

# CalSAWS

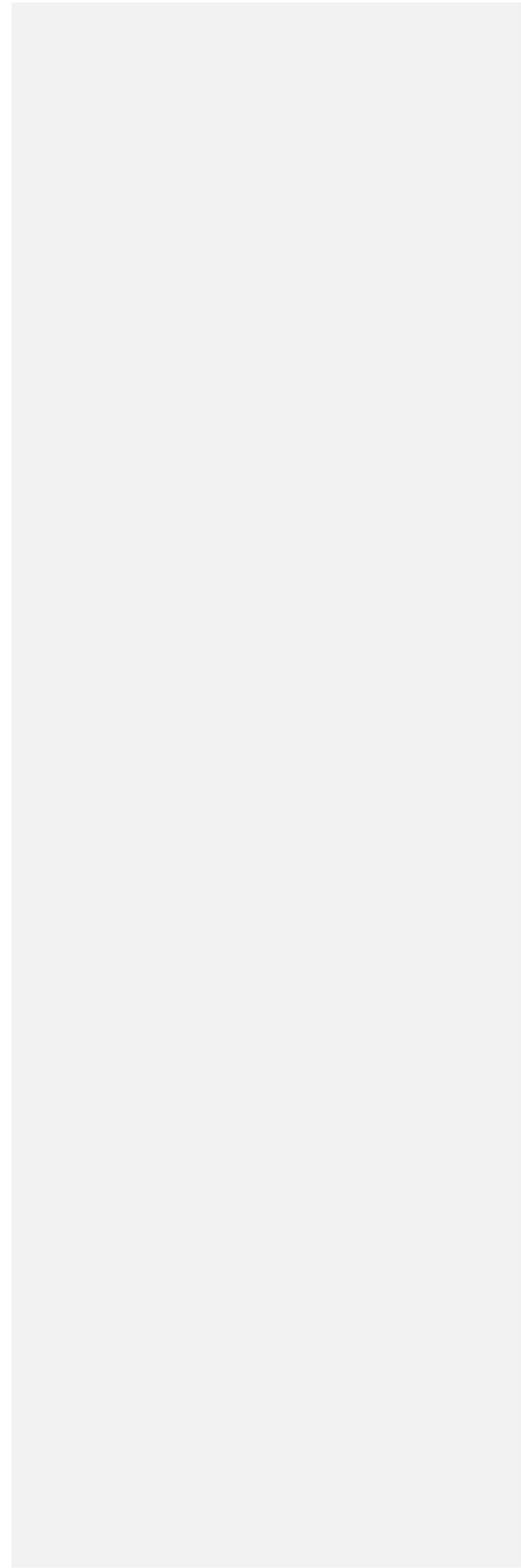
California Statewide Automated Welfare System

## Design Document

CA-48348

Extension of Time-Period for Dropping the  
Worker on Discontinued Eligibility Programs

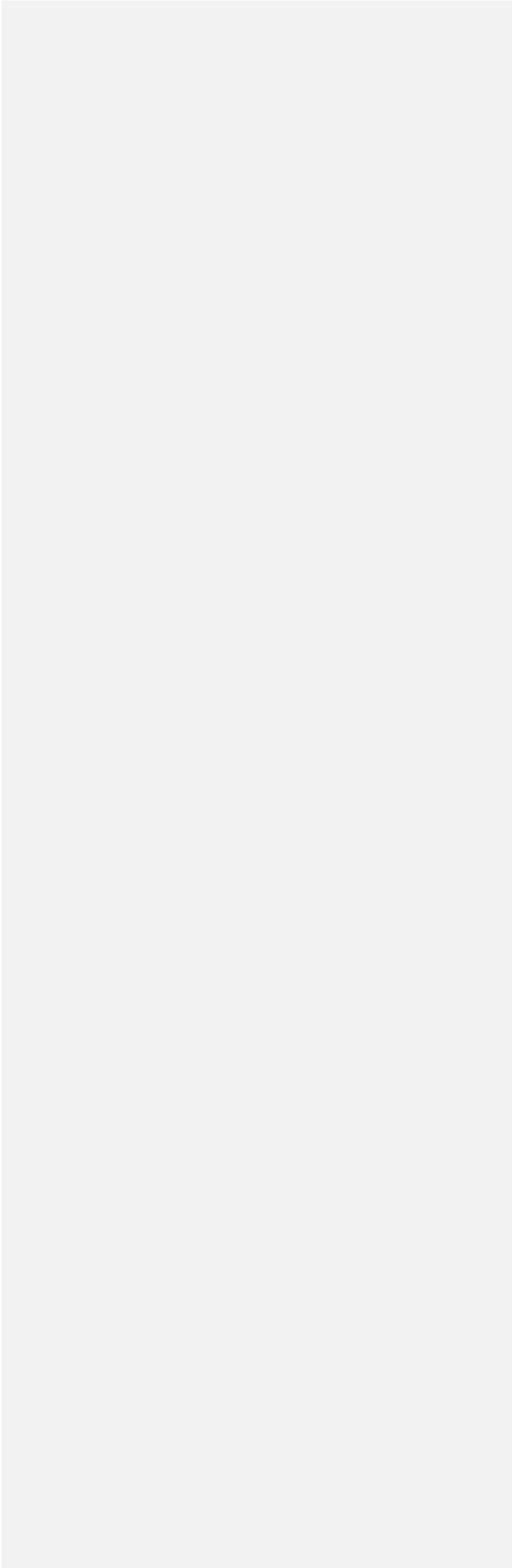
DRAFT



CalSAWS	DOCUMENT APPROVAL HISTORY	
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## Table of Contents

