

CalSAWS | GAGR Committee Deliverable Review -CA-215920 DDID 2314d

GAGR Correspondence Service - Case Worker Functionality

Solution/Correspondence Service - Maintenance Functionality

Date: 03/03/2021	Location: Via Teams
Time: 1:30PM -4:30PM	Meeting Called by: Adelaide Mendoza MendozaAD@CalSAWS.org Caroline Bui BuiC@CalSAWS.org

Attendees: Adelaide Mendoza, Camie Callis, Girish Chakkingal, Marqui Simmons, Richard Weeks, Taylor Fitzhugh, Ritu Chinya, Stephanie Hugo, Cathay Lawrence, Joe Mendez, Ayman Hussein, Anbu Venkataraman, Camie Callis, Franz Lightle, Denise Barajas
Region 1-Babatunde Iroko, Kurt Dodson for Shari Garrity, Jerry Kulper, Shari Penrod-Mills
Region 2-Stacie McNally, Maria Lulyeva for Elizabeth Oakland, Ilda Torrez
Region 3- Amanda Bline
Region 4-Christa Jones, Michelle Hernandez, Dino Licon
Region 5- Kristen Timmins, Belinda Sagun, Roann Brewer, Sonia Garcia, Leopoldo Huerta
Region 6- Nicholas Lopez, Vinh Tran and Yvonne Portillo

Meeting Notes: Region 5 is responsible

Topic	Lead
<p>Roll Call/Updates/comments</p> <ul style="list-style-type: none"> Special meeting today as Client Correspondence (CC) Committee was also invited to attend meeting MSUDRP Pre-Screening questions <ul style="list-style-type: none"> CRFI 21-008-received replies from almost all the counties except 3, will be moving forward with this CRFI 21-008 CRFI- C-IV opt in/out GAGR Overpayment Suspension batch <ul style="list-style-type: none"> This is for C-IV counties, Addie will be sending CRFI out for C-VI to opt in/out Recovery will be set in batch This change will be available go live in September Review Document and send questions/comments to RCMs Voting/comments via email <ul style="list-style-type: none"> Reminder on the voting: when a vote is requested please don't submit votes individually. Submit vote to your region RCMs. The RCM will submit vote by region. If your region only has one vote, then 1 vote shall be submitted. This also applies to comments. All comments/questions shall be submitted to your regions RCMs. The RCM will submit all comments/questions. RCMs ensure that SMEs receive region bylaws 	Caroline/Adelaide
<p>SCR/DDID Review</p> <ul style="list-style-type: none"> CA-215920 DDID 2314d GAGR Correspondence Service - Case Worker Functionality Solution 	Cathay Lawrence

Joe Mendez:

- High level assumptions:
 - “Lift and shift” existing CC administration pages and functionality
 - “Lift and shift” of existing “Case Worker” pages and functionality
 - Adjust look and feel of pages to align with CalSAWS
 - Implement the client correspondence template design application: Extream Software
 - Adjust correspondence to align with CalSAWS
- Available to CalWIN counties and C-IV counties that opt in to the CalWIN GAGR solution
- CC administration steps: design the CC template using Extream software, associate the data variables to the CC template using the CC administration
- Manual level: select the CC template and reason code, enter mandatory variables, and preview CC
- SCR implements the Case Worker page functionality for the new CalSAWS GAGR solution.
- Currently, CalWIN manages the GA program logic and generates the CC using case worker online pages within the CalWIN application. The GAGR solution within the CalSAWS system doesn’t include generating GAGR correspondence.
- New case worker pages will be developed in the GAGR correspondence service. This solution will provide users a platform to review, process, and generate CC for GAGR cases.
- Search NOA page is used to display the reason code/NOA text available for the selected NOA. The NOA Header text, Reason Description and NOA Text display for the selected Reason Code. This page is for a user that wants to generate a NOA manually, they will have to search for a NOA by action, search action will give results based on action search, if there’s multiple actions all will be listed.
- Currently if a NOA has multiple reasons, the user can select up to 10 reason codes. A NOA can include up to 10 reason codes.
- Generate NOA manually page used when generating the NOA manually. From this page, the user can select a current or future budget month and year, enter manual variable information, as well as freeform text. In addition, the user may select and enter manual variable info for an associated tandem correspondence and preview the NOA for any associated tandem correspondence before printing.
- Free form text will allow the user to enter manual comments up to 400 characters, have the option of previewing the notice and cancel the NOA.
- When you see a bracket that means variable data
- Enter NOA Variables page allows the user to view system populated NOA variables and manually enter variable data when needed prior to printing a NOA. NOA variables must be entered when the user is manually generating a NOA. NOA variables will include all the variables that are available.
- All NOAs are broken into sections, header variables (header text) lead in paragraphs-actions taken and here’s why

