN. SPN is required for certain placement types.
  In LRS/CalSAWS a single SPN for a resource can be entered on the FC License Detail page.
- C-IV added a Type field on the license pages (values: ISFC, STRTP, RFA, pre-RFA) to help the transition to the new CCR rate structures and facility types. EDBC validations were also added that require an ISFC or STRTP license type when paying ISFC or STRTP rates, respectively.
  LRS/CalSAWS did not add these License Types or EDBC validations for CCR.
- C-IV added a new resource type of 'Foster Family Agency' (FFA). LRS/CalSAWS did not add that type. LRS/CalSAWS added: 'Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)', and 'Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment).'
- C-IV and LRS/CalSAWS accommodated the new CCR rate structures by adding and renaming fields and adding new dropdown options on the rate pages for Foster Care and Kin-GAP, and by updating EDBC logic to use the new values. The updates added ISFC and Level of Care rates. The systems also allow existing age-based rates to continue for certain placements. The fields and dropdown values differ between the two systems.
- During CCR implementation, C-IV added the ability for workers to enter FC and Kin-GAP rates with Begin Dates and End Dates up to one month in the future. In LRS/CalSAWS those dates can only be after the current system date for AAP.
- At CCR implementation, all Home-Based Foster Care (HBFC) placements moved to a new rate structure except for existing Non-Related Legal Guardian (NRLG) placements:
  - C-IV did a data change to add new records on the Rate Detail page for the new rates on placements that were not NRLG.

    - LRS updated EDBC logic to identify NRLG placements using a matrix of Placement Type and Caregiver Relation to Child values that are considered NRLG to continue paying the older age-based rates to NRLG placements established prior to CCR.
- Kin-GAP placements in C-IV and LRS were moved to the new CCR rate schedule by EDBC if the Case Dismissal Date on the Kin-GAP Summary was 1/1/2017 or later.
- C-IV and LRS added validations on the rate pages to prevent workers from saving CCR rate selections with Begin Dates prior to CCR implementation.
- C-IV allows Standard, Non Standard, and Dual Agency rates for 'Out of State Basic' placements. LRS/CalSAWS only allows Non Standard rates for that placement type.
- C-IV and LRS/CalSAWS both added functionality to record the 'Rate Structure' on EDBC results for FC, KG, and AAP.
- C-IV updated the Infant Supplement payment calculation to pay the new STRTP placement type like Group Homes. LRS did not make this update because the Additional Rate page is used for Infant Supplement.
- C-IV added validations that prevent EDBC from running on FC programs where a Placement Authority is Non-Related Legal Guardianship and certain rates exist. LRS determines NRLG placements differently and did not implement these validations.
- C-IV's LOC reason NOA fragments generate under different Action Types and conditions than their corresponding fragments in LRS/CalSAWS.
- CIV-12488 updated FC EDBC in C-IV to pay Special Care Increments (SCI's) for eligible Foster Family Agency (FFA) placements.

1.2 Requests

Designs were not made jointly between C-IV and LRS/CalSAWS at the time, and there are differences in how CCR was implemented that need to be addressed prior to migration of C-IV into LRS/CalSAWS.

1.3 Overview of Recommendations

1. Replace the Foster Care Facility Ratio Detail page in LRS/CalSAWS with page designs like the Foster Care Facility Ratio List and Detail pages in C-IV, including the side task navigation. Some modifications will be made when importing the page designs because LRS/CalSAWS allows for multiple placement types on each resource.
2. All existing Foster Care Ratio Detail data in LRS was loaded into the system when DCFS converted into LRS and is outdated and will not be maintained when these page updates are implemented.
3. Remove the State Program Number field from the Foster Care License Detail page in LRS/CalSAWS.
4. All Existing State Program Number data in LRS is outdated and it will not be maintained when this page is updated.
5. Add the State Program Number field to the Foster Care Resource Detail page to capture both ISFC and non-ISFC types. Because LRS/CalSAWS allows for

multiple placement types on a resource, the layout will be modified slightly from C-IV. Two columns for entering State Program numbers (one for ISFC and one for non-ISFC) will be added next to the list of placement types. The ISFC State Program Number field can only be entered for certain placement types.

6. DDID 2096 requests that a State Program Number be required for certain placement types. That DDID was marked Obsolete and the request is included in this SCR.
7. The DCFS FC Inbound Reader Interface will be updated to set the non-ISFC State Program Number to a placeholder value of 0000.00.00 (because the State Program Number is not available in the interface) for any placement type added to a new or existing LA resource if the placement type is one of those that requires a State Program Number. The interface will also be updated to accommodate the new table structure.
8. The license pages in LRS/CalSAWS will not be modified to store the type values (ISFC, STRTP, RFA, and pre-RFA) added to C-IV for CCR transition. Converted licenses will display the License Type from C-IV in the Comments field on the FC License Detail page.
9. Add a soft validation for FC EDBC when an ISFC rate is selected and the State Program Number of the placement resource does not indicate that it should be paid ISFC rates.
10. The placement type ‘Foster Family Agency’ (FFA) will be added as a selection on the Foster Care Resource Detail page. The Child Placement Detail and Rate Detail pages will be updated to handle the new placement type and provide the appropriate rate selections. EDBC will be updated, too.
11. The Foster Care and Kin-GAP Rate Detail pages will be updated to allow workers to save rates with Begin Dates and End Dates up to one month in the future from the current system date.
12. Add ‘Standard State Rate’ and ‘Dual Agency’ to the ‘Type’ dropdown on the FC Rate Detail page when the placement type is ‘Out of State Basic’.
13. Soft validations will be added to the Run EDBC page to alert workers when a Placement Authority is Non-Related Legal Guardianship and:
    a. Probate Court established the guardianship and the rate is an ISFC rate or LOC 2, LOC 3, or LOC4; or,
    b. Juvenile court established the guardianship and the rate is an ISFC rate.
14. Update Fiscal batch and Interface jobs to read the State Program Number from the new tables where the fields are stored.
15. Update the generation conditions for CCR-related NOAs.
16. Update verbiage for the Supplemental Care Increment Change NOA.
17. Update FC EDBC to include FFA placements as a placement type that can be paid SCI’s, effective 3/1/2018.
18. Regression test SCI NOA fragments for the newly added FFA placement type.

1.4 Assumptions

1. Differences in rate dropdown selections on the Foster Care and Kin-GAP Rate Detail pages will not require system changes in this SCR. Conversion will move the values into the corresponding fields in LRS/CalSAWS to pay the equivalent rate levels through CCC-1572 and other conversion tasks.

2. EDBC for Kin-GAP in C-IV and LRS/CalSAWS both use the same logic (Case Dismissal Date prior to 1/1/2017) to determine if a case is eligible to CCR or pre-CCR rates. No change is needed.
3. The Date-Picker calendar on the KG Rate Detail page already allows Begin and End Dates in the future and does not need to be updated like the one on the FC Rate Detail page that is being updated in this SCR.
4. LA will not begin using the new 'Foster Family Agency' (FFA) placement type because it is not an available selection in CWS/CMS. Therefore, no LA interface or LA claiming updates are being made for the new placement type at this time.
5. Although 'Standard State Rate' and 'Dual Agency' rates are being added to the 'Type' dropdown on FC Rate Detail for the placement type 'Out of State Basic', no EDBC updates are required. Existing EDBC logic will pay the Basic CCR rate for Standard State Rate, or the appropriate Dual Agency rate if one is selected.
6. LRS/CalSAWS EDBC needs to be able to determine which converted cases are NRLG to continue paying pre-CCR placements from the age-based rate schedules. That is being addressed in SCR CA-207166/DDID 2116.
7. AAP is an automated eligibility program in LRS/CalSAWS. AAP is a manual eligibility program in C-IV. Changes for CCR were made in LRS/CalSAWS for AAP, but no updates are necessary in this SCR because the migrating C-IV counties are adopting the existing LRS/CalSAWS design.
8. No additional validations will be added to those already in LRS/CalSAWS that prevent CCR rates being created for dates prior to when the policies were implemented since those benefit months are well in the past now.
9. No change is made here to pay the higher Infant Supplement rate to STRTP placements. That is addressed in SCR CA-215442.
10. There will be no functional change to the DCFS FC Inbound Reader Interface.
11. Changes in this SCR to the tables holding FC Sharing Ratio and State Program Number data will affect reports that access that data. DDID 1057 & DDID 1056 will capture the discrepancies between C-IV and LRS/CalSAWS when the reports are re-platformed to CalSAWS.
12. Existing page components and logic not mentioned in this SCR will retain their current functionalities.
13. The existing 'Foster Care Facility View' and 'Foster Care Facility Edit' security groups and their associated right and role mappings will not be modified by this SCR.
14. Change made to generate Countable Income, Infant Supplement, and SCI Approval NOAs will not affect current generation conditions that generate these NOAs for Change and Supplement actions.

2 RECOMMENDATIONS

2.1 Foster Care Facility Ratio Side Navigation

2.1.1 Overview

The side navigation bar highlights the page the user has currently selected. In LRS/CalSAWS, Foster Care Facility Ratios will be highlighted when the user navigates to Foster Care Facility Ratio List and Foster Care Facility Ratio Detail and all the FC Resource Databank options will display.

2.1.2 Side Navigation Mockup

2.1.3 Description of Change

1. 'Foster Care Facility Ratios' will be highlighted when the user navigates to the Foster Care Facility Ratio List or Detail page. When the user is on one of those two pages, the list of options shown here will display so they can access other information for the current resource or perform another Foster Care Resource Search. Foster Care Facility Ratio will

only display in task navigation when the user has the security right to view the Foster Care Facility Ratio List page.

2.1.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Facility Ratio**

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 Foster Care Facility Ratio List Page

2.2.1 Overview

The Foster Care Facility Ratio List page displays all Facility Ratio records for a resource. The page exists in C-IV but not in LRS/CalSAWS. This page is accessed by clicking side navigation link Foster Care Facility Ratios when in the context of a FC Resource Databank resource. This page will navigate the worker to the Foster Care Facility Ratio Detail page.

2.2.2 Foster Care Facility Ratio List Mockup

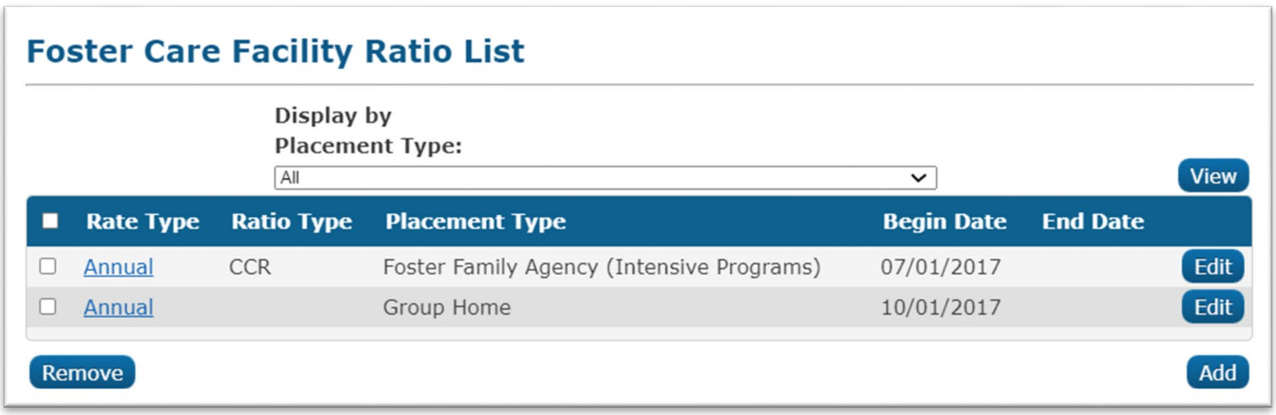


Figure 2.2.1 – Foster Care Facility Ratio List

2.2.3 Description of Changes

1. Create the 'Foster Care Facility Ratio List' page with the following components (Refer to the Appendix for Technical Notes including Reference Code Tables for page display options):
    a. 'Display by Placement Type' dropdown
        i. This dropdown will be populated with 'All' plus a list of the placement types for the resource from the Foster Care Resource Detail page.
        ii. Upon loading the page, 'All' is selected and all ratio records for the resource will display. The records are sorted alphabetically by Placement Type and descending Begin Date.
    b. 'View' button
        i. When the user clicks this button, the page will reload with records that have a Placement Type matching the option selected in the 'Display by Placement Type' dropdown, or all records if 'All' is selected.

c. Checkbox Column
    i. Clicking the checkbox on the header section of the table will mark all checkboxes on the results table.
    ii. Clicking the checkbox associated to a record(s) will delete the record(s) when the user clicks the 'Remove' button.
d. 'Rate Type' column
    i. The values under this column can be 'Annual' or 'Supplemental'. They display as a hyperlink when the user has the security right to view the FC Facility Ratio Detail page. Clicking the hyperlink will navigate the user to the FC Facility Ratio Detail page of the corresponding record in View mode.
e. 'Ratio Type' column
    i. The values under this column can be blank, 'CCR' or 'Non-CCR'.
        1. 'CCR' and 'Non-CCR' will only display if the placement type is one that can have both types of rates (see Appendix: Placement Type to Ratio Detail Page Mode Mapping):
            a. Foster Family Agency (Intensive Programs)
            b. Foster Family Agency (Treatment)
            c. Foster Family Agency (Nontreatment)
            d. Multidimensional
f. 'Placement Type' column
    i. This column will display the placement type linked to the facility ratio record.
g. 'Begin Date' column
    i. This column will display the begin date of the record.
h. 'End Date' column
    i. This column will display the end date of the record.
i. 'Edit' button
    i. Clicking this button will navigate the user to the Foster Care Facility Ratio Detail page of the corresponding record in Edit mode. The user will need the appropriate edit right to access this button.
j. 'Add' Button:
    i. Clicking this button will navigate the user to the Foster Care Facility Ratio Detail page in Create mode. The user will need the appropriate edit right to access this button.
k. 'Remove' Button:
    i. Clicking this button will remove the selected Foster Care Facility Ratio records. The user will need the appropriate remove right to access this button.

2. If there are no Foster Care Facility Ratio records that match the view criteria, the result table will display 'No data found.'.

2.2.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Facility Ratio**

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
FosterCareFacilityRatioRemove	Remove ability on the Foster Care Facility Ratio List	Foster Care Facility Remove
FosterCareFacilityRatioListEdit	Add/Edit ability on the Foster Care Facility Ratio List	Foster Care Facility Edit
FosterCareFacilityRatioListView	View ability on the Foster Care Facility Ratio List	Foster Care Facility View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Foster Care Facility Remove	Gives the user the ability to remove a Foster Care Facility Ratio record.	Fiscal Supervisor
Foster Care Facility Edit	Gives the user the ability to create, edit, and view a Foster Care Facility Ratio record.	Fiscal Supervisor
Foster Care Facility View	Gives the user the ability to view a Foster Care Facility Ratio record.	Collections Staff, Eligibility Staff, Eligibility Supervisor, Executive, Help Desk Staff, Oversight Agency Staff, Special Investigations Staff, Special Investigations Supervisor

2.2.6 Page Mapping

Create the page mapping to include this page.

2.2.7 Page Usage/Data Volume Impacts

Approximately 2,000 records are created per year.

2.3 Foster Care Facility Ratio Detail Page

2.3.1 Overview

The Foster Care Facility Ratio Detail page allows the worker to record and view the sharing ratios for a resource. This SCR will take the existing C-IV system solution and update it to accommodate multiple placement types for a resource. The page is accessed from the Foster Care Facility Ratio List page in various modes depending on the link or button clicked on that page.

2.3.2 Foster Care Facility Ratio Detail Mockup

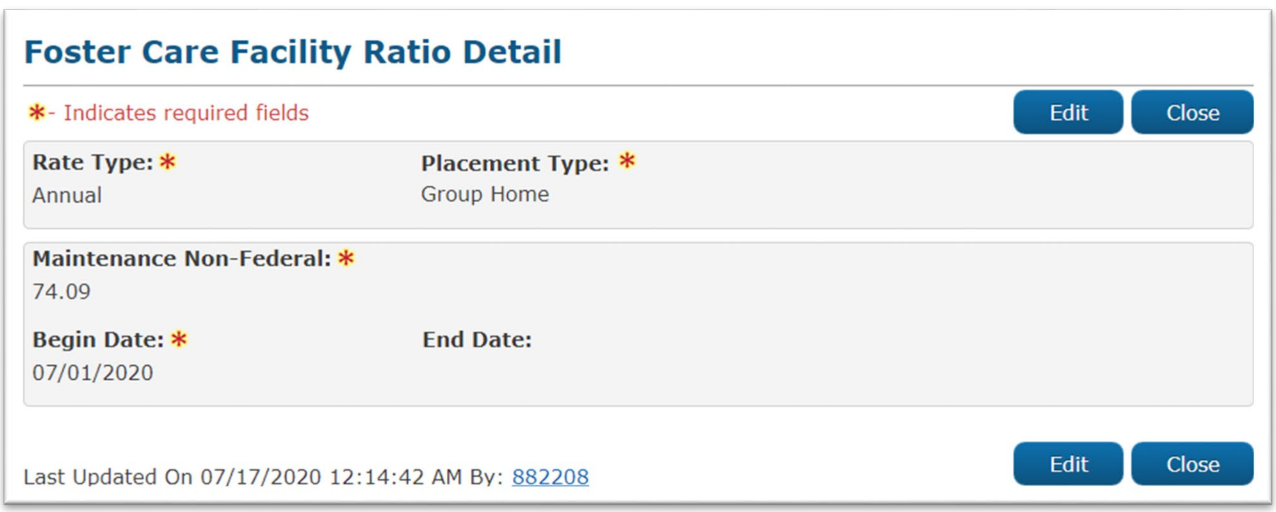


Figure 2.3.1 – Foster Care Facility Ratio Detail/View Mode/Single Ratio Resource

Foster Care Facility Ratio Detail

*- Indicates required fields | Edit | Close

Rate Type: *
Annual

Placement Type: *
Foster Family Agency (Intensive Program)

Ratio Type: *
CCR

Basic

Maintenance Ratio: * 50.0	**Administrative Ratio:** * 50.0
Maintenance Federal: * 50.0	**Administrative Federal:** * 50.0
Maintenance Non-Federal: * 50.0	**Administrative Non-Federal:** * 50.0

LOC 2

Maintenance Ratio: * 50.0	**Administrative Ratio:** * 50.0
Maintenance Federal: * 50.0	**Administrative Federal:** * 50.0
Maintenance Non-Federal: * 50.0	**Administrative Non-Federal:** * 50.0

LOC 3

Maintenance Ratio: * 50.0	**Administrative Ratio:** * 50.0
Maintenance Federal: * 50.0	**Administrative Federal:** * 50.0
Maintenance Non-Federal: * 50.0	**Administrative Non-Federal:** * 50.0

LOC 4

Maintenance Ratio: * 50.0	**Administrative Ratio:** * 50.0
Maintenance Federal: * 50.0	**Administrative Federal:** * 50.0
Maintenance Non-Federal: * 50.0	**Administrative Non-Federal:** * 50.0

Begin Date: *
05/01/2019

End Date:

Edit | Close

Figure 2.3.2 – Foster Care Facility Ratio Detail/View Mode/CCR Ratios

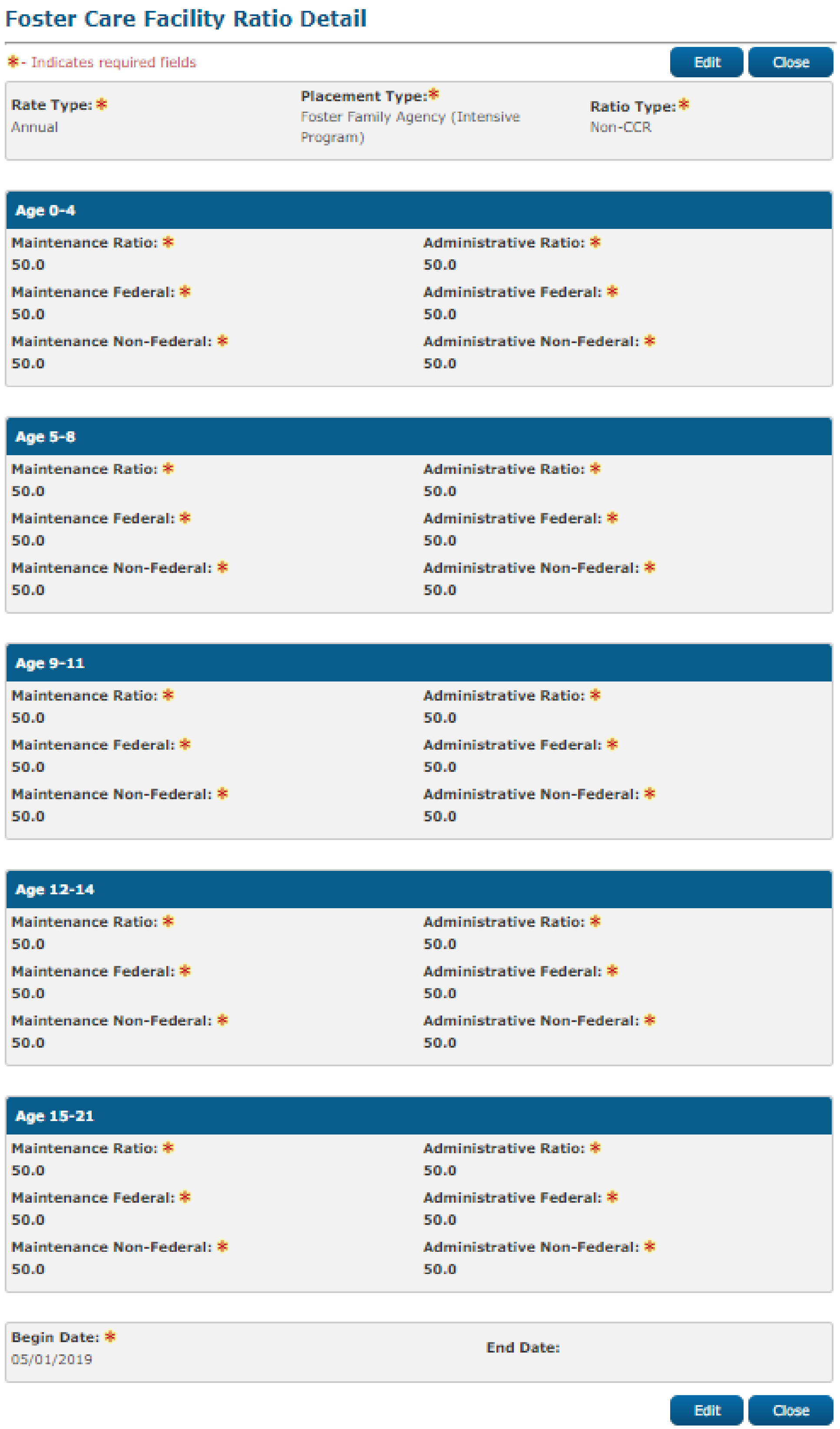


Figure 2.3.3 – Foster Care Facility Ratio Detail/View Mode/Non-CCR Ratios

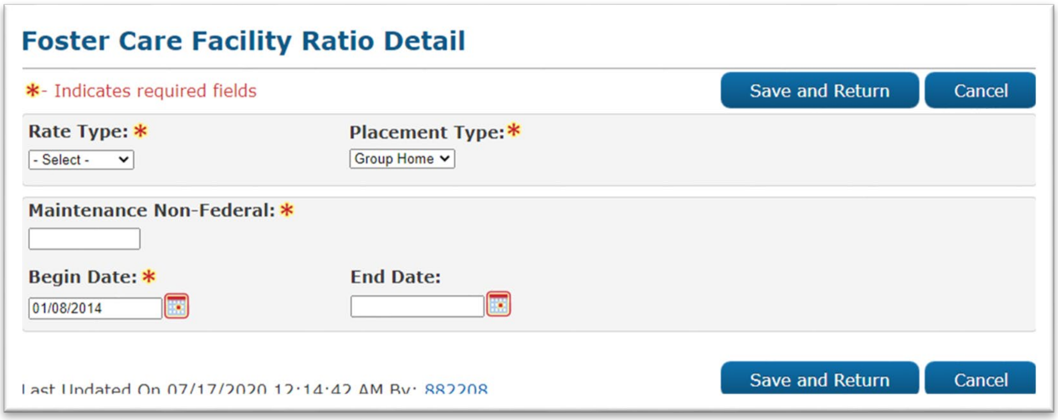


Figure 2.3.4 – Foster Care Facility Ratio Detail/Create Mode/Single Ratio Resource

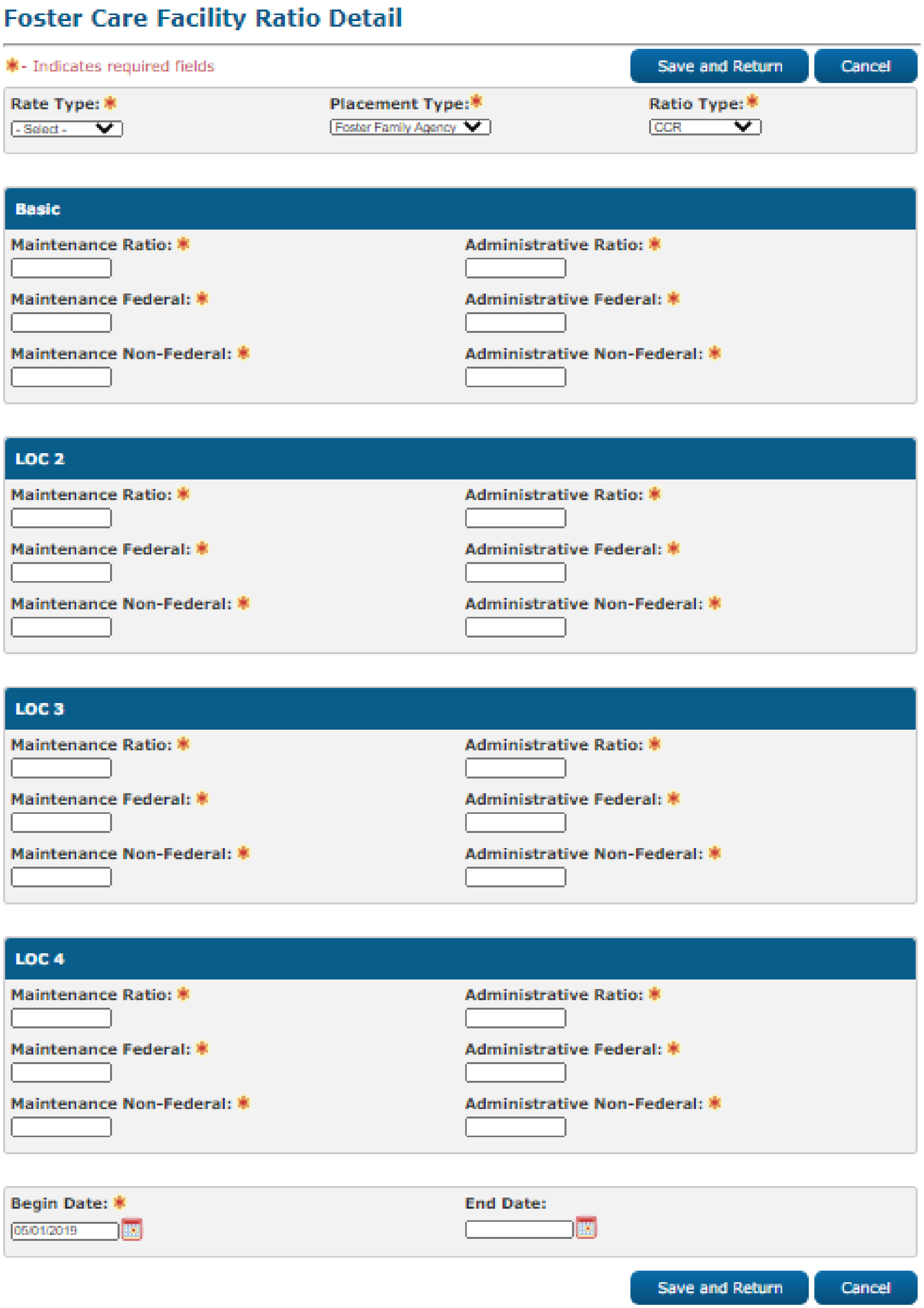


Figure 2.3.5 – Foster Care Facility Ratio Detail/Create Mode/CCR Ratios

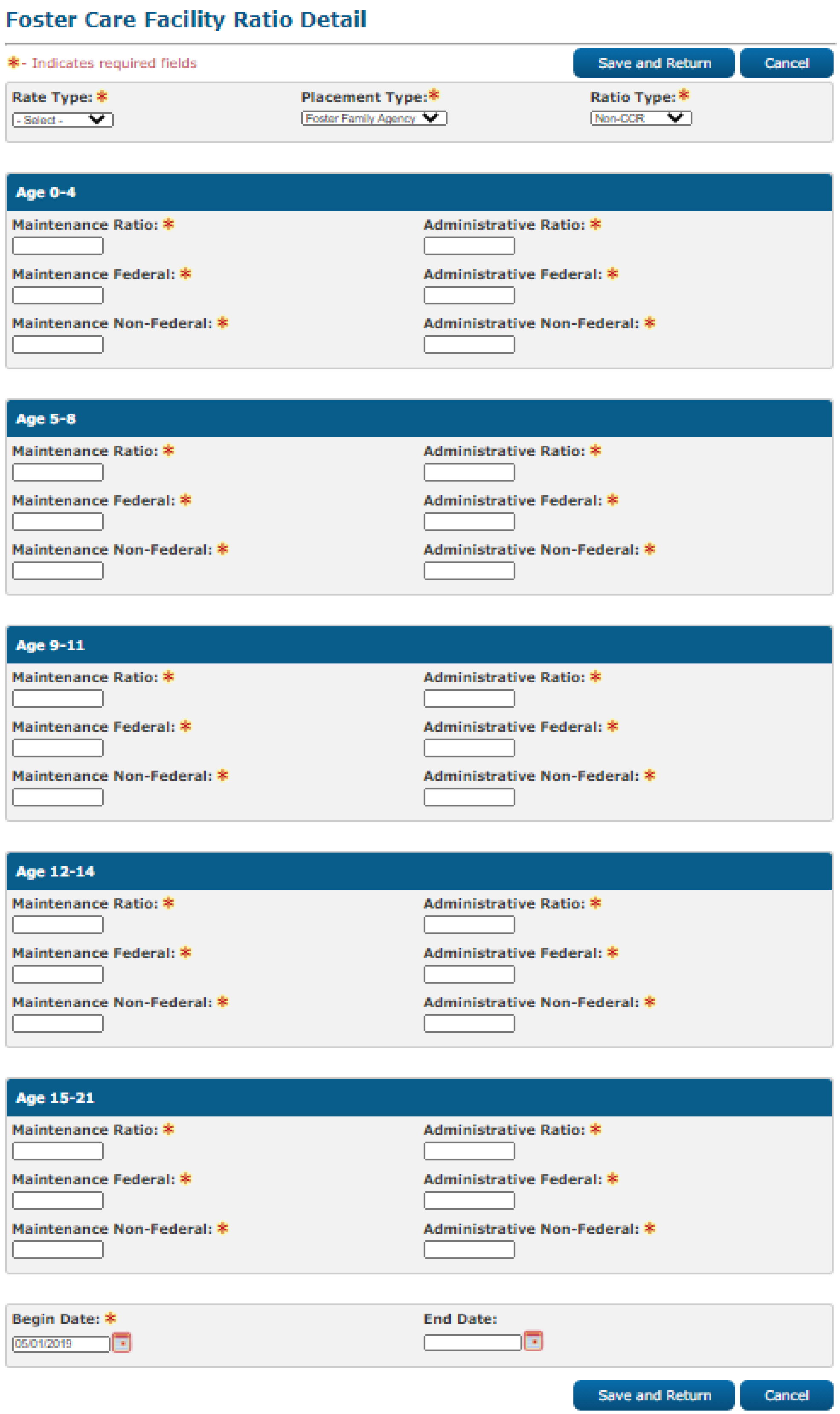


Figure 2.3.6 – Foster Care Facility Ratio Detail/Create Mode/Non-CCR Ratios

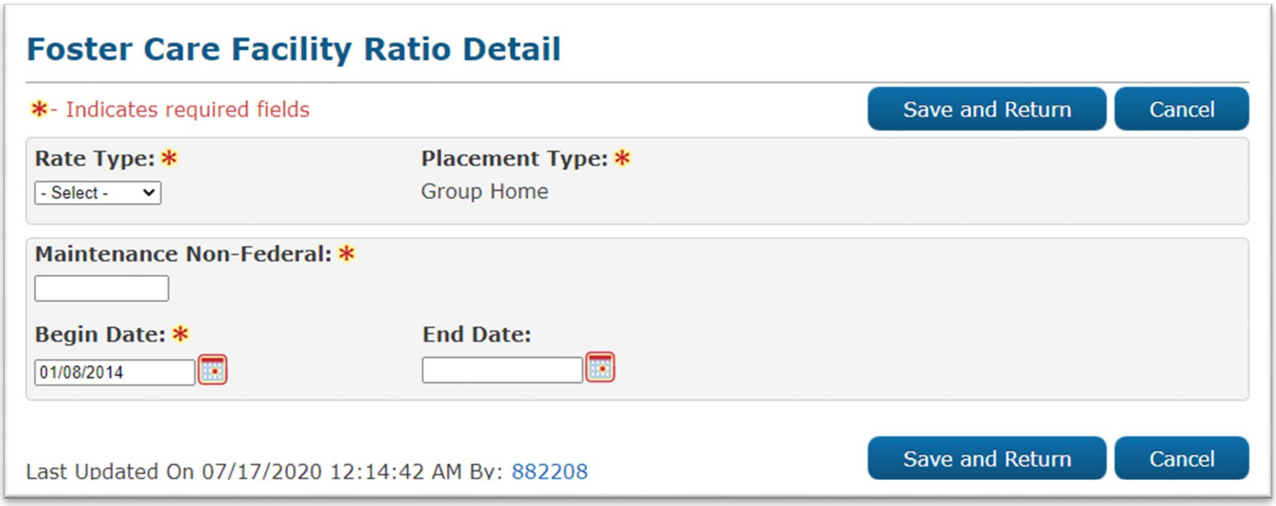


Figure 2.3.7 – Foster Care Facility Ratio Detail/Edit Mode/Single Ratio Resource

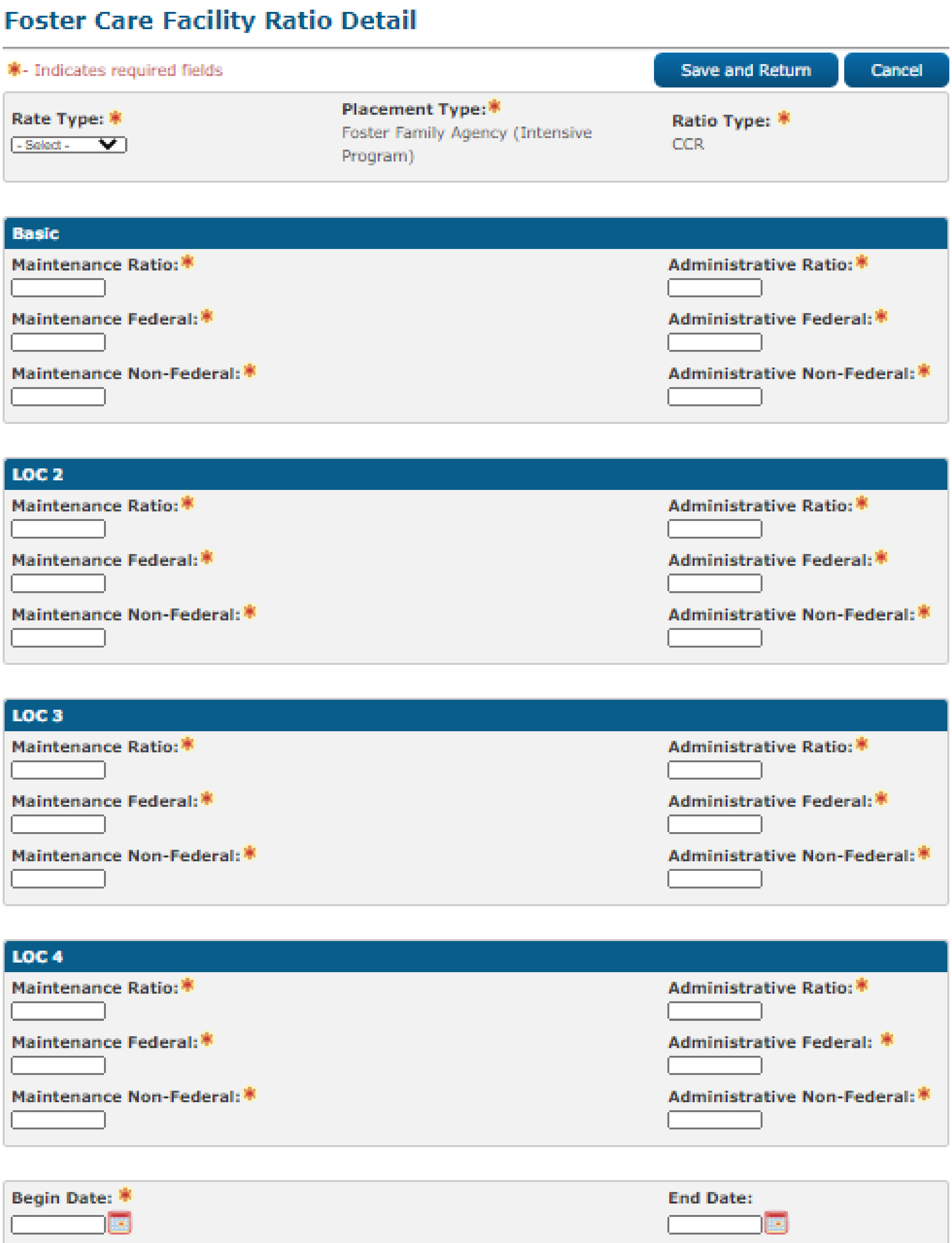


Figure 2.3.8 – Foster Care Facility Ratio Detail/Edit Mode/CCR Ratios

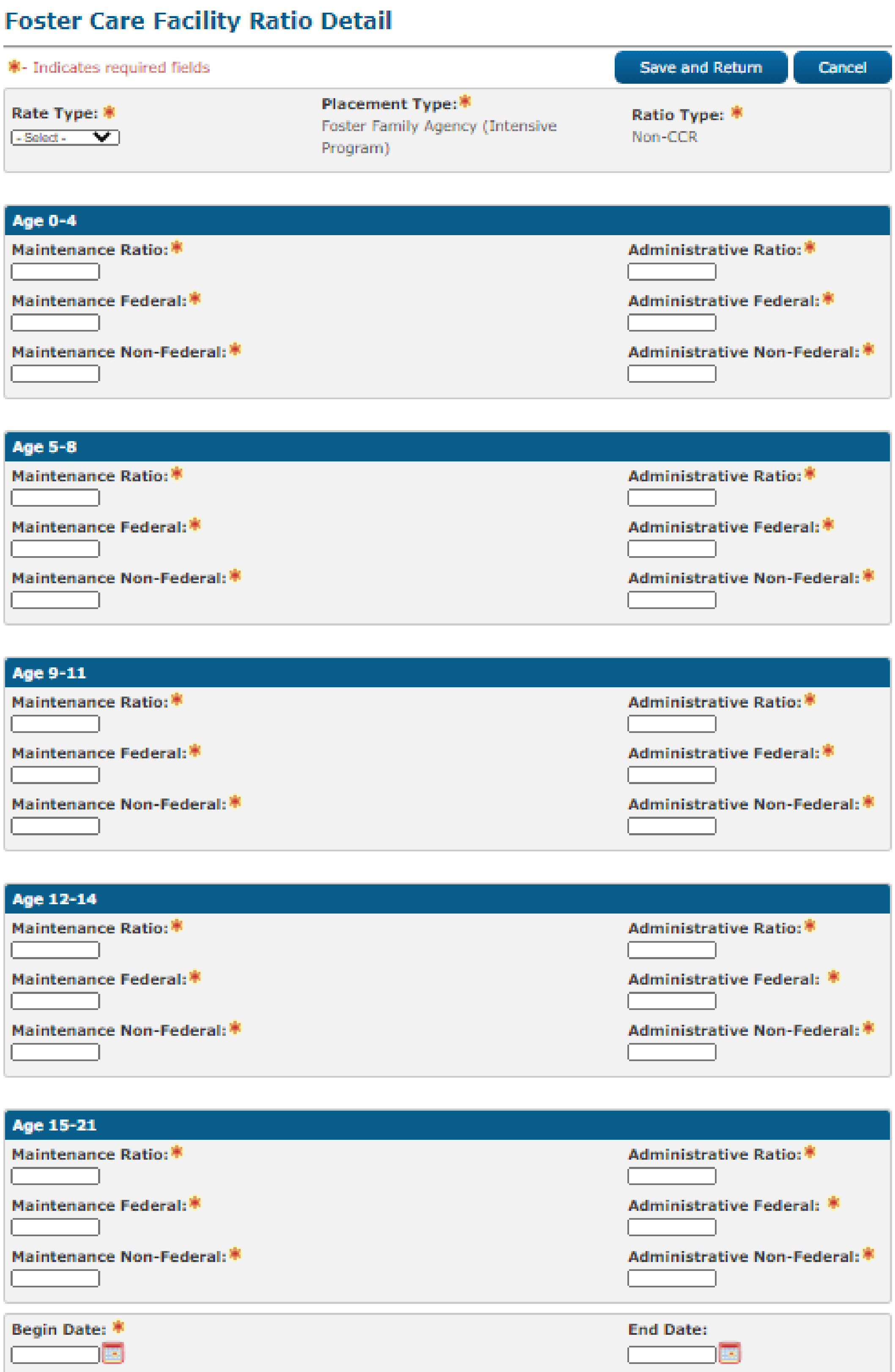
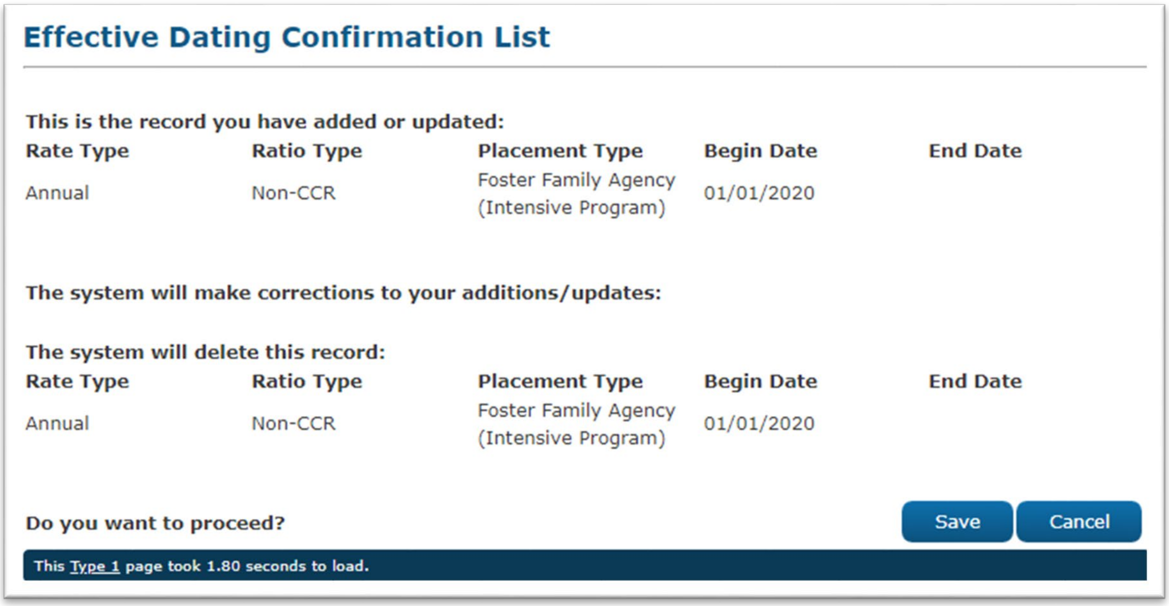


Figure 2.3.9 – Foster Care Facility Ratio Detail/Edit Mode/Non-CCR Ratios



Effective Dating Confirmation List

This is the record you have added or updated:

Rate Type	Ratio Type	Placement Type	Begin Date	End Date
Annual	Non-CCR	Foster Family Agency (Intensive Program)	01/01/2020	

The system will make corrections to your additions/updates:

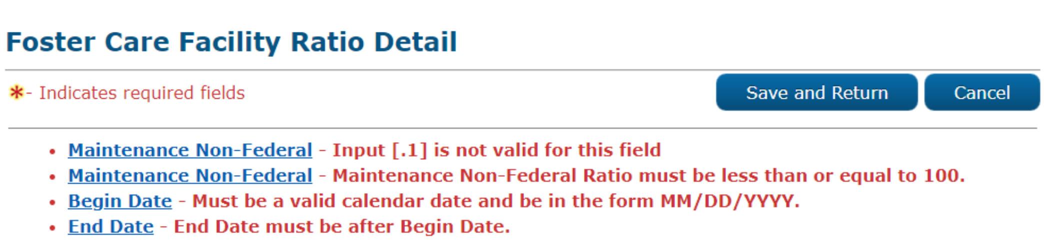
The system will delete this record:

Rate Type	Ratio Type	Placement Type	Begin Date	End Date
Annual	Non-CCR	Foster Family Agency (Intensive Program)	01/01/2020	

Do you want to proceed? Save Cancel

This Type 1 page took 1.80 seconds to load.