1	Overview .....	6
1.1	Current Design .....	6
1.2	Requests .....	7
1.3	Overview of Recommendations .....	7
1.4	Assumptions .....	8
2	Recommendations.....	8
2.1	Staff Assignment Detail .....	8
2.1.1	Overview .....	8
2.1.2	Staff Assignment Detail Mockup .....	9
2.1.3	Description of Changes .....	9
2.1.4	Page Location .....	9
2.1.5	Security Updates.....	9
2.1.6	Page Mapping.....	9
2.1.7	Page Usage/Data Volume Impacts .....	10
2.2	Case Summary .....	10
2.2.1	Overview .....	10
2.2.2	Case Summary Mockup.....	11
2.2.3	Description of Changes .....	11
2.2.4	Page Location .....	12
2.2.5	Security Updates.....	12
2.2.6	Page Mapping.....	12
2.2.7	Page Usage/Data Volume Impacts .....	12
2.3	Eligibility Workload Inventory .....	12
2.3.1	Overview .....	12
2.3.2	Eligibility Workload Mockup .....	13
2.3.3	Description of Changes .....	13
2.3.4	Page Location .....	14
2.3.5	Security Updates.....	14
2.3.6	Page Mapping.....	14
2.3.7	Page Usage/Data Volume Impacts .....	14
2.4	Employment Services Workload Inventory.....	14
2.4.1	Overview .....	14

2.4.2	Employment Services Workload Inventory Mockup .....	15
2.4.3	Description of Changes .....	15
2.4.4	Page Location .....	16
2.4.5	Security Updates.....	16
2.4.6	Page Mapping.....	16
2.4.7	Page Usage/Data Volume Impacts .....	16
2.5	Child Care Workload Inventory .....	16
2.5.1	Overview .....	16
2.5.2	Child Care Workload Mockup.....	16
2.5.3	Description of Changes .....	17
2.5.4	Page Location .....	17
2.5.5	Security Updates.....	17
2.5.6	Page Mapping.....	17
2.5.7	Page Usage/Data Volume Impacts .....	17
2.6	Position Detail .....	18
2.6.1	Overview .....	18
2.6.2	Position Detail Screenshot.....	18
2.6.3	Description of Changes .....	18
2.6.4	Page Location .....	19
2.6.5	Security Updates.....	19
2.6.6	Page Mapping.....	19
2.6.7	Page Usage/Data Volume Impacts .....	19
2.7	Workload Reassignment Detail .....	19
2.7.1	Overview .....	19
2.7.2	Workload Reassignment Detail Screen Shot .....	20
2.7.3	Description of Changes .....	21
2.7.4	Page Location .....	21
2.7.5	Security Updates.....	21
2.7.6	Page Mapping.....	21
2.7.7	Page Usage/Data Volume Impacts .....	21
2.8	Batch Regression Test.....	21
2.8.1	Overview .....	21
2.8.2	Description of Changes .....	21
2.8.3	Execution Frequency.....	22
2.8.4	Key Scheduling Dependencies .....	22

2.8.5	Counties Impacted .....	22
2.8.6	Data Volume/Performance .....	22
2.8.7	Failure Procedure/Operational Instructions.....	22
2.9	Update the Life Cycle Reassignment Batch Job .....	22
2.9.1	Overview .....	22
2.9.2	Description of Change.....	23
2.9.3	Execution Frequency.....	26
2.9.4	Key Scheduling Dependencies .....	26
2.9.5	Counties Impacted .....	26
2.9.6	Data Volume/Performance.....	26
2.9.7	Failure Procedure/Operational Instructions.....	26
2.10	Eligibility Workload Inventory Export .....	27
2.10.1	Overview .....	27
2.10.2	Eligibility Workload Inventory Export Sample .....	27
2.10.3	Description of Change.....	27
2.10.4	Report Location .....	28
2.10.5	Counties Impacted .....	28
3	Supporting Documents.....	28
4	Requirements.....	29
4.1	Project Requirements.....	29

## 1 OVERVIEW

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Through the Staff Detail page, Staff can be end-dated from a Position even though there are programs that are still assigned to the Position. As a result, those programs will no longer be assigned to a Worker and Worker ID information will no longer display on the Case Summary page. CalSAWS will be updated so that Staff assignment cannot be end-dated if there are programs still assigned to the Position and also to continue to display the Worker and Worker ID information.