- Body Text variables-based on the reason code there is an associated body text that explains why the county is taking the action (whether manually generated or systematic system generated)
- Manually generated variables are left blank
- Same for budget variables
- Lastly we have continuation variables-not sure if GAGA NOAs include continuation sheets but it's an option available for GAGR notices
- Radio buttons on the left are more for client correspondence date, the boxes on the right are sections that allow manual variables, gray out sections are system generated
- Enter free form text page allows the user to manually enter freeform text to add to a NOA prior to printing. It's an open box where the worker can enter their text, up to 400 characters, allows to copy and paste, free form text will print at the bottom of the NOA in italic print.
- Regulations will populate for each reason code selected.
- Generate a form/other CC manually page is used to manually generate forms and OCC. From this page, the user can enter manual variables for the selected forms and accompanying tandem correspondence, as well as free text for an OCC. The user can preview the form and tandem correspondence or OCC before printing.
- The correspondence will populate with the necessary information; secondary individual is currently available in CalWIN for example for KinGAP if the individual is CR and the 2nd individual can be the child, that functionality is part of CalWIN and that's why this is available.
- Enter Correspondence variables page is used to view a correspondence's system-populated variables and to enter any additional manual variable information. Manual variable data can be entered for linked tandem correspondence, as well. If the user selects one of the variables it will show you a description of what needs to be added to the NOA.
- View/Generate CC detail page is used to view selected CC details and enter any manual or missing variable information prior to printing. If a CC is systematically generated-the system will allow the user to select the CC correspondence and view the detail information of the CC. If it's a NOA it will let the user know that mandatory variables are needed and what action triggered the CC. Lastly preview and ultimately generate the document.
- All current functionality in CalWIN will be available in CalSAWS.
- **Question:** Are there any security rights to the NOA? Each county will have access to security rights.
- This process is only applicable to CalWIN counties. C-IV counties will continue with their current business process (manually generated). Once all CalWIN counties migrate, this option will be open to all C-IV counties.

Votes:

- R1: 2 votes -Yes
- R2 1 vote-Yes
- R3 1 vote-Yes
- R4 2 votes- Yes
- R5 3 votes- Yes

R6 -requested to submit vote by email no later than tomorrow noon

DDID 2314d GA/GR Correspondence Service Maintenance Functionality

Caroline

- Series of pages currently in CalWIN that will be migrated to CalSAWS to use CalSAWS standards
- Available to CalWIN counties and C-IV counties that opt in to the CalWIN GAGR solution
- Each county will have individual worker (CC SME) that will create and maintain their client correspondence
- Also pages that client correspondence developers manage
- The maintain state county document is a flow that all client correspondence developers will need to follow when creating a CC
- Maintain tandem form, one for forms and one for NOA
- In CalWIN, counties can opt to substitute forms/NOAs. Within CalWIN there are county consortia NOAs that are use internally.
- Assumptions: include dropdown values that are currently available in CalWIN
- Recommendation: select correspondence, this is where the maintenance user will use the page to search for an existing correspondence
- If they are creating a new correspondence, then they will add, update a CC they select and the type
- Maintain State county document: this is the page where they will update all the client correspondence
- PR documents: need to indicate in the bottom if they're a PR document
- Select program page: for every correspondence the county will need to indicate for which program that CC will generated
- Maintain master page: for every correspondence a master CC ID will be created, for multiple CCs there will be multiple ID created
Ex: a denial NOA for whereabouts unknown and discontinuance for whereabouts unknown
- A continuation sheet can be added to the NOA, if needed
- Maintain master components: opens the maintain master components page where all the master components are located, such as headers, footers, hearing rights and budgets. These components will appear on every generated correspondence with a Reason Code Associated to this Master.
- The find button directs the user to the components page
- Search components: this page is used to search for and associate components to Masters and Reason Codes. This search page is used by the Maintain Master Components and Maintain Master Reason Components.
- Maintain mater variables page is used to associate variables to template-level Components, such as headers, footers, hearing rights, and budgets. These variables will appear on every generated correspondence with a Reason Code associated to this Master.
- Search Variables page is used to search for variables to associate to Masters and Reason Codes. This page is accessed by Maintain Master Variables, Maintain Master Reason Variables, and Maintain Variables .
- Maintain master reason page is used to assign an action type and associate Reason Codes to Masters. Each Reason Code added in this page will enable the generation of the correspondence with the Master-level components