Figure 2.3.10 – Effective Date Confirming List



Foster Care Facility Ratio Detail

*- Indicates required fields Save and Return Cancel

- Maintenance Non-Federal - Input [.1] is not valid for this field
- Maintenance Non-Federal - Maintenance Non-Federal Ratio must be less than or equal to 100.
- Begin Date - Must be a valid calendar date and be in the form MM/DD/YYYY.
- End Date - End Date must be after Begin Date.

Figure 2.3.11 – Foster Care Facility Ratio Detail Validation Message

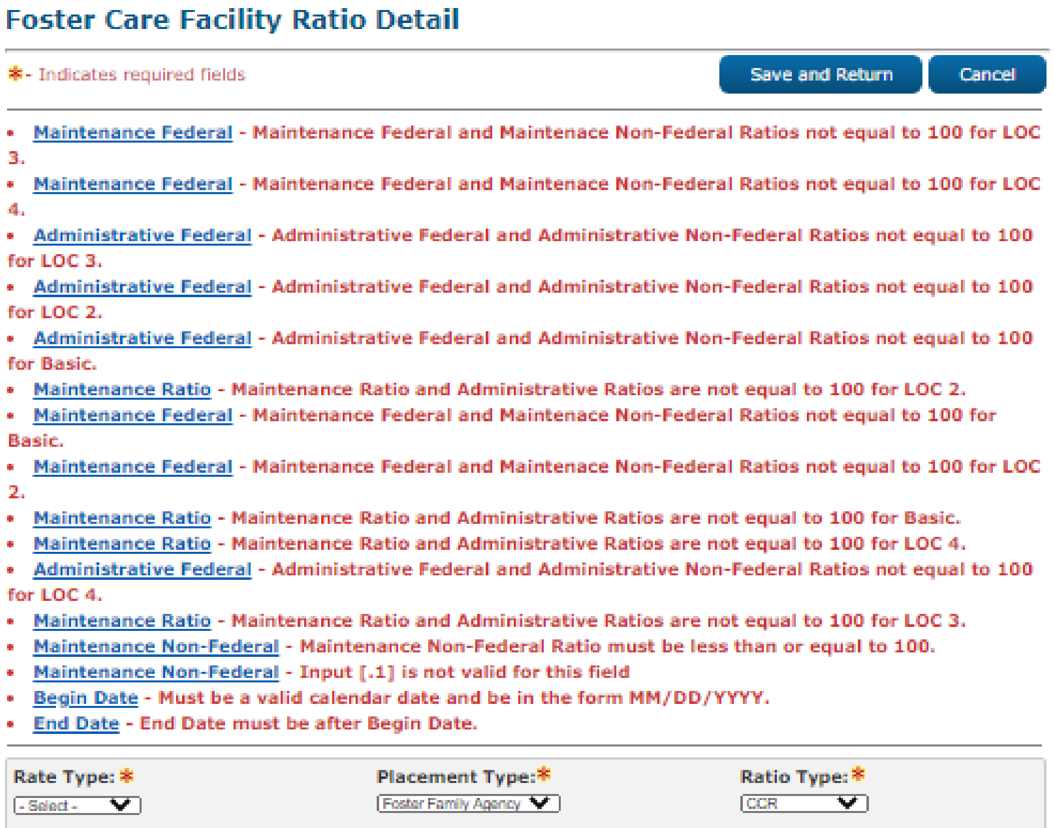


Figure 2.3.12 – Foster Care Facility Ratio Detail Validation Message

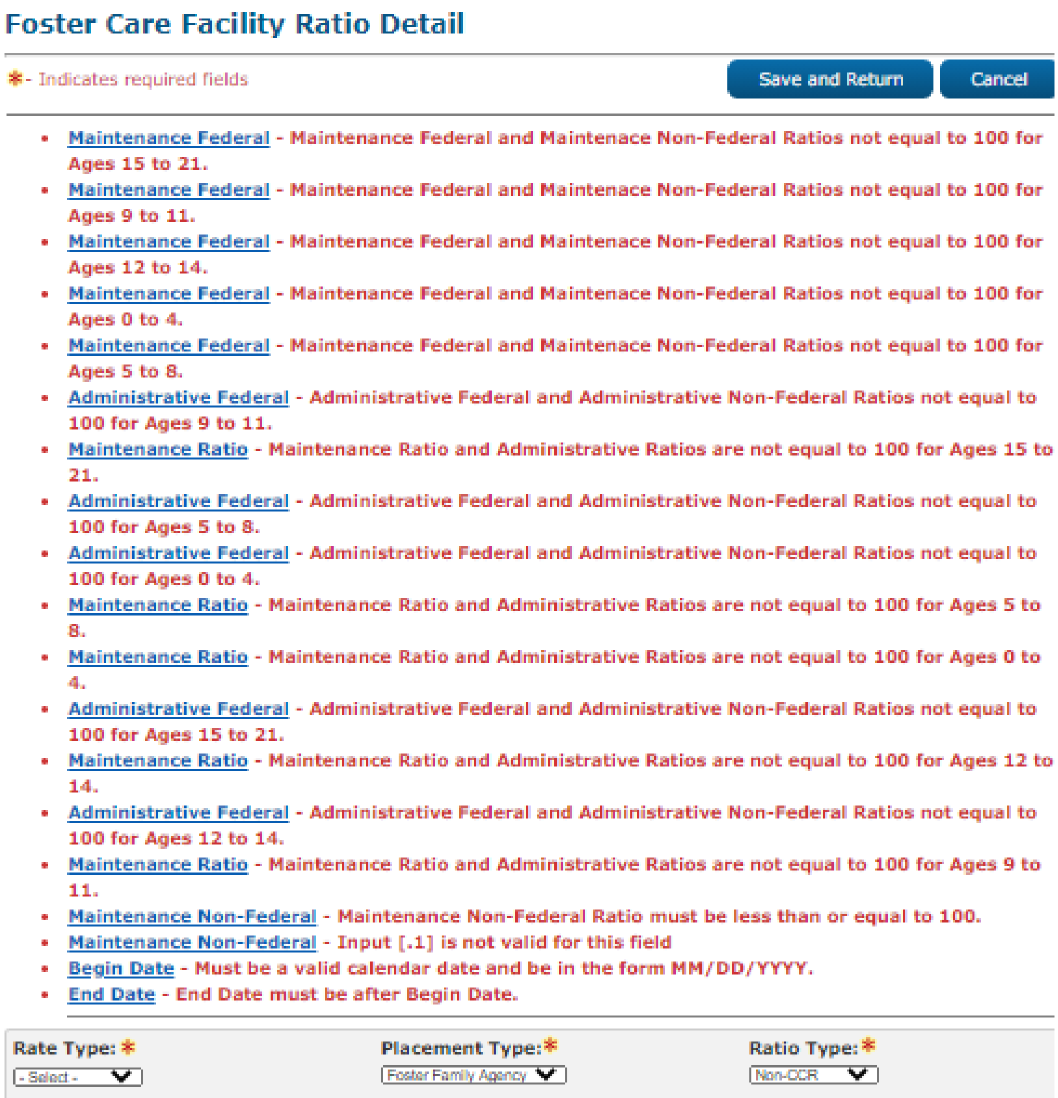


Figure 2.3.13– Foster Care Facility Ratio Detail Validation Message

2.3.3 Description of Changes

1. Create the Foster Care Facility Ratio Detail pages as shown in the figures above. This page will automatically refresh depending on the placement type and/or ratio type that the user selects.
   See Appendix Section:
   - Placement Type to Ratio Detail Page Mode Mapping for page version mapping.
   - Technical Notes for Code Table updates for page display options.

   a. 'Foster Care Facility Ratio Detail' for Single Ratio (as shown in Figures 2.3.1, 2.3.4 and 2.3.7)
      i. This version of the page will load when the placement type is one of the following:

1. Group Home
2. Out of State Group Home
3. Short Term Therapeutic Residential Program
4. Transitional Housing Placement + FC (THP+FC)
5. Transitional Housing Placement Program (THPP)

ii. The page will refresh to the appropriate page version any time a change is made to the 'Placement Type' or 'Ratio Type' dropdown.

iii. This page will have the following components:

1. 'Edit' button
    a. Clicking this button will load the page in Edit mode. This button is only available in View mode and the user will need the appropriate edit right to access this button.
2. 'Close' button
    a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page. This button is only available in View mode.
3. 'Save and Return' button
    a. Clicking this button will save the information entered by the user. If the information does not conflict with an existing record based on the placement type, ratio type, and dates entered, it will navigate the user back to the Foster Care Facility Ratio List page. Otherwise, it will navigate the user to the Effective Dating Confirmation. This button is only available in 'Edit' and 'Create' modes.
4. 'Cancel' button
    a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page without saving the information. This button is only available in 'Edit' and 'Create' modes.
5. 'Rate Type' dropdown
    a. This is a required field.
    b. This will have the following options:
        i. Annual
        ii. Supplemental
6. 'Placement Type' field/dropdown
    a. This is a required field.
    b. This field will be pre-selected with the first value on the dropdown in Create mode.
    c. The dropdown options will contain the placement types linked to the resource listed alphabetically.

d. This field can only be modified in Create mode.

7. 'Ratio Type' field/dropdown
   a. This is a required field when displayed.
   b. This dropdown will have the following options:
      i. CCR
      ii. Non-CCR
   c. This field will dynamically display when the user selects one of the following placement types otherwise, it will be hidden:
      i. Foster Family Agency (Intensive Programs)
      ii. Foster Family Agency (Treatment)
      iii. Foster Family Agency (Nontreatment)
      iv. Multidimensional
   d. This field can only be modified in Create mode.
8. 'Maintenance Non-Federal' field
   a. This is a required numerical field.
   b. If the value entered by the user is not numerical, clicking the 'Save and Return' button will display the following validation:
      i. **"<u>Maintenance Non-Federal</u> – Input [value] is not valid for this field."**
   c. If the value entered by the user is over 100, clicking the 'Save and Return' button will display the following validation:
      i. **"<u>Maintenance Non-Federal</u> – Maintenance Non-Federal Ratio must be less than or equal to 100."**
9. 'Begin Date' field
   a. This is a required date field.
10. 'End Date' field
   a. This is a date field.

b. 'Foster Care Facility Ratio Detail' for CCR (as shown in Figures 2.3.2, 2.3.5 and 2.3.8)
   i. This page will load when the ratio type dropdown is 'CCR' or when the placement type is one of the following:
      1. Foster Family Agency
      2. Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
      3. Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)

ii. The page will refresh to the appropriate page version any time a change is made to the 'Placement Type' or 'Ratio Type' dropdown.

iii. This page will have the following components:

1. 'Edit' button
    a. Clicking this button will load the page in Edit mode. This button is only available in View mode and the user will need the appropriate edit right to access this button.
2. 'Close' button
    a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page. This button is only available in View mode.
3. 'Save and Return' button
    a. Clicking this button will save the information entered by the user. If the information does not conflict with an existing record based on the placement type, ratio type, and dates entered, it will navigate the user back to the Foster Care Facility Ratio List page. Otherwise, it will navigate the user to the Effective Dating Confirmation List. This button is only available in 'Edit' and 'Create' modes.
4. 'Cancel' button
    a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page without saving the information. This button is only available in 'Edit' and 'Create' modes.
5. 'Rate Type' dropdown
    a. This is a required field.
    b. This will have the following options:
        i. Annual
        ii. Supplemental
6. 'Placement Type' field/dropdown
    a. This is a required field.
    b. This field will be pre-selected with the first value on the dropdown in Create mode.
    c. The dropdown options will contain the placement types linked to the resource.
    d. This field can only be modified in Create mode.
7. 'Ratio Type' field/dropdown
    a. This is a required field when displayed.
    b. This dropdown will have the following options:

        i. CCR
        ii. Non-CCR
    c. This field will dynamically display when the user selects one of the following placement types otherwise, it will be hidden:
        i. Foster Family Agency (Intensive Programs)
        ii. Foster Family Agency (Treatment)
        iii. Foster Family Agency (Nontreatment)
        iv. Multidimensional
    d. This field can only be modified in Create mode.
8. Sections representing the CCR categories with the following details:
    a. Titles representing the CCR rate
        i. Basic
        ii. LOC 2
        iii. LOC 3
        iv. LOC 4
    b. Each section will have the following required numerical fields:
        i. Maintenance Ratio
        ii. Administrative Ratio
        iii. Maintenance Federal
        iv. Administrative Federal
        v. Maintenance Non-Federal
        vi. Administrative Non-Federal
    c. The fields under the sections mentioned above are numerical only fields.
        i. If the value entered by the user is not numerical, clicking the 'Save and Return' button will display the following validation:
        ii. **"[Field Name] – Input [value] is not valid for this field."**
    d. The total Maintenance ratio and Administrative ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
        i. **"Maintenance Ratio - Maintenance Ratio and Administrative Ratios are not equal to 100 for [CCR rate]"**
        ii. [CCR rate] will either be Basic, LOC 2, LOC 3, or LOC 4 whichever section caused the validation to trigger.

e. The total Maintenance Federal ratio and Maintenance Non-Federal ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. **"Maintenance Federal - Maintenance Federal and Maintenance Non-Federal Ratios not equal to 100 for [CCR rate]"**
    ii. [CCR rate] will either be Basic, LOC 2, LOC 3, or LOC 4 whichever section caused the validation to trigger.

f. The total Administrative Federal ratio and Administrative Non-Federal ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. **"Administrative Federal - Administrative Federal and Administrative Non-Federal Ratios not equal to 100 for [CCR rate]"**
    ii. [CCR rate] will either be Basic, LOC 2, LOC 3, or LOC 4 whichever section caused the validation to trigger.

9. 'Begin Date' field
    a. This is a required date field.
10. 'End Date' field
    a. This is a date field.

c. 'Foster Care Facility Ratio Detail' for Non-CCR (as shown in Figures 2.3.3, 2.3.6 and 2.3.8)
    i. This page will load when the ratio type dropdown is populated with the 'Non-CCR' value or the placement type is none of the ones mentioned above.
    ii. The page will refresh to the appropriate page version any time a change is made to the 'Placement Type' or 'Ratio Type' dropdown.
    iii. This page will have the following components:
        1. 'Edit' button
            a. Clicking this button will load the page in Edit mode. This button is only available in View mode and the user will need the appropriate edit right to access this button.
        2. 'Close' button
            a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page. This button is only available in View mode.
        3. 'Save and Return' button

    a. Clicking this button will save the information entered by the user. If the information does not conflict with an existing record based on the placement type, ratio type, and dates entered, it will navigate the user back to the Foster Care Facility Ratio List page. Otherwise, it will navigate the user to the Effective Dating Confirmation List. This button is only available in 'Edit' and 'Create' modes.
4. 'Cancel' button
    a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page without saving the information. This button is only available in 'Edit' and 'Create' modes.
5. 'Rate Type' dropdown
    a. This is a required field.
    b. This will have the following options:
        i. Annual
        ii. Supplemental
6. 'Placement Type' field/dropdown
    a. This is a required field.
    b. This field will be pre-selected with the first value on the dropdown in Create mode.
    c. The dropdown options will contain the placement types linked to the resource.
    d. This field can only be modified in Create mode.
7. 'Ratio Type' field/dropdown
    a. This is a required field when displayed.
    b. This dropdown will have the following options:
        i. CCR
        ii. Non-CCR
    c. This field will dynamically display when the user selects one of the following placement types otherwise, it will be hidden:
        i. Foster Family Agency (Intensive Programs)
        ii. Foster Family Agency (Treatment)
        iii. Foster Family Agency (Nontreatment)
        iv. Multidimensional
    d. This field can only be modified in Create mode.
8. Sections representing the Age-Based Ratios with the following details:

a. Titles representing the Age-Based Ratios
    i. Age 0-4
    ii. Age 5-8
    iii. Age 9-11
    iv. Age 12-14
    v. Age 15-21
b. Each section will have the following required numerical fields:
    i. Maintenance Ratio
    ii. Administrative Ratio
    iii. Maintenance Federal
    iv. Administrative Federal
    v. Maintenance Non-Federal
    vi. Administrative Non-Federal
c. The fields under the sections mentioned above are numerical only fields.
    i. If the value entered by the user is not numerical, clicking the 'Save and Return' button will display the following validation:
    "[Field Name] – Input [value] is not valid for this field."
d. The total Maintenance ratio and Administrative ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. "**<u>Maintenance Ratio</u> - Maintenance Ratio and Administrative Ratios are not equal to 100 for [Age-Based Ratio]**"
    ii. [Age-Based Ratio] will either be Ages 0-4, Ages 5-8, Ages 9-11, Ages 12-14, or Ages 15-21 whichever section caused the validation to trigger.
e. The total Maintenance Federal ratio and Maintenance Non-Federal ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. "**<u>Maintenance Federal</u> - Maintenance Federal and Maintenance Non-Federal Ratios not equal to 100 for [Age-Based Ratio]**"
    ii. [Age-Based Ratio] will either be Ages 0-4, Ages 5-8, Ages 9-11, Ages 12-14, or Ages 15-21 whichever section caused the validation to trigger.

f. The total Administrative Federal ratio and Administrative Non-Federal ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. "**Administrative Federal** **Administrative Federal and Administrative Non-Federal Ratios not equal to 100 for [Age-Based Ratio]**"
    ii. [Age-Based Ratio] will either be Ages 0-4, Ages 5-8, Ages 9-11, Ages 12-14, or Ages 15-21 whichever section caused the validation to trigger.

9. 'Begin Date' field
    a. This is a required date field.
10. 'End Date' field
    a. This is a date field.

2.3.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Facility Ratio**

2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
FosterCareFacilityRatioDetailEdit	The ability to create/edit a Foster Care Facility Ratio record.	Foster Care Facility Edit
FosterCareFacilityRatioDetailView	The ability to view a Foster Care Facility Ratio record.	Foster Care Facility View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Foster Care Facility Edit	Gives the user the ability to create, edit, and view	Fiscal Supervisor

Security Group	Group Description	Group to Role Mapping
	a Foster Care Facility Ratio record.	
Foster Care Facility View	Gives the user the ability to view a Foster Care Facility Ratio record.	Collections Staff, Eligibility Staff, Eligibility Supervisor, Executive, Help Desk Staff, Oversight Agency Staff, Special Investigations Staff, Special Investigations Supervisor

2.3.6 Page Mapping

Create the page mapping that captures all fields on this page.

2.3.7 Page Usage/Data Volume Impacts

Approximately 2,000 records will be created per year.

2.4 Foster Care Resource Search Page

2.4.1 Overview

The Foster Care Resource Search page allows the worker to search for a Foster Care resource. One of the search criteria on this page is the State Program Number (SPN). This SCR will update the database table structure to align the C-IV and LRS/CalSAWS Foster Care solution.

2.4.2 Description of Changes

1. Update the page search by State Program Number query to use new database table structure being brought over from C-IV and modified for LRS/CalSAWS.

2.4.3 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Resource Search**

2.4.4 Security Updates

N/A

2.4.5 Page Usage/Data Volume Impacts

No impact to this section.

2.4.6 Page Mapping

Update the State Program Number page mapping.

2.5 Foster Care Resource Detail Page

2.5.1 Overview

The Foster Care Resource Detail page shows information for the Foster Care Resource.

The Placement Types section lists all Types available for the selected Foster Care resource. This SCR will move the State Program Number (SPN) from the License Detail page to this page to align with changes made in C-IV. The page will track up to two SPN's (a non-ISFC and an ISFC) for each Placement Type for a resource. Only certain types will accept an ISFC SPN. SPN values will be conditionally required depending on the placement type.

'Foster Family Agency' will be added to the dropdown of Placement Types.

2.5.2 Foster Care Resource Detail Mockup

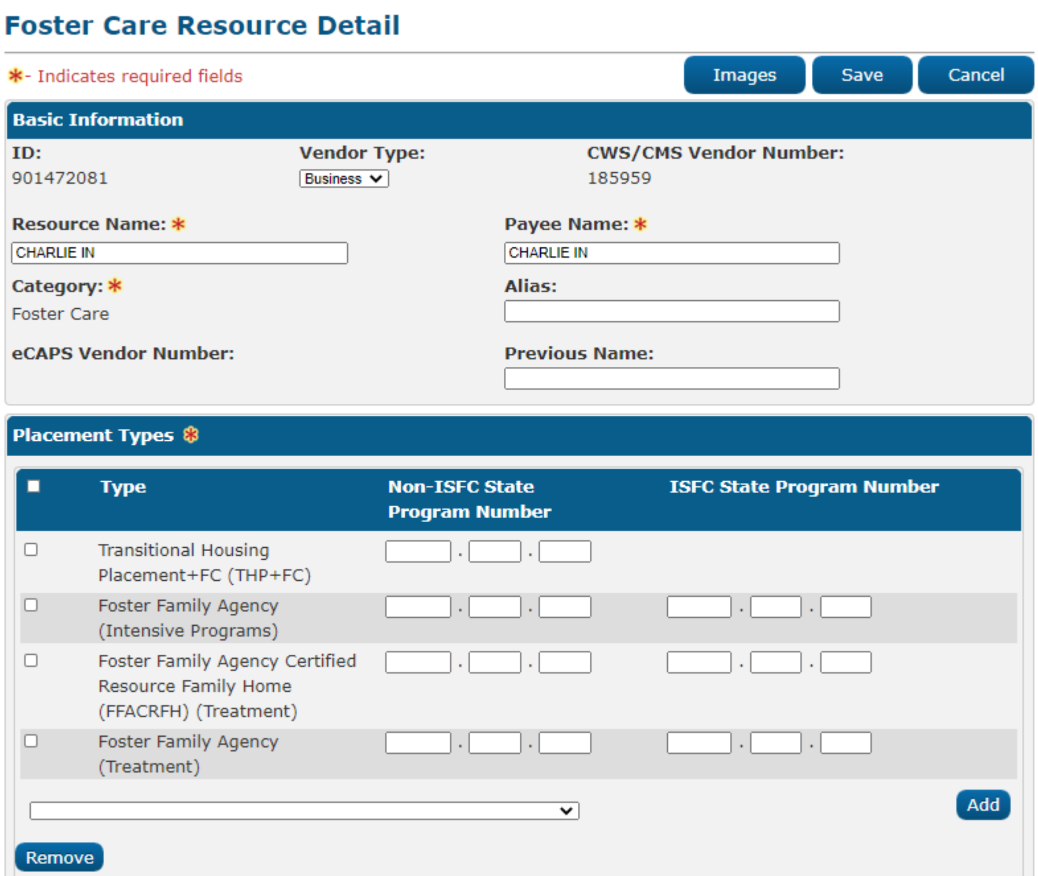


Figure 2.5.1 – Foster Care Resource Detail in Edit Mode

Foster Care Resource Detail

*- Indicates required fields

Images | Issuance Method | Edit | Close

Basic Information

ID: 901472081

Vendor Type: Business

CWS/CMS Vendor Number: 185959

Resource Name:* CHARLIE IN

Payee Name:* CHARLIE IN

Category:* Foster Care

Alias:

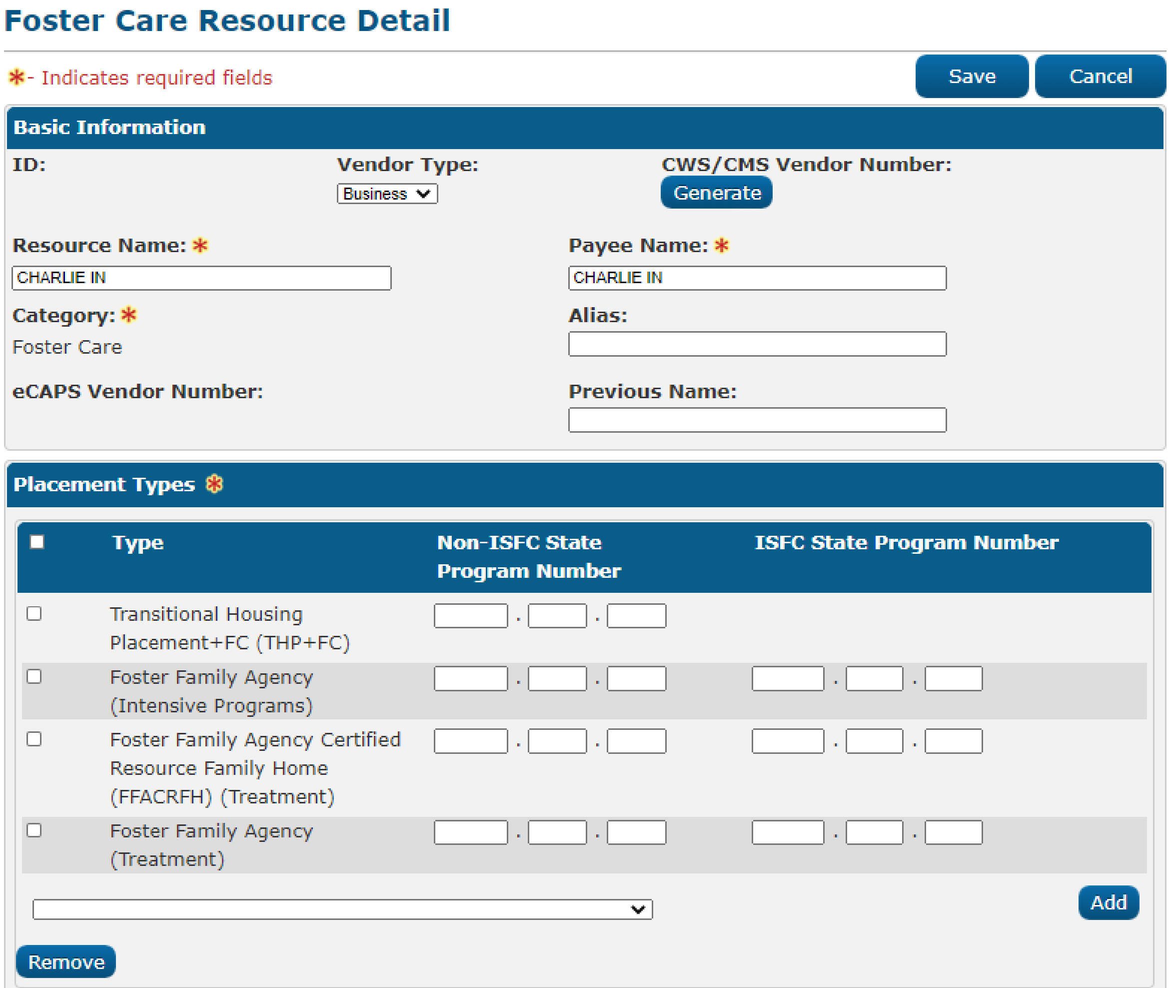
eCAPS Vendor Number:

Previous Name:

Placement Types *

Type	Non-ISFC State Program Number	ISFC State Program Number
Transitional Housing Placement+FC (THP+FC)		
Foster Family Agency (Intensive Programs)		9876 . 54 . 32
Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)	0101 . 03 . 04	1234 . 56 . 78
Foster Family Agency (Treatment)	2468 . 13 . 57	

Figure 2.5.2 – Foster Care Resource Detail in View Mode


Foster Care Resource Detail

*- Indicates required fields

Save Cancel

Basic Information

ID:

Vendor Type: Business

CWS/CMS Vendor Number: Generate

Resource Name: * CHARLIE IN

Payee Name: * CHARLIE IN

Category: * Foster Care

Alias:

eCAPS Vendor Number:

Previous Name:

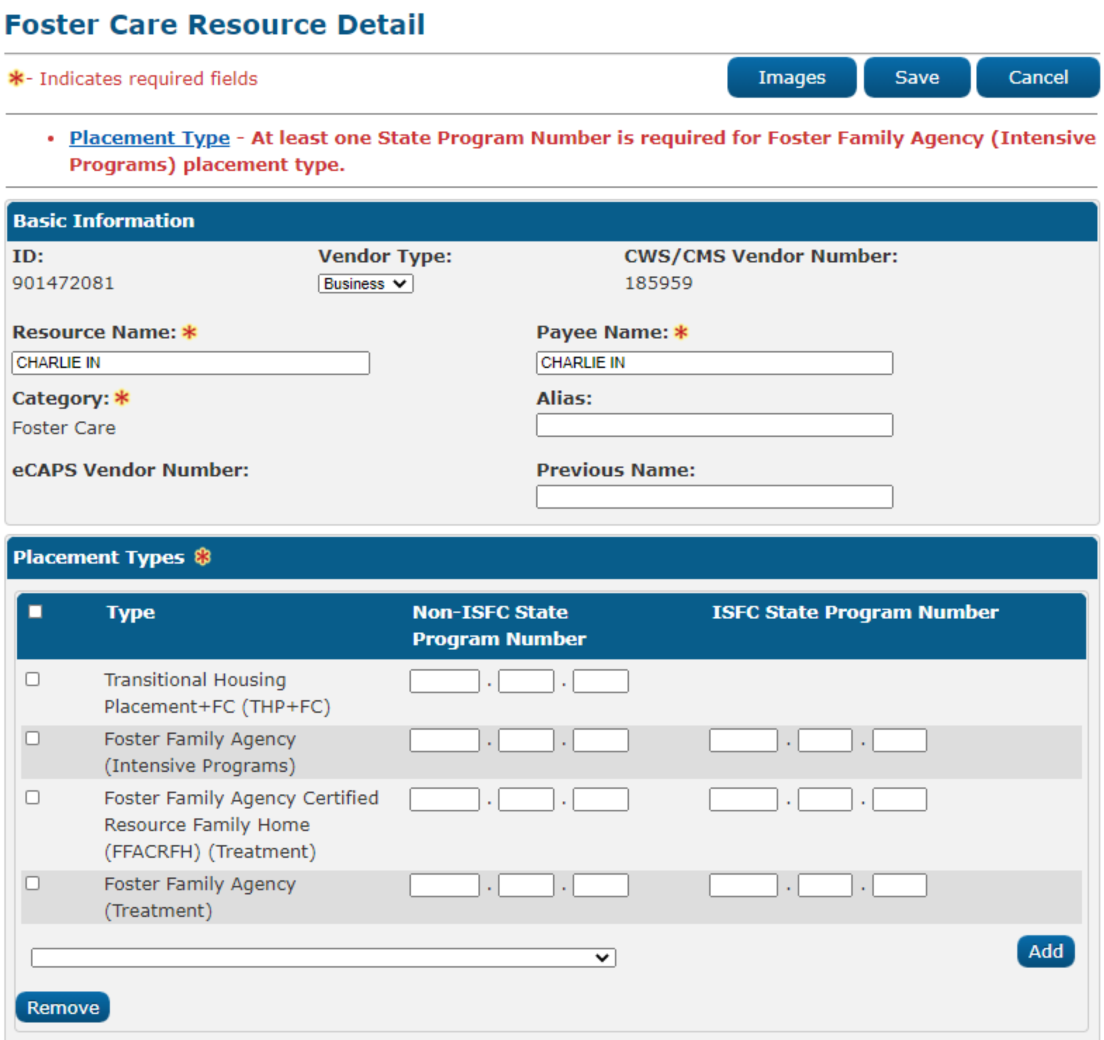
Placement Types *

	Type	Non-ISFC State Program Number	ISFC State Program Number
☐	Transitional Housing Placement+FC (THP+FC)	. .	
☐	Foster Family Agency (Intensive Programs)	. .	. .
☐	Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)	. .	. .
☐	Foster Family Agency (Treatment)	. .	. .

Add

Remove

Figure 2.5.3 – Foster Care Resource Detail in Create Mode


Foster Care Resource Detail

*- Indicates required fields

Images | Save | Cancel

- Placement Type - At least one State Program Number is required for Foster Family Agency (Intensive Programs) placement type.

Basic Information

ID: 901472081

Vendor Type: Business

CWS/CMS Vendor Number: 185959

Resource Name: * CHARLIE IN

Payee Name: * CHARLIE IN

Category: * Foster Care

Alias:

eCAPS Vendor Number:

Previous Name:

Placement Types *

	Type	Non-ISFC State Program Number	ISFC State Program Number
☐	Transitional Housing Placement+FC (THP+FC)	. .	
☐	Foster Family Agency (Intensive Programs)	. .	. .
☐	Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)	. .	. .
☐	Foster Family Agency (Treatment)	. .	. .

Add

Remove

Figure 2.5.4 – Foster Care Resource Detail Placement Type Validation Message

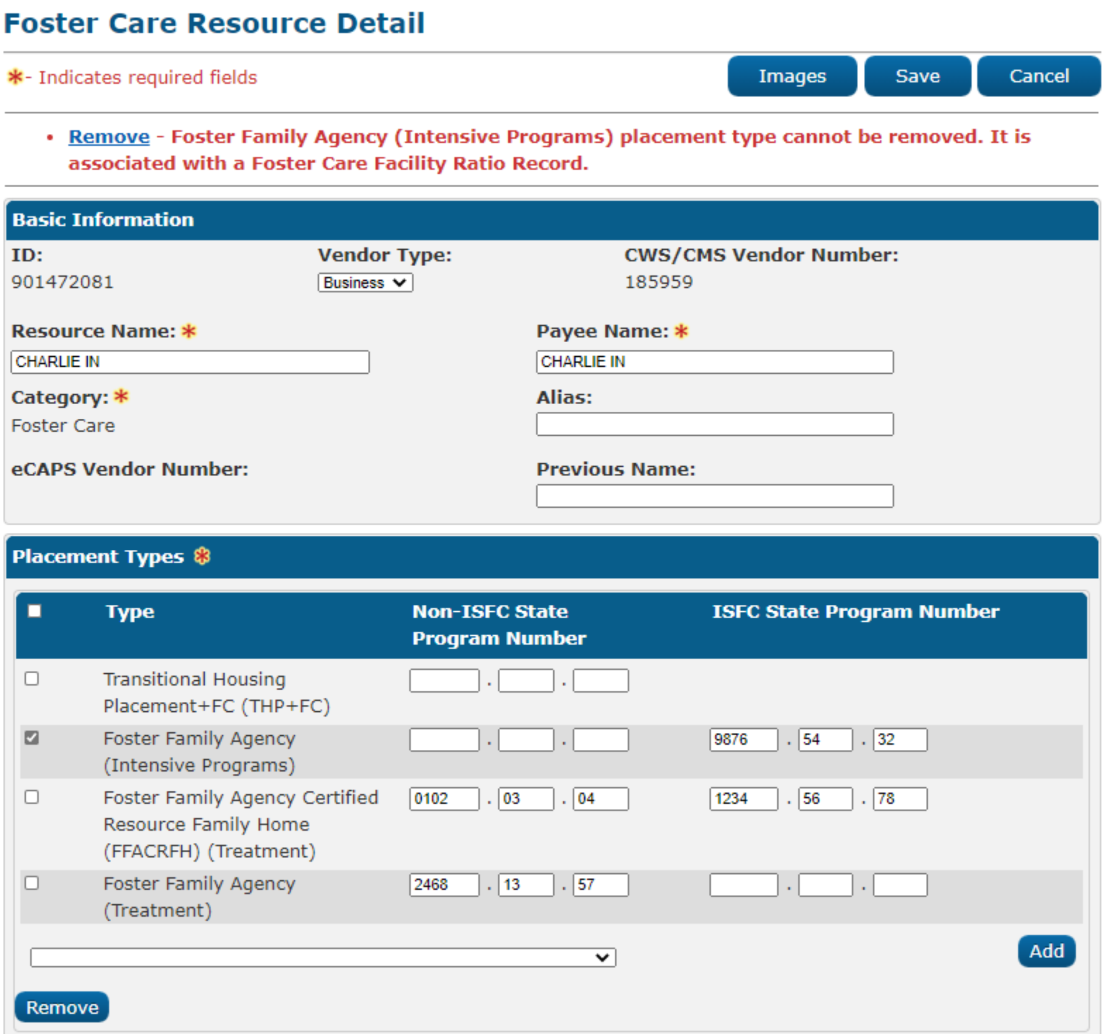
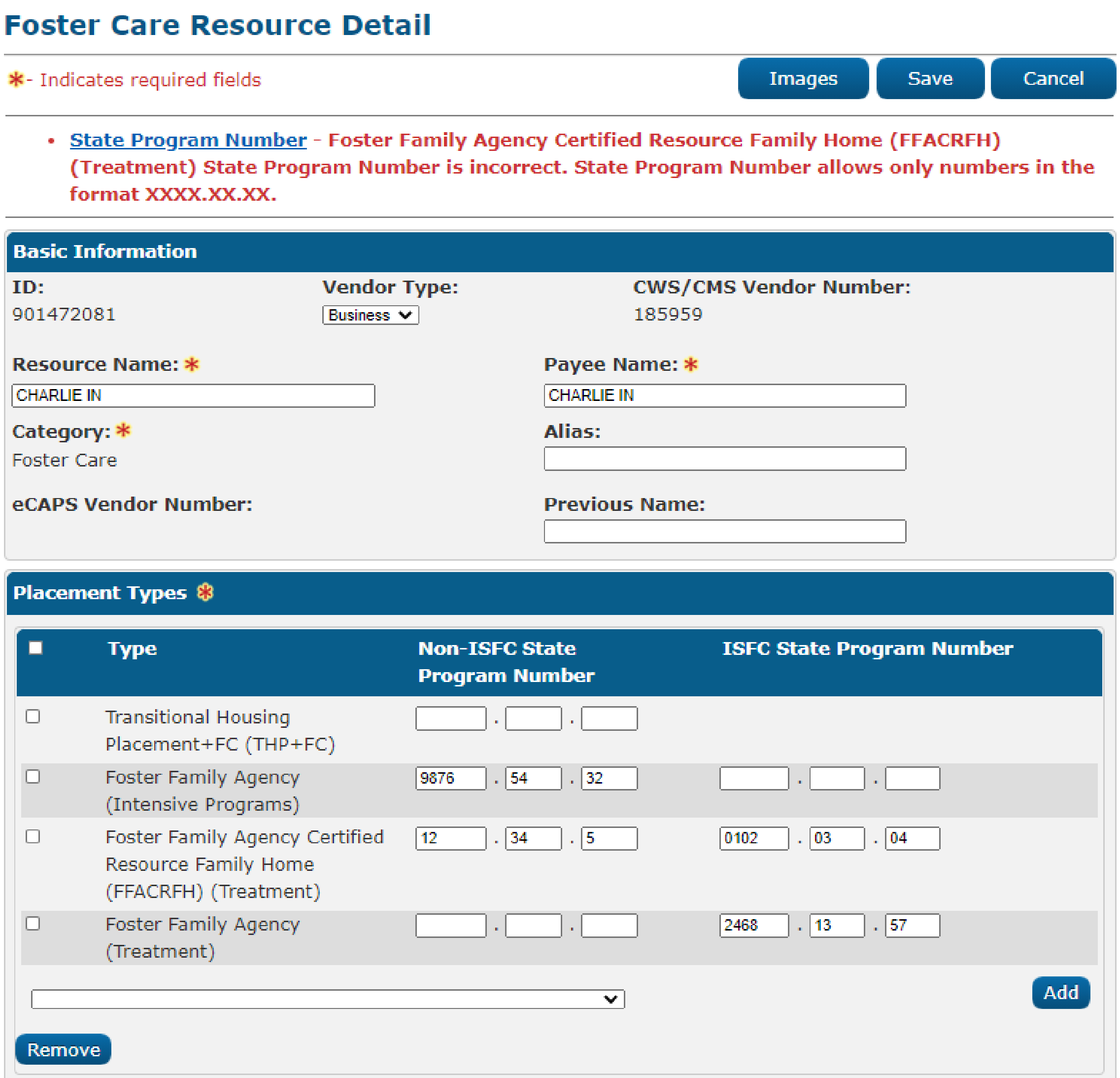


Figure 2.5.5 - Foster Care Resource Detail Remove Validation Message


Foster Care Resource Detail

*- Indicates required fields

Images | Save | Cancel

- State Program Number - Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment) State Program Number is incorrect. State Program Number allows only numbers in the format XXXX.XX.XX.

Basic Information

ID: 901472081
Vendor Type: Business
CWS/CMS Vendor Number: 185959

Resource Name: * CHARLIE IN
Payee Name: * CHARLIE IN

Category: * Foster Care
Alias:

eCAPS Vendor Number:
Previous Name:

Placement Types *

	Type	Non-ISFC State Program Number	ISFC State Program Number
☐	Transitional Housing Placement+FC (THP+FC)	. .	
☐	Foster Family Agency (Intensive Programs)	9876 . 54 . 32	. .
☐	Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)	12 . 34 . 5	0102 . 03 . 04
☐	Foster Family Agency (Treatment)	. .	2468 . 13 . 57

Add

Remove

Figure 2.5.6 – Foster Care Resource Detail with State Program Number Format Validation Message

2.5.3 Description of Changes

1. Add the Non-ISFC State Program Number and ISFC State Program fields to the Placement Type table on the Foster Care Resource Detail page (Figures 2.5.1 and 2.5.2).
    a. The SPN field is formatted as shown above, i.e. "0000.00.00"
    b. When entering the SPN in Create or Edit mode, the cursor will automatically move to the next field once the current one has been filled.
    c. The SPN field under the ISFC State Program Number column will only display for the following placement types:
        i. Foster Family Agency
        ii. Foster Family Agency (Treatment)

    iii. Foster Family Agency (Intensive Programs)
    iv. Foster Family Agency (Non-Treatment)
    v. Multidimensional
    vi. Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
    vii. Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)
2. Add 'Foster Family Agency' as a dropdown option in the placement type dropdown.
3. When a user attempts to add a placement type that requires a SPN without entering at least one SPN of either type, display a validation message:

   "**[Placement Type] – At least one State Program Number is required for [placement] placement type.**" (Figure 2.5.4).

   The list of types that require a SPN is in Appendix: Placement Types That Require a State Program Number.

4. When a user attempts to remove a placement type associated with a Foster Care Facility Ratio Record, display a validation message:

   "**Remove – [Placement Type] placement type cannot be removed. It is associated with a Foster Care Facility Ratio record.**" (Figure 2.5.5).