The Workload Inventory pages allow users to view an inventory of programs assigned to an office position and they will be updated to allow users to be able to filter by program status. The Eligibility Workload Inventory Export report will also be updated to accept new status parameter selection.

The Position Detail page displays information regarding the Position. This includes the ability to set the maximum number of cases that can be assigned to the position and also determine the amount of current case load and total percentage of cases assigned to the position. The logic used in calculating the current case load and total percentage of cases assigned to the position will be updated to disregard programs that are in denied, discontinued or deregistered status.

The Workload Reassignment Detail page allows users to assign/reassign programs to a position. The current logic used in determining program assignment/reassignment to a position does not take into consideration the status of the program. This logic will be updated to disregard programs with denied, discontinued or deregistered status in determining current case load.

Lastly, the Life Cycle Reassignment batch job runs daily to remove worker assignments for programs that have been closed (i.e. discontinued, denied). CalSAWS will update the batch job in order to support all 58 counties for when the worker assignment from the program will be removed based on County and Program.

### 1.1 Current Design

In CalSAWS users are able to end-date a staff assignment even though there are programs that are still assigned to the position. As a result, those programs are no longer assigned to a Worker and Worker ID information does not display on the Case Summary page.

Through the Workload Inventory pages (Eligibility Workload Inventory, Employment Services Workload Inventory and the Child Care Workload Inventory) users are able to determine the number of programs assigned to a position. However, they do not have the option to filter by the status of the program.

The logic that determines program assignment/reassignment to a position does not take into consideration the status of the program when assigning the case load to the worker. As such, a position might not be able to be assigned additional programs once the Maximum Case load amount has been reached. Secondly, the amount of Current Case Load and Total Percentage of Cases Assigned to a position that is displayed on the Position Detail page does not take into consideration the status of the programs that are assigned to the Position.

Lastly, the Life Cycle Reassignment batch job (PB00M100) runs daily and removes the worker assignment from a program. The batch job will behave differently based on the type of program and the closure status (i.e., discontinued, denied). However, the existing Life Cycle Reassignment batch job is not configurable by County.

## 1.2 Requests

1. Update the Staff Assignment Detail page to prevent users from end-dating a staff assignment from a position when there are programs still assigned to it.
2. Update the Case Summary page to display the position information even when there's no staff assigned to the position.
3. Add a filter to the following pages that will allow users to only display results based on the Status of the Program: the Eligibility Workload Inventory, Employment Services Workload Inventory and the Child Care Workload Inventory pages.
4. Update the logic used in assigning/reassigning programs to a position to disregard programs that are in denied, discontinued, deregistered status.
5. Update the Life Cycle Reassignment batch job to be configurable based on County and program information upon determining when a worker assignment will be removed.

## 1.3 Overview of Recommendations

1. Create a validation on the Staff Assignment Detail page to prevent Staff from being end-dated when there are programs that are still assigned to the Position.
2. Update the Case Summary page to display the Worker ID information when there is no Staff assigned to the Position and to display 'No Staff Assigned' when there is no Staff assigned to the Position.
3. Add a new Program Status filter to the Eligibility Workload Inventory, Employment Services Workload Inventory and Child Care Workload Inventory pages.
4. Update the Eligibility Workload Inventory Export report to accept new status parameter.
5. Update the logic used on the Current Case Load field and Total Percentage of Cases Assigned field on the Position Detail page to disregard cases where the programs assigned to the position that are in denied, discontinued or deregistered status.
6. Update the logic used in assigning/reassigning programs to a position to disregard programs that are in denied, discontinued, deregistered status when determining the current case load that a position have.
7. Update the Life Cycle Reassignment batch job (PB00M100) to include County information in determining when to update the worker assignments for a program.

## 1.4 Assumptions

1. All existing functionality will remain unchanged unless called out as part of this SCR.

## 2 RECOMMENDATIONS

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Prevent users from end-dating a Staff assignment to a Position when there are programs that are still assigned to the position and continue to display Position information on the Case Summary page when there's no Staff assigned to the Position. The following pages will be updated to include a Program Status filter: Eligibility Workload Inventory, Employment Services Workload Inventory and Child Care Workload Inventory and the Eligibility Workload Inventory Export report will be updated to accept new status parameter.

The logic used to determine current case load in determining programs assignment/reassignment to a position will be updated to disregard programs with status of denied, discontinued or deregistered. This include updating the logic used on the Current Case Load field and Total Percentage of Cases Assigned field on the Position Detail page.

Lastly, the Life Cycle Reassignment batch job (PB00M100) will be updated to also include County information in determine when the worker assignments for a program will be dropped when the program has been closed (i.e. discontinued, denied, etc.).

### 2.1 Staff Assignment Detail

#### 2.1.1 Overview

The Staff Assignment Detail page allows users to add new staff and update existing staff information. Users are able to end-date a Staff Assignment to a Position through the Staff Assignment Detail page even though there are still programs assigned to the Position. This SCR will add a new validation message to the Staff Assignment Detail page when the Staff Assignment is being end-dated even though there is a program that is still assigned to the worker.