defined in the Maintain Masters page as well as the body text components defined in the Maintain Master Reason Components page.

- Search reason information page allows the user to search for an existing Reason Code to maintain. This page is accessed by Maintain Master Reasons, Maintain Reason Information, and Search For Components Rules.
- The Maintain Master Reason Components page is used to associate components to reason code.
- Maintain Components Rules page is used to maintain and associate rules to reason components. Rules may be associated to NOA type correspondence.
- Search for Component Rules page allows a user to search for an existing rule to maintain. The page is accessed from the Maintain Component Rules page.
- Maintain Master Reason Variables page is used to associate variables to reason codes components. The variables will appear on every generated correspondence with the associated reason codes.
- Maintain tandem form page is used to search for and link a tandem OCC to a main form. Can also unlink a previously linked tandem correspondence. This is used if a county would like to tandem an OCC to a form, any time a form will be triggered then the OCC will also be triggered by entering an effective begin date. Whenever a county would like to turn off the NOA, they can enter an end date.
- Maintain Tandem NOA page is used to link an OCC to NOA appropriate reason code so that they will be sent concurrently with the relevant NOA. Within this page, the user can unlink previously linked CC.
- Substitute forms page allows the user to substitute a selected form for one currently being triggered by the system when certain conditions are met. The user can use a different form to trigger, or if they want to substitute a county consortia form, new form can be associated to the current exiting page, both forms will have reason codes available.
- **Question:** What is Tandem referring to? Is that a part of the Extream Software? This is functionality that is available in CalWIN and will be migrated to CalSAWS. It's a functionality that allows a NOA, OCC to be triggered.
Example: transitional services available-this OCC can be tandem with a NOA to be included and mailed only during the time that services are available.
- **Question:** How will historical NOAs be accessed? All NOAs will be associated with the application. Anything generated in CalSAWS will be in the distributed document page.
- Substitute NOA page allows the user to substitute a selected NOA for one currently being triggered by the system when certain conditions are met. Counties can select the NOA and can turn it on/off.
- The Maintain Variable page is used by the GAGR correspondence service developer within the CalSAWS application to create new variables or modify existing ones.
- Pages that the service developers will be using-maintain variable, will be used when they are creating a new variable or if they're updating a variable, add and effective begin/end date, description, function, position, foreign language translations,
- Maintain function page is used by the GAGR correspondence service developer for GAGR service correspondences within the CalSAWS

application to add a new function or update the details of an existing one. From this page, the user can proceed to add or update function parameters.

- Select function page is used by the GAGR correspondence service developer for GAGR Correspondence within the CalSAWS application to search for an existing function prior to either assigning it to a variable name or modifying its details.
- Maintain function parameters page is used by the GAGR correspondence service developers for GAGR correspondences within the CalSAWS application to view, link, or unlink parameters assigned to a specific function.
- Maintain reason information page will be used by service developers when a new reason code is being added or updated, will capture MEDS reason code, if there an error type or cases status associated
- **Question:** Will all client correspondences generated in CalWIN be migrated? Yes, they will be migrated.
- **Question:** Will county CC maintenance person see the developer options and pages? Or is it based on security? Counties will not have access

Regional Votes

- R1 1 vote- yes
- R2 1 vote- yes
- R3 1 vote- yes
- R4 2 votes- yes
- R5 3 votes- yes
- R6 1 vote- yes

Open Discussion

Caroline/Adelaide

- None

(Optional)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
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1

2

#	Decision Made	Who Made the Decision	Date
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