5. When a user attempts to save the Foster Care Resource Detail with an invalid State Program Number (i.e. the SPN does not follow the XXXX.XX.XX format), display a validation message:

   "**State Program Number – [Placement Type] State Program Number is incorrect. State Program Number allows only numbers in format XXXX.XX.XX.**" (Figure 2.5.6)

2.5.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Resource Detail**

2.5.5 Security Updates

N/A

2.5.6 Page Usage/Data Volume Impacts

No impact to this section.

2.5.7 Page Mapping

Update page mapping to include State Program Numbers.

2.6 Foster Care License Detail Page

2.6.1 Overview

The Foster Care License Detail page shows information related to a license held by the provider. This SCR will remove the SPN field from the page because it is moving to the Foster Care Resource Detail page.

2.6.2 Foster Care License Detail Mockup

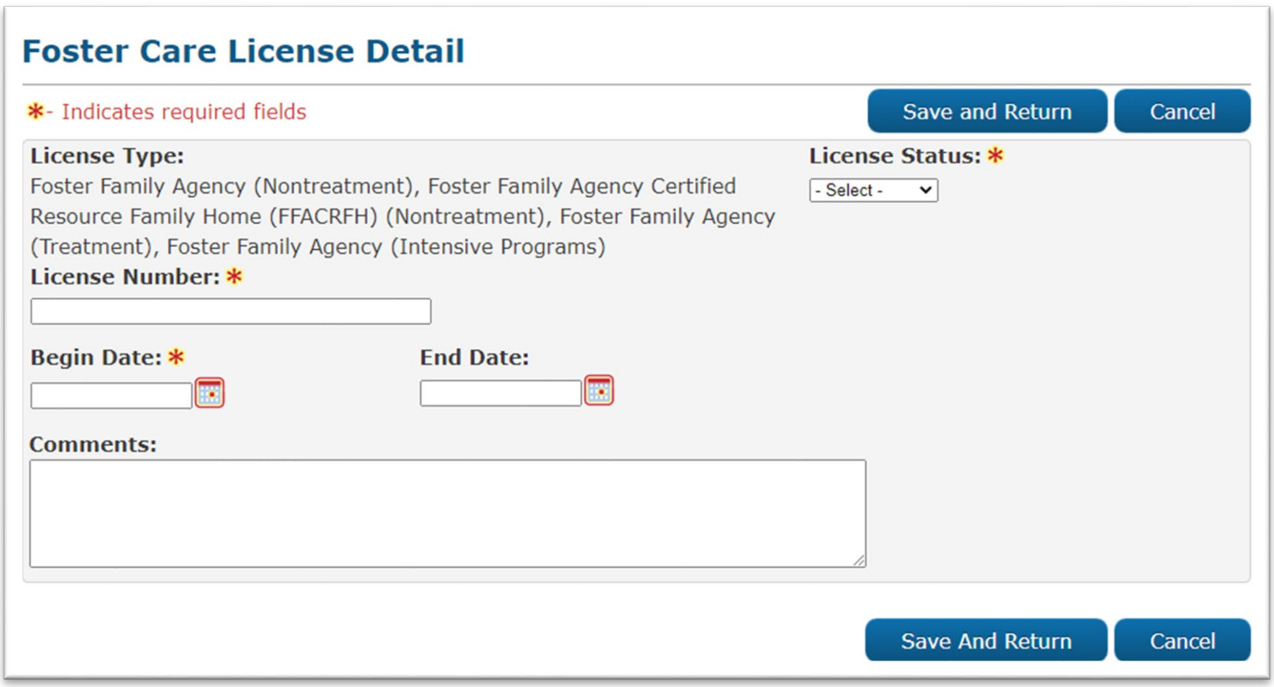


Figure 2.6.1 – Foster Care License Detail (Create Mode)

Figure 2.6.2 – Foster Care License Detail (Edit Mode)

Figure 2.6.3 – Foster Care License Detail (View Mode)

2.6.3 Description of Changes

1. Remove the State Program Number (SPN) field from the Foster Care License Detail page in all modes.

2.6.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: License Information**

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Update page mapping to remove the State Program Number field.

2.6.7 Page Usage/Data Volume Impacts

No impact.

2.7 Foster Care Rate Detail Page

2.7.1 Overview

1. Allow rates with Begin Dates and End Dates up to one month in the future.
2. For the new Placement Type ‘Foster Family Agency’, update the Rate Detail page for FC to display the same dropdowns and options as ‘Foster Family Agency (Nontreatment)’.
3. Add additional selections to the Rate dropdown for the placement type ‘Out of State Basic’.

2.7.2 Foster Care Rate Detail Page Mockup

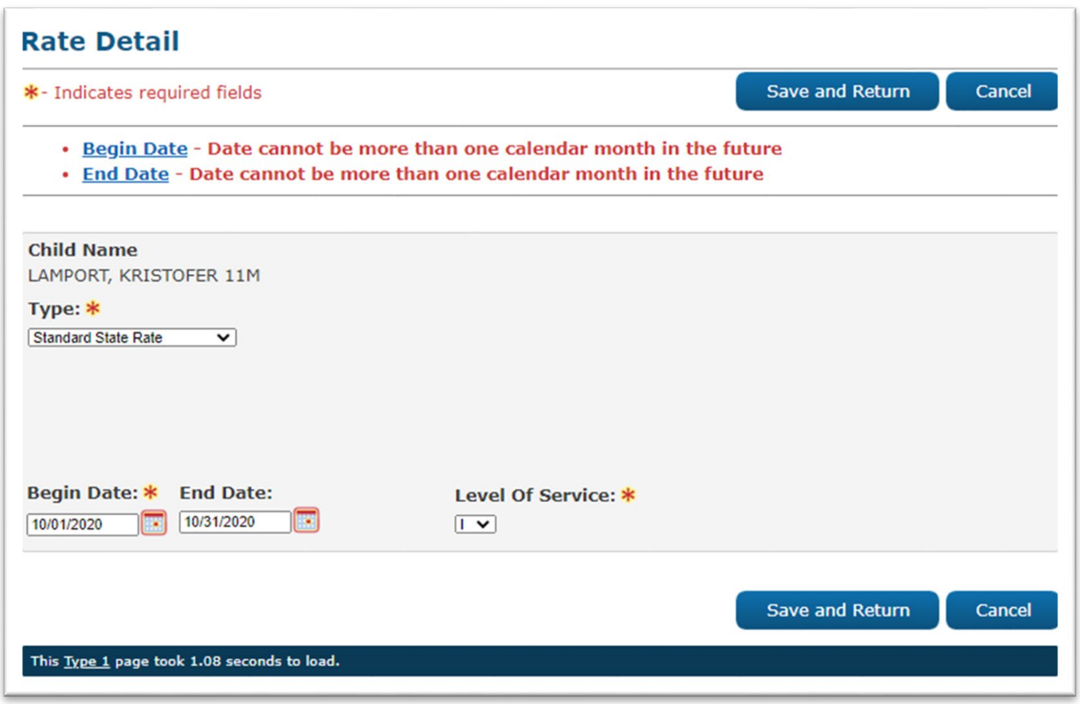


Figure 2.7.1 – FC Rate Detail Validation Message

2.7.3 Description of Changes

1. Modify the current logic on the FC Rate Detail page that prevents a worker from saving future dates for the Begin and End Date. Allow the worker to save a rate with a Begin Date or End Date no later than one calendar month in the future by making the following changes:

   a. Remove the existing logic that prevents the user from saving the page with Begin and End Dates greater than the current date. This includes removing the following validations:

"**Begin Date – Date cannot be greater than current date**"

"**End Date – Date cannot be greater than current date**"

b. Display the following new validation message when user attempts to save a Begin Date that is later than one calendar month in the future (Figure 2.7.1):

"Begin Date – Date cannot be more than one calendar month in the future."

c. Display the following new validation message when user attempts to save an End Date that is later than one calendar month in the future (Figure 2.7.1):

"End Date – Date cannot be more than one calendar month in the future."

d. Update the date-picker next to the Begin Date and End Date fields to allow a user to select a date in the future.

2. LRS/CalSAWS is adding the new Placement Type 'Foster Family Agency' that already exists in C-IV. Update the Type, Basic Rate, and Level of Care fields on the FC Rate Detail page to display the same options for the new placement type 'Foster Family Agency' that display for the existing type 'Foster Family Agency (Nontreatment)'.

   a. Type field:

      i. – Select –
      ii. Non Standard Rate
      iii. Regional Center Vendorized
      iv. Standard State Rate
      v. RB-FFA
      vi. ISTF - ISFC - TFC
      vii. ISFA - ISFC – FFA

   b. When Type selection is Standard, ISTF - ISFC – TFC, or ISFA - ISFC – FFA, the 'Basic Rate' and 'Level of Care' fields are hidden.

   c. When Type is RB-FFA, the 'Basic Rate' field displays with <blank> and 'Level of Care' options and the field is required.

   d. When Basic Rate selection is 'Level of Care', the 'Level of Care' field displays with the dropdown options 'Basic Level Rate', 'LOC 2', 'LOC 3', and 'LOC 4' and the field is required.

   (Note: For 'Non Standard Rate' or 'Regional Center Vendorized', a 'Rate' and 'Frequency' are required, and a 'Rate Location' can be added. For 'Non Standard Rate' a 'Non-Standard Sub-Type' dropdown also displays.)

3. When the placement type is ‘Out of State Basic’, the only selection that currently displays in the ‘Type’ field is ‘Non Standard Rate’. Add the following additional values to the dropdown. No other dropdown options will display on the page when one of these values is selected:
    a. Standard State Rate
    b. Dual Agency RC-California Early Start Intervention
    c. Dual Agency RC-Lanterman Developmental Disability

2.7.4 Page Location

- **Global: Eligibility**
- **Local: Foster Care**
- **Task: Child Placement**

2.7.5 Page Usage/Data Volume Impacts

No impact to this section.

2.7.6 Page Mapping

No impact to this section.

2.8 Kin-GAP Rate Detail Page

2.8.1 Overview

Allow rates with Begin Dates and End Dates up to one month in the future.

2.8.2 Kin-GAP Rate Detail Mockup

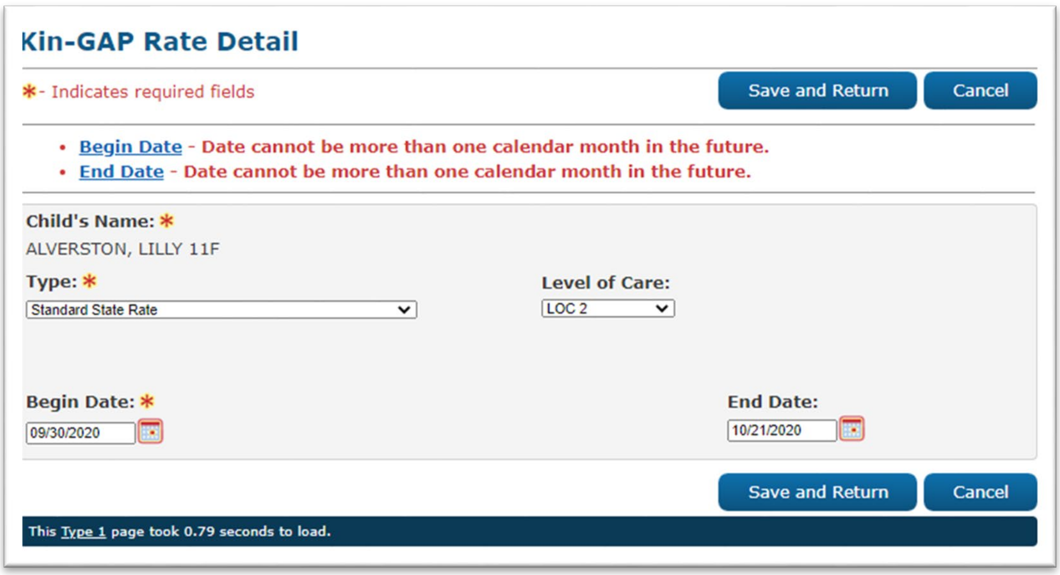


Figure 2.8.1 – Kin-GAP Rate Detail Validation Message

2.8.3 Description of Changes

1. Modify the current logic on the Kin-GAP Rate Detail page that prevents a worker from saving future dates for the Begin and End Date. Allow the worker to save a rate with a Begin Date or End Date no later than one calendar month in the future by making the following changes:

   a. Remove the existing logic that prevents the user from saving the page with Begin and End Dates greater than the current date. This includes removing the following validations:

      i. "**Begin Date – Date cannot be greater than current date**"
      ii. "**End Date – Date cannot be greater than current date**"

b. Display the following new validation message when user attempts to save a Begin Date that is later than one calendar month in the future (Figure 2.8.1):

"<u>Begin Date</u> – Date cannot be more than one calendar month in the future."

c. Display the following new validation message when user attempts to save an End Date that is later than one calendar month in the future (Figure 2.8.1):

"<u>End Date</u> – Date cannot be more than one calendar month in the future."

2.8.4 Page Location

- **Global: Eligibility**
- **Local: Kin-GAP**
- **Task: Rate Summary**

2.8.5 Page Usage/Data Volume Impacts

No impact to this section.

2.8.6 Page Mapping

No impact to this section.

2.9 Eligibility – Updates for New Placement Type: Foster Family Agency (FFA)

2.9.1 Overview

LRS/CalSAWS is adding the new Placement Type 'Foster Family Agency' that already exists in C-IV. This placement type will be mapped to the 'Foster Family Agency (Nontreatment)' placement type. When Standard State Rate is selected, EDBC will pay the appropriate age-based FFA rate. When RB-FFA rate (CCR Resource-based FFA rate) is selected, EDBC will pay the selected FFA LOC rate.

FC EDBC will be updated to allow SCI's to be paid to FFA placements, effective 3/1/2018.

2.9.2 Description of Changes

1. Update FC EDBC to pay the new Placement Type 'Foster Family Agency' the same as the existing LRS/CalSAWS placement type 'Foster Family Agency (Nontreatment)'.
2. Update FC EDBC to include FFA placements as a placement type that can be paid SCI's, effective 3/1/2018.

2.9.3 Programs Impacted

Foster Care

2.9.4 Performance Impacts

No impact.

2.10 Eligibility – Run EDBC Rate Validations for Non-Related Legal Guardianships

2.10.1 Overview

Certain rate selections should not be made for Non-Related Legal Guardianships. Two new soft validations are being added on the Run EDBC page for Foster Care programs. Note: these are soft validations to bring the data condition to the attention of the worker running EDBC. They will not prevent EDBC from running online or in batch if the conditions occur. (Note: C-IV had hard validations for these that prevented EDBC from running.)

2.10.2 Description of Changes

1. Add a new soft validation for the Foster Care program on the Run EDBC page. If these four conditions are all true:

    a. Benefit month is 12/2017 or later.
    b. Placement Authority is 'Non-Related Legal Guardianship' for any part of the benefit month.
    c. The field 'Which court established guardianship?' on the Placement Authority is 'Probate'. (PLACEMT_AUTH.COURT_GRDNSHP_TYPE_CODE Code 'PB')
    d. The Rate Detail for any Child Placement overlapping the above Placement Authority for the benefit month has:
        - 'Type' field is:
            - 'ISCO - ISFC – County', or
            - 'ISFA - ISFC – FFA', or
            - 'ISFO - ISFC - Family-Only', or
            - 'ISTF - ISFC – TFC', or
        - 'Level of Care' field is:
            - 'LOC 2', 'LOC 3', or 'LOC 4'

    display the following message:

    Foster Care: Non-Related Legal Guardianship established by Probate court should not have ISCO, ISFA, ISFO, or ISTF rates, or a Level of Care other than Basic Level Rate.

2. Add a new soft validation for the Foster Care program on the Run EDBC page. If these four conditions are all true:

    a. Benefit month is 12/2017 or later
    b. Placement Authority is 'Non-Related Legal Guardianship' for any part of the benefit month

c. The field ‘Which court established guardianship?’ on the Placement Authority says ‘Juvenile.’ (PLACEMT_AUTH.COURT_GRDNSHP_TYPE_CODE Code ‘JV’)
d. The Rate Detail for any Child Placement overlapping the above Placement Authority for the benefit month has:
   - ‘Type’ field is:
     - ‘ISCO - ISFC – County’, or
     - ‘ISFA - ISFC – FFA’, or
     - ‘ISFO - ISFC - Family-Only’, or
     - ‘ISTF - ISFC – TFC’.

display the following message:

Foster Care: Non-Related Legal Guardianship established by Juvenile court should not have ISCO, ISFA, ISFO, or ISTF rates.

2.10.3 Programs Impacted

Foster Care

2.10.4 Performance Impacts

Impact is negligible.

2.11 Eligibility – Run EDBC Validation for ISFC Rates

2.11.1 Overview

ISFC rates should only be paid to placement resources that are authorized to receive them. A soft validation will be added to FC EDBC in LRS/CalSAWS to warn workers if an ISFC rate was selected for the benefit month but the State Program Number for the resource does not indicate that the resource should be paid an ISFC rate. The validation will not display if the SPN is the placeholder value '0000.00.00'.

2.11.2 Description of Changes

1. Add a new soft validation for the Foster Care program on the Run EDBC page. If these three conditions are all true:

    a. The benefit month is 12/2017 (implementation of CCR) or later.
    b. The Child Placement applicable to the benefit month has any of the following placement rates for any part of the benefit month:

Rate Type	Code Table	Code Value
ISFA - ISFC - FFA	503	FA
ISFO - ISFC - Family-Only	503	FO
ISCO - ISFC - County	503	IC
ISTF - ISFC - TFC	503	TF

    c. The resource where the child is placed does not have a State Program Number that matches the Placement Type on the Child Placement Detail where the State Program Number Type is "ISFC" and <u>both of the following are true</u>:
        i. the two-digit component in the middle of the State Program Number (ORG_STATE_PGM_NUM.STATE_PGM_NUM_IDENTIF_2) is "15".
        ii. The State Program Number is not 0000.00.00

    display the following message:

    Foster Care: [Placement name] has an ISFC rate but does not have a valid ISFC State Program Number.

2.11.3 Programs Impacted

Foster Care

2.11.4 Performance Impacts

Impact is negligible.

2.12 Batch/Interface – DCFS FC Inbound Reader Interface

2.12.1 Overview

Update the DCFS FC Inbound Reader Interface to support CCR policy changes.

2.12.2 Description of Change

Modify Batch Job PI19C884 with the following changes:

- The existing references to 'STATE_PGM_NUM_IDENTIF_1', 'STATE_PGM_NUM_IDENTIF_2', 'STATE_PGM_NUM_IDENTIF_3' on the 'LIC' table will be removed from the Inbound Reader job because those fields are being dropped from the LIC table.
- If any data is received in the inbound interface data for the State Program Number, it will not be updated in LRS/CalSAWS.
- If a new resource is being created or updated for one of the placement types that requires a State Program Number, insert a record in the new ORG_STATE_PGM_NUM table being added with this SCR. Populate the following fields as shown:
  'STATE_PGM_NUM_IDENTIF_1' = "0000"
  'STATE_PGM_NUM_IDENTIF_2' = "00"
  'STATE_PGM_NUM_IDENTIF_3' = "00"
  'Type' = 'Non-ISFC'

  The list of placement types that require an SPN is in Appendix: Placement Types That Require a State Program Number.

2.12.3 Execution Frequency

No Change

2.12.4 Key Scheduling Dependencies

No Change

2.12.5 Counties Impacted

No Change

2.12.6 Data Volume/Performance

N/A

2.12.7 Failure Procedure/Operational Instructions

No Change

2.13 Fiscal - Auditor Controller Writer (POXXF108)

2.13.1 Overview

Update the Auditor Controller Writer to populate State Program Number from the Foster Care Resource Detail page (See section 2.5).

2.13.2 Description of Change

Update the Auditor Controller Writer job to populate State Program Number from the new data table for the unclaimed issuances.

For issuances created by EDBC, the SPN will be based on the Foster Care rate structure code (CCR, Non-CCR or ISFC) of the EDBC_PERS_MISC and the placement type. The system will use Non-ISFC SPN for CCR and Non-CCR and will use ISFC SPN for ISCF.

For Non-EDBC issuances, the SPN will be based on the placement type from the Child Placement record and will be Non-ISFC. System will use the latest record when there are multiple Child Placements available for the benefit month of the issuance.

2.13.3 Execution Frequency

No Changes.

2.13.4 Key Scheduling Dependencies

No Changes.

2.13.5 Counties Impacted

CIV migration counties only.

2.13.6 Data Volume/Performance

N/A

2.13.7 Failure Procedure/Operational Instructions

No changes

2.14 Fiscal - Migration Warrant Print Writer (POXX100, POXXF101, POXXF102)

2.14.1 Overview

Update the Migration Warrant Print Writer to populate State Program Number from the Foster Care Resource Detail page (See section 2.3).

2.14.2 Description of Change

Update the Migration Warrant Print Writer to populate State Program Number from the new data table for issuances.

For issuances created by EDBC, the SPN will be based on the Foster Care rate structure code (CCR, Non-CCR or ISFC) of the EDBC_PERS_MISC and the placement type. The system will use Non-ISFC SPN for CCR and Non-CCR and will use ISFC SPN for ISCF.

For Non-EDBC issuances, the SPN will be based on the placement type from the Child Placement record and will be Non-ISFC. System will use the latest record when there are multiple Child Placements available for the benefit month of the issuance.

2.14.3 Execution Frequency

No Changes.

2.14.4 Key Scheduling Dependencies

No Changes.

2.14.5 Counties Impacted

CIV migration counties only.

2.14.6 Data Volume/Performance

N/A

2.14.7 Failure Procedure/Operational Instructions

No changes

2.15 Fiscal - Foster Care Benefit Issuance Claiming (PBXXF202)

2.15.1 Overview

Update the Foster Care Benefit Issuance Claiming batch to populate State Program Number from the Foster Care Resource Detail page (See section 2.3).

2.15.2 Description of Change

Update the following modules to populate State Program Number from the new table based on the Foster Care rate structure code and the placement type.

- AA/KG Benefit Issuance Claiming Module
- AA/KG Benefit Issuance Adjustment Claiming Module
- FC Benefit Issuance Claiming Module
- FC Benefit Issuance Adjustment Claiming Module

Update the following modules to populate Non-ISFC State Program Number from the new table based on the placement type for the issuance. System will use the latest record when there are multiple Child Placements available for the benefit month of the issuance.

- FC Payment Request Issuance Claiming Module
- FC Payment Request Issuance Adjustment Claiming Module
- FC Payment Request Issuance Pay Code Adjustment Claiming Module

2.15.3 Execution Frequency

No changes

2.15.4 Key Scheduling Dependencies

No changes

2.15.5 Counties Impacted

All Counties.

2.15.6 Data Volume/Performance

N/A

2.15.7 Failure Procedure/Operational Instructions

No changes

2.16 Fiscal - Recovery Account Claiming (PBXXR203)

2.16.1 Overview

Update the Recovery Account Claiming batch to determine the State Program Number of the Foster Care Vendors. This is a code-maintenance update and does not change any batch functionalities.

2.16.2 Description of Change

Update the Cross-Program Adjustment Module to read State Program Number from the new table based on the Foster Care rate structure code of the EDBC_PERS_MISC and the placement type when processing transactions due to cross program adjustments.

2.16.3 Execution Frequency

No changes

2.16.4 Key Scheduling Dependencies

No changes

2.16.5 Counties Impacted

All Counties

2.16.6 Data Volume/Performance

The Cross Program Adjustment Batch has not processed any records and should be disabled since we do not have cross program adjustments in the system. This update is only to make sure batch will not break during execution. Fiscal committee will decide whether to disable this module in the future.

2.16.7 Failure Procedure/Operational Instructions

No changes

2.17 Client Correspondence – Updates FC/KG CCR Approval NOA Template

2.17.1 Overview

Update the FC/KG Approval NOA to support three additional dynamic sections: Approval for Income Change, Infant Supplement, and Supplemental Care Increment. These three reasons are currently triggered for Change and Supplement NOAs and will be updated to trigger for the Approval NOA as well.

State Form/NOA: FC: NA 403 (4/17); KG: NA 403A (4/17)

Existing Template Revision Date: 4/17

Current Program(s): FC, KG

Include NA Back 9: Y

Existing Languages:

English

2.17.2 Add Section Generation for Countable Income, Infant Supplement Issued, and Supplemental Care Increment

The following fragments will be added to the FC/KG CCR Approval NOA as dynamic fragments, to generate under the following conditions:

Section	Generation Conditions
Income Change **Verbiage:** "The Child has Countable Income" **Associated Action Fragment:** FC_KG_AP_ACTION4_EN ID #: 4110	• Program is FC or KG • Action Type is Approval • Current EDBC has a CCR or ISFC rate structure • The Child has Countable Earned or Unearned Income in the Foster Care Budget

Section	Generation Conditions
Infant Supplement Issued **Verbiage:** "Your case had been issued an Infant Supplement Payment." **Associated Action Fragment:** FC_KG_AP_ACTION4_EN ID #: 4110	• Program is FC or KG • Action Type is Approval • Current EDBC has a CCR or ISFC rate structure • The newly saved EDBC has an Infant Supplement Amount in the Foster Care Budget
Special Care Increment **Verbiage:** "Your case has been issued a Special Care Increment" * *Current fragment verbiage reads "Supplemental Care Increment". This will be updated to read "Special Care Increment" **Associated Action Fragment:** FC_KG_AP_ACTION4_EN ID #: 4110	• Program is FC or KG • Action Type is Approval • Current EDBC has a CCR or ISFC Rate Structure • The newly saved EDBC has a Special Care Increment amount in the Foster Care Budget

2.17.3 Regression Test to ensure continued generation for Change and Supplement Action Types

2.18 Client Correspondence – Update FC/KG Approval Action Fragments

2.18.1 Overview

C-IV populates the FC/KG Approval Action Fragment with an additional piece of information – Aid Type. This update will add this variable on the Action Fragment, placing it in a separate column to the right of the Person variable, in order to better match the C-IV and State versions.

Action Fragment Name and ID:

FC_KG_AP_ACTION4

ID # = 4110

State Form/NOA: FC: NA 403 (4/17); KG: NA 403A (4/17)

Current Program(s): FC, KG

Current Action Type: AP

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages:

English

2.18.2 Update Fragment XDP

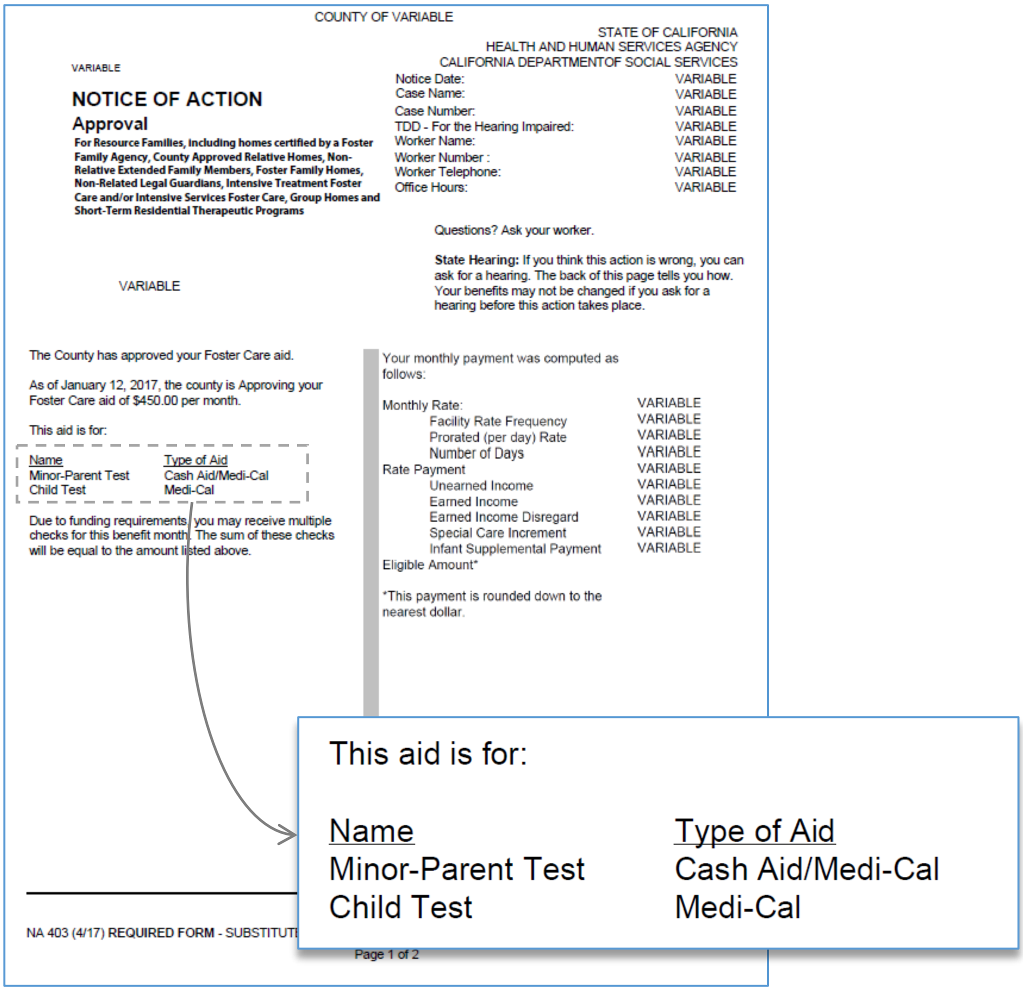
XDP will be updated with an additional column to the right of 'Person'(s) that will populate with the Aid Type – either Medi-Cal or Cash Aid/Medi-Cal

Updated Languages:

English

NOA Mockups/Examples: See Supporting Documents #1

Description	Existing Text	Updated Text	Formatting*
Static	This aid is for: <Person 1> <Person 2> …	This aid is for: Name: Type of Aid: <Person 1> <Aid Type 1> <Person 2> <Aid Type 2> …	Arial, Size 10


COUNTY OF VARIABLE

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

VARIABLE

NOTICE OF ACTION

Approval

For Resource Families, including homes certified by a Foster Family Agency, County Approved Relative Homes, Non-Relative Extended Family Members, Foster Family Homes, Non-Related Legal Guardians, Intensive Treatment Foster Care and/or Intensive Services Foster Care, Group Homes and Short-Term Residential Therapeutic Programs

Notice Date:	VARIABLE
Case Name:	VARIABLE
Case Number:	VARIABLE
TDD - For the Hearing Impaired:	VARIABLE
Worker Name:	VARIABLE
Worker Number :	VARIABLE
Worker Telephone:	VARIABLE
Office Hours:	VARIABLE

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. Your benefits may not be changed if you ask for a hearing before this action takes place.

VARIABLE

The County has approved your Foster Care aid.

As of January 12, 2017, the county is Approving your Foster Care aid of $450.00 per month.

This aid is for:

Name	Type of Aid
Minor-Parent Test	Cash Aid/Medi-Cal
Child Test	Medi-Cal

Due to funding requirements, you may receive multiple checks for this benefit month. The sum of these checks will be equal to the amount listed above.

Your monthly payment was computed as follows:

Monthly Rate:	VARIABLE
Facility Rate Frequency	VARIABLE
Prorated (per day) Rate	VARIABLE
Number of Days	VARIABLE
Rate Payment	VARIABLE
Unearned Income	VARIABLE
Earned Income	VARIABLE
Earned Income Disregard	VARIABLE
Special Care Increment	VARIABLE
Infant Supplemental Payment	VARIABLE
Eligible Amount*	

*This payment is rounded down to the nearest dollar.

This aid is for:

Name	Type of Aid
Minor-Parent Test	Cash Aid/Medi-Cal
Child Test	Medi-Cal

NA 403 (4/17) REQUIRED FORM - SUBSTITUTI

Page 1 of 2

2.18.3 Add/Update Fragment Variable Population

A new variable, positioned in a column to the right of the current Person variable, will populate with Aid Type.

Variable Name	Population	Formatting*
Aid Type	Populates with Aid Type – either "Medi-Cal" if the status is an active MMO, or "Cash Aid/Medi-Cal" if the status is active MEM.	Arial, Size 10

Variables Requiring Translations: N/A

2.19 Client Correspondence – Update FC/KG Change Action Fragment

2.19.1 Overview

The FC/KG Change Action Fragment will be updated to populate with the same Aid Type variable as the Approval Fragment.

Action Fragment Name and ID:

FC_KG_CH_ACTION3

ID # = 4111

State Form/NOA: FC: NA 403 (4/17); KG: NA 403A (4/17)

Current Program(s): FC, KG

Current Action Type: AP

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages:

English

2.19.2 Update Fragment XDP

XDP will be updated with an additional column to the right of 'Person'(s) that will populate with the Aid Type – either Medi-Cal or Cash Aid/Medi-Cal

Updated Languages:

English

NOA Mockups/Examples: See Supporting Documents #1

Description	Existing Text	Updated Text	Formatting*
Static	This aid is for: <Person 1> <Person 2> ...	This aid is for: Name: Type of Aid: <Person 1> <Aid Type 1> <Person 2> <Aid Type 2> …	Arial, Size 10

2.19.3 Add/Update Fragment Variable Population

A new variable, positioned in a column to the right of the current Person variable, will populate with Aid Type.

Variable Name	Population	Formatting*
Aid Type	Populates with Aid Type – either "Medi-Cal" if the status is an active MMO, or "Cash Aid/Medi-Cal" if the status is active MEM.	Arial, Size 10

Variables Requiring Translations: N/A

2.20 Client Correspondence – Update FC/KG SCI Change Fragment Verbiage

2.20.1 Overview

Update the verbiage used in Supplemental Care Increment Issued XDP to match the verbiage used by C-IV, and by the existing Foster Care Budget page and NOA snippet in LRS/CalSAWS.

Action Fragment Name and ID:

Foster Care

FC_CH_ SUPPLEMENTAL_CARE_INCREMENT_T311

ID # = 7487

Kin-GAP

KG_CH_SUPPLEMENTAL_CARE_INCREMENT_K020

ID # = 7492

State Form/NOA: FC – NA 403 (4/17); KG – NA 403A (4/17)

Current Program(s): FC, KG

Current Action Type: Change, Supplement

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

English

2.20.2 Update Fragment XDP

Update Fragment text to replace "Supplemental" with "Special" to match C-IV verbiage, and the Foster Care Budget that appears on the NOA in LRS/CalSAWS.

Updated Languages: English

Description	Existing Text	Updated Text	Formatting*
Static	Your case has been issued a Supplemental Care Increment.	Your case has been issued a Special Care Increment.	Arial, Size 10

2.21 Client Correspondence – Turn off KG Age Rules Discontinuance Reason

2.21.1 Overview

For KG, currently the Age Rules NOA generates when the discontinuance reason is 'Guardianship Ended' which is incorrect. This change will turn off that NOA.

Turn off NOA generation in LRS/CalSAWS for:

Reason Fragment Name and ID:

KG_TN_NO_LONGER_SUPPORT_K015

ID #: 7502

"You are no longer providing support for {Person}. He/She no longer meets the Age Rules"

State Form/NOA: NA 403A (4/17)

Current Program(s): KG

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

English

2.22 Client Correspondence – Update KG Legal Guardianship Terminated Discontinuance Reason

2.22.1 Overview

Currently in LRS/CalSAWS, the Legal Guardianship fragment is generated only when the Child is under 18 and the reason is *not* 'Guardianship Ended', which is incorrect. This change will update the generation conditions for the Legal Guardianship Discontinuance NOA. It will now fire when the reason *is* 'Guardianship Ended'.

Action Fragment Name and ID:

KG_TN_LEGAL_GUARD_TERM_K014

ID # = 7501

"The Legal Guardianship was Terminated"

State Form/NOA: NA 403A (4/17)

Current Program(s): KG

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

English

2.22.2 Updates to Fragment Generation

Update the Generation Conditions for the Legal Guardianship Terminated Reason Fragment to generate when:

- Program is Kin-GAP
- Action Type is Discontinuance
- Prior EDBC has the CCR or ISFC Rate Structure
- EDBC Fails for reason 'Guardianship Ended' (CT73_84_GUARDIANSHIP_ENDED) *(Note: this last bullet is the only change to the existing logic)*

New NOA Template: N

New Program Generation: N

New Action Type: N

Update to Fragment Level: N

Repeatable: N

New Forms/NOAs Generated with this NOA: N/A

Action Fragment: FC_KG_TN_ACTN4

Message Fragment: N/A

Ordering on NOA: This fragment will generate immediately following the Discontinuance Action Fragment

2.23 Data Change – Delete LRS FC Ratio data from Conversion

2.23.1 Overview

FC Ratio and FC Age Ratio data was loaded into LRS/CalSAWS database tables in 2016 during the conversion process. The data in those tables was not able to be viewed or updated through the LRS/CalSAWS application. It will be deleted prior to the FC Ratio page changes in this SCR being implemented.

2.23.2 Description of Change

1. Delete all existing FC Ratio and FC Age Ratio data stored in the LRS/CalSAWS database in the FC_RATIO and FC_AGE_RATIO tables.

2.23.3 Estimated Number of Records Impacted/Performance

Approximately 6,000 records will be deleted.

2.24 Data Change – Set Initial State Program Number Values for existing Resources in LRS/CalSAWS where required.

2.24.1 Overview

Per a request from DDID 2096, a State Program Number is required for certain Placement Types. This SCR is updating the State Program Number field and implementing the logic that will make it required for some placement types.

A data change will insert an initial placeholder value for existing resources in LRS/CalSAWS with one of those required types.

2.24.2 Description of Change

Insert a State Program Number with Type 'Non-ISFC' and value '0000.00.00' for all placement types on existing LRS/CalSAWS Foster Care resources that are listed in the Appendix: Placement Types That Require a State Program Number.

2.24.3 Estimated Number of Records Impacted/Performance

Approximately 1,800 records will be updated.

2.25 Automated Regression Test

2.25.1 Overview

Create new automated scripts to verify the data entry and a subset of the validation messages on the following pages:

1. Foster Care Facility Ratio List
2. Foster Care Facility Ratio Detail
3. Foster Care Resource Detail
4. Foster Care Rate Detail
5. Kin-GAP Rate Detail

Note: Page validations will only be verified in a single page mode (Create or Edit).

2.25.2 Description of Change

1. Create new automated scripts to verify the following on the Foster Care Facility Ratio List page:
    a. The 'No data found.' message displays when no detail records exist for the resource in context.
    b. The table data populates as expected for saved detail records.
    c. Clicking the Remove button refreshes the page with the selected records (and only the selected records) no longer displayed.
2. Create new automated scripts to verify that new records can be created and saved through the Foster Care Facility Ratio Detail page, and to verify the following on this page:
    a. Page version updates when the Placement Type or Ratio Type values are changed.
    b. Editable field availability and content based on the Placement Type, and Ratio Type where appropriate:
        i. Single Ratio page version when each of the following Placement Types is selected:
            1. Group Home
            2. Out of State Group Home
            3. Short Term Therapeutic Residential Program
            4. Transitional Housing Placement + FC (THP+FC)
            5. Transitional Housing Placement Program (THPP)
        ii. CCR page version when each of the following Placement Types is selected:
            1. Foster Family Agency
            2. Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
            3. Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)

iii. CCR page version when each of the following Placement Types is selected, and the Ratio Type ‘CCR’ is selected:
    1. Foster Family Agency (Intensive Programs)
    2. Foster Family Agency (Nontreatment)
    3. Foster Family Agency (Treatment)
    4. Multidimensional
iv. Non-CCR page version when each of the following Placement Types is selected:
    1. Adoptive Homes
    2. Community Treatment Facility
    3. Foster Family Home
    4. Foster Family Home-Shelter Care
    5. Legal Guardian
    6. Relative Home
v. Non-CCR page version when each of the following Placement Types is selected, and the Ratio Type ‘Non-CCR’ is selected:
    1. Foster Family Agency (Intensive Programs)
    2. Foster Family Agency (Nontreatment)
    3. Foster Family Agency (Treatment)
    4. Multidimensional

c. The Effective Dating Confirmation List page displays when attempting to save a new record or change to an existing record such that the Begin Date and End Date range would overlap another existing record with the same Rate Type, Ratio Type, and Placement Type.
d. The following validation messages display in at least one applicable scenario:
    i. **“<u>[Field Name]</u> - Input [value] is not valid for this field.”**
    ii. **“<u>Administrative Federal</u> - Administrative Federal and Administrative Non-Federal Ratios not equal to 100 for [Age-Based Ratio / CCR Rate]”**
    iii. **“<u>End Date</u> - End Date must be after Begin Date”**
    iv. **“<u>Maintenance Federal</u> - Maintenance Federal and Maintenance Non-Federal Ratios not equal to 100 for [Age-Based Ratio / CCR Rate]”**
    v. **“<u>Maintenance Non-Federal</u> - Maintenance Non-Federal Ratio must be less than or equal to 100”**
    vi. **“<u>Maintenance Ratio</u> - Maintenance Ratio and Administration Ratios are not equal to 100 for [Age-Based Ratio / CCR Rate]”**

    Note: Each message will be verified at least once across all Placement Type and Ratio Type combinations, and at least one applicable field / section. These messages will not be verified for each individual combination or field / section.

3. Create new, or update existing automated scripts to verify that new records can be created and saved through the Foster Care Resource Detail page, and to verify the following on this page:
    a. Multiple Placement Types can be added for the same resource.
    b. The following value is available in the Placement Type dropdown:
        i. Foster Family Agency
    c. The following validation messages display in at least one applicable scenario:
        i. **"[Placement Type] - At least one State Program Number is required for [Placement Type] placement type."**
        ii. **"Remove - [Placement Type] placement type cannot be removed. It is associated with a Foster Care Facility Ratio Record."**
        iii. **"State Program Number - [Placement Type] State Program Number is incorrect. State Program Number allows only numbers in the format XXXX.XX.XX."**

        Note: This validation message will be verified for both ISFC and Non-ISFC fields.
4. Create new, or update existing automated scripts to verify that new records can be created and saved through the Foster Care Rate Detail page, and to verify the following on this page:
    a. Records can be saved with Begin Date and End Date values one calendar month in the future.
    b. The following validation messages display in at least one applicable scenario:
        i. **"Begin Date - Date cannot be more than one calendar month in the future."**
        ii. **"End Date - Date cannot be more than one calendar month in the future."**
    c. When the Placement Type of 'Foster Family Agency' is selected, the following Type field values are available:
        i. Non Standard Rate
        ii. Regional Center Vendorized
        iii. Standard State Rate
        iv. RB-FFA
        v. ISTF - ISFC - TFC
        vi. ISFA - ISFC - FFA
    d. When the Placement Type of 'Out of State Basic' is selected, the following Type field values are available:
        i. Dual Agency RC-California Early Start Intervention
        ii. Dual Agency RC-Lanterman Developmental Disability
        iii. Non Standard Rate
        iv. Standard State Rate
5. Create new, or update existing automated scripts to verify that new records can be created and saved through the Kin-GAP Rate Detail page, and to verify the following on this page:

a. Records can be saved with Begin Date and End Date values one calendar month in the future.
b. The following validation messages display in at least one applicable scenario:
    i. **"<u>Begin Date</u> - Date cannot be more than one calendar month in the future."**
    ii. **"<u>End Date</u> - Date cannot be more than one calendar month in the future."**

2.26 Client Correspondence - Regression Test SCI FFA NOAs

Conduct Regression Testing to ensure the generation of the following Special Care Increment (SCI) NOA fragments for the newly added FFA placement type:

Fragment ID #	Fragment Name
7486	FC_CH_SCI_T311
6156	FC_CH_AUTHORIZED_SPECIAL_CARE_RATE_T025
6162	FC_CH_TERMINATED_SPECIAL_CARE_RATE_T026
6168	FC_CH_REDUCED_SPECIAL_CARE_RATE_T027
6181	FC_CH_AUTHORIZED_REGIONAL_CENTER_RATE_T028
7750	FC_CH_STOP_SCI_NON_CCR_T904
7751	FC_CH_STOP_SCI_PRORATION_NON_CCR_T905
7756	FC_CH_STOP_SCI_CCR_T906
7757	FC_CH_STOP_SCI_PRORATION_CCR_T907

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	CC	Mockup of a Change NOA with the FC/KG Change Action Fragment. This updated fragment contains a two-column section, with the Person's name, as well as Aid Type. This example is generated for Kin-GAP, but the same verbiage and logic is used for Foster Care. This addition will also be made for the FC/KG Approval Action Fragment.	PDF FC/KG Change Fragment w/ Aid Type
2	Online	Online Security Matrix	CA-200366 Migration SCR for CC

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.4.26	The LRS shall make payments based on Vendor-specific and DCFS Programs Foster Care rates if those rates are indicated and available for a specified service. If the Vendor-specific rate is not available in the LRS, payment shall be defaulted to the general rate for the service provided.	Updates are being made to align CCR changes from C-IV and LRS/CalSAWS prior to migration to pay the correct FC and KG rates.
2.5.2.38	The LRS shall allow COUNTY-specified Users to collect DCFS Programs child placement information at the individual level.	Updates are being made to align CCR changes from C-IV and LRS/CalSAWS prior to migration to pay the correct FC and KG rates.