## 2.1.2 Staff Assignment Detail Mockup

The mockup shows a form titled "Staff Assignment Detail". At the top right are two buttons: "Save and Return" and "Cancel". Below the title bar, a red error message is displayed: "• **End Date** - The End Date cannot be set due to current program assignments for this worker." The form contains the following fields:

- Worker Identification:** 19LS90900R - Sec 00 - Eligibility Worker
- Staff Name:** Dan Tester
- Begin Date:** 09/23/2019
- End Date:** An empty date input field with a calendar icon.

At the bottom right of the form are two buttons: "Save and Return" and "Cancel".

Figure 2.1.1 – Staff Assignment Detail

## 2.1.3 Description of Changes

1. Update the Staff Assignment Detail page to display a new custom validation.
  - a. Validation will display when the user attempts to save the record (by clicking the 'Save and Return' button) when there are programs still assigned to the position and there's a date (current date or a date in the future) entered on the 'End Date' field.
  - b. Custom validation will display the following message: 'End Date – The End Date cannot be set due to current program assignments for this worker.'

## 2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Staff Assignment**

## 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 Case Summary**

### **2.2.1 Overview**

The Case Summary page allows users to view a summary of the programs on the selected case. This include Worker and Worker ID information assigned to the programs. When a Staff assignment has been end-dated from a Position, the Worker and Worker ID information no longer display on the Case Summary page for the program that was assigned to that Position. This SCR will update the Case Summary page to always display the Worker ID information even if there is no Staff assigned to the Position and also display the Worker as No Staff Assigned.

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## 2.2.2 Case Summary Mockup

### Case Summary

**Case Name**  
[Case Name](#)

**County**  
Los Angeles

---

▼ Companion Cases

**Case Number**

**Case Name**

[Add](#)

---

**Display:**  
12/01/2020 [View](#)

---

▶ Case Flags

---

▶ Child Care

---

▼ CalWORKS

**Worker:** No Staff Assigned

**Worker ID:** [19DP344W16](#)

**Program Status:** Active

**RE Due Month:** 01/2021 [Re-Evaluate](#)

**Reporting Type:** Semi-Annual Reporting

**SAR Due Month:** 07/2020

**Aid Code:** 30 - CW-All Other Families (Fed)

**Public Assistance Indicator:**

**FBU:** 1

**Primary Applicant/Recipient:** TEST, JOSEPHINA 35F

**Language:** English

**Phone Number:** (507)946-2663

**Email:** johndoe@caisaws.org

**Payee:** TEST, JOSEPHINA 35F

**Application Date:** 01/29/2020

Name	Deprivation	Role	Role Reason	Status	Status Reason
<a href="#">TEST, JOSEPHINA 35F</a>		MEM		Active	
<a href="#">TEST, RANDELL 14M</a>	Absence	MEM		Active	

[View WPR](#) [View Details](#)

---

▼ CalFresh

**Worker:** John Carry

**Worker ID:** [19DP344W13](#)

**Program Status:** Discontinued

**Discontinued Date:** 10/01/2020

**RE Due Month:** 11/2020

**Aid Code:** 0F - TCF

**Meets ESAP Criteria:**

**Public Assistance Indicator:** No

**FBU:** 1

**Primary Applicant/Recipient:** TEST, JOSEPHINA 35F

**Language:** English

**Phone Number:** (507)946-2663

**Email:** johndoe@caisaws.org

**Payee:** TEST, JOSEPHINA 35F

**Application Date:** 01/29/2020

Name	Role	Role Reason	Status	Status Reason
<a href="#">TEST, JOSEPHINA 35F</a>	MEM		Discontinued	Gets CalWORKS
<a href="#">TEST, RANDELL 14M</a>	MEM		Discontinued	Gets CalWORKS

[View Details](#)

Figure 2.2.1 – Case Summary

## 2.2.3 Description of Changes

1. Update the Case Summary page to always display the Worker ID information that is assigned to the Program even when there is no Staff assigned to the Position.

- a. This change will apply for all programs .
2. Update the Case Summary page to display 'No Staff Assigned' under the 'Worker' field when there is no Staff assigned to the Position.
  - a. This change will apply for all programs .

#### **2.2.4 Page Location**

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

#### **2.2.5 Security Updates**

N/A

#### **2.2.6 Page Mapping**

N/A

#### **2.2.7 Page Usage/Data Volume Impacts**

N/A

### **2.3 Eligibility Workload Inventory**

#### **2.3.1 Overview**

The Eligibility Workload Inventory page allows users to view programs assigned to an office position. Currently, users do not have an option to filter the status of the program that they would like to view. This SCR will create a new Program Status Filter, that will allow the worker the option to filter by Program Status.