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
CA-200366	Online	**FC_RATIO** – adding PLACEMT_TYPE_CODE (values from Code Table 298) and RATIO_TYPE_CODE (values from Code Table 550).	Conversion impact		Yes
CA-200366	Online	**FC_AGE_RATIO –** adding the CCR_RATIO_CODE column that already exists in C-IV	Conversion impact		Yes
CA-200366	Online	**LIC table –** Dropping columns STATE_PGM_NUM_IDENTIF_1, STATE_PGM_NUM_IDENTIF_2, STATE_PGM_NUM_IDENTIF_3	Conversion impact		Yes
CA-200366	Online	**ORG_STATE_PGM_NUM table –** adding this table that C-IV already has with the addition of a foreign key to the ORG_TYPE_ORG	Conversion impact		Yes

6 APPENDIX

6.1 Placement Type to Ratio Detail Page Mode Mapping

Placement Type	Single Ratio	CCR Ratio Only	CCR & non-CCR Ratio
Group Home	X		
Out of State Group Home	X		
Short Term Residential Therapeutic Program	X		
Transitional Housing Placement + FC (THP+FC)	X		
Transitional Housing Placement Program (THPP)	X		
Foster Family Agency (Intensive Programs)			X
Foster Family Agency (Nontreatment)			X
Foster Family Agency (Treatment)			X
Multidimensional			X
Foster Family Agency		X	
Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)		X	
Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)		X	

Any Placement Type not listed above will display in non-CCR mode only.

6.2 Placement Types That Require a State Program Number

	Placement Type
1	Foster Family Agency
2	Foster Family Agency (Intensive Programs)
3	Foster Family Agency (Nontreatment)
4	Foster Family Agency (Treatment)
5	Community Treatment Facility
6	Group Home
7	Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
8	Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)
9	Short Term Residential Therapeutic Program
10	Transitional Housing Placement+FC (THP+FC)
11	Transitional Housing Placement Program (THPP)

6.3 Technical Notes

Category Name	Values	New or Existing	Id	Notes
State Program Number	ISFC non-ISFC	New	529	Exists in C-IV
Organization Type Code	Foster Family Agency (Organization Type Abbreviation is “FFA”; value is currently end-dated in LRS)	Existing	298	
Organization Type Code	Single Ratio Indicator (Reference column)	New	298	Exists in C-IV
Organization Type Code	Display Ratio Type (Reference column)	New	298	Exists in C-IV
Organization Type Code	State Program Number Required (Reference column)	Existing	298	Update for new selections.
Foster Care Facility Ratio Age Range Code	Code Value 05 “Age 15-21”	Existing	762	Rename from current value: “Age 15-18”
Foster Care Facility Ratio CCR Code	Basic, LOC 2, LOC 3, LOC 4	New	551	Exists in C-IV
Organization Type Code	CCR Ratio Only Indicator (Reference column)	New	298	

Categories updated in C-IV SCR 3933 and C-IV SCR 11142

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201485

DDCR 5044 Reception Management Dashboard

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
	1.0	Initial	G. Limbrick

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Table of Contents

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1 OVERVIEW

This document outlines the changes that will be necessary to migrate the real-time management dashboard, from the C-IV System, to display what is currently occurring in the reception area.

The Visit Type List and Visit Type Detail pages will be migrated re-named as 'Visit Purpose List' and 'Visit Purpose Detail'. These pages will allow users with appropriate security rights to configure wait time thresholds, based on Reception Log Visit Purpose (Visit Type in C-IV), and to configure multiple prefixes per Visit Purpose.

1.1 Current Design

The Reception Log is used to manage the lobby for customers, to notify workers when customers are waiting and for tracking a customer's status from Waiting to Complete.

The C-IV System has an existing Reception Management Dashboard to track activity in each office lobby; the dashboard needs to be re-created for CalSAWS.

CalSAWS has no page to configure the prefixes or wait time thresholds for a Reception Log Visit Purpose Number.

The Visit Purpose "EBT" has been end dated/deactivated in CalSAWS; "EBT" is still used by C-IV counties and needs to be available/re-activated in CalSAWS.

1.2 Requests

1. Migrate the Reception Management Dashboard to track the information from the Reception Log for each office. The dashboard will display real time reception information including the wait times per Visit Purpose and it will indicate when wait time thresholds are reached.
2. Migrate the Visit Type List and Visit Type Detail pages, which will allow the users to add wait time thresholds based on Visit Purposes, re-named as 'Visit Purpose List' and 'Visit Purpose Detail'.
    a. On the Visit Purpose Detail page, the users will associate Visit Purposes to prefixes that will appear along with the number on receipts and on the Reception Log visits
    b. Migrate/re-activate the Visit Purpose EBT in CalSAWS
3. Re-create the navigation items under the Lobby Management Task Navigation menu:
    a. Reception Dashboard - The Reception Dashboard link will open the Reception Dashboard in another window at full display size.
    b. Visit Purpose (Visit Type in C-IV) – The Visit Purpose link will open the Visit Purpose List page in the existing window.
4. Update Reception Log Detail to include a drop down when multiple prefixes are created for one Visit Purpose.

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1.3 Overview of Recommendations

The Reception Management Dashboard will pull real time data about the reception area. It will display information for the office that the current user is assigned to. Only users with the LobbyDashboardView security right will be able to view or access the 'Reception Dashboard' Task Navigation item.

The Visit Purpose List page (Visit Type List in C-IV) will display all the Visit Purposes as well as the associated prefix(es) and the wait time thresholds, if they are set. Only users with the VisitPurposeList security right will be able to view or access the 'Visit Purpose' Task Navigation item.

C-IV has the Visit Purpose (Reception Log Visit Type) "EBT", which has been deactivated/end dated in CalSAWS; there is no comparable option in CalSAWS. Re-activate "EBT" as a current and available option in CalSAWS.

The Visit Purpose Detail page will provide the ability to add multiple prefixes for each Visit Purpose by office and to set the wait time thresholds for each Visit Purpose by office.

When adding a Reception Log visit entry, the prefix displays in front of the Number assigned. For the Create and Edit page modes, the Worker will select a prefix from a dropdown selector, if there is more than one prefix associated to a Visit Purpose. Only the prefixes set on the Visit Purpose Detail page will be available to the Reception Log page. The Kiosk/FACT, Lobby Check-In Application and Self-Service Check-In Application will continue to use existing Prefix and Number Generation Logic. Note: This logic is being updated with CA-207252 | DDID 1778 Updates to LRS Lobby Check-in App, Kiosk and FACT functionality.

1.4 Assumptions

1. SCR CA-51740 DDCR 5091 Lobby Management Customer Lobby Monitoring System creates the Lobby Management task navigation dropdown, accessible by users with one or more specified security rights.

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2 RECOMMENDATIONS

2.1 Reception Management Dashboard

2.1.1 Overview

The Reception Management Dashboard will pull real time data about the reception area. The Reception Management Dashboard will display todays information for the office that the current user is assigned to. Only users with the LobbyDashboardView security right will be able to view or access the 'Reception Dashboard' Task Navigation item.

2.1.2 Reception Management Dashboard Mockups

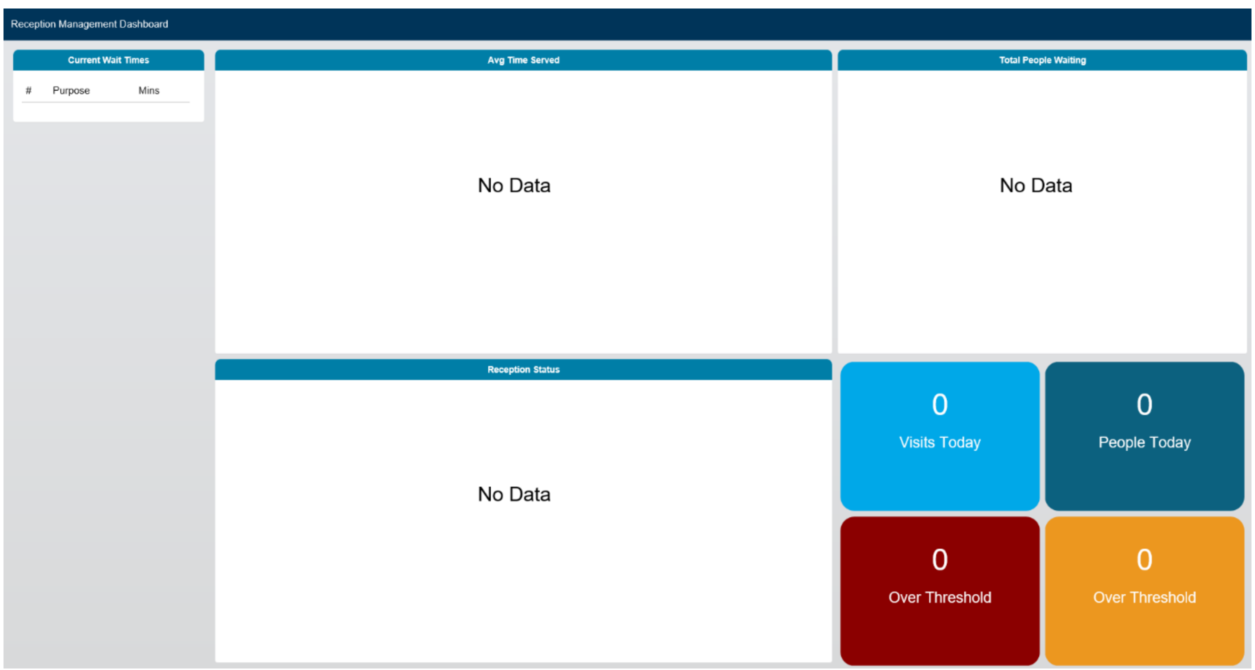

Figure 2.1.2.1 - Reception Management Dashboard

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Current Wait Times

#	Purpose	Mins
1	Screening	21
2	Screening	21
3	Agency Partners	21
4	Application	20
F5	Application	20
6	Collections	20
L7	Appointment	19
A8	Appointment	19
9	Leave Msg for Worker	18
L10	Appointment	18
11	Health Care Options	17
W12	Group Session	16
13	Health Care Options	16
14	Agency Partners	15
E15	EBT	14
16	Drop Off Document	13
17	Drop Off Document	13
18	Other/Information	12
19	Screening	11
A20	Appointment	11

Figure 2.1.2.2 - Current Wait Times panel

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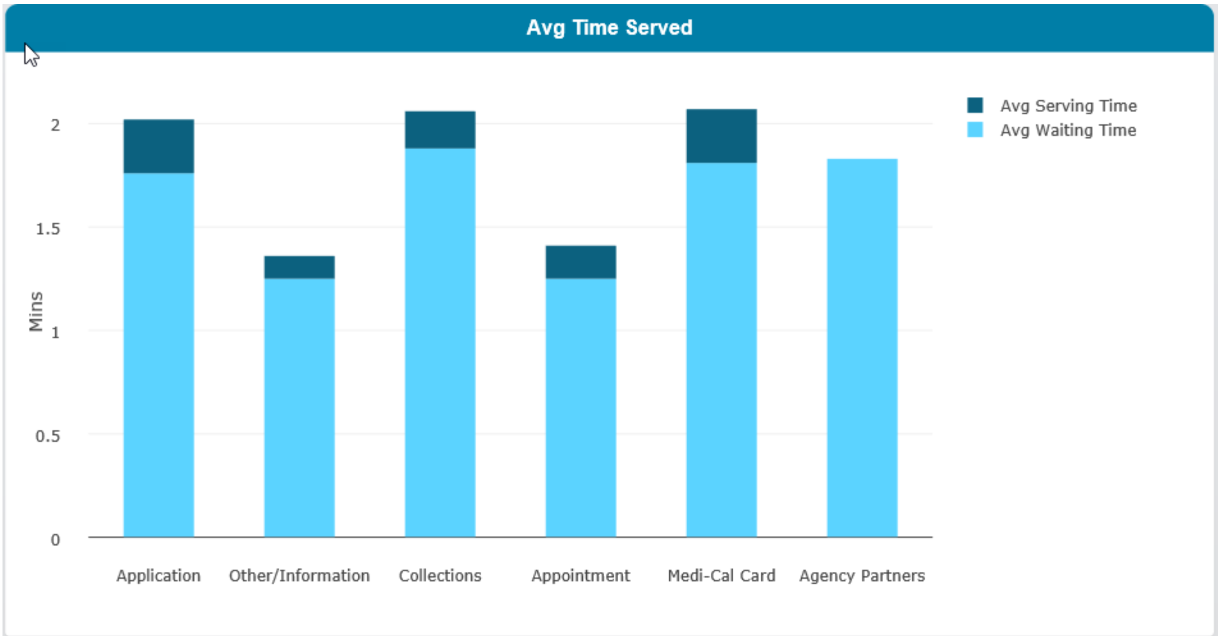

Figure 2.1.2.3 - Average Time Served panel

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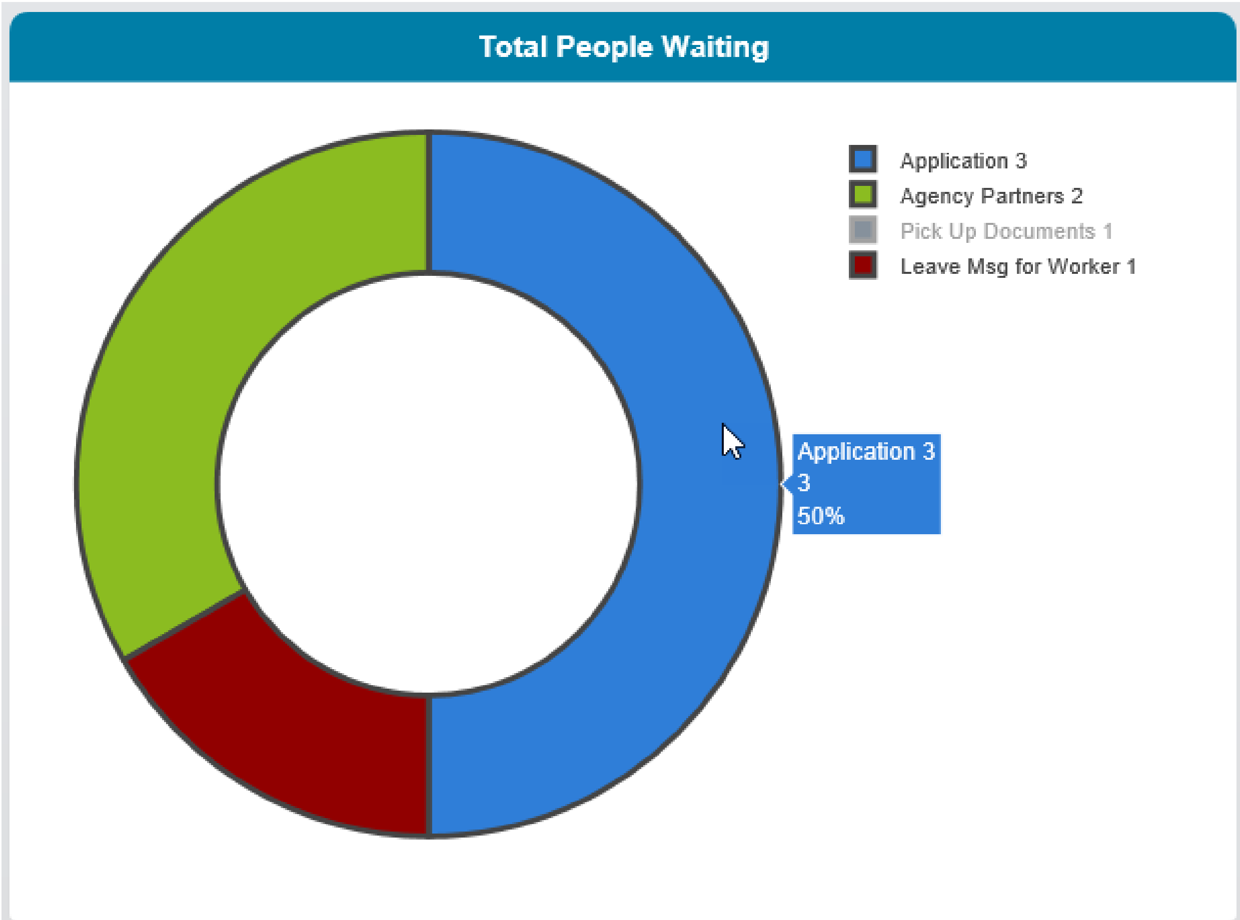

Figure 2.1.2.4 - Total People Waiting panel

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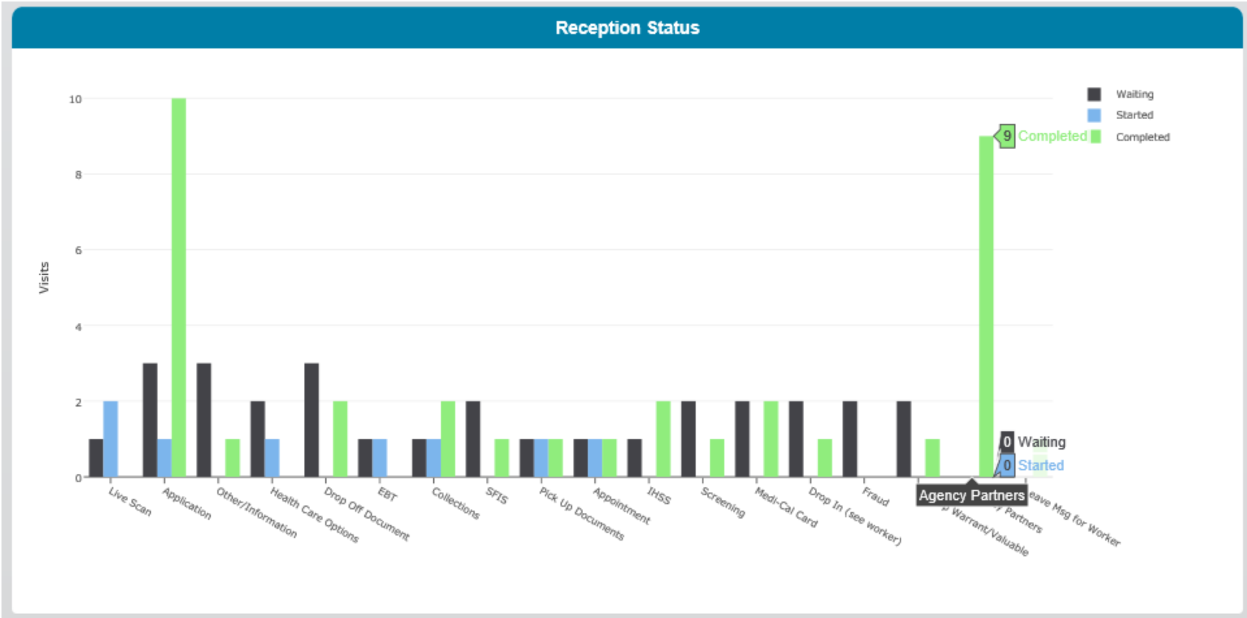

Figure 2.1.2.5 - Reception Status panel

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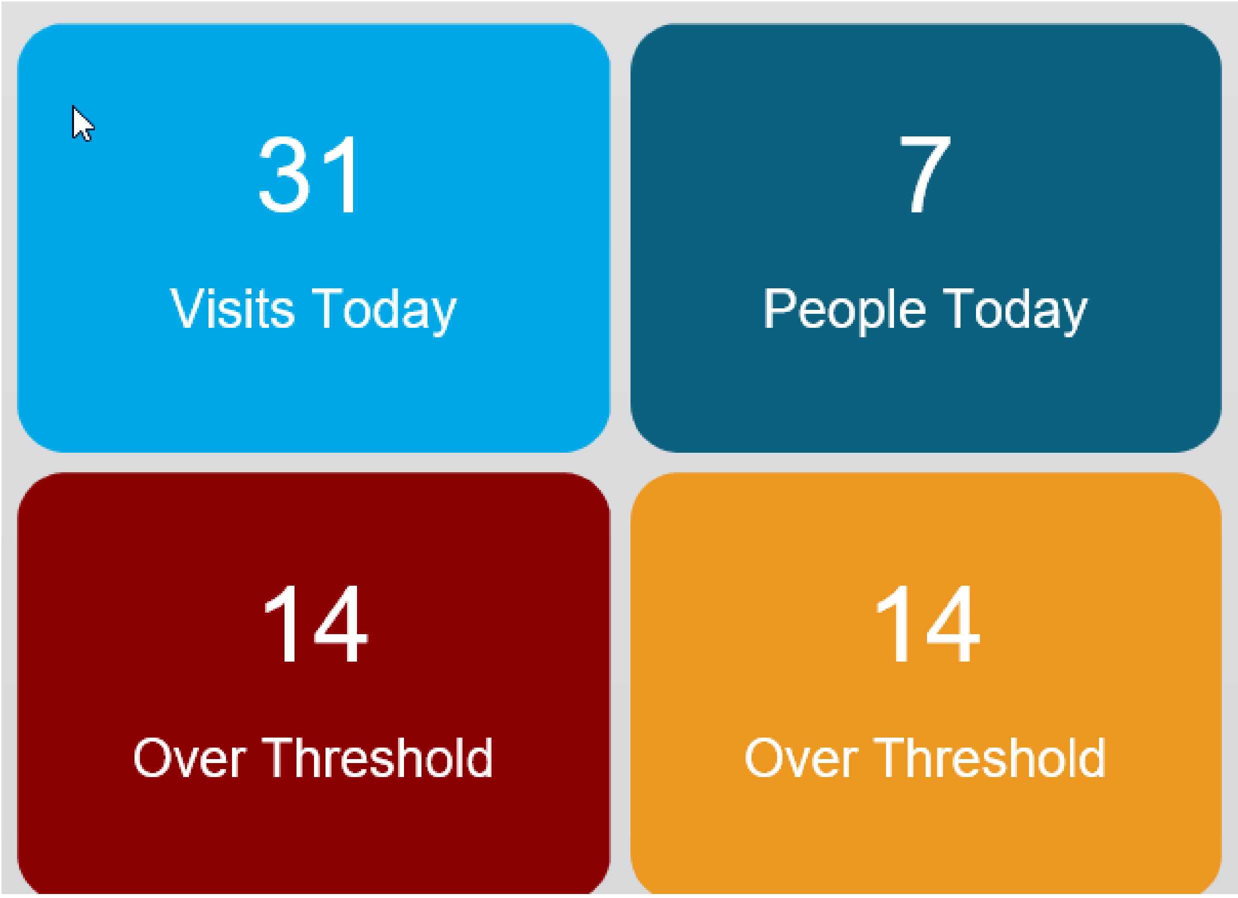

Figure 2.1.2.6 - Visits Today panel group

2.1.3 Description of Changes

1. Migrate the C-IV Reception Management Dashboard page, re-named as 'Reception Management Dashboard'; the charts on this page represent todays information for the office the current user is assigned to.
2. Add the 'Current Wait Times' panel, on the left edge of the page, with a list of Visit Purposes and associated current wait times, sorted by wait time with the longest time on top.
   a. Add column headers:
      i. #
      ii. Purpose
      iii. Mins
   b. Display the top 20 longest waiting Visit Purposes in the office lobby
   c. Add logic to create a flashing effect, so that they flash with corresponding red or yellow indicators, when the visits reach their custom threshold time limit (see Visit Purpose List page below)

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3. Add the 'Avg Time Served' panel.
    a. Add a stacked bar chart reflecting the "Average Waiting Time" and "Average Serving Time", in minutes, by Visit Purpose.
        i. Include only Visit Purposes which have had a visit in the Started and Completed status for the day, i.e. the Visit Purpose has an Average Time Served for the day
        ii. Display this chart with the Average Waiting Time and Average Serving Time on the same stacked column of the chart (average serving time on top when both sub-sections are showing)
        iii. Add hover over effects to each stacked column showing:
            1. The Visit Purpose represented by the stacked column
            2. The numeric values represented by each (displayed) sub-section of the column, in minutes
    b. Add a legend showing the colors of the 'Avg Serving Time' and 'Avg Waiting Time' sub-sections
        i. On clicking a legend item, toggle the display of that sub-section for each column of the chart; grey out the display of the legend item when that sub-section is hidden
        ii. Show the 'Avg Serving Time' legend item on top
4. Add the 'Total People Waiting' panel
    a. Add a donut chart displaying the total number of visits that are in Waiting status by Visit Purpose
        i. Include Visit Purposes that have one or more visits in a Waiting status
        ii. Add a hover over effect to each slice of the donut chart, displaying the:
            1. Visit Purpose represented by the slice
            2. Count of Visits represented by the slice
            3. Percentage of Visits represented by the slice
    b. Add a legend listing the colors and the Visit Purposes they represent
        i. Add the number of Visits of each purpose after the color and Visit Purpose
        ii. Order the legend items by Percentage of Visits, in descending order
        iii. On clicking a legend item, toggle the display of that Visit Purpose in the donut chart; grey out the display of the legend item when that Visit Purpose is hidden
5. Add the 'Reception Status' panel.
    a. Add a bar chart displaying the count of visits in each status grouped by Visit Purpose
        i. Include only Visit Purposes that have had a visit for the day

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        ii. Include bars representing counts for Waiting, Started and Completed Visits by Visit Purpose
    b. Add a legend listing the bar colors and the status they represent
        i. Order the legend in the order of the status i.e. Waiting, Started then Complete
        ii. On clicking a legend item, toggle the display of that status in the bar chart; grey out the display of the legend item when that status is hidden
6. Add a group of, smaller, no header, colored background, panels displaying:
    a. 'Visits Today'
        i. Display the number/count over the label
        ii. Display this panel with a lighter blue background
    b. 'People Today'
        i. Display the number/count over the label
        ii. Display this panel with a darker blue background
    c. 'Over Threshold' (2nd threshold)
        i. Display the number/count over the label; this is the number of visits that went over the 2nd threshold
        ii. Display this panel with a red background
    d. 'Over Threshold' (1st threshold)
        i. Display the number/count over the label; this is the number of visits that went over the 1st threshold
        ii. Display this panel with a yellow background

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management > Reception Dashboard**

1. Update the Lobby Management Task Navigation dropdown.
    a. Add the LobbyDashboardView security right as a right that allows access to the dropdown
2. Add a new Task Navigation item under the 'Lobby Management' dropdown.
    a. Label the item as: 'Reception Dashboard'
    b. This item will open the new Reception Management Dashboard page in a, new, full display size, window
    c. Show this item only for users with the LobbyDashboardView security right

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2.1.5 Security Updates

N/A; **Note**: The LobbyDashboardView security right has already been migrated.

2.1.6 Page Mapping

Add new fields to page mapping.

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2.2 Visit Purpose List

2.2.1 Overview

The Visit Purpose List page (Visit Type List in C-IV) will display all the Visit Purposes with their associated prefix(es) and their wait time thresholds, if they are set. Only users with the VisitPurposeList security right will be able to view or access the 'Visit Purpose' Task Navigation item.

C-IV has the Visit Purpose (Reception Log Visit Type) "EBT", this Visit Purpose has been deactivated/end dated in CalSAWS; there is no comparable option in CalSAWS. Re-activate "EBT" as a current and available option in CalSAWS.

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2.2.2 Visit Purpose List Mockup

Visit Purpose List

▼ Refine Your Search

Search

Office:
HSA Main Campus Select

Search

Visit Purpose	Prefix	Thresholds	
Agency Partners		5 min, 10 min	Edit
Application	W, E, I, F, C, M, O, R, P, N, G, T	30 min, 45 min	Edit
Appointment	A, L	30 min, 45 min	Edit
Collections		30 min, 45 min	Edit
Drop Off Document		30 min, 45 min	Edit
Drop In (see worker)	C, M, E, D, G, H, F, R	30 min, 45 min	Edit
EBT	E	30 min, 45 min	Edit
Fraud		30 min, 45 min	Edit
Group Session	H, J, W, O	5 min, 125 min	Edit
Health Care Options		30 min, 45 min	Edit
IHSS		30 min, 45 min	Edit
Live Scan		30 min, 45 min	Edit
Medi-Cal Card	M	30 min, 45 min	Edit
Leave Msg for Worker		30 min, 45 min	Edit
Other/Information		30 min, 45 min	Edit
Pick Up Documents	P	30 min, 45 min	Edit
Pick Up Warrant/Valuable		30 min, 45 min	Edit
Screening		5 min, 10 min	Edit
SFIS		30 min, 45 min	Edit

Figure 2.2.2.1 - Visit Purpose List

2.2.3 Description of Changes

1. Migrate the Visit Type List page re-named as 'Visit Purpose List'.
    a. Protect this page with the VisitPurposeList security right

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2. Add the collapsible 'Refine Your Search' section.
    a. Add 'Search' buttons to the top and bottom of the section; on searching, display the Visit Purposes associated to the selected office in the Results table (described below)
    b. Add the 'Office:' label and a text area, to display the selected office; Default this to the users assigned office
    c. Add the 'Select' button:
        i. On pressing, re-direct the user to the Select Office page.
        ii. On selecting an office, the user will be returned to this page.
3. Add the Results table with the following headers and columns:
    a. 'Visit Purpose'
        i. Display this as a link to the Visit Purpose Detail page (described below), opened in View mode
        ii. Include all current Visit Purposes (Reception Log Visit Types) in alphabetical order
    b. 'Prefix'
        i. This is a comma separated list of the prefixes that can be associated to the Visit Purpose check-in numbers, assigned through the Reception Log, as set on the Visit Purpose Detail page
    c. 'Thresholds'
        i. This is a comma separated list of threshold times, in minutes, as set on the Visit Purpose Detail page
        ii. Format as {MINUTES} + " " + "min", e.g. "20 min"
    d. Blank Header
        i. This column will hold an 'Edit' button associated to each record/row
        ii. The 'Edit' button will re-direct the user to the Visit Purpose Detail page, opened in Edit mode
        iii. Display the 'Edit' button only for users with the VisitPurposeEdit security right
4. Re-activate the discontinued/end dated "EBT" Visit Purpose

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management > Visit Purpose**

1. Update the Lobby Management Task Navigation dropdown; add the VisitPurposeList security right as a right that allows access to the dropdown.
2. Add the 'Visit Purpose' Task Navigation item under the Lobby Management dropdown (labeled as 'Visit Type' in C-IV). **Note:** SCR

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CA-51740 DDCR 5091 Lobby Management Customer Lobby Monitoring System creates this dropdown, accessible by users with one or more specified security rights.

a. This item will navigate the user to the new Visit Purpose List page
b. Show this Task Navigation item only for users with the VisitPurposeList security right

2.2.5 Security Updates

1. Update the following security right names:
    a. Change VisitTypeList to VisitPurposeList
    b. Change VisitTypeView to VisitPurposeView
    c. Change VisitTypeEdit to VisitPurposeEdit
2. Update the following security group names:
    a. Change Visit Type View to Visit Purpose View
    b. Change Visit Type Edit to Visit Purpose Edit
3. Add the VisitPurposeList security right to the Visit Purpose Edit security group.

The above updates will result in the following Security settings:

1. Security Rights

Security Right	Right Description	Right to Group Mapping
VisitPurposeList	Users can access the Visit Purpose List page	Visit Purpose View
VisitPurposeView	Users can access the Visit Purpose Detail page in View mode	Visit Purpose View
VisitPurposeView	Users can access the Visit Purpose Detail page in View mode	Visit Purpose Edit
VisitPurposeEdit	Users can access the Visit Purpose Detail page in Edit mode	Visit Purpose Edit
VisitPurposeList	Users can access the Visit Purpose List page	Visit Purpose Edit

2. Security Groups

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Security Group	Group Description	Group to Role Mapping
Visit Purpose View	View the Visit Purpose List and Detail pages.	View Only
Visit Purpose View	View the Visit Purpose List and Detail pages.	System Administrator
Visit Purpose Edit	View and Edit the Visit Purpose List and Detail pages.	System Administrator

2.2.6 Page Mapping

Update Page Mapping with all new fields.

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2.3 Visit Purpose Detail

2.3.1 Overview

The Visit Purpose Detail page will provide the ability to add multiple prefixes for each Visit Purpose by office and to set the wait time thresholds for each Visit Purpose by office.

2.3.2 Visit Purpose Detail Mockups

Visit Purpose Detail

Edit Close

Office:	**Visit Purpose:**
HSA Main Campus	Group Session

Prefix	Description
H	Housing Support Workshops
J	Job Readiness/Assessments
W	Other Workshops
O	Orientations

Threshold Type	Minutes	Email Address
First (Yellow)	50	receptions@hsa.co.merced.ca.us
Second (Red)	125	receptionst@hsa.co.merced.ca.us

Edit Close

Figure 2.3.2.1 - Visit Purpose Detail - View mode

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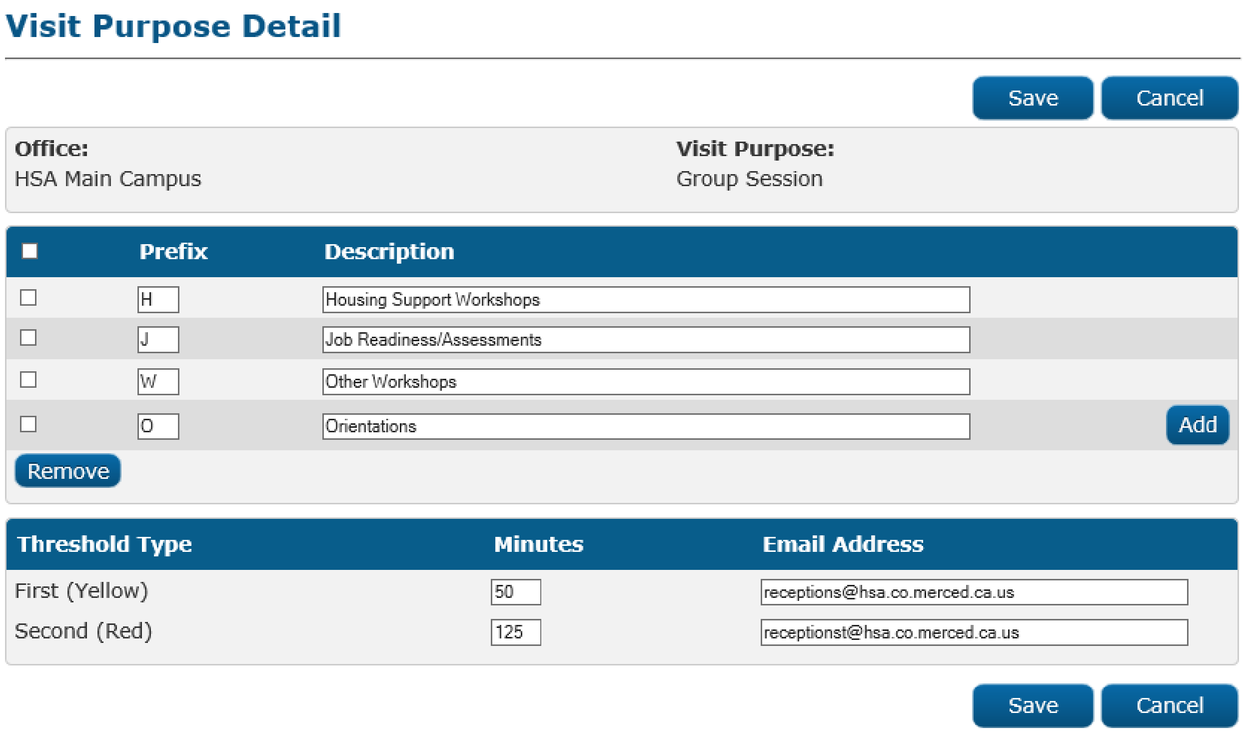

Figure 2.3.2.2 - Visit Purpose Detail - Edit mode

2.3.3 Description of Changes

1. Migrate the Visit Type Detail page re-named as 'Visit Purpose Detail'.
    a. Protect this page with the VisitPurposeView security right for View mode
    b. Protect this page with the VisitPurposeEdit security right for Edit mode
    c. Add the following buttons to the top and bottom of the page:
        a. 'Edit'
            i. This button will only show in View mode
            ii. This button will re-open the same page in 'Edit' mode
            iii. Protect this button with the VisitPurposeEdit security right; do not show the button for users without this security right
        b. 'Close'
            i. This button will only show in View mode
            ii. This button will return the user to the Visit Purpose List page
        c. 'Save'
            i. This button will only show in Edit mode

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            ii. This button will save the user's changes and re-open the page in View mode
        d. 'Cancel'
            i. This button will only show in Edit Mode
            ii. This button will cancel the user's changes and redirect the user to the Visit Purpose List page
2. Add a No Header panel at the top of the page
    a. Add the 'Office' label and text area
    b. Add the 'Visit Purpose' label and text area (Visit Type in C-IV)
3. Add a Prefix panel
    a. Add a Prefix table with the following column headers:
        i. Check Box
            1. The checkbox in the column header will select/unselect all checkboxes in the table rows
            2. The checkboxes in the table rows will mark the rows for removal
        ii. Prefix
            1. Add validation to the 'Prefix' field: If the user attempts to add a non-alphabetic character, show: "This is an invalid character for the Prefix"
        iii. Description
        iv. Blank
            1. This column will provide space for an 'Add' button beside the final row; this button will only show in Edit mode
            2. On clicking the 'Add' button a new empty row will appear at the bottom of the table; this will allow the user to add multiple prefixes for each Visit Purpose
    b. Add a 'Remove' button under the Prefix table; this button will remove/delete all records marked for removal with the checkboxes in the table
4. Add a Threshold panel
    a. Add a Threshold table with the following column headers:
        i. 'Threshold Type'; there will be 2 rows with the following text values
            1. 'First (Yellow)'
            2. 'Second (red)'
        ii. 'Minutes';
            1. Display this field as:
                a. Display as text only for View mode
                b. Display as a text input field for Edit mode
            2. Add validation to the 'Minutes' field:
                a. If the User attempts to add a first threshold of less than 5 minutes, show: "First Threshold must be greater than 5 minutes."
                b. If the User attempts to add a second threshold that is less than 5 minutes from the

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First threshold, show: "Second Threshold must be at least 5 minutes greater than the First Threshold"

c. If the user attempts to add decimal or negative numbers to either threshold, show: "Whole non-negative and non-zero numbers must be entered in this field."

iii. 'Email Address'

1. A notification will be sent to the E-mail address (if any is entered) when a visit reaches the threshold; multiple E-mails can be input in the E-mail Address field by separating individual E-mail addresses using a semi-colon
2. Display this field as:
   a. Display as a text only for View mode
   b. Display as a text input field for Edit mode
3. Add validation to the 'E-mail Address' field; if input is not in E-mail address format (having an @ sign and a period) show "E-mail – Input [insert E-mail address] is not valid for this field."

b. Add logic to send an E-mail to the specified address(es) when a threshold is reached:

i. The format of the email is:
From: The Application
Subject: Reception {Threshold_Type} Threshold Notification

Body:

Waiting Time is over the {Threshold_Type} threshold limit.
Time Waited: {Minutes} Minutes
Visit Purpose: {Visit_Purpose}
Number Assigned: {Number Assigned}
Case Number: {Case_Number}

ii. An example of the of the email is:
From: The Application
Subject: Reception Second Threshold Notification

Body:
Waiting Time is over the Second threshold limit.
Time Waited: 60 Minutes
Visit Purpose: Application
Number Assigned: A132
Case Number: 1113057

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2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management > Visit Purpose**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update Page Mapping with all new fields.

2.4 Reception Log Detail

2.4.1 Overview

When adding a Reception Log visit entry, the prefix displays in front of the Number assigned to the Visit Purpose. For the Create and Edit page modes, the Worker will select a prefix from a dropdown selector, if there is more than one prefix associated to a Visit Purpose. Only the prefixes set on the Visit Purpose Detail page will be available to the Reception Log page. The Kiosk/FACT, Lobby Check-In Application and Self-Service Check-In Application will continue to use existing Prefix and Number Generation Logic. **Note:** This logic is being updated with CA-207252 | DDID 1778 Updates to LRS Lobby Check-in App, Kiosk and FACT functionality.

2.4.2 Reception Log Mockups

Figure 2.4.2.1 - View Mode – (not changed – shown for reference only)

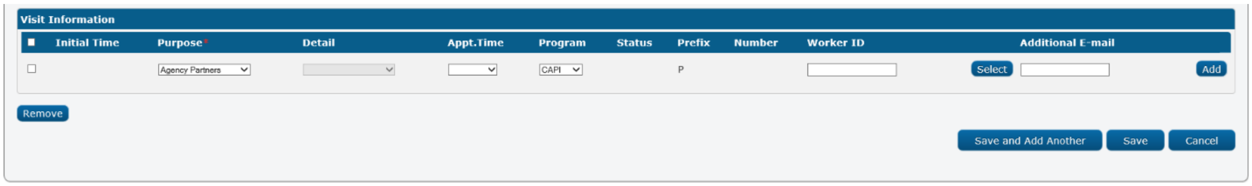

Figure 2.4.2.2 - Create Mode - One Prefix

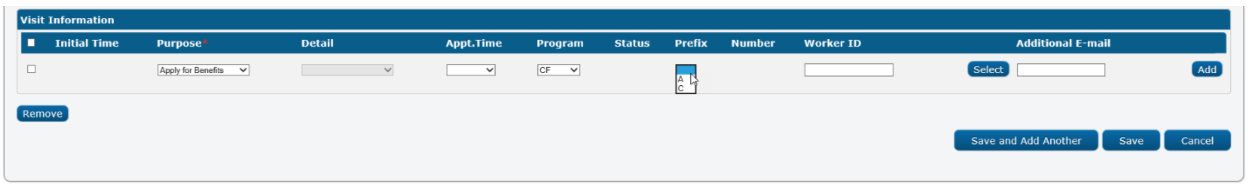

Figure 2.4.2.3 - Create Mode - Multiple Prefixes

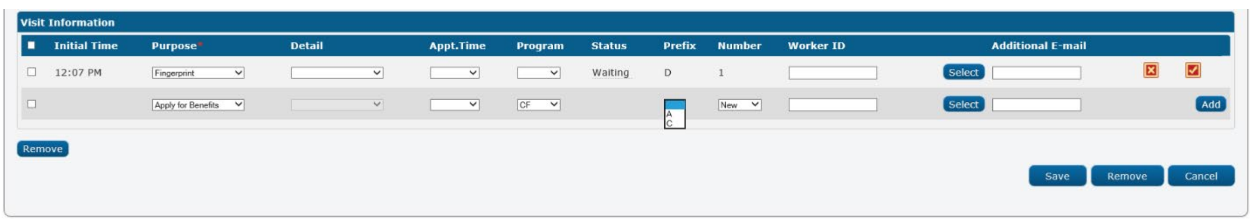

Figure 2.4.2.4 - Edit Mode - Multiple Prefixes

2.4.3 Description of Changes

1. Update the Visit Information Table
    a. Update the Number Assigned column, for Create and Edit modes
        i. Title the field as: "Number"
        ii. Display as a numerical value, without the prefix
    b. Add a Prefix Column, to the Create and Edit page modes
        i. When a Visit Purpose is selected, populate this column as a text field or dropdown based on prefixes available for that Visit Purpose on the Visit Purpose Detail page
        ii. When Creating or Editing a record:
            1. If there is only one or no prefix associated to the selected Visit Purpose, display this as an un-editable text field
            2. If there is more than one prefix for the selected Visit Purpose:
                a. Display this as a dropdown selector populated with options from the Visit Purpose Detail page

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b. Default the dropdown to an empty/blank option.
c. If no option is selected add or re-add the Number Assigned with no prefix

Note: It will be possible to choose a new prefix to use with a previously closed number

Note: The View mode of the page will continue to display the Number Assigned as a single column, with the prefix

2.4.4 Page Location

- **Home Page > LRS Quick Links**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update page mapping with new and updated fields.