## 2.3.2 Eligibility Workload Mockup

### Eligibility Workload Inventory

\*- Indicates required fields

Worker ID: 19DP344W16  Assignment Type: Primary  Display Workload: \*

Status Effective Date: \*  Status: All

Results per Page: 100

**Search Results Summary** Results 1 - 100 of 1327

1 2 3 4 5 6 7 8 9 10 Next

**Total Assignments**

Cases	576
Programs	1327

Case Number	Primary	Program	Status	Application Date	Auth Date	RE Date	CFS
<input type="button" value="L567128"/>	JANE, EDDA 40F	CW	Active	01/06/2020	09/05/2020	12/2020	<input type="button"/>
<input type="button" value="L567128"/>	JANE, EDDA 40F	MC	Active	01/06/2020	06/11/2020	12/2020	<input type="button"/>

Figure 2.3.1 – Eligibility Workload Inventory

## 2.3.3 Description of Changes

1. Add a new dropdown field titled 'Status:' to the Eligibility Workload Inventory page as shown on Figure 2.3.1.
  - a. The 'Status:' dropdown field will allow users to filter which program status they would like to view and have it display under the Search Results Summary section accordingly.
  - b. The 'Status:' dropdown field will have the following options and will default to 'All':
    - i. All
      1. All Programs statuses will display under the Search Result Summary section.
    - ii. Active
      1. Only Programs with 'Active' status will display under the Search Result Summary section.
    - iii. Denied
      1. Only Programs with 'Denied' status will display under the Search Result Summary section.
    - iv. Discontinued
      1. Only Programs with 'Discontinued' status will display under the Search Result Summary section.
    - v. Ineligible

1. Only Programs with 'Ineligible' status will display under the Search Result Summary section.
- vi. Pending
  1. Only Programs with 'Pending' status will display under the Search Result Summary section.

#### 2.3.4 Page Location

- **Global: Eligibility**
- **Local: Workload Inventory**
- **Task: Workload Inventory**

#### 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 Employment Services Workload Inventory

#### 2.4.1 Overview

The Employment Workload Inventory allows users to view all programs assigned to an office position. Currently, users do not have an option to filter by the status of the program that they would like to view. This SCR will create a new Program Status Filter, that will allow users the option to filter by Program Status.

## 2.4.2 Employment Services Workload Inventory Mockup

### Employment Services Workload Inventory

**Worker ID:**  
90LS005N00 Select

**Display Workload: \***

**Status Effective Date: \***

**Program Status:**  
All

View

Total Assignments	
Cases	0
Program	0

Case Number	Name	Program	Program Status	Program Status Reason	Program Review Date	Activity	Activity Review Date	Benefit Program Status
No Data Found								

Figure 2.4.1 – Employment Services Workload Inventory

## 2.4.3 Description of Changes

1. Add a new dropdown field titled 'Program Status:' to the Employment Workload Inventory page as shown on Figure 2.4.1.
  - a. The 'Program Status:' dropdown field will allow users to filter which program status they would like to view and have it display under the Search Results Summary section accordingly.
  - b. The 'Program Status:' dropdown field will have the following options and will default to 'All':
    - i. All
      1. This will display all Programs statuses on the 'Program Status' column under the Search Result Summary section.
    - ii. Active
      1. This option will only display Programs with 'Active' status on the 'Program Status' column under the Search Result Summary section
    - iii. Ineligible
      1. This option will display Programs that have 'Ineligible' status on the 'Status' column under the 'Search Result Summary section.
    - iv. Pending
      1. This option will only display Programs that have 'Pending' status on the 'Program Status' column under the Search Result Summary section.
2. Relabel the 'Go' button to 'View'.

**Commented [EK1]:** Denied and Discontinued Deregistere are not added on the drop down, since both CIV counties and LA will drop the worker on the same day. → Confirm with BA

#### 2.4.4 Page Location

- Global: Empl. Services
- Local: Workload Inventory
- Task: Workload Inventory

#### 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 Child Care Workload Inventory

#### 2.5.1 Overview

The Child Care Workload Inventory allows users to view programs assigned to an office position. Currently, users do not have an option to filter by the status of the program that they would like to view. This SCR will create a new Program Status Filter, that will allow users the option to filter by Program Status.

#### 2.5.2 Child Care Workload Mockup

### Child Care Workload Inventory

Worker ID: 90LS005N00  Display Workload: \* 11/04/2020  Status Effective Date: \* 12/01/2020  Status: All

Total Assignments	
Cases	0
Programs	0

Case Number	Primary	Sub-Program	Status	Application Date	Re-Evaluation Date
No Data Found					

This Type 1 page took 0.32 seconds to load.