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	SCR 201485 Security Matrix.xlsx

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4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.2.6	The LRS shall include a real time customer service monitoring screen, for use by COUNTY-specified Users, that includes the following features: a. The ability to sort and view a list of individuals by the length of time an individual has been waiting but not yet seen, including the ability to sort and view by the longest waiting time. b. The ability to filter, sort, and view the reason for the contact, including new applications, appointments, and other types of services, as specified by COUNTY. c. A visual indicator, such as change in color or flashing indicator, for individuals who have not been served within a COUNTY specified period of time. d. The capability for managers to configure the monitoring screen in order to monitor time-sensitive customer services in the office(s) up to and including division, bureau and department real-time performance.	The Reception Management Dashboard combined with the Reception Log List page meet these requirements. The Management Dashboard displays real time information about the current user's assigned office. The dashboard automatically sorts visits and lists the top 20 longest waiting visits with their check-in number and Visit Purpose. The Visit Purpose Detail page allows users with appropriate security rights to configure wait time thresholds by Office and Visit Purpose. The dashboard includes a flashing effect when visits reach their Office configurable wait time thresholds. The Reception Dashboard allows the user to hide/remove visits with particular Visit Purposes.

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207159 | DDID 2126

Updates to OP/OI Notices

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/27/2020	1.0	Initial Revision	Rainier Dela Cruz
09/28/2020	1.1	Updates per deliverable comments.	Rainier Dela Cruz
12/01/2020	1.2	Added recommendation to add the CF 377.7E1 in Spanish.	Rainier Dela Cruz

Table of Contents

1 OVERVIEW

1.1 Current Design

On the 'Recovery Account Detail' page, the Overpayment (OP)/Overissuance (OI) notices for CalWORKs (CW) or CalFresh (CF) can be generated by clicking on the 'Generate Form' button. The program will determine which notice will generate. For CalFresh, the cause code also determines which form to generate. For example, if the program is CalFresh and the cause code is CalFresh Inadvertent Household Error (IHE), the CF 377.7B form will generate. If the program is CalFresh and the cause code is CalFresh Administrative Error (AE), the CF 377.7D3 form will generate. If the program is CalFresh and the cause code is CalFresh Intentional Program Violation (IPV), the DFA 377.7G form will generate. If the program is CalWORKs, the M44-352A form will generate.

The Recovery Account Activation batch job will activate recovery accounts and send out notices to the responsible party regarding their recovery account. Like the 'Recovery Account Detail' page, the program and cause code (CalFresh only) will determine which notices to send out. For example, if the program is CalWORKs, it will send the M44-350I and NA 274G forms. If the program is CalFresh and the cause code is CalFresh Inadvertent Household Error, it will send out the CF 377.7B, DFA 377.7C, NA 1263 and PA 1820 forms for Los Angeles County and CF 377.7B, DFA 377.7C and NA 1263 forms for the 57 Migration Counties. If the program is CalFresh and the cause code is CalFresh Administrative Error, it will send out the CF 377.7D3, DFA 377.7E1, NA 1263 and PA 1820 forms for Los Angeles County and CF 377.7D3, DFA 377.7E1, and NA 1263 forms for the 57 Migration Counties.

1.2 Requests

Per Design Differences ID (DDID) 2126, add the functionality to generate, view, edit and print the overpayment notice with the budget for CalWORKs and the overissuance notice with the budget, repayment agreement and the EBT release form for CalFresh from the Recovery Account Detail page.

1.3 Overview of Recommendations

1. Create the CalFresh Inadvertent Household Error packet.
    a. The packet for Los Angeles County will contain the following forms:
        i. CF 377.7B (CalFresh Overissuance for Client Error)
        ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
        iii. DFA 377.7C (CalFresh Repayment Agreement for Inadvertent Household Errors Only)
        iv. CSF 104 (EBT Release Form)
        v. NA 1263 (Overissuance Budget Worksheet)
    b. The packet for the 57 Migration Counties will contain the following forms:

        i. CF 377.7B (CalFresh Overissuance for Client Error)
        ii. DFA 377.7C (CalFresh Repayment Agreement for Inadvertent Household Errors Only)
        iii. CSF 104 (EBT Release Form)
        iv. NA 1263 (Overissuance Budget Worksheet)

2. Create the CalFresh Administrative Error packet.
    a. The packet for Los Angeles will contain the following forms:
        i. CF 377.7D3 (CalFresh Overissuance Notice for Administrative Errors)
        ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
        iii. CF 377.7E1 (CalFresh Repayment Agreement for Administrative Errors Only)
        iv. CSF 104 (EBT Release Form)
        v. NA 1263 (Overissuance Budget Worksheet)
    b. The packet for the 57 Migration Counties will contain the following forms:
        i. CF 377.7D3 (CalFresh Overissuance Notice for Administrative Errors)
        ii. CF 377.7E1 (CalFresh Repayment Agreement for Administrative Errors Only)
        iii. CSF 104 (EBT Release Form)
        iv. NA 1263 (Overissuance Budget Worksheet)

3. Create the CalFresh Intentional Program Violation packet.
    a. The packet for Los Angeles County will contain the following forms:
        i. DFA 377.7F (CalFresh Overissuance Notice for Intentional Program Violation (IPV))
        ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
        iii. DFA 377.7G (CalFresh Repayment Agreement for an Intentional Program Violation (IPV) Only)
        iv. CSF 104 (EBT Release Form)
        v. NA 1263 (Overissuance Budget Worksheet)
    b. The packet for the 57 Migration Counties will contain the following forms:
        i. DFA 377.7F (CalFresh Overissuance Notice for Intentional Program Violation (IPV))
        ii. DFA 377.7G (CalFresh Repayment Agreement for an Intentional Program Violation (IPV) Only)
        iii. CSF 104 (EBT Release Form)
        iv. NA 1263 (Overissuance Budget Worksheet)

4. Create the CalWORKs Overpayment packet. The packet will contain the following forms for all Counties (Los Angeles and the 57 Migration Counties):
    a. M44-350I (CalWORKs Overpayment Notice)
    b. NA 274G (Continuation Page - Overpayment Computations)

5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.

6. Update the Recovery Account Activation batch job to send out the OP/OI packets.

7. Add the CF 377.7E1 in Spanish.

1.4 Assumptions

1. The packets will only be available in English and Spanish. The packets will be added in threshold languages with SCR **CA-220208**.
2. The imaging barcodes for the packets will be added with SCR **CA-217626.**
3. The overissuance packets for CalFresh will use the CF 377.7B and CF 377.7D3 that was updated with SCR **CA-202684.**
4. The overissuance packets for CalFresh will use the DFA 377.7F form added with SCR **CA-214084.**
5. The overpayment packet for CalWORKs will use the M44-350I that was updated with SCR **CA-50293**.
6. The DFA 377.7E1 was updated to CF 377.7E1 with SCR **CA-207395.**

2 RECOMMENDATIONS

2.1 CalFresh Inadvertent Household Error (IHE) Packet

2.1.1 Overview

This section will describe the addition of the CalFresh IHE packet to LRS/CalSAWS. One packet will be created for Los Angeles County and one for the 57 Migration Counties.

Form Name: CalFresh IHE Packet

Form Number: CalFresh IHE Packet

Language: English, Spanish

Template Repository Visibility: Not visible

2.1.2 Description of Change

1. Create the CalFresh IHE Packet.
    a. Create the packet for Los Angeles County. The packet will contain the following forms:
        i. CF 377.7B
        ii. PA 1820
        iii. DFA 377.7C
        iv. CSF 104
        v. NA 1263
    b. Create the packet for the 57 Migration Counties. The packet will contain the following forms:
        i. CF 377.7B
        ii. DFA 377.7C
        iii. CSF 104
        iv. NA 1263
    c. Update the non-header fields on all the forms to be editable. The fields will be editable when the fields are blank or pre-populated.

2. Add population logic for the packet.
    a. The existing population logic for the CF 377.7B, PA 1820, DFA 377.7C, CSF 104, and NA 1263 will be used to populate the forms within the packet.
    b. The population of the PA 1820 will only be done for Los Angeles County.

3. The packet will have the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
N	Y	Y	Y	Y	Y

4. The packet will have the following mailing options:

Mailing Options	Option for CF IHE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through the Recovery Account Detail page, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	CalFresh Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

5. The packet will have the following barcodes options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

6. The packet will have the following additional requirements:

Requirement	Option for CF IHE Packet
Post to Self-Service Portal	Y

2.2 Add the CF 377.7E1 in Spanish

2.2.1 Overview

The CF 377.7E1 is only available in English in CalSAWS. Add the CF 377.7E1 in Spanish.

2.2.2 Description of Change

1. Add the Spanish version of the CF 377.7E1 (1/14).
2. Update the English version of the CF 377.7E1 to the 1/14 revision.

2.3 CalFresh Administrative Error (AE) Packet

2.3.1 Overview

This section will describe the addition of the CalFresh AE packet to LRS/CalSAWS. One packet will be created for Los Angeles County and one for the 57 Migration Counties.

Form Name: CalFresh AE Packet

Form Number: CalFresh AE Packet

Language: English, Spanish

Template Repository Visibility: Not visible

2.3.2 Description of Change

1. Create the CalFresh AE Packet.
    a. Create the packet for Los Angeles County. The packet will contain the following forms:
        i. CF 377.7D3
        ii. PA 1820
        iii. CF 377.7E1
        iv. CSF 104
        v. NA 1263
    b. Create the packet for the 57 Migration Counties. The packet will contain the following forms:
        i. CF 377.7D3
        ii. CF 377.7E1
        iii. CSF 104
        iv. NA 1263
    c. Update the non-header fields on all the forms to be editable. The fields will be editable when the fields are blank or pre-populated.

2. Add population logic for the packet.
    a. The existing population logic for the CF 377.7D3, PA 1820, CF 377.7E1, CSF 104, and NA 1263 will be used to populate the forms within the packet.
    b. The population of the PA 1820 will only be done for Los Angeles County.

3. The packet will have the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
N	Y	Y	Y	Y	Y

4. The packet will have the following mailing options:

Mailing Options	Option for CF AE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through the Recovery Account Detail page, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	CalFresh Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

5. The packet will have the following barcodes options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

6. The packet will have the following additional requirements:

Requirement	Option for CF AE Packet
Post to Self-Service Portal	Y

2.4 CalFresh Intentional Program Violation (IPV) Packet

2.4.1 Overview

This section will describe the addition of the CalFresh IPV packet to LRS/CalSAWS. One packet will be created for Los Angeles County and one for the 57 Migration Counties.

Form Name: CalFresh IPV Packet

Form Number: CalFresh IPV Packet

Language: English, Spanish

Template Repository Visibility: Not visible

2.4.2 Description of Change

1. Create the CalFresh IPV Packet.
    a. Create the packet for Los Angeles County. The packet will contain the following forms:
        i. DFA 377.7F
        ii. PA 1820
        iii. DFA 377.7G
        iv. CSF 104
        v. NA 1263
    b. Create the packet for the 57 Migration Counties. The packet will contain the following forms:
        i. DFA 377.7F
        ii. DFA 377.7G
        iii. CSF 104
        iv. NA 1263
    c. Update the non-header fields on all the forms to be editable. The fields will be editable when the fields are blank or pre-populated.

2. Add population logic for the packet.
    a. The existing population logic for the DFA 377.7F, PA 1820, DFA 377.7G, CSF 104 and NA 1263 will be used to populate the forms within the packet.
    b. The population of the PA 1820 will only be done for Los Angeles County.

3. The packet will have the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
N	Y	Y	Y	Y	Y

4. The packet will have the following mailing options:

Mailing Options	Option for CF IPV Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through the Recovery Account Detail page, the individual selected on the

Mailing Options	Option for CF IPV Packet
	'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	CalFresh Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

5. The packet will have the following barcodes options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

6. The packet will have the following additional requirements:

Requirement	Option for CF IPV Packet
Post to Self-Service Portal	Y

2.5 CalWORKs Overpayment Packet

2.5.1 Overview

This section will describe the addition of the CalWORKs Overpayment packet to LRS/CalSAWS. One packet will be created for all counties to use.

Form Name: CalWORKs Overpayment Packet

Form Number: CalWORKs Overpayment Packet (M44-350I and NA 274H)

Language: English, Spanish

Template Repository Visibility: Not visible

2.5.2 Description of Change

1. Create the CalWORKs Overpayment Packet. The packet will contain the M44-350I and NA 274G forms for all counties (Los Angeles and the 57 Migration Counties). Update the non-header fields on all the forms to be editable. The fields will be editable when the fields are blank or pre-populated.

2. Add population logic for the packet. The existing population logic for the M44-350I and NA 274G will be used to populate the forms within the packet.

3. The packet will have the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
N	Y	Y	Y	Y	Y

4. The packet will have the following mailing options:

Mailing Options	Option for CW OP Packet
Mail-To (Recipient)	When generated through the batch process, the CalWORKs Primary Applicant. When generated through the Recovery Account Detail page, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	CalWORKs Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

5. The packet will have the following barcodes options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

6. The packet will have the following additional requirements:

Requirement	Option for CW OP Packet
Post to Self-Service Portal	Y

2.6 Recovery Account Detail Page

2.6.1 Overview

On the 'Recovery Account Detail' page, the OP/OI notices for CalWORKs or CalFresh can be generated by clicking on the 'Generate Form' button.

The program and cause code determines which notice will generate. The generation logic will be updated to generate the new OP/OI packet when the 'Generate Form' button is clicked.

2.6.2 Recovery Account Detail Mockup

N/A – no visual changes to the page.

2.6.3 Description of Changes

1. Update the logic of the 'Generate Form' button to generate the CalFresh IHE packet when the program is CalFresh and the cause code is CalFresh - IHE (Customer Caused) or CalFresh - Potential IPV.

2. Update the logic of the 'Generate Form' button to generate the CalFresh AE packet when the program is CalFresh and the cause code is CalFresh - Admin Caused (prior to 3/2000) or CalFresh - Admin Caused (after 3/2000).

3. Update the logic of the 'Generate Form' button to generate the CalFresh IPV packet when the program is CalFresh and the cause code is CalFresh - IPV (waiver), CalFresh - IPV (ADH), or CalFresh - IPV (Court)

4. Update the logic of the 'Generate Form' button to generate the CalWORKs Overpayment packet when the program is CalWORKs, Diversion, Child Support, Immediate Need, or Refugee Cash Assistance.

2.6.4 Page Location

- **Global: Fiscal**
- **Local: Collections**
- **Task: Recovery Account Search**

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Recovery Account Activation Batch Job

2.7.1 Overview

The Recovery Account Activation batch job will activate recovery accounts and send out correspondence to the responsible party regarding their recovery account. Update the Recovery Account Activation batch job to send out the new OP/OI packets.

2.7.2 Description of Change

1. Update the logic to send out the CalFresh IHE packet when the program is CalFresh and the cause code is CalFresh - IHE (Customer Caused) or CalFresh - Potential IPV.

2. Update the logic to send out the CalFresh AE packet when the program is CalFresh and the cause code is CalFresh - Admin Caused (prior to 3/2000) or CalFresh - Admin Caused (after 3/2000)

3. Update the logic to send out the CalWORKs Overpayment packet when the program is CalWORKs, Diversion, Child Support, Immediate Need, or Refugee Cash Assistance.

2.7.3 Execution Frequency

No Change.

2.7.4 Key Scheduling Dependencies

N/A

2.7.5 Counties Impacted

All Counties.

2.7.6 Data Volume/Performance

N/A

2.7.7 Failure Procedure/Operational Instructions

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CF 377.7E1 Mockup	CF377.7E1_EN.pdf CF377.7E1_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2126	The CONTRACTOR shall add the ability to generate, view, print and edit the informing notice of action with budget, repayment agreement, and EBT Release Form (OI Only) for OP/OI using the generate form button on the Recovery Account Detail page. Note: For CalWORKs - NOA with budget For CalFresh - NOA with budget, repayment agreement, EBT Release Form Note: Want ability to print locally or go out in batch	N/A	The packets created for CalFresh contain the overissuance NOA with budget, repayment agreement, and the EBT release form. The packet created for CalWORKs contains the overpayment NOA with the budget. The packet can be generated through the Recovery Account Detail page or through the Recovery Account Activation job.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207452 | DDID 429

SAR 7 / SAR 2 Wording Update

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jamie Ng
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/7/2019	1.0	Original Draft	Jamie Ng
06/25/2019	1.1	Updates to document	Brian Furlong
10/9/2019	1.2	Updates based on CRFI response	Vallari Bathala
11/04/2019	1.3	Update to Inyo and Monterey based on CFRI response	Vallari Bathala
11/07/2019	1.4	Updated document based on QA feedback	Vallari Bathala
11/12/2019	1.5	Removed batch recommendation and updated assumptions	Lawrence Samy
11/19/2019	1.6	Revised Contractor Assumption to correct a typo per Deliverable comments	Amy Gill
11/21/2019	1.7	Clarified SAR 7/SAR 2 will be available in template repository and LRS SAR 7 will be end dated.	Lawrence Samy
10/14/2020	1.8	Updated document to migrate the SAR 7/SAR 2 for the Migration Counties and have LA County continue using the existing SAR 7.	Rainier Dela Cruz
10/20/2020	1.9	Updated document based on QA feedback	Rainier Dela Cruz
12/03/2020	2.0	Updated the document to add a recommendation to make the existing SAR 7 in CalSAWS only be available to LA County.	Rainier Dela Cruz

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1 OVERVIEW

SAR 2 – Reporting Changes for Cash Aid and CalFresh (09/2013) – This form is used to notify a customer of their responsibility to report changes in income.

SAR 7 – Eligibility Status Report (12/2014) – This form is sent semi-annually to gather information from participants to determine their eligibility status.

SAR 7 Addendum – Instructions and Penalties SAR 7 Eligibility Status Report – For Cash Aid and CalFresh (04/2013) – This form is used to inform participants of the instructions, examples and penalties for the SAR 7 Eligibility Status Report.

1.1 Current Design

C-IV automatically sends the SAR 7 Addendum, SAR 2, and SAR 7 as a combined form when a Cash Aid or CalFresh program is due for Semi-Annual Reporting.

CalSAWS automatically sends the SAR 7 when a Cash Aid or CalFresh program is due for Semi-Annual Reporting. A SAR 2 is automatically sent when the reporting type or IRT amount changes.

1.2 Requests

Migrate the combined SAR 7 Addendum/SAR 2/SAR 7 form from C-IV to CalSAWS in English and Spanish for the 57 migration counties.

Note: LA County will keep their existing SAR 7. ~~Maintain the following elements from the existing LRS SAR 7 on the migrated SAR 7:~~

1. ~~IRT elements~~
2. ~~Income elements~~
3. ~~Welfare Fraud Hotline~~
4. ~~Newborn check box~~

1.3 Overview of Recommendations

1. Migrate C-IV SAR 7 Addendum/SAR 2/SAR 7 (Instructions and Penalties SAR 7 Eligibility Status Report/Reporting Changes for Cash Aid and CalFresh/Semi-Annual Eligibility Status Report) into CalSAWS in English and Spanish. SAR 7 Addendum/SAR 2/SAR 7 will only be available to the 57 Migration Counties.
2. Update the existing SAR 7 in CalSAWS to be available to only Los Angeles County.
3. ~~Maintain elements from LRS version of SAR 7 on CalSAWS SAR 7.~~
4. ~~Turn off threshold languages other than English and Spanish.~~
5. Update the SAR 7 batch process to send out the existing SAR 7 for LA County and send out the migrated SAR 7/SAR 2 for the 57 Migration Counties.

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1.4 Assumptions

1. There are no changes to the existing SAR 7 in CalSAWS. There are no changes to the SAR 7 in the Self Service Portal.
2. There are no changes to standalone SAR 2 and SAR 7 Addendum available in Template Repository.
3. ~~LRS version of SAR 7 will be obsolete when SAR 7/SAR 2 is migrated.~~
4. ~~If a Welfare Fraud Hotline number if not provided by a county, the phone numbers will be blank on the form.~~
5. ~~Threshold language updates to the form will be made with CA-208670.~~
6. SAR 2 batch job will not be turned off because the SAR 2 needs to generate when the reporting type or IRT amount changes.

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2 RECOMMENDATIONS

2.1 Migrate the SAR 7 Addendum/SAR 2/SAR 7 Form

2.1.1 Overview

Migrate the combined SAR 7 Addendum/SAR 2/SAR 7 form in English and Spanish from C-IV to CalSAWS for the 57 migration counties. ~~Maintain the following elements from the LRS SAR 7 on the migrated SAR 7:~~

1. ~~IRT elements~~
2. ~~Income elements~~
3. ~~Welfare Fraud Hotline~~
4. ~~Newborn check box~~

Programs: CalFresh, CalWORKs, Refugee Cash Assistance

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

Template Repository Visibility: Migration Counties Only

2.1.2 Description of Change

1. Create the SAR 7 Addendum/SAR 2/SAR 7 form.

   Form Header: CalSAWS Standard Header (Header 1)

   Form Footer: CalSAWS Standard Footer (Footer 1)

   Form Title: Reporting Changes for Cash Aid and CalFresh/Semi-Annual Eligibility Status Report

   Form Number: SAR 7 Addendum/SAR 2/SAR 7

   Include NA Back 9: No

   Form Mockup/Example: Please refer to **Section 2.1.5**

2. Use the following Document Parameters page for the SAR 7 Addendum/SAR 2/SAR 7:

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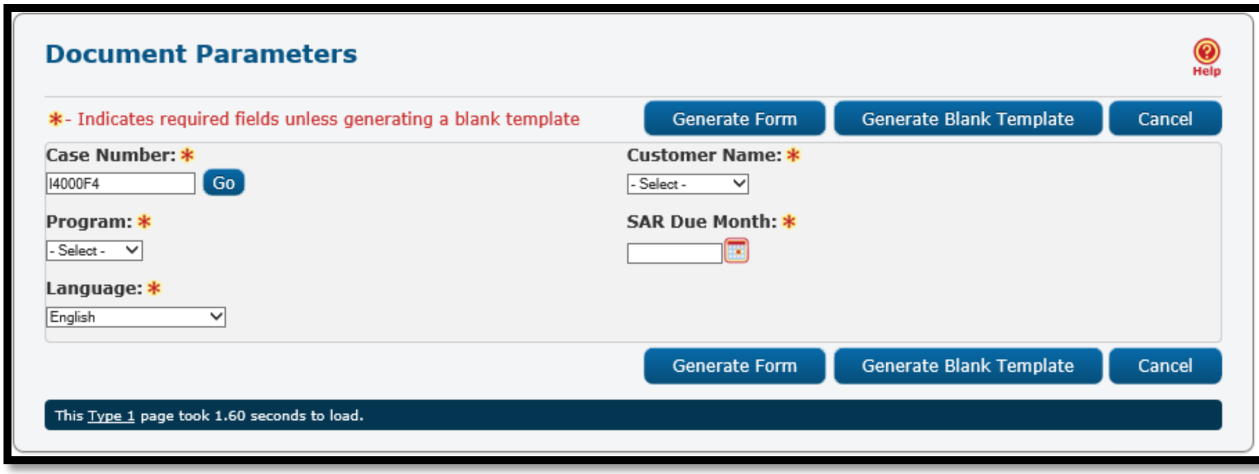

Figure 2.1.1 – Document Parameters Page

a. The following validation message will display on the Document Parameters page to prevent the generation of the SAR 7 Addendum/SAR 2/SAR 7 from Template Repository when there is a Customer Reporting record for a SAR 7 Addendum/SAR 2/SAR 7 in any status except 'Not Applicable' for the same Submit Month already exists: 'SAR Due Month - SAR 7 Addendum/SAR 2/SAR 7 has been sent for this SAR Due Month. Reprint if another one is needed.'

3. Use the same form type and print options as existing CalSAWS SAR 7 for the migrated SAR 7 Addendum/SAR 2/SAR 7:
   a. Create a Customer Reporting entry when the SAR 7 Addendum/SAR 2/SAR 7 is generated and saved with the following information:

Field to Populate	Population for SAR 7 Addendum/SAR 2/SAR 7
Type	S7
Submit Month - when generated from Template Repository	SAR Due Month on the Document Parameters
Submit Month - when generated through Batch	SAR Due Month
Program	CF, CW, RCA
Status	Customer Reporting Tracking Status Customer Reporting Statuses: • Generated • Sent • Received

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	• Incomplete • Not Applicable • Reviewed – Ready to Run EDBC • Complete – EDBC Accepted For example: The status will be set to “Sent” if the Packet is generated and sent to the recipient through Batch.
Status Date	Date of the latest Status Date

b. The SAR 7 Addendum/SAR 2/SAR 7 will have the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

c. The SAR 7 Addendum/SAR 2/SAR 7 will have the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

d. The SAR 7 Addendum/SAR 2/SAR 7 will have the following mailing option:

Mailing Options	Option for SAR 7 Addendum/SAR 2/SAR 7
Mail-To (Recipient)	When generated through the batch process, the Primary Applicant. When generated through Template Repository, the individual selected on the ‘Customer Name’ dropdown on the Document Parameters page.
Mailed From (Return)	Worker’s Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard
Return Envelope Type	BRM
Special Paper Stock	N/A

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4. Remove the ADM 109 – E-Notification Flyer.

5. Remove the NA 1273 – Electronic Notification Agreement.

6. Update the Business Reply Mail (BRM) address on Page 3 to match the CalSAWS BRM envelope location. Add the following fields to the right side of the BRM address: County, Date, Case Name, Case Number, Worker Name, Worker Id, Worker Phone Number, and Customer Id.

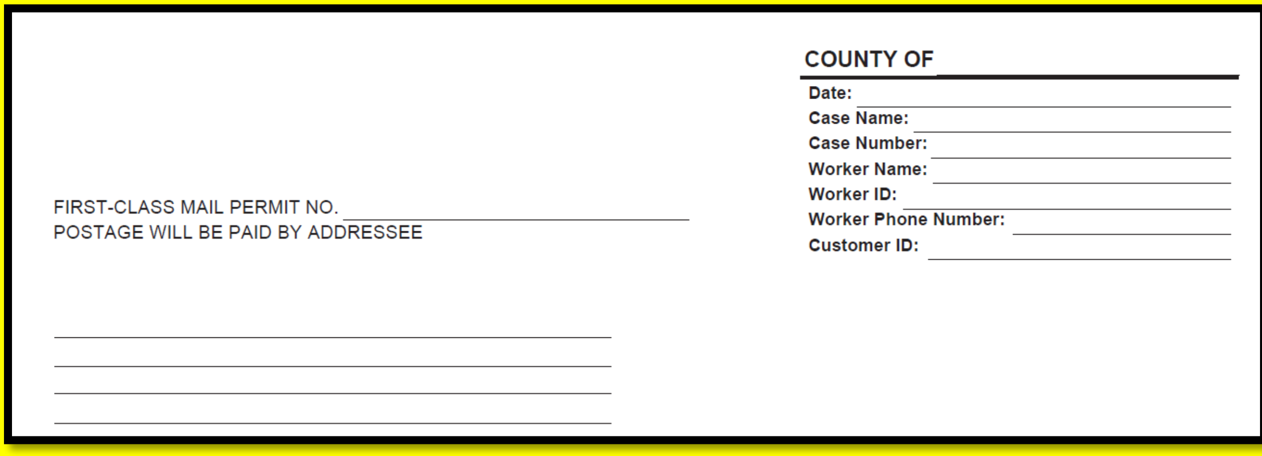

Figure 2.2.2 – BRM Address

7. SAR 7 Addendum/SAR 2/SAR 7 will be available in Template Repository and will only be available to the 57 Migration Counties. Update the existing SAR 7 in CalSAWs to be only available to Los Angeles County.

~~8. SAR 7/SAR 2 will trigger through batch using the same trigger conditions as the LRS SAR 7.~~

~~9. End date the LRS SAR 7 so it is not available in Template Repository.~~

~~2.1.3 Maintain elements from LRS version of SAR 7 on CalSAWS SAR 7~~

~~**Top of first page:**~~

~~1. IRT elements~~

~~**Bottom of first page:**~~

~~2. Income elements~~
~~3. Newborn checkbox~~
~~4. Welfare Fraud Hotline~~
   ~~a. Populate the Welfare Fraud Hotline phone number for each county per the table below.~~
   ~~b. If the Welfare Fraud Hotline phone number is not provided by a county, the phone number will be blank.~~

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~~County #~~	~~County~~	~~WELFARE FRAUD HOTLINE PHONE NUMBER~~
~~1~~	~~Alameda~~	~~(888) 991-TIPS~~
~~2~~	~~Alpine~~	~~(530) 694-2235~~
~~3~~	~~Amador~~	~~(209) 223-6550~~
~~4~~	~~Butte~~	~~(530) 538-7269~~
~~5~~	~~Calaveras~~	~~(209) 754-6872~~
~~6~~	~~Colusa~~	~~(530) 458-0279~~
~~7~~	~~Contra Costa~~	~~(925) 521-5080~~
~~8~~	~~Del Norte~~	~~(707) 464-3191~~
~~9~~	~~El Dorado~~	~~(530) 642-7300~~
~~10~~	~~Fresno~~	~~(559) 600-5045~~
~~11~~	~~Glenn~~	~~(530) 934-6518~~
~~12~~	~~Humboldt~~	~~(707) 445-6072~~
~~13~~	~~Imperial~~	~~(442) 265-1191~~
~~14~~	~~Inyo~~	~~(877) 565-0655~~
~~15~~	~~Kern~~	~~(661) 633-7283~~
~~16~~	~~Kings~~	~~(559) 852-2121~~
~~17~~	~~Lake~~	~~(707) 995-4302~~
~~18~~	~~Lassen~~	~~(530) 251-8182~~
~~20~~	~~Madera~~	~~(559) 661-5160~~
~~21~~	~~Marin~~	~~(415) 473-7071~~
~~22~~	~~Mariposa~~	~~(209) 966-2000~~
~~23~~	~~Mendocino~~	~~(707) 463-7752~~
~~24~~	~~Merced~~	~~(209) 723-7283~~
~~25~~	~~Modoc~~	~~(800) 344-8477~~
~~26~~	~~Mono~~	**~~BLANK – no response~~**
~~27~~	~~Monterey~~	~~(831) 755-3224~~
~~28~~	~~Napa~~	~~(707) 251-1099~~
~~29~~	~~Nevada~~	~~(530) 265-1792~~
~~30~~	~~Orange~~	~~(714) 347-8636~~
~~31~~	~~Placer~~	~~(916) 784-6180~~
~~32~~	~~Plumas~~	~~(530) 283-6350~~
~~33~~	~~Riverside~~	~~(951) 358-3278~~
~~34~~	~~Sacramento~~	**~~BLANK – no response~~**
~~35~~	~~San Benito~~	~~(831) 630-5125~~

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~~County #~~	~~County~~	~~**WELFARE FRAUD HOTLINE PHONE NUMBER**~~
~~36~~	~~San Bernardino~~	~~(877) 605-2321~~
~~37~~	~~San Diego~~	~~(800) 421-2252~~
~~38~~	~~San Francisco~~	~~(415) 557-5771~~
~~39~~	~~San Joaquin~~	~~(800) 815-9387~~
~~40~~	~~San Luis Obispo~~	~~(805) 781-1914~~
~~41~~	~~San Mateo~~	~~(650) 802-7583~~
~~42~~	~~Santa Barbara~~	~~(800) 822-6222~~
~~43~~	~~Santa Clara~~	~~(408) 755-7175~~
~~44~~	~~Santa Cruz~~	~~(831) 454-4109~~
~~45~~	~~Shasta~~	~~**BLANK - Do not want a #**~~
~~46~~	~~Sierra~~	~~(530) 993-6720~~
~~47~~	~~Siskiyou~~	~~(530) 841-2705~~
~~48~~	~~Solano~~	~~(800) 585-4700~~
~~49~~	~~Sonoma~~	~~(707) 565-8530~~
~~50~~	~~Stanislaus~~	~~(209) 558-2020~~
~~51~~	~~Sutter~~	~~(877) 652-0735~~
~~52~~	~~Tehama~~	~~(530) 527-1911~~
~~53~~	~~Trinity~~	~~(530) 623-1265~~
~~54~~	~~Tulare~~	~~(559) 636-5230~~
~~55~~	~~Tuolumne~~	~~(209) 533-5711~~
~~56~~	~~Ventura~~	~~(805) 477-1605~~
~~57~~	~~Yolo~~	~~(800) 344-8477~~
~~58~~	~~Yuba~~	~~(530) 749-6400~~

~~2.1.4 Turn off threshold languages for SAR 7~~

1. ~~Turn off all threshold languages apart from English and Spanish of SAR 7 in CalSAWS. CA-208670 has been created to add the threshold language versions of SAR 7 with the required updates.~~

2.1.5 Form Mockup

~~Below is the mockup of C-IV SAR 7/SAR 2 for demonstration purposes. CalSAWS SAR 7/SAR 2 will be different based on the current CalSAWS standards.~~

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COUNTY OF <CountyName>

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

SAR 7 ELIGIBILITY STATUS REPORT
For Cash Aid and CalFresh

Need Help? Call the County.

- If you do not send in a complete report including, but not limited to, answering all questions on the SAR 7 and attaching proof when we ask for it, your benefits may be delayed, changed, or stopped. **Attach a separate sheet of paper if needed.**
- Facts you report may result in your benefits going up, down, or being stopped.
- Send in your completed report by the 5th of the month after the report month. It is late after the 11th.

Examples

Income	• Wages • Vacation pay • In-Home Supportive Services (IHSS) • Child/spousal support • Insurance or legal settlements • Rental income and rental assistance • Any government benefits • State Disability Indemnity	• Self-Employment • Tips • Interest or dividends • Strike benefits • Tax refunds • Unemployment • Social Security • Supplemental Security Income/State Supplementary Payment (SSI/SSP)	• Salary • Income In-kind, such as earned housing, free housing/utilities/clothing/food • Gambling/Lottery winnings • Cash, gifts, loans, scholarships • Other private or government disability or retirement • Workers Compensation • Veterans or Railroad retirement
Property	• Motor vehicles • EBT cash aid balance • Home	• Checking • Saving Bonds • Land	• Savings • Life Insurance policies • Trusts
Housing Costs	• Rent • Utilities	• Mortgage • Homeowners insurance	• Property taxes • Garbage/trash collection fees
Expenses	• Medical expenses • Health insurance premiums • Child/dependent Care	• College tuition & supplies • Mandatory school fees • Child/spousal support	• Transportation • Room & Board • Housing costs

Gross income means the amount you get before deductions are taken out (Examples of deductions are: Taxes, Social Security or other retirement contributions, health care plan premiums, garnishments, etc.).

Penalties

PENALTIES FOR CASH AID FRAUD: If on purpose you do not follow Cash Aid rules, your Cash Aid can be lowered for a period of time and you may be fined up to $10,000 and/or sent to jail or prison for up to 3 years.

Your Cash Aid can be stopped:

- For not reporting all facts or for giving wrong facts: 6 months for the first offense, 12 months for the second offense, or forever for the third.
- For submitting one or more application to get aid in more than one case for the same time period: 2 years for the first conviction, 4 years for the second, and forever for the third.
- For conviction of felony fraud to get aid: 2 years for theft of amounts under $2,000; 5 years for amounts of $2,000 through $4,999.99; and forever for amounts of $5,000 or more.
- Forever: for giving the county false proof of residency in order to get aid in two or more counties or states at the same time; giving the county wrong facts for an ineligible child or a child that does not exist; getting more than $10,000 in cash benefits through fraud; getting a third conviction for fraud in a court of law or an administrative hearing.

PENALTIES FOR CALFRESH FRAUD: If on purpose you do not follow CalFresh rules, your CalFresh benefits can be stopped for 12 months for the first violation, 24 months for the second, and forever for the third. You may be fined up to $250,000 and/or sent to jail/prison for 20 years.

If you are found guilty in any court of law or administrative hearing because:

- You traded or sold CalFresh benefits for firearms, ammunition, or explosives, your CalFresh benefits can be stopped forever for the first violation.
- You traded or sold CalFresh benefits for controlled substances, your CalFresh benefits can be stopped for 24 months for the first violation and forever for the second.
- You traded or sold CalFresh benefits that were worth $500 or more, your CalFresh benefits can be stopped forever.
- You gave the county false identify or residence information, so you can get CalFresh benefits in more than one case at the same time, your CalFresh benefits can be stopped for 10 years.

SAR 7 ADDENDUM (4/13) ELIGIBILITY STATUS REPORT - SEMI-ANNUAL FOR CASH AID AND CALFRESH - REQUIRED FORM - SUBSTITUTES PERMITTED

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REPORTING CHANGES FOR CASH AID AND CALFRESH

CASE NAME:

CASE NUMBER:

WORKER NUMBER:

Because you get ☐ Cash Aid ☐ CalFresh, you must report within 10 days when your TOTAL income reaches a certain level. You must report anytime your household's total monthly income is more than your current Income Reporting Threshold (IRT).

Benefit Month:

Benefit Type	CalWORKs	CalFresh
Family Size		
Your Current Income		
Your IRT is		

Note: If your IRT for CalFresh is listed as "N/A", you are not required to report income changes for CalFresh until your next SAR 7 or recertification, whichever comes first. However, if you have an IRT amount listed for CalWORKs, you must report when your gross income goes over that amount.

<u>How to report?</u>

If your total income is over the IRT amount listed above, you must report this to the County **within 10 days**. You can report this information to the County by calling the county or reporting it in writing.

<u>By "total monthly income" we mean:</u>

- ▶ Any money you get (both earned **and unearned**).
- ▶ The amount *before* any deductions are taken out. (Examples of deductions are: taxes, Social Security or other retirement contributions, garnishments, etc.)

<u>What will happen?</u>

- ▶ Your benefits may be lowered or stopped based on income over your IRT.
- ▶ Your IRT may change when your income changes or when someone moves in or out of your home.
- ▶ The County will let you know in writing each time your IRT changes.
- ▶ You also need to report on your SAR 7 all income you get during the Report Month, even if you already reported that money.

<u>Penalty for not reporting</u>

If you do not report when your income is more than your household's IRT limit you might get more benefits than you should. You **must** repay any extra benefits you get. If you do not report on purpose to try to get more benefits, this is fraud, and you may be charged with a crime and/or may no longer get CalFresh for a period of time or life.

If you get Cash Aid, you <u>MUST ALSO</u> report the things below <u>within 10 days</u> of when they happen:

1. Anytime someone joins, or is in your household, who has been found by a court of law to be in violation of a condition of probation or parole.
2. Anytime someone joins, or is in your household, who is running from the law (has a warrant out for their arrest).
3. Anytime you have an address change.

If you get CalFresh, you <u>MUST ALSO</u> report the following:

- If you are an Able Bodied Adult Without Dependents (ABAWD), you must report anytime your work or training hours drop to *less* than 20 hours a week or 80 hours a month.

<u>Voluntarily reporting information</u>

You may also voluntarily report changes to the County anytime. *Reporting some changes may get you more benefits.* For example:

- Your income stops or goes down.
- Someone with income moves out of your home.
- Someone without income moves into your home.
- Someone in the house becomes pregnant.
- Someone on cash aid has a special need, such as: a pregnancy, a special diet prescribed by a doctor, household emergency, etc.
- The birth of a child.
- For CalFresh, if someone disabled or age 60 or older has new or higher out of pocket medical costs.

Note: Some changes you report voluntarily may result in a decrease in your CalFresh benefits.

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STATE OF CALIFORNIA – HEALTH AND HUMAN SERVICES AGENCY

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES
CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES

SAR 7 ELIGIBILITY STATUS REPORT

WORK PAYS

REPORT MONTH ______

TO KEEP YOUR BENEFITS COMING ON TIME, PLEASE SIGN THE FORM AFTER ______ 1ST AND RETURN IT BY ______ 5TH
SUBMIT MONTH SUBMIT MONTH

COUNTY OF

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

FIRST-CLASS MAIL PERMIT NO.
POSTAGE WILL BE PAID BY ADDRESSEE

Check the box if you would like to STOP getting any of the following: ☐ STOP my CalWORKs ☐ STOP my CalFresh ☐ STOP my Medi-Cal

1. Has anyone moved into or out of your home (including newborns) or did you move in with someone else since you last reported? ☐ Yes ☐ No (If yes, complete the section below.)

Date of Move (mm/dd/yy)	Name (First, Middle, Last)	Date Of Birth	Relationship To You	Regularly Purchase And Prepare Food Together?
☐ In ☐ Out / /		/ /		☐ YES ☐ NO
☐ In ☐ Out / /		/ /		☐ YES ☐ NO
☐ In ☐ Out / /		/ /		☐ YES ☐ NO

2. Have there been any changes to your address since you last reported? ☐ Yes ☐ No (If yes, complete the section below.)

New Address: ______ Date Moved: ______

Mailing Address (if different than above) ______

3. If you have moved since you last reported please fill out the section below:

Your rent or mortgage per month now?	If paid separately, your property taxes and home insurance per month now?
$	$

Do you have utility costs that are not included in your rent or mortgage payment? If so, check which ones:
☐ Phone ☐ Trash ☐ Water ☐ Electric/Gas ☐ Other heating or cooling costs

4. CalWORKs only: Is anyone in your home:
A. Running from an outstanding warrant?
B. Found by a court to be in violation of probation or parole?
☐ Yes ☐ No (If yes, complete the section below.)

Name of person	A or B from above	In what state was the warrant issued, or did violation happen?	Date of warrant or violation

5. Medical Costs: If anyone who gets CalFresh and is 60 years old or older, or disabled, had an increase in medical costs please complete the section below and attach proof:

Who had the change?	Amount of Increase:
	$

6. Child Support: Did anyone who gets CalFresh have a change in the amount of child support they have to pay since they last reported? ☐ Yes ☐ No If yes, complete the section below and attach proof.

What was the amount paid in the Report Month? $______.

Who paid support? ______

7. Dependent Care: If anyone who gets CalFresh and either works, is looking for work, or is going to school, had an increase in out-of-pocket dependent care costs since they last reported, please complete the section below and attach proof:

What was the amount paid out-of-pocket in the Report Month? $______

Who paid: ______ List dependent(s): ______

8. Did anyone: Get, buy, sell, trade or give away any property, land, homes, cars, bank accounts, money, payments (such as lottery/casino winnings, back benefits from social security), or other property items since last reported?

☐ Yes ☐ No (If yes, complete the section below and attach proof. If you need more space, attach a separate piece of paper.)

Who?	Type of Property?	When?	Amount/Value?	
				☐ Bought ☐ Sold ☐ Gave Away ☐ Spent ☐ Got as a gift ☐ Traded ☐ Won ☐ Other

SAR 7 (12/14) ELIGIBILITY STATUS REPORT - FOR CASH AID AND CALFRESH - REQUIRED FORM - SUBSTITUTES PERMITTED

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9. **Did anyone get income from employment in the Report Month?** ☐ **Yes** ☐ **No** (If yes, complete the section below and **attach proof.**) The **Report Month** is listed at the top of the first page. List each job for each person who works. If you need more space attach a separate piece of paper. Examples include babysitting, salary, self-employment, sick pay, tips, etc. **If you lost your job, attach proof.**

	Job #1	Job #2	Job #3
Name of person who got income:			
Source of income/Employer name:	Self-employed, check here ☐	Self-employed, check here ☐	Self-employed, check here ☐
How often paid:	☐ Weekly ☐ Biweekly ☐ Other ☐ Monthly ☐ Twice monthly	☐ Weekly ☐ Biweekly ☐ Other ☐ Monthly ☐ Twice monthly	☐ Weekly ☐ Biweekly ☐ Other ☐ Monthly ☐ Twice monthly
Gross amount of income they got in the report month:	$ DATE(S) RECEIVED:	$ DATE(S) RECEIVED:	$ DATE(S) RECEIVED:
Hours worked per month:			

10. **Will there be any changes to your income from employment in the next six months (including income listed in #9)?** ☐ **Yes** ☐ **No** (If yes, explain here and **attach proof**). Examples: Stopping or starting a job; increase or decrease of income; changes in hours; quitting a job or going on strike; change in how often you are paid.

11. **Did anyone get money from any other source in the Report Month:** ☐ **Yes** ☐ **No** (If yes, complete the section below and **attach proof.**) The **Report Month** is listed at the top of the first page. Examples include: Social Security, Unemployment Compensation, Veterans Benefits, State Disability Insurance (SDI), Child/Spousal Support, Worker's Compensation, Loans/Gifts, Earned/Unearned Housing, Utilities, Food, etc. If you no longer get money from a source you previously reported, **attach proof.**

Name	Source of income	One time payment or monthly	How much
			$
			$
			$

12. **Will there be any changes to money received from any other source in the next six months (including income listed in #11)?** ☐ **Yes** ☐ **No** (If yes, explain here and **attach proof.**) Examples of changes: An increase or decrease in income or benefits, or if you will start or stop getting income or benefits.

13. **CalWORKs only: Have any of the following happened to anyone in your home since you last reported?** ☐ Yes ☐ No (If yes, check below and attach proof):

- ☐ Family Change (Married, divorced, separated, entered into a California Registered Domestic Partnership (RDP), have a non-California Domestic Partnership (DP), ended a DP or RDP, became pregnant, or is no longer pregnant?)
- ☐ Job/Employment (Start, stop, quit a job, started a business or went on strike?)
- ☐ Disability (Became disabled or recovered from a disability or major illness?)
- ☐ Immigration (Citizenship or immigration status change, or got a new card, form, or letter from USCIS (INS)?)
- ☐ Insurance (Started, stopped, or changed health, dental, or life insurance benefits, including MEDICARE?)
- ☐ Custody (Any change in the amount of time you care for/have custody of your children?)
- ☐ In-Home Support Services (Started or stopped getting services?)
- ☐ School Attendance
  For Age 18 or older student - started or stopped school/college? (You may be able to claim costs for books, school transportation, etc.)
- ☐ Someone paid for all of my housing, food, clothing or utility costs (please explain).
- ☐ Other

Please read carefully, sign, and date.

By signing this form:

- I understand and certify, under penalty of perjury, that all my answers on this report are correct and complete to the best of my knowledge.
- I understand the penalties for fraud are as follows: I may be sent to prison for up to 20 years and fined up to $250,000. I may have to pay back benefits if I was not eligible to them. The first time I break the rules on purpose I will not be able to get CalFresh for one year; the second time two years; and after the third time I will not be able to get CalFresh again.
- I understand and agree to give copies of all documents needed to complete my semi-annual report.
- I understand that in some instances, I may be asked to give consent to the County to make whatever contacts are necessary to determine eligibility.

CERTIFICATION - FRAUD WARNING

I UNDERSTAND THAT: If on purpose I do not report all facts or give wrong facts about my income, property, or family status to get or keep getting aid or benefits, I can be legally prosecuted. I may also be charged with committing a felony if more than $950 in Cash Aid, and/or CalFresh is wrongly paid out as a result of such an action. I have received a copy of the Instructions and Penalties for the SAR 7 Eligibility Status Report for Cash Aid and CalFresh.

YOU MUST SIGN AND DATE THIS REPORT AFTER THE LAST DAY OF THE REPORT MONTH OR IT WILL BE CONSIDERED INCOMPLETE.
I declare under penalty of perjury under the laws of the United States and the State of California that the facts contained in this report are true and correct and complete.

WHO MUST SIGN BELOW:	**For Cash Aid:** You and your aided spouse, registered domestic partner, or the other parent (of cash-aided children) if living in the home. **For CalFresh:** The head of household, a responsible household member, or the household's authorized representative.

SIGNATURE OR MARK	DATE SIGNED	HOME PHONE	CONTACT/CELL PHONE
		( )	( )

SIGNATURE OF SPOUSE, REGISTERED DOMESTIC PARTNER, OR OTHER PARENT OF CASH AIDED CHILD(REN)	DATE SIGNED	SIGNATURE OF WITNESS TO MARK, INTERPRETER, OR OTHER PERSON COMPLETING FORM	DATE SIGNED

SAR 7 (12/14) ELIGIBILITY STATUS REPORT - FOR CASH AID AND CALFRESH - REQUIRED FORM - SUBSTITUTES PERMITTED

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Populate the following element on the SAR 7/SAR 2 when the form is generated via Batch or Template Repository for the applicable month.

Section	Field	Description
Addendum	Standard Header	Standard Header elements
SAR 2	Program Checkboxes	Cash Aid will be checked if active program exists
SAR 2	Program Checkboxes	CalFresh will be checked if active program exists
SAR 2	Benefit Month	SAR Submit Month
SAR 2	Family Size	Current CalWORKs Assistance Unit Size
SAR 2	Your Current Income	Current Income for CalWORKs recipient
SAR 2	Your IRT is	Current CalWORKs IRT Amount
SAR 2	Family Size	Current CalFresh Household Size
SAR 2	Your Current Income	Current Income for CalFresh recipient
SAR 2	Your IRT is	Current CalFresh IRT Amount
SAR 7	Report Month	SAR Data Month
SAR 7	Sign Month	Submit Month
SAR 7	Return Month	Submit Month

2.2 Update the SAR 7 Batch Job

2.2.1 Overview

The SAR 7 batch job (PB00R412) will find cases that need a SAR 7 to be send out. The batch job will be updated to send out the existing SAR 7 in CalSAWS for LA County and to send out the migrated SAR 7 Addendum/SAR 2/SAR 7 for the 57 Migration Counties.

2.2.2 Description of Change

1. Update the logic to:
    a. Send out the existing SAR 7 in CalSAWS for LA County.
    b. Send out the migrated SAR 7 Addendum/SAR 2/SAR 7 for the 57 Migration Counties.

2.2.3 Execution Frequency

N/A

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2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

All counties.

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

N/A

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3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
429	The Contractor shall migrate the SAR 7/SAR 2 (4/13) form from C-IV to CalSAWS for the 57 Migration Counties.	**Original:** N/A **Revised:** Los Angeles County will retain their existing SAR 7. There are no changes to the editable SAR 7 on YBN.	The C-IV SAR7/SAR 2 is migrated over to CalSAWS.

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213876

DDCR 5055, 5028, 5011, 4095, 5092, 3177, 3179

Call Log Enhancements

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Srividhya Sivakumar, Michael Wu, Christine Altavilla, William Baretsky.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03.20.2020	1.0	Initial	Erika Kusnadi-Cerezo
10.13.2020	2.0	Added to section 2.1.3 Description of changes on how the County field and Edit button should behave on the Call Log List. Add to section 2.2.3 how the Caller's County of Residence field should be behave and updated 'customer' to 'custom' on 1.g.iv. Added to section 2.3.3 the option of 'Pending MAGI Determination to section 1c	Erika Kusnadi-Cerezo
10/23/2020	3.0	Updated/Added to Section 2.1.2 and 2.2.2 mockups Updated Section 2.2.31.iv for the Message Worker ID field.	Erika Kusnadi-Cerezo
10/29/2020	4.0	Added Gender to be displayed as part of the 'Person' name format. Multiple mockups were updated to match this change as well. On the Program block on the Call Log Detail page IHSS will be updated to IHSS/CMIPS II	Erika Kusnadi-Cerezo.
10/30/2020	5.0	Updated description of changes to match the changes for the format for the 'Person' field and also the 'Message Worker ID' field. Lastly, Email was updated to E-mail.	Erika Kusnadi-Cerezo
11/3/2020	6.0	Added to Section 2.2.3.1J that the Long Description	Erika Kusnadi-Cerezo

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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		will be a text box and will have a maximum count of 8000. Added to the list of program block on Section 2.2.3 description of changes the following programs: GROW, Disaster CalFresh and Refugee Employment Program. All mockups are updated to reflect the change as well	
11/10/2020	7.0	Added an assumption that some of the CIV code will need to be modified due to LRS/CalSAWS existing data model. Added to the Call Log Detail section (2.2) description of changes how the Last 5 contact information should display what information (this is to match the mockup), added more information on how the 'Person' field such behave in various scenarios. Lastly, removed the Tracker ID for when Call Log should display on the Subscriber County Review List page.	Erika Kusnadi-Cerezo.
11/11/2020	8.0	Added more details on when the Transfer complete button should display. Also added that on the Call Log List page, there should also be an 'All' option for the County field and what that field should Default to for RCC user. For Call Log Detail page added what the default should be for the County of Residence should be for RCC user.	Erika Kusnadi-Cerezo
11/16/2020	9.0	Added to Section 2.2.3 k for	Erika Kusnadi-Cerezo

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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		the Last Updated On information that display on the Call Log Detail page. Updated Section 2.2.3.f.i to say Programs instead of Program and Mockups on Section 2.2 was updated accordingly to match the changes. Added Section 2.6 to the Design Document to change the way the Worker Detail page look like when worker click on the Staff ID from the Call Log Detail page.	
12/8/2020	10.0	Added to Section 2.1.3 to add validation message to the Call Log List page to display when user is searching for 'All' on the County field and the Worker ID field is blank. Added to Section 2.4.3 on how Message Center notification should look like when the Call Log Record is not tied to valid case & updated all the mockups on section 2.4.2 as well.	Erika Kusnadi-Cerezo

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1 OVERVIEW

The Call Log List and Call Log Detail page are currently used by county workers that are working from a Call Center or County office(s) to log calls and also to keep track and monitor those calls that are being logged.

1.1 Current Design

Currently in the LRS/CalSAWS system the Call Log List and Call Log Detail page are not used by the county workers. This is different than the C-IV system in that the Call Log List and the Call Log Detail page are being used on a regular basis. Because of this, the Call Log List and Call Log Detail page in the C-IV system have more information compared to the ones in the LRS/CalSAWS system.

The C-IV system also has the Subscriber County Review List enabled and Message Center was enhanced with the ability to display the Call Log. These specific functionalities currently do not exist in the LRS/CalSAWS system.

1.2 Requests

Override the LRS/CalSAWS Call Log List and Call Log Detail page code with the C-IV Call Log List and Call Log Detail page. Enable the Subscriber County Review List in LRS and add Message Center capabilities to Call Log Detail page.

1.3 Overview of Recommendations

1. Override the LRS/CalSAWS Call Log List code with the C-IV Call Log List code base.
2. Override the LRS/CalSAWS Call Log Detail code with the C-IV Call Log Detail code base.
3. Enable the Subscriber County Review List in LRS/CalSAWS system so that it's no longer hidden.
4. Add Message Center capabilities to the Call Log Detail page, include updating the Message Center to display Call Log notifications.
5. Enable automated journal for Call Log, so that users can open the Journal Window from the Call Log Detail page (View or Edit mode).

1.4 Assumptions

1. Task for Call Log will be addressed in a future SCR (CA-215944).
2. IVR related functionality will be addressed in a future SCR (CA-215560).
3. Updates to the Call Log Report/Dashboard will be addressed in a future SCR
4. Conversion team will map over the existing CIV data for Non-C-IV County value for Call Type/Call Action type to Non-CalSAWS County during migration.
5. Call Log Code from C-IV that's being ported over to LRS/CalSAWS will be updated/modified accordingly due to the existing/current LRS/CalSAWS data model.

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2 RECOMMENDATIONS

Override the LRS/CalSAWS code for the Call Log List and the Call Log Detail with the C-IV Call Log List and Call Log Detail code base. Enable the Subscriber County Review List in the LRS/CalSAWS system so it's no longer hidden, add message center capabilities to Call Log Detail page.

2.1 Call Log List

2.1.1 Overview

Override the existing LRS/CalSAWS Call Log List code with the C-IV system Call Log List code base. With this change, the Call Log List page in LRS/CalSAWS system will now look and function the same way as the Call Log List page in the C-IV system.

2.1.2 Call Log List Page Mockup

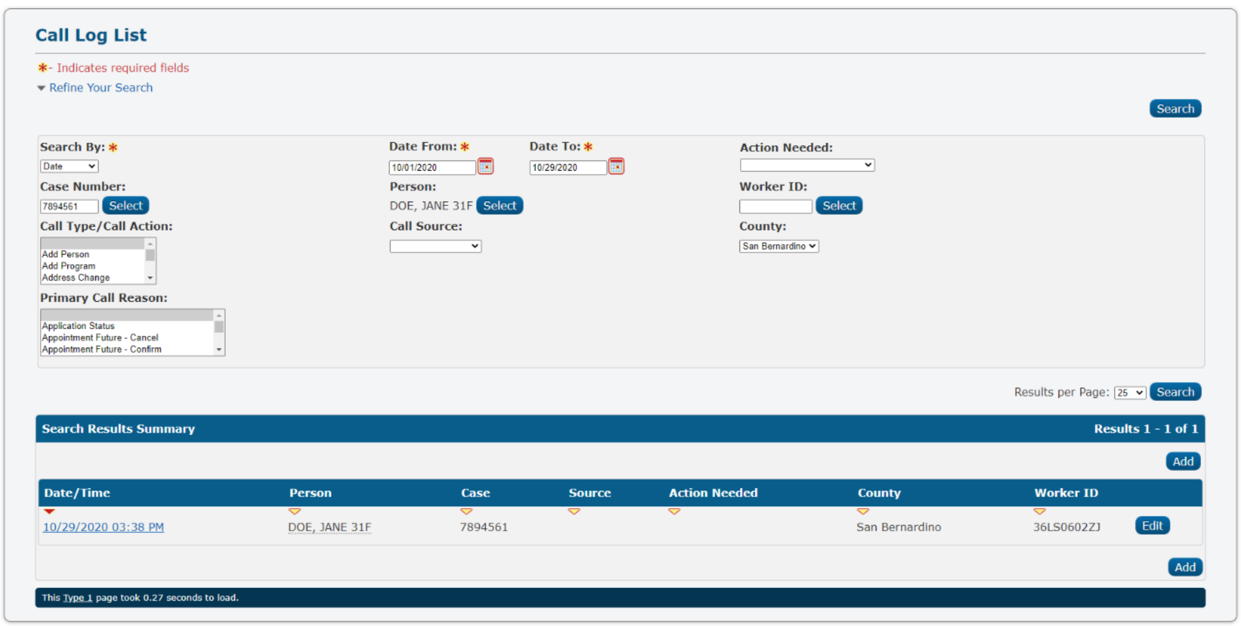

Figure 2.1.1a – Call Log List

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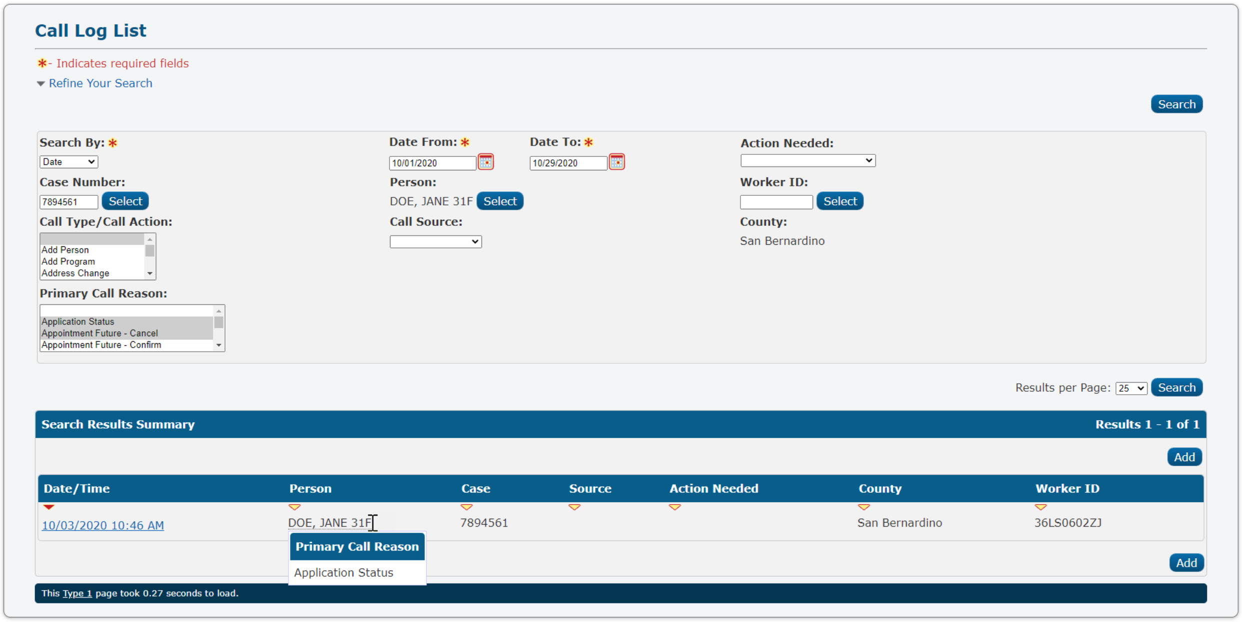

Figure 2.1.1b – Call Log List

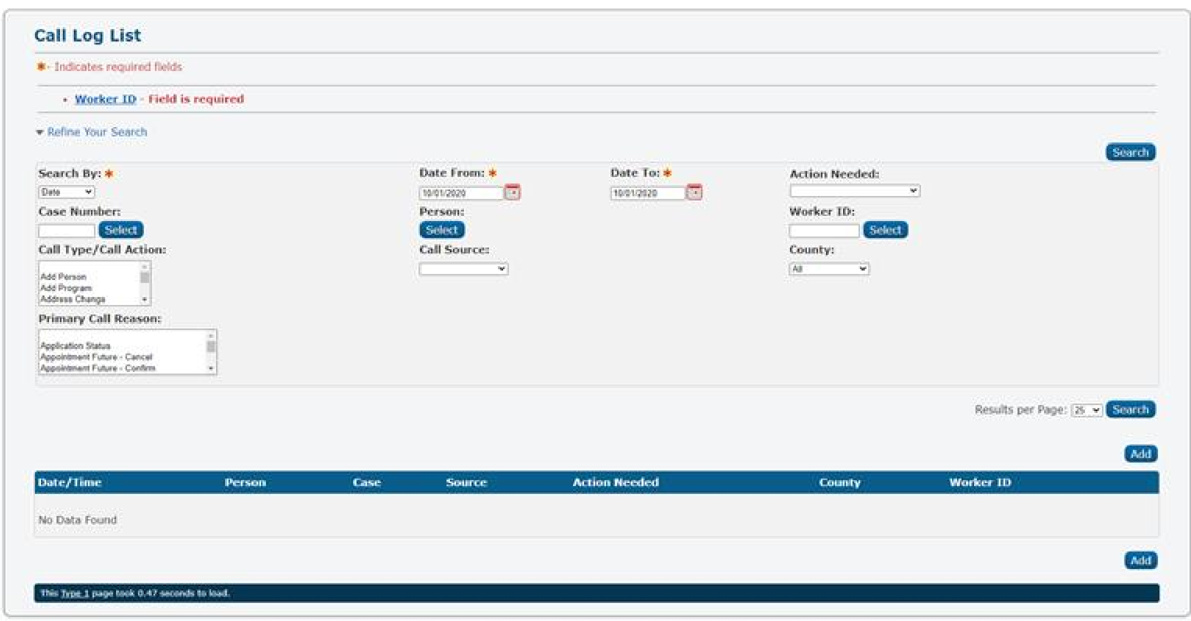

Figure 2.1.2 – Call Log List Validation

2.1.3 Description of Changes

1. The Call Log List page will look (Figure 2.1.1a, b) and function the same way as the current C-IV system Call Log List page.
    a. The "Search By" field will have the following value:

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i. Date
    1. The previous value of "View Date" that was in the LRS/CalSAWS will be updated to "Date" as part of this change.

ii. Tracker ID

Note: Searching by Tracker ID will not provide any data until after migration.

b. The "View Date:" field will no longer exist in the LRS/CalSAWS Call Log List page and will be replaced by "Date From:" and "Date To:" field.
    i. The "View Date" and the corresponding "Date" value that was entered (which was part of the LRS/CalSAWS code) will no longer display under the "Search Results Summary" section.
    ii. The New field "Date From:" and "Date To:" field will be a requirement.
        1. Default the date range to be the current system date and allow a date range of up to 31 days.
        2. Create a validation: "The selected Date range must be 31 days or less" if someone attempts to search for longer than 31 days.
        3. These fields will be used as the date range criteria when users are searching for Calls that were logged.

c. Case Number will automatically prepopulate in the "Case Number" field when the workers are in a case context or viewing a case as soon as the Call Log List page opens.
    i. Case Number field will remain empty if the worker is not in the context or viewing a case.
    ii. Case Number field will not be required.

d. 'Person' field will display the value selected in the following format:
    i. Last Name, First Name Age Gender, (example: DOE, JOHN 34M)

Note: Last Name and First can be all capitalized, all lower case or a combination of both capitalize and lower case letters. This is dependent on how the Person's name was originally inputted into the system.

e. The "Call Type:" drop down field that was originally in the LRS/CalSAWS system will now display as "Call Type/Call Action:"
    i. Workers can continue to make multiple selections from the "Call Type/Call Action" field.
    ii. "Call Type/Call Action" field will not be required
    iii. The following values will be displayed under the "Call Type/Call Action" field and in the following order:
        1. "Blank" value

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2. Add Person
3. Add Program
4. Address Change
5. Appointment/Activity
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
6. BIC/EBT
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
7. Benefits Question
8. Discontinuance
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
9. Dropped Call/Disconnect
10. Escalation
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
11. General Question
12. Household Status
13. ICT/Other County
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
    b. "Other County" value that was part of the LRS/CalSAWS code will now be displayed as "ICT/Other County".
14. Income
15. Missing Document
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
16. New Application
17. Non-CalSAWS County
    a. Update the value 'Non-C-IV county' to 'Non-CalSAWS County'.
18. Notice of Action
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
19. Other Agency/Resources
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
20. Phone Number Update

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a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code

21. Property
22. RE
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
23. Report
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
24. Restoration
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
25. Verifications

f. The Call Source field will be non-mandatory and will have the following drop down fields and will default to blank:
   i. Call Center
   ii. Covered California
   iii. Office
   iv. Outbound IVR
      1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code

g. A new field titled "Primary Call Reason:" will now display as part of the Call Log List page.
   i. The "Primary Call Reason" field will not be required, and the worker can choose multiple selections.
   ii. The "Primary Call Reason" will have the following options:
      1. "Blank" value
      2. Application Status
      3. Appointment Future – Cancel
      4. Appointment Future – Confirm
      5. Appointment Future – New
      6. Appointment Future – Question
      7. Appointment Future – Reschedule
      8. Appointment Past – Question
      9. Appointment Past – Reschedule
      10. BIC Replacement
      11. Benefits (NOA) – Denial or Discontinuance
      12. Benefits (NOA) – Other
      13. Benefits (NOA) – Reduction
      14. Change of Address
      15. Change of Employment
      16. Change of Household
      17. Change of Income
      18. Document – Request or Question

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19. Document Status
20. EBT Card Replacement
21. New Application
22. None of the Above

h. The "Search Results Summary" section of the Call Log List page will be updated to the following:
    i. It will no longer display the "View Date: MM/DD/YYYY" as noted above in point b.i. (This is to align with the change of the Search Criteria to have a Date Range)
    ii. The Column titled "Time" will be replaced to "Date/Time".
        1. Value will be displayed in the following format: MM/DD/YYYY HH:MM AM/PM (ex: 04/04/2020 04:15 PM)
        2. This will be a hyperlink and clicking the hyperlink will take the worker to the Call Log Detail page in "View" mode.
    iii. The Column titled 'Person' will display the Person information when the Call Log record was created.
        1. For Call Log Records that was associated to a valid Case, the 'Person' field will display the value in the following format: Last Name, First Name Age Gender (ex: Doe, Jane 31F).

            Note: Last Name and First can be all capitalized, all lower case or a combination of both capitalize and lower case letters. This is dependent on how the Person's name was originally inputted into the system.

        2. For Call Log Record that is not associated to a valid Case, the 'Person' field will display the value as what was entered when the Call Log record was created.

i. Update Tool Tip to display when hovering over the following fields
    i. When hovering over the "Primary Call Reason" field, it will display the following "Primary Call Reason"
    ii. When hovering over the "Person" column in the Search Summary Result, it will display the "Primary Call Reason" as shown on Figure 2.1.1

j. 'County' field will be an editable field for RCC (Regional Call Center) users only.
    i. For RCC users, the 'County' field will be a drop down field and will list all 58 counties and an 'All' option
        1. It will default to the County that the user is accessing or selected.
    ii. For non-RCC users, this field will not be editable, and it will default to the county that the user is residing in.

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   k. 'Edit' button will be hidden for Call Log records that are created in the past.
      i. 'Edit' button will display for Call Log Records that are created on the same day.
      ii. 'Edit' button will display for Call Log Records that are created in the past and was not associated to a Case Number.
2. Add a custom validation to the Call Log List page to display the following message: 'Worker ID – Field is required'
   a. Message will display when the user clicked the 'Search' button and the 'County:' field is set to 'All' and the 'Worker ID:' field is blank.

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Call Log**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Page Mapping will be updated to accommodate the changes to the Call Log List page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Call Log Detail Page

2.2.1 Overview

Override the existing LRS/CalSAWS Call Log List code with the C-IV system Call Log Detail code base. With this change, the Call Log Detail page in LRS/CalSAWS system will now look and function the same way as the Call Log Detail page in the C-IV system.

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2.2.2 Call Log Detail Page Mockup

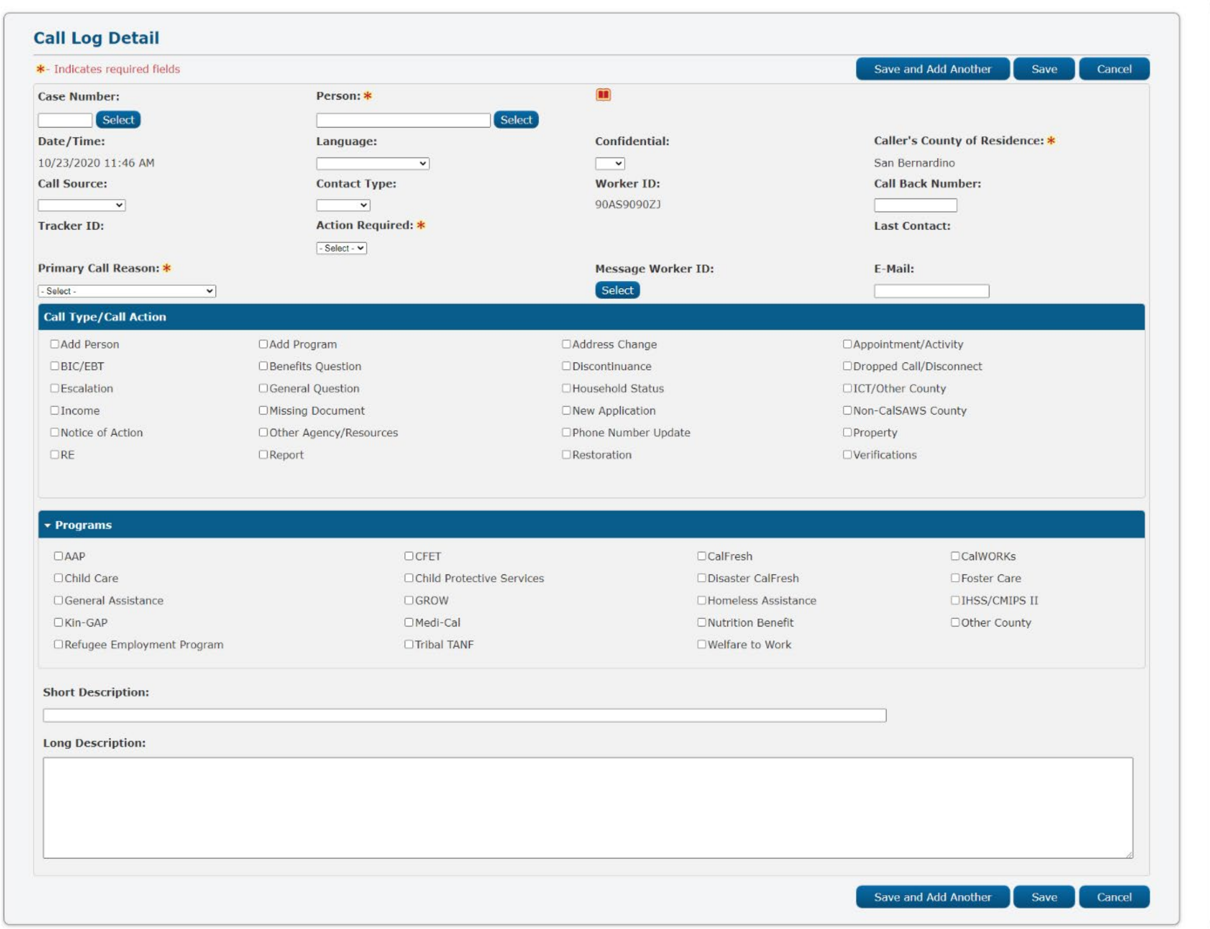

Figure 2.2.1a – Call Log Detail Create Mode

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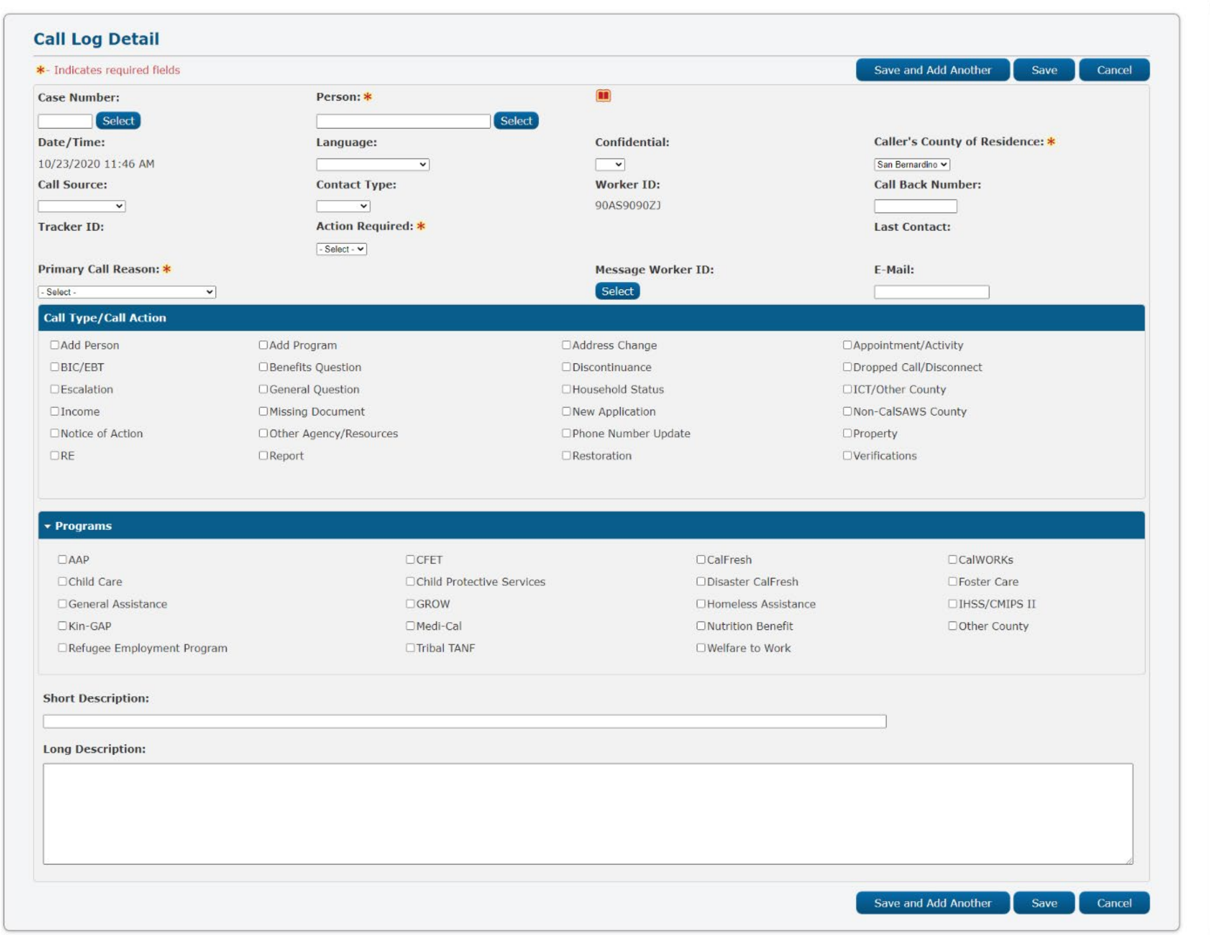

Figure 2.2.1b – Call Log Detail Create Mode

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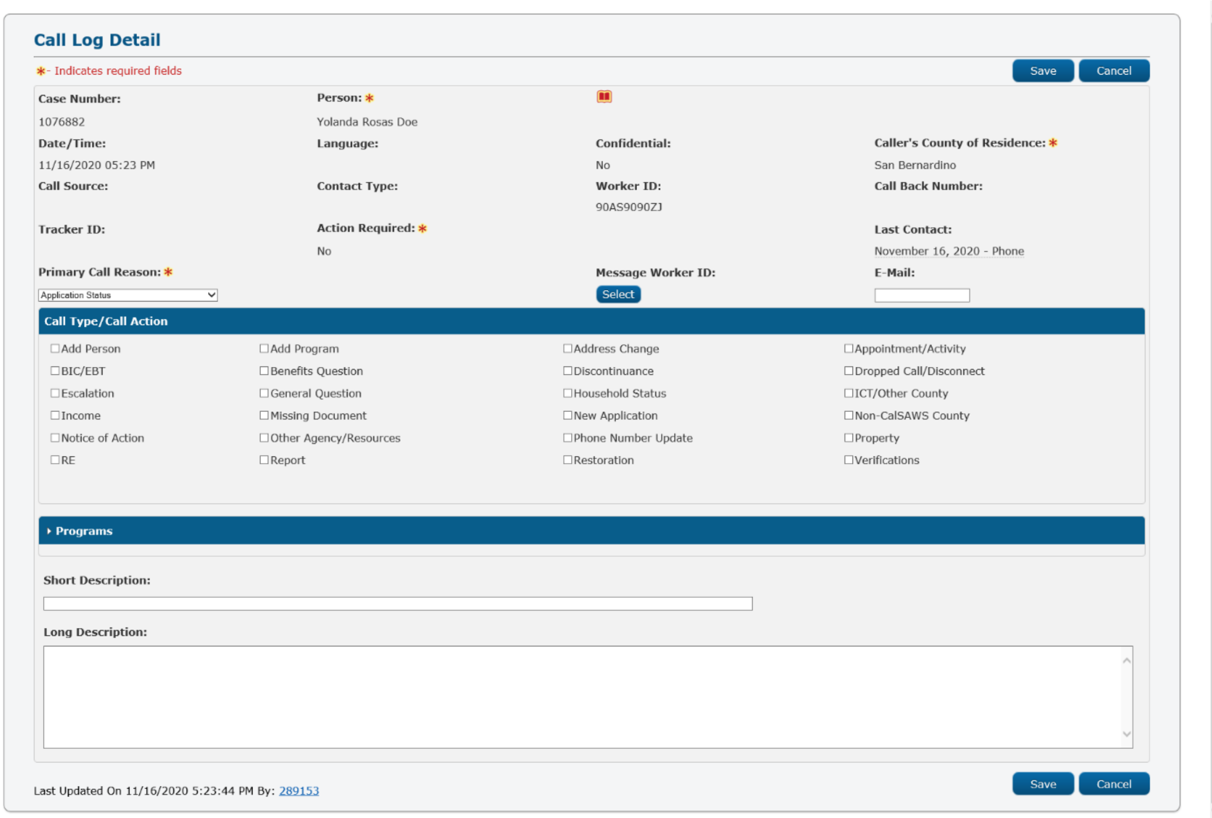

Figure 2.2.1c – Call Log Detail Edit Mode

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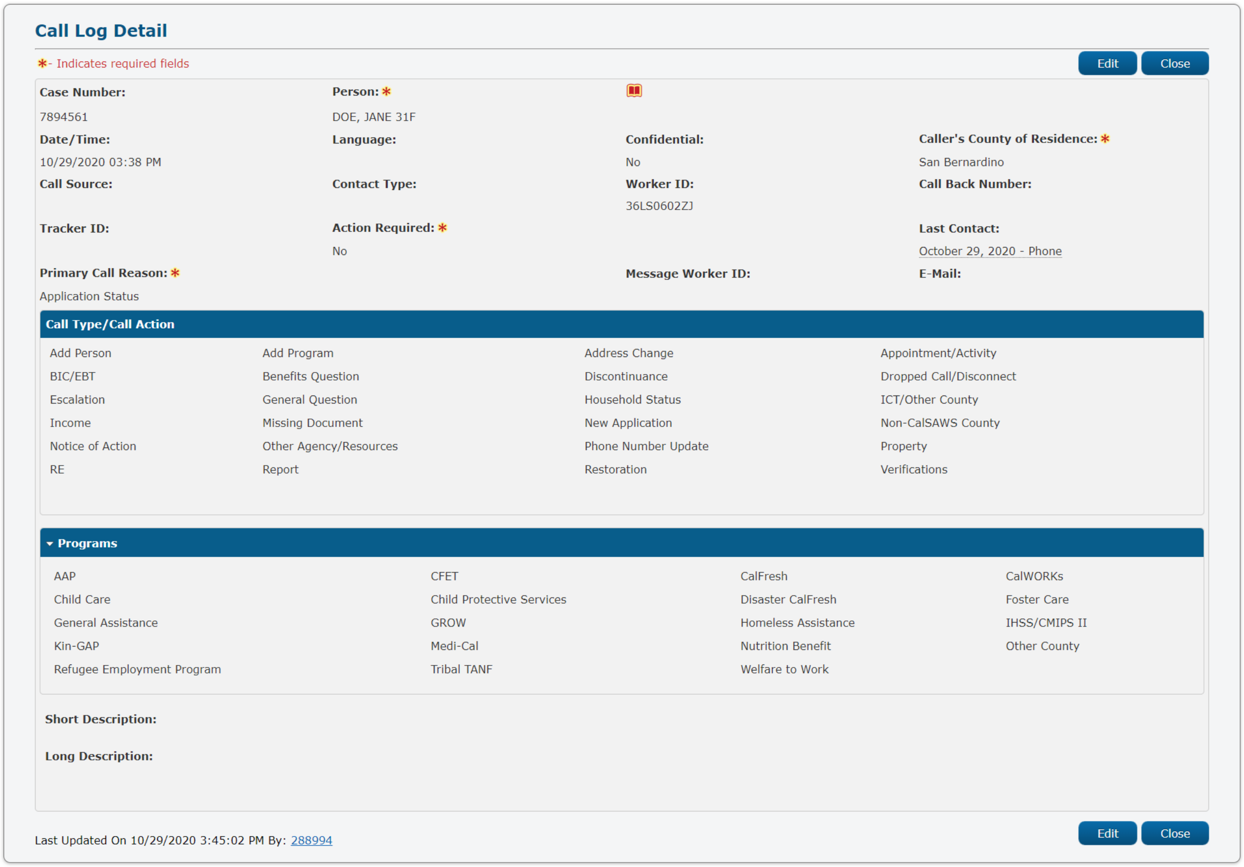

Figure 2.2.1d – Call Log Detail View Mode

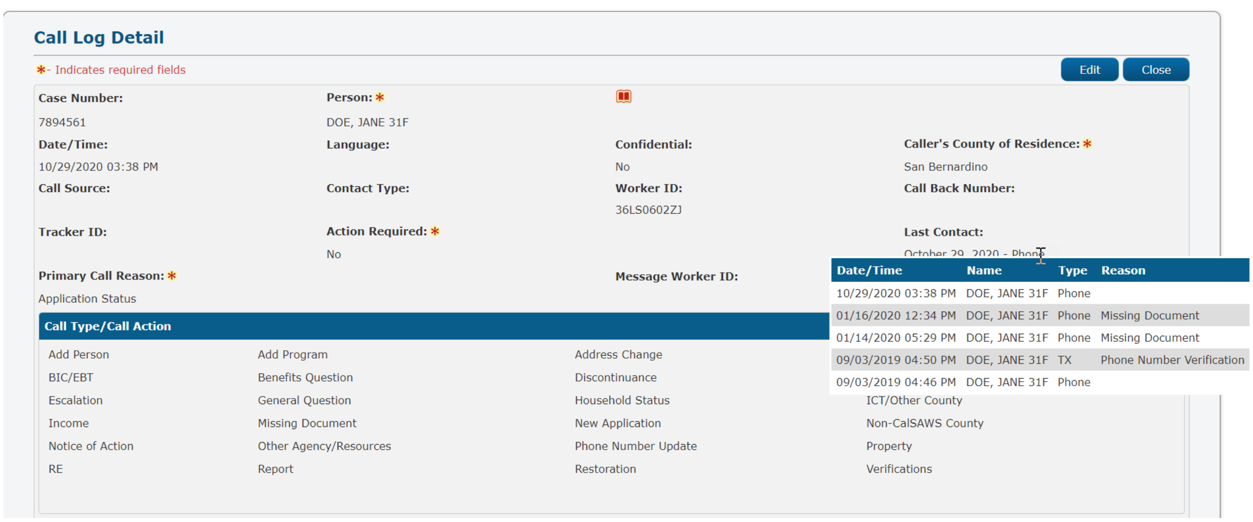

Figure 2.2.2 – Last 5 contact information for hovering over the Last Contact field

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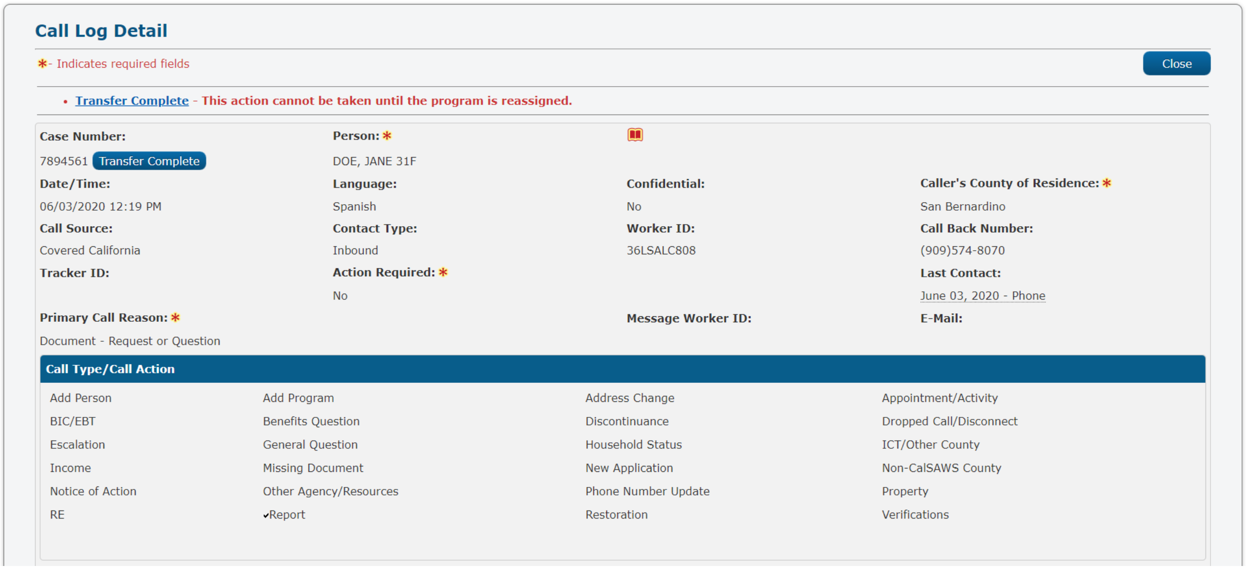

Figure 2.2.3 – Transfer Complete option for Call Log Detail "View" mode.