Figure 2.5.1 – Child Care Workload Inventory

### 2.5.3 Description of Changes

1. Add a new dropdown field titled 'Status:' to the Child Care Workload Inventory page as shown on Figure 2.5.1.
  - a. The 'Status:' dropdown field will allow users to filter which program status they would like to view and have it display under the Search Results Summary section accordingly.
  - b. The 'Status:' dropdown field will have the following options and will default to 'All':
    - i. All
      1. All Programs statuses will display under the Search Result Summary section.
    - ii. Active
      1. Only Programs with 'Active' status will display under the Search Result Summary section.
    - iii. Denied
      1. Only Programs with 'Denied' status will display under the Search Result Summary section.
    - iv. Discontinued
      1. Only Programs with 'Discontinued' status will display under the Search Result Summary section.
    - v. Ineligible
      1. Only Programs with 'Ineligible' status will display under the Search Result Summary section.
    - vi. Pending
      1. Only Programs with 'Pending' status will display under the Search Result Summary section.
2. Relabel the 'GO' button to 'View'.

### 2.5.4 Page Location

- **Global: Child Care**
- **Local: Workload Inventory**
- **Task: Workload Inventory**

### 2.5.5 Security Updates

N/A

### 2.5.6 Page Mapping

N/A

### 2.5.7 Page Usage/Data Volume Impacts

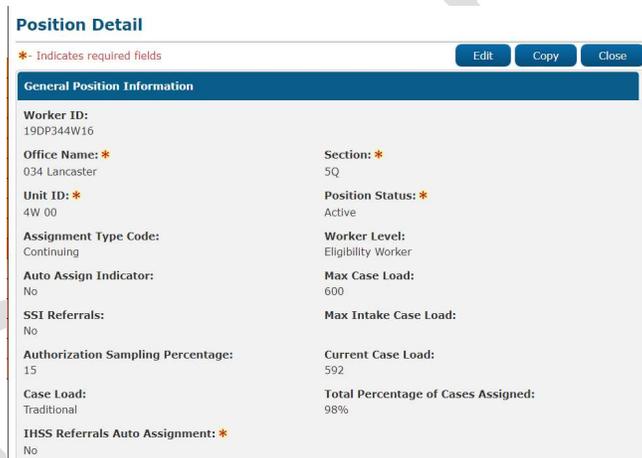
N/A

## 2.6 Position Detail

### 2.6.1 Overview

The Position Detail page is used to display information regarding the position. Within the page, it displays information such as Office information, programs assigned, tasks, etc. Additionally, users are able to set the maximum amount of case to be assigned to the position and determine the amount of current case load and the total percentage of cases assigned to the position. Currently, the logic used to display the amount of Current Case Load and Total Percentage of Cases Assigned does not consider the status of the programs assigned to the position. This SCR will update the logic used on the Current Case Load and Total Percentage of Cases Assigned fields to disregard programs that are in denied, discontinued or deregistered status.

### 2.6.2 Position Detail Screenshot



The screenshot shows a web form titled "Position Detail". At the top right, there are buttons for "Edit", "Copy", and "Close". Below the title, a legend indicates that an asterisk (\*) denotes required fields. The form is organized into a table-like structure with two columns. The fields and their values are as follows:

General Position Information	
Worker ID: 19DP344W16	
Office Name: * 034 Lancaster	Section: * 5Q
Unit ID: * 4W 00	Position Status: * Active
Assignment Type Code: Continuing	Worker Level: Eligibility Worker
Auto Assign Indicator: No	Max Case Load: 600
SSI Referrals: No	Max Intake Case Load:
Authorization Sampling Percentage: 15	Current Case Load: 592
Case Load: Traditional	Total Percentage of Cases Assigned: 98%
IHSS Referrals Auto Assignment: * No	

Figure 2.6.1 – Position Detail Screenshot – Reference only.

### 2.6.3 Description of Changes

1. Update the logic used on the 'Current Case Load' field to disregard cases where the program assigned to the position is in denied, discontinued or deregistered status.
2. Update the logic used on the 'Total Percentage of Cases Assigned' to disregard cases where the program assigned to the position is in denied, discontinued or deregistered status.

#### 2.6.4 Page Location

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

#### 2.6.5 Security Updates

N/A

#### 2.6.6 Page Mapping

Update Page Mapping for the Current Case Load field and Total Percentage of Cases Assigned field.

#### 2.6.7 Page Usage/Data Volume Impacts

N/A

### 2.7 Workload Reassignment Detail

#### 2.7.1 Overview

The Workload Reassignment Detail page allows users to assign/reassign programs to a position. The current logic used to determine the current case load in determining the program assignment/reassignment to a position does not take into consideration the status of the program. This SCR will update the logic used in assigning/reassigning programs to a position to disregard programs with denied, discontinued or deregistered status when determining current case load.

## 2.7.2 Workload Reassignment Detail Screen Shot

### Workload Reassignment Detail

\*- Indicates required fields Reassign

Unconfirmed Assignments: 0

**From:**

Worker ID: Select

Case Number:  Select

From Any Eligible Position      Office: CalSAWS Project Office Select

**Reassign Quantity:**

Number of Cases:

Entire Workload

Program: \*      Language: \*

Case Flag:      Status:

**To:**

Worker ID:

Select

Unit      Office: Select Unit:

Auto Assign to Eligible Positions      Office:  CalSAWS Project Office Select Remove

Auto Assign to Eligible Position in County

**Effective Date:**

Effective Date:  🗓

Immediate Assignment

**Reassignment Option**

Automatically Reassign When Activated: \*

Print New Worker Letter

Reassign

This Type\_1 page took 2.09 seconds to load.