2.2.3 Description of Changes

1. The Call Log Detail page will look (Figure 2.2.1) and function the same way as the current C-IV system Call Log Detail page.
   a. Case Number should be auto populating in the Case Number field as it will carry over from the Call Log List page when the worker clicks on the "Add" button.
      1. If there is no Case Number that is inputted in the Case Number field from the Call Log List page, the Case Number field in the Call Log Detail page will remain empty.
   b. 'Person' field will be required, and the value selected will be display in the following format:
      i. If no case number is inputted, the 'Person' field will be an editable text field with a select button next to the editable text field.
         1. Clicking on the 'Select' button will take the user to the 'Select Person' page.
            a. The 'Person' field will be a drop down if the Person selected from the 'Select Person' page is associated to a case that exist in the County that is selected on the 'Caller's County of Residence field.
               i. The Case Number will display on the 'Case Number' field.
               ii. 'Person' field will be a drop down with the list of all the Person(s)

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associated to Case and will follow the format of LAST NAME, FIRST NAME AGE Gender (example: DOE, JOHN 34M).

b. The 'Person' field will remain an editable text field if the Person selected from the 'Select Person' page is not associated to a case or if it is associated to a case but the case does not exist in the County that is selected on the 'Caller's County of Residence field.

   i. The Person selected will display on the 'Person' field as First Name and Last Name (It will not follow the LAST NAME, FIRST NAME AGE Gender format).

Note: If a worker enters a value manually, the 'Person' field will display the value as what was entered when the Call Log record is saved.

Note: This apply for when Call Log is in Create or Edit mode.

ii. If a valid case number is inputted on the 'Case Number' field, the 'Person' field will display with a list of names associated to the case in a drop down format.

1. 'Person' field will display the person name in the following format: LAST NAME, FIRST NAME AGE Gender (example: DOE, JOHN 34M)
2. When worker change the value on the 'Caller's County of Residence' field and the case number entered on the 'Case Number' field exist for the County that the 'Caller's County of Residence' field is change to, the 'Person' field will continue to be a drop down field and will display a list of all the person that is associated to the new Case Number.
   a. 'Person' field will display the person name in the following format: LAST NAME, FIRST NAME AGE Gender (example: DOE, JOHN 34M).

Note: Last Name and First can be all capitalized, all lower case or a combination of both capitalize and lower case letters. This is dependent on how the Person's name was originally inputted into the system.

3. The 'Person' field will change to an editable text field when the worker change the value on the 'Caller's County of Residence' field and the case number entered on the 'Case Number' field does

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not exist for the County that the 'Caller's County of Residence' field is changed to.

a. Previous value on the 'Person' field will not display.
b. Value entered on the 'Case Number' field will remain.

Note: This apply for when Call Log is in Create or Edit mode.

c. Caller's County of Residence field will now be a required field.
    i. For RCC users this field will be an editable drop down field.
        1. Drop Down field will display the list of all 58 counties.
            a. It will default to the County that the user is accessing or selected.
    ii. For non RCC users this field will not be an editable field and it will default to the county that the user is residing in.
d. A new field titled "Contact Type:" will be added to the Call Log Detail page.
    i. This will be located between the "Call Source" field and the "Worker ID" field.
    ii. The "Contact Type" field will have the following drop down values and will default to blank:
        1. Inbound
        2. Outbound
        3. Webchat
    iii. A new "Last Contact:" field will be added to the Call Log Detail page. This will display the Last Contact information for the Case (this will be based on the information that is inputted on the "Case" field).
        1. This field will display the last contact information in the following format: Month Name, Date, YYYY – Type (Example: July 10, 2019 – Phone)
            a. Type will be based on the Type of Call or Visit (Reception Log) that was received.
        2. Hovering over the "Last Contact" field will display the last 5 contacts information for the case as shown on figure 2.2.2
            a. The most recent contact history will be listed at the top of the page.
            b. It will display the following information:
                i. Date/Time
                    1. This will display the Date and Time the participant was contacted.
                ii. Name
                    1. This will display the Name of the Person contacted.

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a. If the contact record has a manually entered person name value, the name displayed will match as what was entered.
b. If the contact record has a name from within the CalSAWS system, the name display will be in the format of Last Name First Name Age Gender.

iii. Type
1. This will display how the person was contacted.

iv. Reason
1. This will display the reason why the Person was contacted.

iv. A required "Primary Call Reason:" will be added to the Call Log Detail Page
1. The "Primary Call Reason:" field will have the following drop down values and will default to "-Select-":
a. Application Status
b. Appointment Future – Cancel
c. Appointment Future – Confirm
d. Appointment Future – New
e. Appointment Future – Question
f. Appointment Future – Reschedule
g. Appointment Past – Question
h. Appointment Past – Reschedule
i. BIC Replacement
j. Benefits (NOA) – Denial or Discontinuance
k. Benefits (NOA) – Other
l. Benefits (NOA) – Reduction
m. Change of Address
n. Change of Employment
o. Change of Household
p. Change of Income
q. Document – Request or Question
r. Document Status
s. EBT Card Replacement
t. New Card Replacement
u. New Application
v. None of the Above
2. Only 1 value can be selected

v. Add a new editable field titled "Other Reason"

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1. This will be a required field
2. This field will be dynamic and only display if the value chosen in the "Primary Call Reason" field is "None of the Above" or "Benefits (NOA) – Other"
3. This field will have a maximum amount of 150 characters

vi. A new-field titled "Message Worker ID:" will be added to the Call Log Detail page.

1. This field will have a "Select" button.
    a. Clicking on the "Select" button will take the worker to the Select Worker page.
    b. Once a Worker ID is selected, the 'Remove' button will replace the 'Select' button.
        i. Clicking the 'Remove' button will remove the Worker ID value on the Message Worker ID field.
        ii. The 'Select' button will display again after the Worker ID value is removed.
2. This field will trigger a notification to display in the message center. Worker information that is inputted in this field will be receiving a message.
3. If this field is left blank, a Message Center notification will only be sent to the Worker assigned to the case (this apply if the Call Log record is associated to a valid case).

vii. A new editable field titled "E-mail" will be added to the Call Log Detail page

1. Worker will need to enter the E-mail address using the traditional format of a period or @. If the incorrect format was used, a validation message will display stating the E-mail (E-mail address) is not valid for this field.
2. The E-mail information that is inputted into this field will receive the e-mail notification.

Note: In order for the send a Message Center notification to a worker that is not assigned to the case, the worker's information needs to be selected into the "Message Worker ID" field as this will be the field that will trigger the notification to display in Message Center.

e. The "Call Type" block will be updated to be non-mandatory and it will be renamed from "Call Type" to "Call Type/Call Action"

i. The following values will display on the "Call Type/Call Action" block:

1. Add Person
2. Add Program
3. Address Change

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4. Appointment/Activity
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
5. BIC/EBT
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
6. Benefits Question
7. Discontinuance
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
8. Dropped Call/Disconnect
9. Escalation
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
10. General Question
11. Household Status
12. ICT/Other County
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
    b. "Other County" value that was part of the LRS/CalSAWS code will now be displayed as "ICT/Other County".
13. Income
14. Missing Document
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
15. New Application
16. Non-CalSAWS County
    a. Update the value 'Non-C-IV county' to 'Non-CalSAWS County'.
17. Notice of Action
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
18. Other Agency/Resources
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
19. Phone Number Update
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code

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20. Property
21. RE
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
22. Report
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
23. Restoration
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
24. Verifications

f. The following values will display on the "Programs" block:
    i. AAP
        1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log Detail page
    ii. CFET
        1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log Detail page
    iii. CalFresh
    iv. CalWORKs
    v. Child Care
    vi. Child Protective Services
    vii. Disaster CalFresh
    viii. Foster Care
    ix. General Assistance
    x. GROW
    xi. Homeless Assistance
    xii. IHSS/CMIPS II
        1. This a originally IHSS and will be relabel to IHSS/CMIPS II
    xiii. Kin-GAP
        1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log Detail page
    xiv. Medi-Cal
    xv. Nutrition Benefit
    xvi. Other County
        1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log Detail page
    xvii. Refugee Employment Program
    xviii. Tribal TANF
    xix. Welfare to Work

g. Add a "Transfer Complete" button to the Call Log Detail page in view mode only as shown on Figure 2.2.3.
    i. The "Transfer Complete" button will appear when the following conditions are met:

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1. Call Source on the Call Log record is Covered California.
2. The Call Log record being viewed is in 'View' mode.
3. The Action Complete Status is set to 'No'
4. The Call Log record was not created on the same day as when the Call Log Detail page is being viewed.
5. The Call Log record has a Case Number or the Action Required field is set to Yes.

ii. Workers will need to be assign to the 'Call Log Edit' Security Group in order for the 'Transfer Complete' button to display for them.

iii. Clicking "Transfer Complete" button will clear the call log record from the Subscriber County Review List page.

iv. The "Transfer Complete" button will not display after the worker clicks the button or reassigns the programs from the Subscriber County Review List page.

v. Add a custom validation that will display if the worker clicks the "Transfer Complete" button before reassigning the program from the Generic Worker (reassignment will need to be done from the Subscriber County Review List page).

1. Validation message should be: "<u>Transfer Complete</u> – This action cannot be taken until the program is reassigned.

h. Hide the "Add Task" icon from the Call Log Detail page.

i. Note: The "Add Task" icon will be enabled under a future SCR when "Task functionality is addressed overall for the LRS/CalSAWS system.

i. Enable the "Journal" icon so that the Journal window will open when the user clicks the "Journal" icon from the Call Log Detail page.

i. Journal Window will only open from the Call Log Detail page when it's in 'View' or 'Edit' mode. (Journal window will not open when it's in 'Create' mode since a journal entry will be created upon saving the Call Log entry). Please see Section 2.5 for Automated Journal functionality for Call Log.

j. The Long Description field will be a text box and have a maximum character limit of 8000 characters.

k. When Call Log is in 'Edit' mode or 'View' mode at the bottom of the page it will display the information on when the Call Log record was Last Updated (as shown on Figure 2.2.1c and Figure 2.2.1d).

i.

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ii. It will display the following text: 'Last Updated On Date Time By: Worker Information (Last Updated On 11/16/2020 5:23:44 AM By: Staff ID)'
    1. Date will be in the following format MM/DD/YYYY and it will display the Date when the Call Log was last updated on.
    2. Time will be in the following format HH:MM:SS AM/PM and it will display the Time when the Call Log was last updated on.
    3. Staff ID will display the Staff ID of the worker that last updated the Call Log.
        a. Staff ID will be a hyperlink. Upon clicking the hyperlink, the worker will be redirected from the Call Log Detail page to the Worker Detail page on the same Pop Up Window (please see section 2.6 for further information).

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Call Log**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Page Mapping will be updated to accommodate the changes to the Call Log Detail page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Subscriber County Review List page

2.3.1 Overview

The Subscriber County Review List allows workers to view a list of call log records. Workers will also be able to reassign a program to a worker from this page as well. The Subscriber County Review List will be enabled in the LRS/CalSAWS system so that workers are able to use this page accordingly.

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2.3.2 Subscriber County Review List Mockup

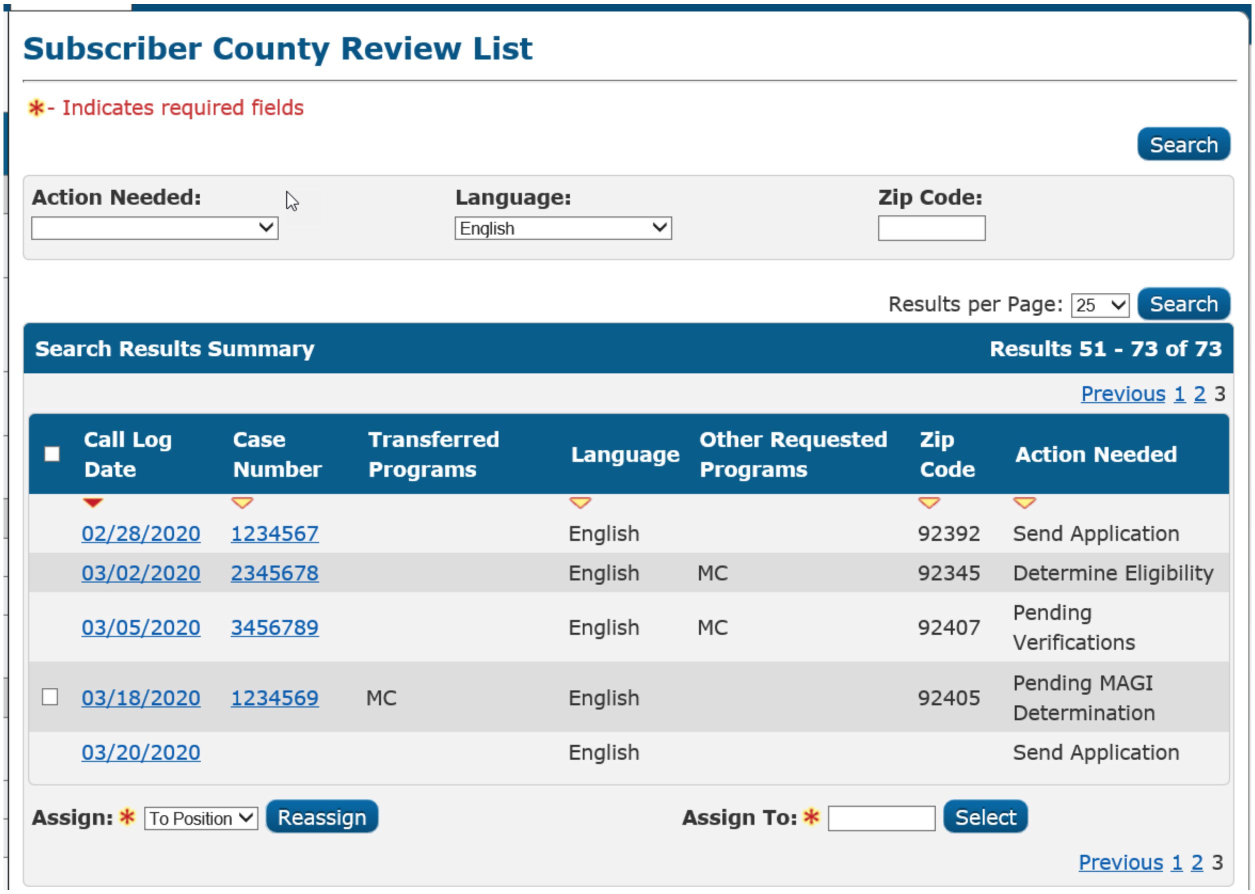

Figure 2.3.1 – Subscriber County Review List Mockup

2.3.3 Description of Change

1. The Subscriber County Review List page will be enabled in the LRS/CalSAWS system as show on Figure 2.3.1
    a. The Subscriber County Review List page will be available under the e-tools local navigation and will be listed under the" External Agencies" task navigation.
    b. The Subscriber County Review List page will not load the search results by default. Workers will need to click the Search button in order to view the call log records.
        i. The Subscriber County Review List will provide a list of call log entries created by the Regional Call Center Agents in Host Counties. These call log records that are listed require additional processing by the Subscriber County.
            1. Information will be displayed the day after the call log entries were created.

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2. These will display for call log records with a Call Source of Covered California and one of the following:
    a. The "Action Needed" field is set to "Yes" on the Call Log Record.
    b. The "Program" field is set to "Medi-Cal" and it's been assigned to a Generic Worker

Note: To search for call log records associated to a case with a program assigned to the Generic worker that did not have an "Action Needed", select "Not Required" from the "Action Needed" drop-down box; this will display with call log records not associated with a case and an Action Required of No.

c. The Subscriber County Review List page will have 3 different fields that the worker can use to filter their search by. These field will be titled as below:
    i. Action Needed
        1. This will be a field that will have the following drop down values and it will default to blank.
            a. Appointment
            b. Determine Eligibility
            c. Incomplete Data Collection
            d. Pending MAGI Determination
            e. MEDS Discrepancy
            f. Pending Verifications
            g. Reported Changes
            h. Send Application
            i. Not Required
    ii. Language
        1. This will be a drop down field that will have the same drop down values as the Language field in the Call Log Detail page. This field will default to blank.
    iii. Zip Code
d. The Search Result field will have the following columns:
    i. Check box
        1. This Check box will display if the case number is associated to the call log record. This check box will be used to reassign program(s) from the Generic Worker. This check box will allow the worker to assign it from the Generic Worker to a different worker. (Please see section 'e' on reassignment process).
    ii. Call Log Date (The date the RCC Agent received the initial call)
        1. This will display in the following format: MM/DD/YYYY

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2. This will be a hyperlink and clicking the hyperlink will take the worker to the Call Log Detail page in View mode.

iii. Case Number (The Case number associated to the call log record)

1. This will display the Case Number that was associated to the Call Log
   a. If no Case Number is associated to the Call Log, this column will be blank
2. This will be a hyperlink and clicking the hyperlink will take the worker to the Case Summary page.

iv. Transferred Programs (The Program code if the RCC Agent created/pended the program and assigned it to the Generic Worker)

1. This field will display the programs that are currently assigned to a generic Worker

v. Language (The Customer's language)

1. This field will display the language that is associated to the call log record.

vi. Other Requested Programs (Other programs the Customer requested).

1. This field will display the additional programs that may be associated to a call log record.

vii. Zip Code (The zip code of the case associated to the call log record)

1. This field will display the Zip Code of the person that is associated to a Call Log record.

viii. Action Needed (The Action Needed Selected on the call log record)

1. This field will display the action that is needed to be taken.

e. At the bottom of the page there will be two required fields that will allow the worker to reassign the program(s) from the Generic Worker for the call log record that is associated to a case (please reference section d.1 for explanation on the check box that will allow you to choose the call log record). These two fields will be titled:

i. Assign:

1. This field will have the following values:
   a. To Position
      i. It will default to this value
      ii. Workers will need to determine the position by entering the "Assign To" field with a Worker ID.
   b. To Me
2. There will be a button next to the drop down field labeled "Reassign".

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a. Clicking the “Reassign” button will reassign the Program (currently assign to a generic worker) to the worker that’s been set in the “Assign” field.
    i. Choosing “To Position” will reassign the program to the Worker ID in the “Assign To” field.
    ii. Choosing “To Me” will reassign the program to the worker that is currently logged in to the system.

ii. Assign To:
    1. This will be an editable field that will allow the worker to input a “Worker ID” directly.
    2. There will be a button next to the editable field labeled “Select”.
        a. Clicking the “Select” button will take the worker to the “Select Worker” page that will allow the worker to search for the worker they would like to reassign the Program that is currently assign to a generic worker to.

Note: This field will only display if there is a Call Log record that is eligible to be reassigned.

f. The Call Log record can be cleared out from the Subscriber County Review List by the following options:
    i. Clicking the “Call Log Date” hyperlink which will take the user to the Call Log Detail page. There, the worker will need to click on the “Transfer Complete” button. Clicking on the button will then clear the call log record from the Subscriber County Review List. (Please see section 2.2 section
    ii. The worker reassigns the program from the Generic Worker position to another Generic Worker by clicking the Reassignment button (see Section ‘e’ for more information on how to reassign the call log entry).

2.3.4 Page Location

- **Global: Case Info**
- **Local: e-tools**
- **Task: Subscriber County Review List**

2.3.5 Security Updates

N/A

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2.3.6 Page Mapping

Page Mapping will be updated to accommodate for the newly enabled page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Message Center

2.4.1 Overview

Message Center will be updated to allow the worker to receive notifications from the Call Log.

2.4.2 Message Center Mockup

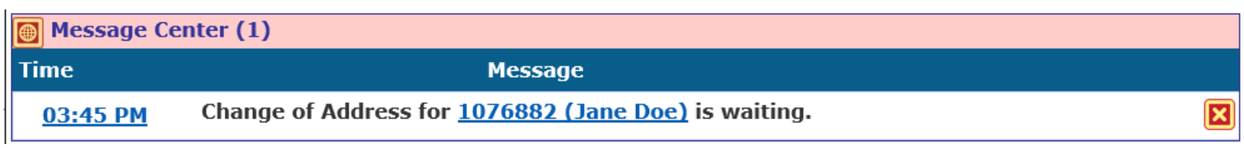

Figure 2.4.1 – Message Center Mockup

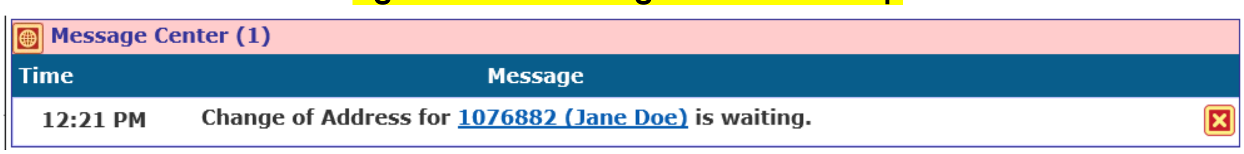

Figure 2.4.2 – Message Center Mockup

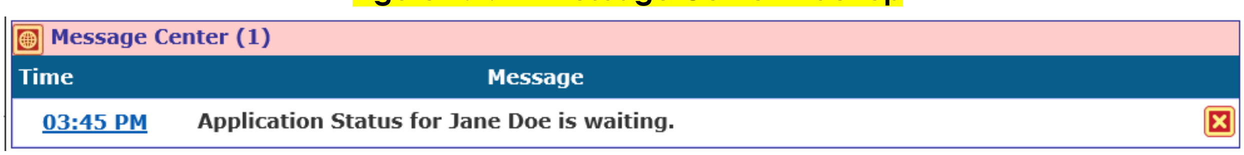

Figure 2.4.3a – Message Center Mockup

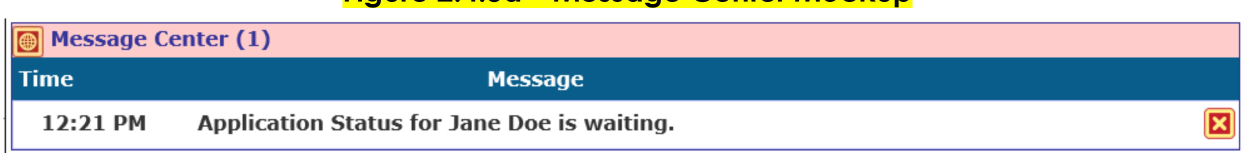

Figure 2.4.3b – Message Center Mockup

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2.4.3 Description of Change

1. Update Message Center so the worker can receive notifications from the Call Log as shown on Figure 2.4.1 and Figure 2.4.2.
    a. Message Center will display the information for Call Log notification:
        i. Time
            1. This will be the time associated on the Call Log
            2. For users that have security rights to the Call Log, the "Time" will be a hyperlink
                a. Clicking on the hyperlink will take the worker to the Call Log Detail page in "View" mode.
            3. For users that do not have the security rights to access the Call Log, the "Time" will still be displayed but it will not be a hyperlink (this is to ensure that users without security rights to the Call Log will not be able to access the Call Log Detail page from message center) as shown on Figure 2.4.2.
        ii. Primary Call Reason
            1. Primary Call Reason that is associated to the Call Log entry.
            2. This will be followed by "for".
        iii. Case Number with the associated Case Name
            1. This will be followed by "is waiting."
            2. Case Number (Case Name) will be a hyperlink.
                a. Case Number will be for the Case Number information that's associated to the Call Log entry.
                b. Case Name will be for the Case Name that's based on the Case Number that's associated to the Call Log entry
                c. Clicking on the Case Number (Case Name) hyperlink will take the worker to the Case Summary page.
        iv. "X" icon will be displayed on the right hand side.
            1. This will be a no response icon. Clicking on this icon will clear the Call Log notification from Message Center.
            2. Display a Tool tip when hovering over the "X" icon that will display the following "No Response button".
    b. Message Center will display the following information for Call Log that is not associated to a Case or the Case Number is not valid for that specific County as shown on Figure 2.4.3a and Figure 2.4.3b.
        i. Time

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1. This will be the time associated on the Call Log
2. For users that have security rights to the Call Log, the "Time" will be a hyperlink
    a. Clicking on the hyperlink will take the worker to the Call Log Detail page in "View" mode.
3. For users that do not have the security rights to access the Call Log, the "Time" will still be displayed but it will not be a hyperlink (this is to ensure that users without security rights to the Call Log will not be able to access the Call Log Detail page from message center) as shown on Figure 2.4.3b.

ii. Primary Call Reason
1. Primary Call Reason that is associated to the Call Log entry.
2. This will be followed by "for".

iii. Person Name
1. This will be the Value that was inputted on the 'Person' field on the associated Call Log Record.
2. This will be followed by 'is waiting.'

iv. "X" icon will be displayed on the right hand side.
1. This will be a no response icon. Clicking on this icon will clear the Call Log notification from Message Center.
2. Display a Tool tip when hovering over the "X" icon that will display the following "No Response button".

2.4.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: N/A**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

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2.5 Call Log - Journal

2.5.1 Overview

Update Automatic Journal, so that a journal entry will automatically be created when a user saves a Call Log Detail page that is associated to a case.

2.5.2 Call Log Automated Journal Mockup

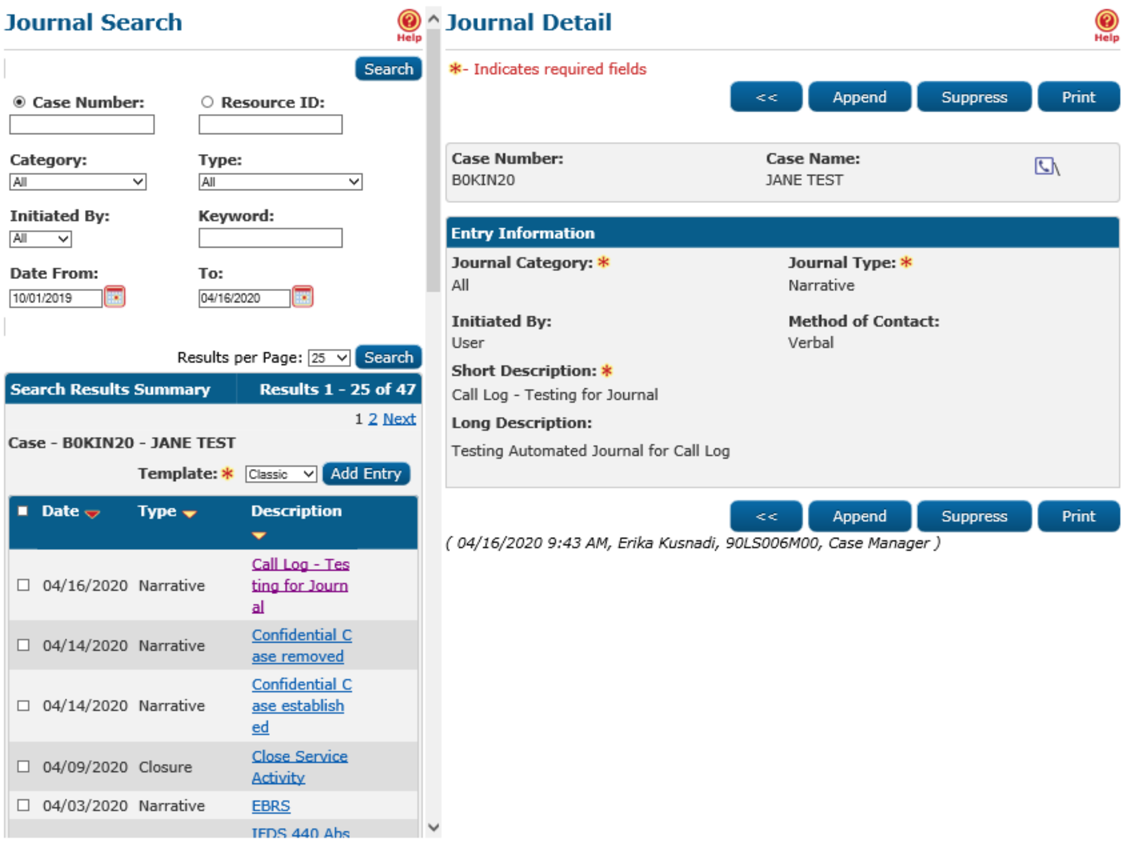

Figure 2.5.1 – Journal

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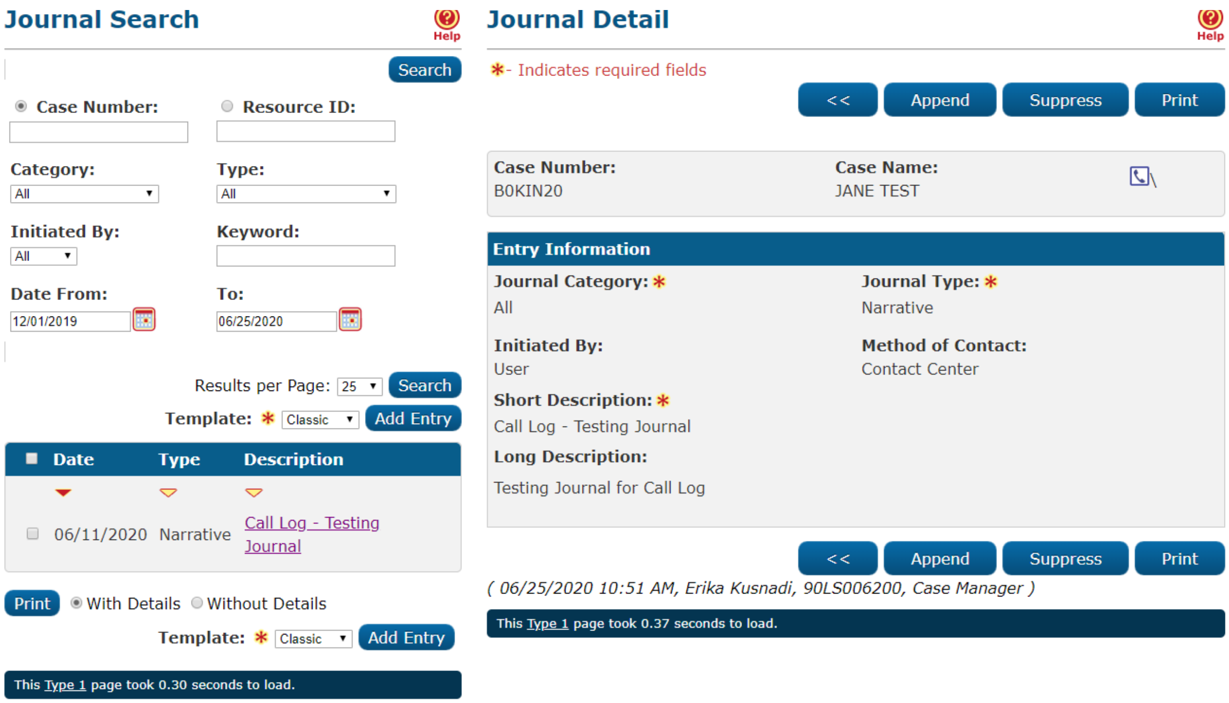

Figure 2.5.2 – Journal opened via Call Log Detail page

2.5.3 Description of Change

1. Update Journal so that Call Log entry is being captured when a user saves a Call Log Detail page that is associated to a case (if no case is associated, it will not create a journal entry).
    a. If the Journal window was opened via the Toolbar, the Call Log entry will display as shown on Figure 2.5.1

       Note: It will display like any other journal entries.
    b. If the Journal window was opened via the "Journal" icon from the Call Log Detail page (Edit or View mode) it will display as shown on Figure 2.5.2
        i. Journal will open and automatically will display only the journal entry for the associated Call Log record associated to the Call Log Detail page from which the "Journal" icon was clicked from.
    c. The journal entry for Call Log uses the Classic template and the information populates from the Call Log Detail page. The following information displays on the auto-created journal entry:
        i. Case Number – This will be the Case number that is associated to the Call Log entry
        ii. Case Name – This will be the Case Name that is associated to the Call Log entry
        iii. Journal Category – All
        iv. Journal Type – Narrative

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v. Initiated By – User
vi. Method of Contact – This will be based on the Call Source drop-down selection associated to the Call Log entry.
    1. If 'Covered California' is the Call Source, it will display as 'Contact Center' in the Method of Contact field in the Journal.
    2. If 'Call Center' is the Call Source, it will display as 'Contact Center' in the Method of Contact field in the Journal.
    3. If 'Office' is the Call Source, it will display as 'Verbal' in the Method of Contact field in the Journal.
vii. Short Description – It will display as such:
    1. Call Log – (text that was inputted on the Short Description text box on the associated Call Log entry from the Call Log Detail page.)

    Note: If there's no text that was entered on the Short Description text box when the Call Log entry was originally created, the Short Description field in Journal will display 'Call Log'

viii. Long Description – It will display the text that was inputted on the Long Description text box on the associated Call Log entry from the Call Log Detail page.

    Note: If there's no text that was entered on the Long Description text box when the Call Log entry was originally created, the Long Description field in the Journal will not display anything (this will be blank).

d. The 'Phone' icon will display on the Journal Detail page only for the journal entry that was created from the Call Log Detail Page.
    i. Clicking on the 'Phone' icon will open the associated Call Log Detail page for that Call Log entry (in view mode) in a separate window.
e. For automated journal entries for Call Log (journal entries that were created from the Call Log Detail page and it's associated to a case) will only be created upon creation of the Call Log record. Any changes that were made to the Call Log record will not create a new journal entry or modify the original journal entry.

2.5.4 Page Location

- **Toolbar: Journal**

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2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Worker Detail

2.6.1 Overview

Update the Worker Detail page to neither display the top nor the left navigation when opened in the Pop Up window.

2.6.2 Worker Detail Mockup

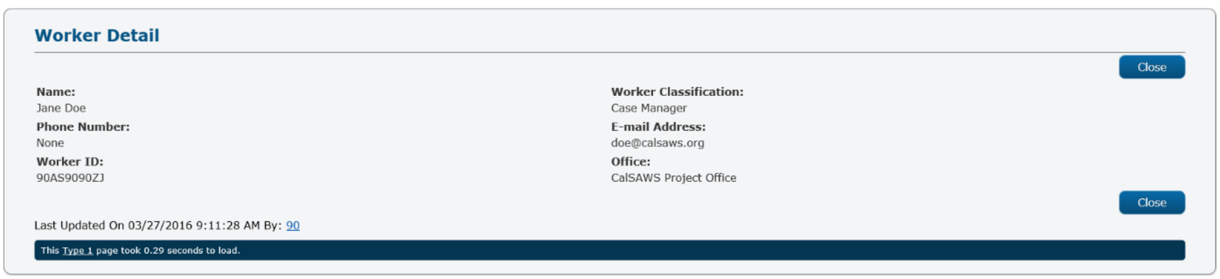

Figure 2.6.1 – Worker Detail Mockup

2.6.3 Description of Change

1. The Worker Detail page will open as shown on Figure 2.6.1 on the Pop Up Window when a worker clicks on the Staff ID hyperlink from the Call Log Detail page (Please see Section 2.2 for more details).
    a. The top and left navigation will no longer display.
    b. Upon clicking the 'Close' button, the worker will be redirected back to the Call Log Detail page that was being viewed on the Pop Up window and to open in the same mode that it was in prior to clicking the Staff ID hyperlink.

2.6.4 Page Location

- **Global: N/A**

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- **Local: N/A**
- **Task: N/A**

Worker Detail page is accessible by clicking the Staff ID hyperlink from the Call Log Detail page.

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Automated Regression Testing

2.7.1 Overview

Update or duplicate the existing Call Log script(s) [ex. "CF - Customer Contact"] to be executable against the CalSAWS application. Expand the scope of the existing or new script to verify the details of the Journal Entry that is automatically created when saving a new Call Log record.

2.7.2 Description of Changes

Either update the existing automated script(s) associated to the Call Log functionality, or create a new automated script, to verify the following:

1. That a new Call Log record can be created from the Call Log List page for the primary applicant of an existing program, associated by Case Number and Person.
2. That a newly saved Call Log record displays on the Customer Contact History page, and that the Call Log Detail page for the record can be opened from this page.
3. That a Call Log record can be created from the Customer Contact History page.
4. That a Journal Entry is automatically created when a new Call Log record is saved, with the appropriate details.

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3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.1.3	LRS shall provide a method for capturing the purpose of the contact.	Call Log pages, Subscriber County Review List page and Journal were updated in order to provide the counties the ability to log and capture the purpose of the contact made by the participants to the county workers.
2.2.1.4	LRS shall provide a method to log and record individual contact and inquiries.	Call Log pages, Subscriber County Review List page and Journal were updated in order to provide the counties ability to log and capture the purpose of the contact made by the participants to the county workers.

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California Statewide Automated Welfare System

Design Document

CA-214895

DDID 1628

Task Management

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mayuri Srinivas
	Reviewed By	Justin Dobbs, Sarah Cox, Pandu Gupta, Carlos Albances

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/20/2020	1.0	Initial Revision	Mayuri Srinivas
12/7/2020	1.1	Content Revision #1 Corrected the Task Long Description information for Recommendation 2.1.3.21.	Justin Dobbs

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Table of Contents

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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.

CA-214893 migrated an initial population of C-IV System Automated Actions into the LRS/CalSAWS System.

1.2 Requests

Migrate a second 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

Migrate a second population of the C-IV System Automated Action settings for automated tasks into the 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 support 58 counties 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.

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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

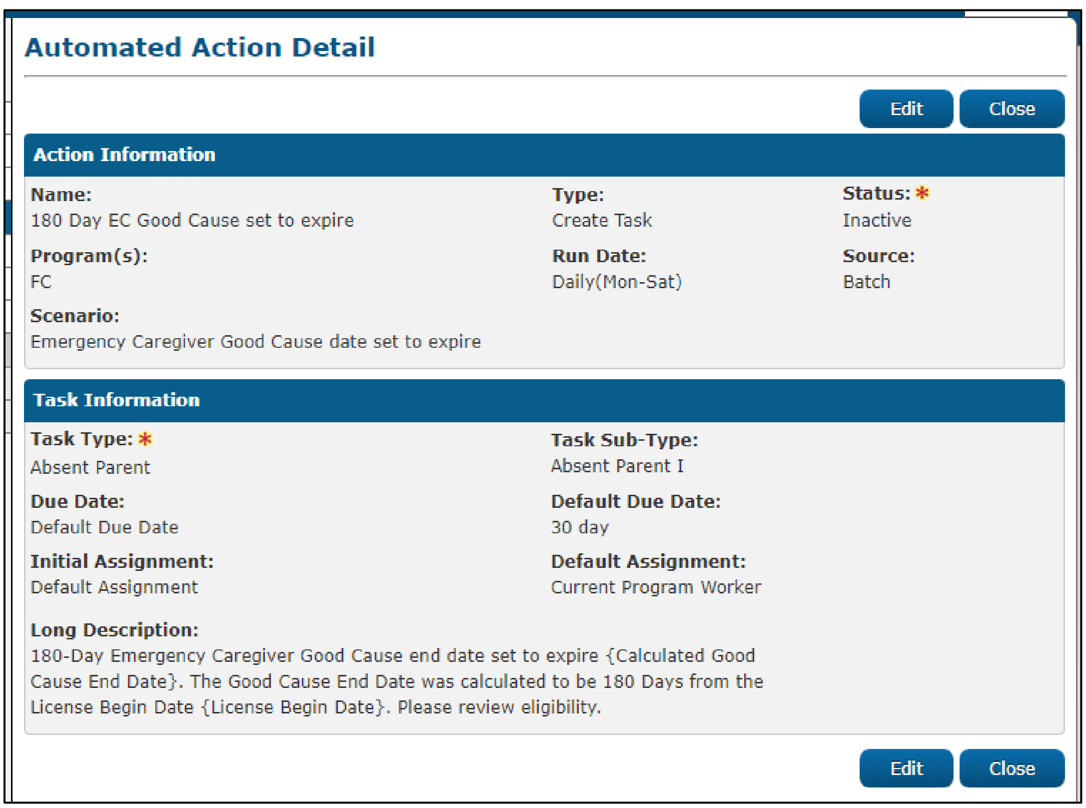

Figure 2.1.2.1 – Automated Action Detail

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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 CalWIN counties, the Automated Action 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. CalFresh Member: Received Indian Commodities

   This Automated Action is specific to Riverside county as it is dependent on a Riverside specific interface.

   a. Action Information
      i. Name: CalFresh Member: Received Indian Commodities
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CF
      v. Run Date: Daily(Monday-Friday)
      vi. Source: Batch
      vii. Scenario: An active CalFresh member has received Indian commodities. Re-evaluate the applicant's eligibility for CalFresh.

   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's Name} received Indian Commodities and is currently active/pending in CalFresh. SSN:

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{Person's Social Security Number} Please take appropriate action.

Note: SCR CA-216568 for Phase 5 of DDID 1787 will migrate the appropriate batch processes to LRS/CalSAWS that handle the interface file and the triggering of the Automated Action with the same release as this (CA-214895) enhancement.

2. CalFresh Member: Age 60 Review Eligibility
   a. Action Information
      i. Name: CalFresh Member: Age 60 Review Eligibility
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CF
      v. Run Date: 1st day of each month(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: An active CalFresh member is turning 60. Review the member's eligibility for CalFresh.

   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: Review the CalFresh eligibility determination for the household.

   c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A110 to run on the 1st day of each month (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A110 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

3. Child Care: Age 10 Years 10 Months Review Eligibility
   a. Action Information
      i. Name: Child Care: Age 10 Years 10 Months Review Eligibility
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CC
      v. Run Date: 1st day of each month(Mon-Sat)
      vi. Source: Batch

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vii. Scenario: A Child Care member is turning 10 years and 10 months next month. Review for continued eligibility and notifications.

b. Task Information
   i. Task Type: BLANK
   ii. Task Sub-Type: BLANK
   iii. Due Date: Default Due Date
   iv. Default Due Date: 60 days before a child on a Child Care Program turns 11 years old
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: {Child_Name} ({Birthdate}) turns 10 years 10 months old on {next_month}. Review to determine continued eligibility. Send all required notifications.

c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A119 to run on the 1st day of each month (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A119 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

4. Child Care: Age 13 Review Eligibility
   a. Action Information
      i. Name: Child Care: Age 13 Review Eligibility
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CC
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A Child Care participant is turning 13 in the next 30 days. Review program for continued eligibility.

   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: The child, {Name}, will turn 13 years of age on {Birth Date}. Review the child care program for continued eligibility.