**Figure 2.7.1 – Workload Reassignment Detail Screenshot – Reference only**

### **2.7.3 Description of Changes**

1. Update the logic used to determine program assignment/reassignment (either done through the Workload Reassignment Detail page or through the overnight batch job) to disregard cases where the program assigned to the position is in denied, discontinued or deregistered status when determining current case load.

### **2.7.4 Page Location**

- **Global: Admin Tools**
- **Local: Workload Assignment**
- **Task: Workload Reassignment**

### **2.7.5 Security Updates**

N/A

### **2.7.6 Page Mapping**

N/A

### **2.7.7 Page Usage/Data Volume Impacts**

N/A

## **2.8 Batch Regression Test**

### **2.8.1 Overview**

The LifeCycleReassignment3 (PB00M102) and Update Assignments (PB00M103) modules utilize the same method that determines a worker's case load. The logic currently does not filter a program's status when determining a worker's current case load.

Section 2.7.3 describes the logic update to disregard cases where the program assigned to the position is in Denied, Discontinued or Deregistered status when determining current case load.

### **2.8.2 Description of Changes**

1. Perform a regression test for PB00M102 and PB00M103 and validate that both batch jobs are excluding programs with a Discontinued,

Denied, and/or Deregistered status when determining a worker's current case load.

### **2.8.3 Execution Frequency**

No Change. This batch job runs daily during county business days (Monday – Saturday) excluding Sundays and holidays.

### **2.8.4 Key Scheduling Dependencies**

No Change.

### **2.8.5 Counties Impacted**

All Counties.

### **2.8.6 Data Volume/Performance**

No change.

### **2.8.7 Failure Procedure/Operational Instructions**

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

## **2.9 Update the Life Cycle Reassignment Batch Job**

### **2.9.1 Overview**

The Life Cycle Reassignment Batch job (PB00M100) automatically end-dates program assignments with a status of Denied, Discontinued, Deregistered and Sanctioned.

The table below maps the current functionality between C-IV and CalSAWS. The batch logic will end-date a worker assignment based on the following program and program status parameters:

**Table 2.8.1 – Current End Worker Assignment Logic**

System	Program	Program Status	End Worker Assignment on...
<b>C-IV</b>	All programs	Discontinued, Denied, Deregistered	Same day of program status effective date
<b>CalSAWS</b>	WTW, REP, GROW, and Cal-Learn	Discontinued, Denied, Deregistered	Same day of program status effective date
<b>CalSAWS</b>	All Programs excluding the following Medi-Cal, WTW, REP, GROW, and Cal-Learn	Discontinued, Deregistered	30 <sup>th</sup> day after the Discontinued/Deregistered effective begin date
<b>CalSAWS</b>	All Programs excluding the following WTW, REP, GROW, and Cal-Learn	Denied	31 <sup>st</sup> day after the Denial action date
<b>CalSAWS</b>	Medi-Cal	Discontinued	90 <sup>th</sup> day after the Discontinued effective begin date
<b>CalSAWS</b>	WTW	Sanction	Same day of program status effective date

*Note: If the End Assignment date falls on a Sunday or holiday, the batch job will run on the next business day.*

This section outlines the updates necessary to allow removing a worker assignment to be configurable:

- Update PB00M100 logic to derive the appropriate worker end date based on a configuration table.
- Create a new configuration table to inform the batch job logic per County, Program, and status combination.

### 2.9.2 Description of Change

1. Update the end worker assignment driving query to derive the appropriate worker assignment end date based on the new configuration table described in section 2.8.2.2. The lookup functionality will derive the worker assignment end date for all programs that have a "Closed" status (Denied, Discontinued, Deregistered, and Sanctioned) as of the Batch Date where the closed program is still assigned to a Worker.

Los Angeles County and C-IV counties will continue to use current functionality when removing a worker assignment. The current rules are displayed below.

**Table 2.8.2.1 – End Worker Assignment Logic Reference**

Migration County	Program	Program Status	Rules
57 Migration Counties	All	Discontinued, Denied, Deregistered	Immediately end-date worker assignment based on the begin date (effective date) of the program status. See <i>example #5 below</i> .
Los Angeles	WTW, REP, GROW, and Cal-Learn	Discontinued, Denied, Deregistered	Immediately end-date worker assignment based on the begin date (effective date) of the program status.
Alpine, Butte, Calaveras, Colusa, El Dorado, Fresno, Humboldt, Los Angeles, Marin, Mendocino, Merced, Nevada, San Joaquin, Orange, Placer, San Diego, Solano, Sonoma, Stanislaus, Tuolumne <b>Note:</b> The list of counties above are the counties who opted into the functionality per DDID 85.	WTW, REP	Sanctioned	Immediately end-date worker assignment based on the begin date (effective date) of the program status. See <i>example #3 below</i> .
Los Angeles	All Programs excluding the following Medi-Cal, WTW, REP, GROW, and Cal-Learn	Discontinued, Deregistered	End-date worker assignment after 1 full month (30 days) of the Program status.  Note: If a program is closed effective in the middle of the month, then the worker will remain assigned for the remainder of the current month throughout the following month. The worker assignment will be end-dated when the job runs for the first time after the following month. See <i>example #4 below</i> .