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c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A123 to run daily (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A123 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

5. Child Care: Age 2 or 6 Rate Change
   a. Action Information
      i. Name: Child Care: Age 2 or 6 Rate Change
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CC
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A Child Care participant is turning 2 or 6 in the next 55 days. Review for rate change.

   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: The child, {Name}, will turn {Age} years of age on {Birth Date}. Review rate type and date of age change for timely notification of rate change.

   c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A120 to run daily (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A120 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

6. Child Care: Certificate Rate Change
   a. Action Information
      i. Name: Child Care: Certificate Rate Change
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CC
      v. Run Date: Daily(Mon-Sat)

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        vi. Source: Batch
        vii. Scenario: The certificate associated to a Child Care participant has a rate change. Review for rate change.

    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: The {Rate Type} rate associated with Child Care Certificate {Certificate Number}, for child {Name}, has changed.

    c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A121 to run daily (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A121 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

7. Child Care: Service Terminated or Closed
    a. Action Information
        i. Name: Child Care: Service Terminated or Closed
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): CC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: The service that is associated with this Child Care Certificate has been either Terminated or Closed. Review the associated service.

    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: The service associated with Child Care Certificate {Certificate Number}, for child {Name}, has been {Status}.

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c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A122 to run daily (Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A122 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

8. Child Care: Stage 2 Time Limit Expiring
   a. Action Information
      i. Name: Child Care: Stage 2 Time Limit Expiring Months
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): CC
      v. Run Date: 1st day of each month(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: A Child Care member in this case is in their 22nd month, and will reach the Stage 2 time limit in 2 months.

   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: The Stage 2 Time Limit for this case will expire in two months.

   c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A109 to run on the 1st day of each month(Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A109 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

9. Foster Care Child: Permanency Plan Order Expiring
   a. Action Information
      i. Name: Foster Care Child: Permanency Plan Order Expiring
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): FC
      v. Run Date: 1st day of each month(Mon-Sat)
      vi. Source: Batch

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vii. Scenario: A Foster Care child has a permanency plan court order that will expire in the next month. A new court order must be verified.

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: Verify a court finding was made on behalf of {child_name} and run EDBC to continue federal eligibility.

c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A116 to run on the last day of next month after batch date and evaluate information for all 58 counties. Batch job PB00A116 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

10. Former Foster Care: Age 26
    a. Action Information
        i. Name: Foster Care Child: Former Foster Care: Age 26
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): MC
        v. Run Date: First business day of every month
        vi. Source: Batch
        vii. Scenario: A Former Foster Care recipient will turn 26 in the next 4 months. Review eligibility for other Insurance Affordability Programs.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: First of the month in which child turns 26 OR if the person still has the aid code in the next month the task due date will be first of next month after Batch Date
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker

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vii. Long Description: {Person_Name} will turn 26 on {birth_date}. Please determine eligibility for any other Insurance Affordability Program.

c. Implement a new batch job in LRS/CalSAWS to trigger the Automated Action for Medi-Cal Active Members with a 4M aid code who are turning 26 years of age within the next 4 months. **Technical:** Batch process (PB00A136) in the C-IV System can be referenced for the specific logic and conditions to be ported that trigger the Automated Action. Note that the C-IV System reference logic triggers the Automated Action with a scenario code of 'C1'. The scenario code for this Automated Action in LRS/CalSAWS will be F4, so the reference logic will require an adjustment to accommodate this scenario code change.

11. Child Care: Activity Updated Review Eligibility
    a. Action Information
        i. Name: Child Care: Activity Updated Review Eligibility
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): CC, WT
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A Former Foster Care recipient will turn 26 in the next 4 months. Review eligibility for other Insurance Affordability Programs.

    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: Activity of {Activity Name}, for {Name}, was {Status}. Please review for continued child care need.

    c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A124 to run daily(Mon-Sat) and evaluate information for all 58 counties. Batch job PB00A124 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

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12. Generated Document Failed: Review
    a. Action Information
        i. Name: Generated Document Failed: Review
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): WT, FT, CW, MC, CF
        v. Run Date: Daily(Monday-Saturday)
        vi. Source: Batch
        vii. Scenario: A NOA or form was not produced as part of the Generated Document Batch process. Review the case for missing Primary Applicant (PA), Primary Applicant Mailing Address, and/or Worker Assignment.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 30 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Form/NOA generation failed for either no Primary Applicant (PA), No PA Mailing Address or no Worker Assignment.

    c. Update the LRS/CalSAWS Dynamic NOA/forms generation processes to trigger the Automated Action when a NOA/form fails to be generated.

13. Generated Document Failed: Review
    a. Action Information
        i. Name: Generated Document Failed: Review
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): WT, CW, MC, CF
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A new worker letter was not produced during workload reassignment. Review the case for missing Primary Applicant (PA), Primary Applicant Mailing Address, and/or Worker Assignment.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 days

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v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Form/NOA generation failed for either no Primary Applicant (PA), no PA Mailing Address or no Worker Assignment.

c. Update LRS/CalSAWS to trigger the Automated Action when the Reassign button is used on the Workload Reassignment Detail page and the new worker letter form fails to be generated.

14. MC 355 Due
  a. Action Information
    i. Name: MC 355 Due
    ii. Type: Create Task
    iii. Status: Inactive
    iv. Program(s): MC
    v. Run Date: Daily(Mon-Sat)
    vi. Source: Batch
    vii. Scenario: MC 355 Due Automated Task

  b. Task Information
    i. Task Type: BLANK
    ii. Task Sub-Type: BLANK
    iii. Due Date: Default Due Date
    iv. Default Due Date: 5 calendar days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: MC 355 pending verifications are overdue. Review the MC 355 Detail page and take appropriate action.

  c. Update LRS/CalSAWS to trigger the Automated Action with batch process (PB00E105) for all LRS/CalSAWS counties. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

15. DCSS Report: Custodial Parent Claims Good Cause
  a. Action Information
    i. Name: DCSS Report: Custodial Parent Claims Good Cause
    ii. Type: Create Task
    iii. Status: Inactive
    iv. Program(s): AR, CW, FC, KG, MC
    v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
    vi. Source: Batch

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    vii. Scenario: DCSS has reported the custodial parent is not cooperating with child support because they have claimed Good Cause. Review the custodial parent's eligibility for Good Cause.

  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: {Custodial Parent Name} Claimed Good Cause at IVD. Review eligibility for Good Cause

  c. Update LRS/CalSAWS to trigger the Automated Action with batch process (PIXXF1601). This batch process currently runs in LRS/CalSAWS and it will run for each additional county except Riverside and San Bernardino. These two counties will trigger the Automated Action with batch process (PIXXF1600), which is current process in the C-IV System as well.

16. Expected Delivery Date Reached: Follow Up
  a. Action Information
    i. Name: Expected Delivery Date Reached: Follow Up
    ii. Type: Create Task
    iii. Status: Inactive
    iv. Program(s): WT, FT, HP, CW, FC, CC, CL, KG, MC, CS, CF, AS, HT, LS
    v. Run Date: Runs the last business day of every month.
    vi. Source: Batch
    vii. Scenario: A pregnancy with an expected delivery date in this past month has been reached. Follow up with the member to confirm pregnancy status.

  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: Expected delivery date for pregnancy of {Person Name} has occurred on {Expected Delivery Date}. Follow up on pregnancy status.

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c. Update LRS/CalSAWS to trigger the Automated Action by scheduling batch job PB00A300 to run on the last business day of every month and evaluate information for all 58 counties. Batch job PB00A300 is currently available in the LRS/CalSAWS System but it is not currently scheduled to run. If the trigger conditions differ between the LRS/CalSAWS and C-IV Systems, migrate the C-IV System trigger conditions from the same batch process.

17. CalHEERS: Customer Information Updated
    a. Action Information
        i. Name: CalHEERS: Customer Information Updated
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): MC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A customer has updated their information in CalHEERS

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Customer information has been updated in CalHEERS and is available to be reviewed. Please navigate to the Inter-Agency Transfer Summary page to find the Information Update.

    c. Update LRS/CalSAWS to trigger the Automated Action from batch process PB00CH210 by migrating the trigger conditions from the same batch process in the C-IV System.

18. WTW Recipient: Employment Added
    a. Action Information
        i. Name: WTW Recipient: Employment Added
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): WT
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: "Either of the following actions has occurred on the Welfare to Work (WTW) program:

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- an employment record was created for the current Primary Applicant

- the WTW program is currently in a status other than Pending or Deregistered

- the worker adding the employment is not the worker currently assigned to the program"

b. Task Information
   i. Task Type: BLANK
   ii. Task Sub-Type: BLANK
   iii. Due Date: Default Due Date
   iv. Default Due Date: 7 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: Employment for {Person Name} entered by {workerId}.

c. Update LRS/CalSAWS to trigger the automated action from the Employment Detail page by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

19. WTW Recipient: Dropped from Class
   a. Action Information
      i. Name: WTW Recipient: Dropped from Class
      ii. Type: Create Task
      iii. Status: Inactive
      iv. Program(s): WT
      v. Run Date: Real Time
      vi. Source: Online
      vii. Scenario: A Welfare to Work (WTW) recipient has been dropped from a class by the organization. Review impacts to WTW program.

   b. Task Information
      i. Task Type: BLANK
      ii. Task Sub-Type: BLANK
      iii. Due Date: Default Due Date
      iv. Default Due Date: Immediately
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: {Organization ID} has dropped {Person Name} from {Service Type Decode} at {Organization Name} on {Drop Date}.

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c. Update LRS/CalSAWS to trigger the automated action from the Class Performance Detail page when a resource dropped a recipient from a class by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

20. Issuance Returned: Review
    a. Action Information
        i. Name: Issuance Returned: Review
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): WT, AA, HP, FT, FC, CW, IN, CC, CL, KG, MC, HT, CF, CP, GA, GM, AR
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: An issuance has been returned on this case and needs further review.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 30 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Issuance ID: {issuanceId} for Case: {caseNumber} and Case Name: {caseName} has been Returned with a Status Reason of "{statusReason}". Please update this case and notify fiscal to take the appropriate action regarding this returned warrant.

    c. Update LRS/CalSAWS to trigger the automated action when an Issuance receives a 'Returned' status through the Issuance Detail page.

21. Change in Benefits: Review WEX
    a. Action Information
        i. Name: Change in Benefits: Review WEX
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): WT, AA, AR, FT, HP, CW, FC, IN, CC, CL, DV, KG, MC, CS, CF, HT, CP, RC, GA
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A change in benefits has occurred. Review the Work Experience (WEX) and/or community hours.

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b. Task Information
    i. Task Type: BLANK
    ii. Task Sub-Type: BLANK
    iii. Due Date: Default Due Date
    iv. Default Due Date: 30 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: Review WEX/Community Service hours due to change in benefits for {caseNumber}.

c. Update LRS/CalSAWS to trigger the automated action when EDBC results in a change in benefits by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

22. Foster Care Child: Placement Change
    a. Action Information
        i. Name: Foster Care Child: Placement Change
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): FC
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A Foster Care child has had a placement change. Review the new placement and run EDBC as needed.

    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: A Placement has changed for the Foster Care child on your case. Please review the Placement information and run EDBC.

    c. Update LRS/CalSAWS to trigger the automated action when a child placement changes by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

23. Child Care Service: Closed With Active Certificate
    a. Action Information
        i. Name: Child Care Service: Closed With Active Certificate
        ii. Type: Create Task
        iii. Status: Inactive

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iv. Program(s): CC
v. Run Date: Real Time
vi. Source: Online
vii. Scenario: A Child Care service has been closed with an active certificate associated. Review certificates.

b. Task Information
   i. Task Type: BLANK
   ii. Task Sub-Type: BLANK
   iii. Due Date: Default Due Date
   iv. Default Due Date: Immediately
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: The service associated with Child Care Certificate {id}, for child {ChildName}, has been closed.

c. Update LRS/CalSAWS to trigger the automated action from the Service Detail page when a Child Care service is closed with an active certificate associated by porting the logic that triggers this automated action in the C-IV System into LRS/CalSAWS.

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 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	- Approximately 22 C-IV automated actions directly overlap with LRS automated tasks. - Support for mapping CalWIN automated tasks to C-IV	This design will migrate a second population of 23 C-IV System automated tasks into the LRS/CalSAWS System as the second phase of DDID 1628.

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	the CalSAWS Software as default settings for the 39 C-IV Migration Counties.	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'	

5 MIGRATION IMPACTS

N/A

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6 OUTREACH

N/A

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7 APPENDIX

N/A

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214897

DDID 1629

Task Management

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Justin Dobbs
	Reviewed By	Sarah Cox, Pandu Gupta, Carlos Albances, Michael Wu, Naveen Bhumandla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/28/2020	1.0	Initial Revision	Justin Dobbs
12/7/2020	1.1	Content Revision #1 • Corrected the Name for Automated Action #19. • Added Technical paragraph to Description of Changes	Justin Dobbs

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Table of Contents

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1 OVERVIEW

This design outlines modifications to a population of existing LRS/CalSAWS automated tasks to function per the Automated Action framework introduced with CA-214928 (DDID 34 – Unified Task Management).

1.1 Current Design

The LRS/CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 includes recommendations to introduce Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties.

1.2 Requests

Update a population of automated LRS/CalSAWS tasks to function within the Automated Action framework.

1.3 Overview of Recommendations

Update a sub population of automated LRS/CalSAWS tasks to function within the Automated Action framework.

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, they are Los Angeles specific, or DDID 1787 has already accounted for the migration of C-IV System specific batch processes into the LRS/CalSAWS System.

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2 RECOMMENDATIONS

This section will outline recommendations to adjust a population of LRS/CalSAWS automated tasks to function within the Automated Action framework.

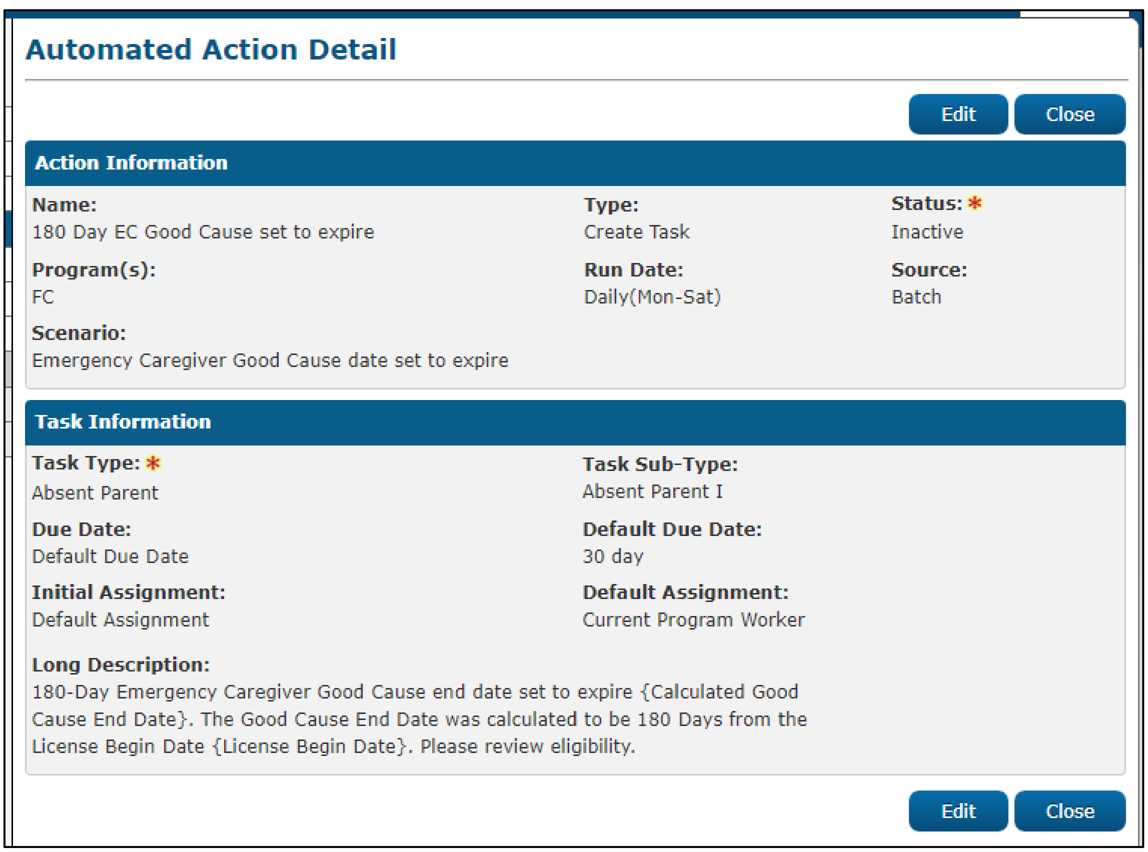
2.1 Update LRS/CalSAWS Automated Tasks Per Automated Action Framework

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 LRS/CalSAWS automated tasks in the Automated Action framework.

2.1.2 Automated Action Detail – Reference Example



Automated Action Detail

Edit Close

Action Information

Name: 180 Day EC Good Cause set to expire
Type: Create Task
Status: * Inactive
Program(s): FC
Run Date: Daily(Mon-Sat)
Source: Batch
Scenario: Emergency Caregiver Good Cause date set to expire

Task Information

Task Type: * Absent Parent
Task Sub-Type: Absent Parent I
Due Date: Default Due Date
Default Due Date: 30 day
Initial Assignment: Default Assignment
Default Assignment: Current Program Worker
Long Description: 180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.

Edit Close

Figure 2.1.1 – Automated Action Detail

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2.1.3 Description of Changes

Update the following LRS/CalSAWS automated tasks to define the required Automated Action attributes in order to function with the Automated Action Framework. (Please reference the Automated Action Detail page in Figure 2.1.1 for display of the attributes.)

Technical: The below Automated Actions will be available and Active for LA county as the automated Tasks currently exist within the LRS/CalSAWS System. For the C-IV and 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 a C-IV 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. The subset of Automated Actions defined below that currently exist in the C-IV System will have a status of Inactive and a blank Task-Type and Sub-Type. The conversion processes that will bring the C-IV counties to the CalSAWS System will bring over the county specific configurations for these Automated Actions that exist in the C-IV System at the time of cutover.

Attribute values such as "Program(s)" and "Run Date" are based on the existing logic of the automated Task in the LRS/CalSAWS System. The current processing was evaluated to determine which programs the Task is applicable to, how the due date is calculated and when the automated Task creation runs.

1. WTW/REP Recipient: 11 Month Vocational Training Exhausted

    a. Action Information
        i. Name: WTW/REP Recipient: 11 Month Vocational Training Exhausted
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): WT, RE
        v. Run Date: 1st day of each month(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A WTW/REP recipient has reached 11 months in a Vocational Training activity.

    b. Task Information
        i. Task Type: 11 months after Vocational Training Activity Start Date
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 30 days

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v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: 11 months after Vocational Training Activity Start Date

c. Update the batch process (PB19A225) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

2. REP Recipient: 55 Months Since Date of Entry

   This Automated Action will only be configured for Los Angeles county as it is specific to the Refugee Employment Program (REP).

   a. Action Information
      i. Name: REP Recipient: 55 Months Since Date of Entry
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): RE
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: 55 months have passed since a REP recipient's date of entry. Take appropriate action.

   b. Task Information
      i. Task Type: 55 months from DOE
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 7 days
      v. Initial Assignment: Default Assignment
      vi. Default Assignment: Current Program Worker
      vii. Long Description: Participant reaches 55 months from Date of Entry on {Date}

3. REP Recipient: 60 Months Since Date of Entry

   This Automated Action will only be configured for Los Angeles county as it is specific to the Refugee Employment Program (REP).

   a. Action Information
      i. Name: REP Recipient: 60 Months Since Date of Entry
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): RE

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v. Run Date: Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: 60 months have passed since a REP recipient's date of entry. Take appropriate action.

b. Task Information
   i. Task Type: 60 months from DOE
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 7 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: Participant reaches 60 months from Date of Entry on {Date}

4. Child Support: Absent Parent Living with Applicant

   a. Action Information
      i. Name: Child Support: Absent Parent Living with Applicant
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): AR, CW, FC, KG, MC
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch
      vii. Scenario: An absent parent, in a child support case, is now living with the applicant. Update case information accordingly.

   b. Task Information
      i. Task Type: Absent Parent in household
      ii. Task Sub-Type: N/A
      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: {Absent Parent Name} is living with applicant as of {Date}.

5. Child Support: Parent Not Living with Applicant

   a. Action Information
      i. Name: Child Support: Parent Not Living with Applicant
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): AR, CW, FC, KG, MC
      v. Run Date: Daily(Mon-Sat)
      vi. Source: Batch

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vii. Scenario: A parent, in a child support case, is no longer living with the applicant. Update case information accordingly.

b. Task Information
   i. Task Type: Absent Parent not living with applicant
   ii. Task Sub-Type: N/A
   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: {Absent Parent Name} is not living with applicant as of {Date}

6. Child Care Recipient: Activity End Date Changed

a. Action Information
   i. Name: Child Care Recipient: Activity End Date Changed
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): CC
   v. Run Date: Real Time
   vi. Source: Online
   vii. Scenario: A Child Care recipient's activity end date has been changed.

b. Task Information
   i. Task Type: Activity End Date changed
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 7 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: Activity End Date changed

7. Medi-Cal Recipient: Carry Forward DER Received

a. Action Information
   i. Name: Medi-Cal Recipient: Carry Forward DER Received
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): MC
   v. Run Date: Monthly or Real Time
   vi. Source: Batch/Online
   vii. Scenario: A Determination of Eligibility Response (DER) has been received from CalHEERS with a carry forward status of yes for an Active Medi-Cal program. The DER is not the result of a

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worker initiated Eligibility Determination Request (EDR). Take appropriate action.

b. Task Information
    i. Task Type: APTC Carry Forward
    ii. Task Sub-Type: N/A
    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: MAGI response received with APTC Carry Forward. Review results to determine if new MAGI request should be sent for future month to Lift Carry Forward.

8. Medi-Cal Recipient: Soft Pause DER Received

a. Action Information
    i. Name: Medi-Cal Recipient: Soft Pause DER Received
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): MC
    v. Run Date: Monthly or Real Time
    vi. Source: Batch/Online
    vii. Scenario: A soft pause Determination of Eligibility Response (DER) has been received from CalHEERS for an Active Medi-Cal program. The DER is not the result of a worker initiated Eligibility Determination Request (EDR). Take appropriate action.

b. Task Information
    i. Task Type: MAGI Soft Pause
    ii. Task Sub-Type: N/A
    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: MAGI response received with Soft Pause. Review results to determine if new MAGI request should be sent for future month to Lift Soft Pause. For persons: {SP_PERSONS_FOUND}.

9. Cal-Learn Recipient: Age 19

a. Action Information
    i. Name: Cal-Learn Recipient: Age 19
    ii. Type: Create Task
    iii. Status: Active

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iv. Program(s): CL
v. Run Date: Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: A Cal-Learn recipient is turning 19 years of age in 45 days.

b. Task Information
   i. Task Type: Cal-Learn - turning 19 years old
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 30 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: A Cal-Learn recipient is turning 19 years old.

c. Update the batch process (PB19A238) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

10. Child Care Recipient: CalWORKs Benefit Amount Changed

a. Action Information
   i. Name: Child Care Recipient: CalWORKs Benefit Amount Changed
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): CC, CW
   v. Run Date: Monthly
   vi. Source: Batch
   vii. Scenario: CalWORKs benefits have changed for an Active Child Care recipient.

b. Task Information
   i. Task Type: CalWORKs benefit amount has changed
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 7 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: CalWORKs benefit amount has changed.

c. Update the batch process (PB19A233) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the

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batch process is Los Angeles specific indicated by the ‘19’ in the batch process name. The ‘19’ will be updated to be ‘00’ to reflect processing for all counties.

11. Language: Spoken and/or Written Language Changed

    a. Action Information
        i. Name: Language: Spoken and/or Written Language Changed
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): All Programs
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A recipient's primary spoken and/or written language has changed. Please review and reassign as needed.

    b. Task Information
        i. Task Type: Change in Primary Language Designation
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 5 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: The participant's primary spoken and/or written language has changed. Please review and transfer the case to a bi-lingual worker, if appropriate.

12. Child Care Recipient: Household Status Changed

    a. Action Information
        i. Name: Child Care Recipient: Household Status Changed
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): CC
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A Child Care recipient's Household Status has been updated. Please review.

    b. Task Information
        i. Task Type: Child Living in the Home Status changed
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker

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vii. Long Description: Child Living in the Home Status changed.

13. WTW Recipient: Compliance Plan Expired

    a. Action Information
        i. Name: WTW Recipient: Compliance Plan Expired
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): WT
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A Welfare to Work recipient's Compliance Plan has expired. Take appropriate action.

    b. Task Information
        i. Task Type: Compliance Plan Expired
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Compliance Plan Expired. Enter completion Result.

    c. Update the batch process (PB19A223) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

14. Primary Applicant: Deceased

    This Automated Action will only be configured for Los Angeles county as it is based on information from the Los Angeles County Registrar Recorder/County Clerk Office. CA-216162 includes the Automated Action specifics when MEDS communicates a deceased person, which will apply to all counties.

    a. Action Information
        i. Name: Primary Applicant: Deceased
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): CF, CP, CW, GA, MC, NB, RC
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch

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vii. Scenario: The Los Angeles County Registrar Recorder/County Clerk Office has indicated that an Active Primary Applicant is deceased. Take appropriate action.

b. Task Information
   i. Task Type: Head of Household/Case Payee Deceased
   ii. Task Sub-Type: N/A
   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: {Deceased Individual Name} died on {deceasedDate}.Please take appropriate action to change the case payee.

15. Cal-Learn Participant: Earned High School Diploma

a. Action Information
   i. Name: Cal-Learn Participant: Earned High School Diploma
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): CL
   v. Run Date: Real Time
   vi. Source: Online
   vii. Scenario: A Cal-Learn program participant has been Discontinued due to earning a high school diploma or equivalent.

b. Task Information
   i. Task Type: Participant Earned HS Diploma or Equivalent
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 7 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: Participant Earned high school diploma or equivalent.

16. General Assistance Participant: Jail Match

This Automated Action will only be configured for Los Angeles county as it is specific to the Los Angeles county jail match interface.

a. Action Information
   i. Name: General Assistance Participant: Jail Match
   ii. Type: Create Task

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iii. Status: Active
iv. Program(s): GA
v. Run Date: Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: An Active General Assistance program participant has received a jail match. Take appropriate action.

b. Task Information
i. Task Type: Received Jail Match Record
ii. Task Sub-Type: N/A
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: Received Jail Match record for {first, Last Name} please review.

17. CalWORKs Program: New Child Added

a. Action Information
i. Name: CalWORKs Program: New Child Added
ii. Type: Create Task
iii. Status: Active
iv. Program(s): CW
v. Run Date: Real Time
vi. Source: Online
vii. Scenario: A new child has been added to a CalWORKs program.

b. Task Information
i. Task Type: New child added to CalWORKs Program
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 7 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: New child added to CalWORKs Program.

c. Update the Los Angeles county Task Type to be "New child added to CalWORKs Program" instead of "New child added to CalWorks Program". CalWORKs was misspelled.

18. Customer Activity: Added

a. Action Information

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i. Name: Customer Activity: Added
ii. Type: Create Task
iii. Status: Active
iv. Program(s): WT, FT, CW, CL, CC
v. Run Date: Real Time
vi. Source: Online
vii. Scenario: A new activity has been added for a participant.

b. Task Information
i. Task Type: New Activity added
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 7 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: New Activity added.

19. Learning Disability: Evaluation Completed
a. Action Information
i. Name: Learning Disability: Evaluation Completed
ii. Type: Create Task
iii. Status: Active
iv. Program(s): CL, RE, WT
v. Run Date: Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: A participant has been screened for a learning disability. Take appropriate action.

b. Task Information
i. Task Type: Learning disability Evaluation Completed
ii. Task Sub-Type: N/A
iii. Due Date: Default Due Date
iv. Default Due Date: 7 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: Learning disability evaluation Completed. Add Services 005 activity.

c. Update the batch process (PB19A222) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

20. Welfare to Work: Good Cause Expiring

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a. Action Information
    i. Name: Welfare to Work: Good Cause Expiring
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): WT
    v. Run Date: Daily(Mon-Sat)
    vi. Source: Batch
    vii. Scenario: Welfare to Work Good Cause is expected to end in 10 days. Take appropriate action.

b. Task Information
    i. Task Type: Good Cause Expiring
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 7 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: Participant's Good Cause is expiring in 10 days.

c. Update the batch process (PB19A221) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

21. Work Registration: Status Changed

a. Action Information
    i. Name: Work Registration: Status Changed
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): CW, RC, GA, CP, CF, MC
    v. Run Date: Real Time
    vi. Source: Online
    vii. Scenario: A Work Registration exemption status changed from Exempted to Mandatory or from Mandatory to Exempted. Take appropriate action.

b. Task Information
    i. Task Type: Exemption Change
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 15 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker

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vii. Long Description: The participant exemption status changed from Exempted to Mandatory or from Mandatory to Exempted. Take appropriate action.

22. Living Arrangement: Homeless Ended

a. Action Information
    i. Name: Living Arrangement: Homeless Ended
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): All Programs
    v. Run Date: Real Time
    vi. Source: Online
    vii. Scenario: An eligibility worker ended the homeless living arrangement for the case. Take appropriate action.

b. Task Information
    i. Task Type: Participant No Longer Homeless
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 7 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: The eligibility worker ended the homeless situation for this case.

23. Recovery Account: Created

a. Action Information
    i. Name: Recovery Account: Created
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): All Programs
    v. Run Date: Daily(Mon-Sat)
    vi. Source: Batch
    vii. Scenario: The system has created a Recovery Account. Take appropriate action.

b. Task Information
    i. Task Type: Overpayment created.
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 7 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker

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vii. Long Description: The system created an overpayment due to no receipts on records after 30 days.

c. Update the batch process (PB19A236) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the ‘19’ in the batch process name. The ‘19’ will be updated to be ‘00’ to reflect processing for all counties.

24. Program Participant: Name Changed

a. Action Information
   i. Name: Program Participant: Name Changed
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): All Programs
   v. Run Date: Real Time
   vi. Source: Online
   vii. Scenario: A person's name has been changed on the Individual Demographics Detail page and the Case includes a Child Care program.

b. Task Information
   i. Task Type: Participant name is changed
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 7 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: The participant's name has changed.

25. Welfare to Work Participant: CalWORKs Discontinued

a. Action Information
   i. Name: Welfare to Work Participant: CalWORKs Discontinued
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): CW, WT
   v. Run Date: Daily(Mon-Sat)
   vi. Source: Batch
   vii. Scenario: A participant with an Active Welfare to Work program is associated to a Discontinued CalWORKs program. Review and take appropriate action.

b. Task Information
   i. Task Type: Participant is no longer eligible
   ii. Task Sub-Type: N/A

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iii. Due Date: Default Due Date
iv. Default Due Date: 7 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: A Welfare to Work participant is no longer receiving CalWORKs assistance.

c. Update the batch process (PB19A202) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

26. REP Recipient: Flag Expiring

This Automated Action will only be configured for Los Angeles county as it is specific to the Refugee Employment Program (REP).

a. Action Information
   i. Name: REP Recipient: Flag Expiring
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): RE
   v. Run Date: Daily(Mon-Sat)
   vi. Source: Batch
   vii. Scenario: The refugee flag expires in less than 30 days. Take appropriate action.

b. Task Information
   i. Task Type: Refugee Flag Expires In Less Than 30 Days
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 30 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: The Refugee Flag Expires In Less Than 30 Days - Review the case.

27. DCSS Report: Paternity Proof for Absent Parent Established

a. Action Information
   i. Name: DCSS Report: Paternity Proof for Absent Parent Established
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): AR, CW, FC, KG, MC

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v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: DCSS has reported that paternity proof for the absent parent has been established. Update the details of the child support case accordingly.

b. Task Information
i. Task Type: Paternity Established for {Child Name}
ii. Task Sub-Type: N/A
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: {Absent Parent Name} has been proven to be the father of {Child Name} as of {Date}

28. DCSS Report: Custodial Parent Has Not Cooperated

a. Action Information
i. Name: DCSS Report: Custodial Parent Has Not Cooperated
ii. Type: Create Task
iii. Status: Active
iv. Program(s): AR, CW, FC, KG, MC
v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: DCSS has reported that a custodial parent associated to a child support case has not cooperated. Update the case information to apply the applicable penalty, after proper noticing.

b. Task Information
i. Task Type: Paternity Established for {Child Name}
ii. Task Sub-Type: N/A
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: Apply penalty following Timely & Adequate Notice

29. Child Support: Excess Amount Paid to Custodial Parent

a. Action Information
i. Name: Child Support: Excess Amount Paid to Custodial Parent
ii. Type: Create Task
iii. Status: Active

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    iv. Program(s): AR, CW, FC, KG, MC
    v. Run Date: Daily(Mon-Fri)
    vi. Source: Batch
    vii. Scenario: Excess child support amount has been paid to the custodial parent.

b. Task Information
    i. Task Type: Excess Child Support
    ii. Task Sub-Type: N/A
    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: Excess Child Support of {Amount} paid to {Custodial Parent Name} on {Date}.

30. Child Support: Direct Amount Paid to Custodial Parent

a. Action Information
    i. Name: Child Support: Direct Amount Paid to Custodial Parent
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): AR, CW, FC, KG, MC
    v. Run Date: Daily(Mon-Fri)
    vi. Source: Batch
    vii. Scenario: Direct child support amount has been paid to the custodial parent.

b. Task Information
    i. Task Type: Direct Child Support
    ii. Task Sub-Type: N/A
    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: Direct Child Support of {Amount} paid to {Custodial Parent Name} on {Date}.

31. DCSS Report: Absent Parent Excluded as Father of Child

a. Action Information
    i. Name: DCSS Report: Absent Parent Excluded as Father of Child
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): AR, CW, FC, KG, MC

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v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
vi. Source: Batch
vii. Scenario: DCSS has reported that an absent parent has been excluded as the father of child. Update the details of the child support case accordingly.

b. Task Information
   i. Task Type: Paternity Excluded
   ii. Task Sub-Type: N/A
   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: {Absent Parent Name} has been excluded as the father of {Child Name} as of {Date}

32. DCSS Report: Update to OHC Provided by Absent Parent

a. Action Information
   i. Name: DCSS Report: Update to OHC Provided by Absent Parent
   ii. Type: Create Task
   iii. Status: Active
   iv. Program(s): WT, AR, CW, FC, KG, MC, CF
   v. Run Date: Daily(Mon-Fri)/Daily(Mon-Sat)
   vi. Source: Batch
   vii. Scenario: DCSS has reported updates to the Other Health Coverage (OHC) provided by the absent parent. Update the case with new health coverage information.

b. Task Information
   i. Task Type: Health Insurance provided by Absent Parent
   ii. Task Sub-Type: N/A
   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: Insurance Type: {Type} Health insurance provided by {Policy Holder Name} for {Member Name} through {Co Name} Policy Number: {Policy Num} Insurance Company Address Line 2: {Addr Line2} Insurance Company Address Line 1: {Addr Line1} City: {Co City} State: {Co State} Zip: {Co Zip}

33. IEVS Report: New Earnings Clearance Report
a. Action Information

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    i. Name: IEVS Report: New Earnings Clearance Report
    ii. Type: Create Task
    iii. Status: Active
    iv. Program(s): CW, CF, MC, RC, CP, FC, AR
    v. Run Date: Daily(Monday-Friday)
    vi. Source: Batch
    vii. Scenario: A new IEVS earnings clearance report has been assigned to a case, based on county configuration. Review the IEVS report.

b. Task Information
    i. Task Type: IFDS Income Match - Over $2500 discrepancy
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 45 days
    v. Assignment:

County	Initial Assignment	Default Assignment
Los Angeles	Office Distribution	NA - Field does not display
All other counties	Default Assignment	Current Program Worker

    vi. Long Description: New Earnings Clearance report assignment for case {case_number} (assign date: {date})

c. Update the Los Angeles county batch process (PB19C406) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC400 logic which will trigger the task for the remaining 57 counties.

d. **Technical:** Update the batch process (PBXXC400) for the 57 migration counties to trigger this Automated Action with a scenario code of ‘N4’ instead of ‘C7’.

34. IEVS Report: New PVS Match
    a. Action Information
        i. Name: IEVS Report: New PVS Match
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): CW, CF, MC, RC, CP, FC, AR
        v. Run Date: Daily(Monday-Friday)
        vi. Source: Batch

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vii. Scenario: A new IEVS PVS match report has been assigned to a case, based on county configuration. Review the IEVS report.

b. Task Information
   i. Task Type: Pending PVS Abstract
   ii. Task Sub-Type: N/A
   iii. Due Date: Default Due Date
   iv. Default Due Date: 20 days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: New PVS report assignment for case {case_number} (assign date: {date})

c. Update the Los Angeles county batch process (PB19C404) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC405 logic which will trigger the task for the remaining 57 counties. **Technical:** Also update the Los Angeles county batch process to trigger the Automated Action with a scenario code of 'C3' instead of 'C9'.

35. IEVS Report: New Prisoner Match
   a. Action Information
      i. Name: IEVS Report: New Prisoner Match
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CW, CF, MC, RC, CP, FC, AR
      v. Run Date: Daily(Monday-Friday)
      vi. Source: Batch
      vii. Scenario: A new IEVS prisoner match report has been assigned to a case, based on county configuration. Review the IEVS report.

   b. Task Information
      i. Task Type: Pending NPM abstract
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 20 days
      v. Assignment:

County	Initial Assignment	Default Assignment
Los Angeles	Office Distribution	NA - Field does not display

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County	Initial Assignment	Default Assignment
All other counties	Default Assignment	Current Program Worker

vi. Long Description: New Prisoner Match report assignment for case {case_number} (assign date: {date})

c. Update the Los Angeles county batch process (PB19C201) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC404 logic which will trigger the task for the remaining 57 counties.

d. **Technical**: Update the batch process (PBXXC404) for the 57 migration counties to trigger this Automated Action with a scenario code of ‘N1’ instead of ‘C4’.

36. IEVS Report: New Hire Report
   a. Action Information
      i. Name: IEVS Report: New Hire Report
      ii. Type: Create Task
      iii. Status: Active
      iv. Program(s): CW, CF, MC, RC, CP, FC, AR
      v. Run Date: Daily(Monday-Friday)
      vi. Source: Batch
      vii. Scenario: A new IEVS new hire report has been assigned to a case, based on county configuration. Review the IEVS report.

   b. Task Information
      i. Task Type: Pending NHR Abstract
      ii. Task Sub-Type: N/A
      iii. Due Date: Default Due Date
      iv. Default Due Date: 20 days
      v. Assignment:

County	Initial Assignment	Default Assignment
Los Angeles	Office Distribution	NA - Field does not display
All other counties	Default Assignment	Current Program Worker

      vi. Long Description: New New Hire report assignment for case {case_number} (assign date: {date})

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c. Update the Los Angeles county batch process (PB19C505) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC403 logic which will trigger the task for the remaining 57 counties.

d. **Technical**: Update the batch process (PBXXC403) for the 57 migration counties to trigger this Automated Action with a scenario code of 'N6' instead of 'C5'.

37. IEVS Report: New Fleeing Felon Report
    a. Action Information
        i. Name: IEVS Report: New Fleeing Felon Report
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): CW, CF, MC, RC, CP, FC, AR
        v. Run Date: Daily(Monday-Friday)
        vi. Source: Batch
        vii. Scenario: A new IEVS fleeing felon report has been assigned to a case, based on county configuration. Review the IEVS report.

    b. Task Information
        i. Task Type: Pending Fleeing Felon Abstract
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 20 days
        v. Assignment:

County	Initial Assignment	Default Assignment
Los Angeles	Office Distribution	NA - Field does not display
All other counties	Default Assignment	Current Program Worker

        vi. Long Description: New Fleeing Felon report assignment for case {case_number} (assign date: {date})

    c. Update the Los Angeles county batch process (PB19C200) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC402 logic which will trigger the task for the remaining 57 counties.

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d. **Technical**: Update the batch process (PBXXC402) for the 57 migration counties to trigger this Automated Action with a scenario code of ‘N3’ instead of ‘C6’.

38. IEVS Report: New IEVS Applicant Abstract
    a. Action Information
        i. Name: IEVS Report: New IEVS Applicant Abstract
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): CW, CF, MC, RC, CP, FC, AR
        v. Run Date: Daily(Monday-Friday)
        vi. Source: Batch
        vii. Scenario: A new IEVS applicant abstract report has been assigned to a case, based on county configuration. Review the IEVS report.

    b. Task Information
        i. Task Type: Pending Applicant IEVS Abstract
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 20 days
        v. Initial Assignment: Office Distribution
        vi. Default Assignment: N/A – Field does not display
        vii. Long Description: IEVS Applicant information is available for {CASE_NUMBER}

    c. Update the batch process (PIXXC503) that triggers this Task to populate the case number into the Long Description of the task. **Technical Note:** This batch process will also trigger the Automated Action with a scenario code of ‘C8’.

39. GR/GROW: Hearing Reversed
    a. Action Information
        i. Name: GR/GROW: Hearing Reversed
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): GA, GW
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: A GR/GROW Hearing has been "Reversed", take action to rescind the program if necessary.

    b. Task Information
        i. Task Type: GR/GROW Hearing Results
        ii. Task Sub-Type: N/A

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iii. Due Date: Default Due Date
iv. Default Due Date: 2 days before the third Thursday of the month
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: GR/GROW Hearing has been "Reversed" need to rescind case

40. Welfare to Work Participant: Missed Appraisal Appointment
    a. Action Information
        i. Name: Welfare to Work Participant: Missed Appraisal Appointment
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): WT
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A Welfare to Work Exempt Volunteer missed an appraisal appointment. Take appropriate action.

    b. Task Information
        i. Task Type: Exempt Participant did not show for Appraisal
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Exempt Volunteer no show for appraisal appointment - Deregister the case.

    c. Update the batch process (PB19A226) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

41. Employment: Added or Updated by EW
    a. Action Information
        i. Name: Employment: Added or Updated by EW
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): WT
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: Employment information has been added or updated by an eligibility worker.

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b. Task Information
    i. Task Type: Employment Added/Updated by EW
    ii. Task Sub-Type: N/A
    iii. Due Date: Default Due Date
    iv. Default Due Date: 15 days
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Current Program Worker
    vii. Long Description: Participant reported Employment changes to Eligibility Worker.

42. Welfare to Work Participant: Sanction Curing Period Ending
    a. Action Information
        i. Name: Welfare to Work Participant: Sanction Curing Period Ending
        ii. Type: Create Task
        iii. Status: Active
        iv. Program(s): WT
        v. Run Date: Daily(Mon-Sat)
        vi. Source: Batch
        vii. Scenario: A Welfare to Work participant's sanction curing period end date is approaching. Take appropriate action.

    b. Task Information
        i. Task Type: Sanction Curing Period End Date Approaching
        ii. Task Sub-Type: N/A
        iii. Due Date: Default Due Date
        iv. Default Due Date: 7 days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: Curing period end date approaching and sanction is not ended.

    c. Update the batch process (PB19A220) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1629	The CONTRACTOR shall update the existing LRS automated tasks, as specified in the "Task Management LRS Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as update current task configurations for Los Angeles County into the CalSAWS Software as default settings for Los Angeles County.	- Existing thresholds for authorization based tasks will remain the same, and threshold amounts will not be configurable by county. - Support for mapping CalWIN automated tasks to LRS 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 'LRS Automated Tasks'	42 automated Tasks in LRS/CalSAWS are being converted into the Automated Action framework with this enhancement. This is the second phase of DDID 1629.

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5 MIGRATION IMPACTS

N/A

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6 OUTREACH

N/A

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7 APPENDIX

N/A

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