Migration County	Program	Program Status	Rules
Los Angeles	All Programs excluding the following WTW, REP, GROW, and Cal-Learn	Denied	End-date worker assignment 31 days after the Denial creation/action date. See <i>example #2 below</i> .
Los Angeles	Medi-Cal	Discontinued	End-date worker assignment 90 days after the Discontinuance Begin date. See <i>example #1 below</i> .

Example 1: Sarah from County 19 is assigned to a Medi-Cal program that was Discontinued on April 1<sup>st</sup>, 2021. Based on the lookup table, batch will determine the worker assignment end date based on County, program and program status. The worker assignment will be removed 90 days from the status begin date. The worker assignment end date will be July 1<sup>st</sup>, 2021.

Example 2: John from County 19 is assigned to a CalWORKs program that was Denied on March 1<sup>st</sup>, 2021. Batch will remove the worker assignment 31 days after the denial action date. The worker assignment end date will be April 1<sup>st</sup>, 2021.

Example 3: Amanda from County 19 is assigned to a Refugee Employment Program (REP) that was Sanctioned on June 1<sup>st</sup>, 2021. Batch will remove the worker assignment the same day as the status begin date. The worker assignment end date will be June 1<sup>st</sup>, 2021.

Example 4: Bob from County 19 is assigned to a Child Care program that was Discontinued on June 16, 2021. Batch will remove the worker assignment 30 days (1 full month) from the status begin date. Program is closed in the middle of the month of June, so the worker will remain assigned for the remainder of June and throughout all of July. The worker assignment end date will be August 2<sup>nd</sup>, 2021 (*August 1<sup>st</sup> falls on a Sunday*).

Example 5: Keith from County 24 is assigned to a CalFresh program that was Denied on June 3<sup>rd</sup>, 2021. Batch will remove the worker assignment the same day as the status begin date. The worker assignment end date will be June 3<sup>rd</sup>, 2021.

2. Create a new table to store county configurations for end-dating a worker assignment. The table will include the following attributes:

Attribute	Description
Program Code	This column is associated to the Program assigned to a Worker
Status Code	This column is associated to the status of the program assigned
County Code	This column identifies the County to which the Case belongs
Calculation Type	This column describes the calculated elapsed time type. Examples: Elapsed Days, Elapsed Months, etc.
Value	This column identifies the number of elapsed days or months from which to determine the end worker assignment date
Compare Date	This column identifies the date from when to begin calculating the worker assignment end date

- a. Refer to [Supporting Document 1](#) for Drop Worker Logic Lookup table.

### 2.9.3 Execution Frequency

No Change. This batch job runs daily during county business days (Monday – Saturday) excluding Sundays and holidays.

### 2.9.4 Key Scheduling Dependencies

No Change.

### 2.9.5 Counties Impacted

All Counties.

### 2.9.6 Data Volume/Performance

The anticipated average number of records processed is between 15,000 – 20,000 per day. Please note that this is an approximation and the number of records may vary.

### 2.9.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file

from the directory and contacting the external partner if there is an account or password issue, etc...)

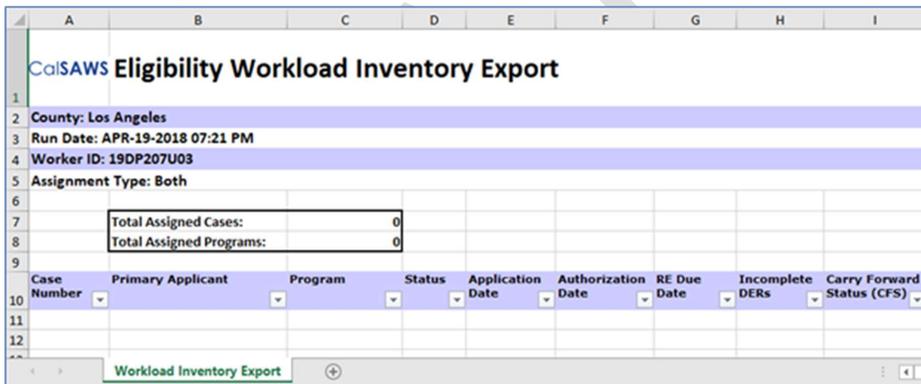
## 2.10 Eligibility Workload Inventory Export

### 2.10.1 Overview

The Eligibility Workload Inventory Export report is executed by an on-demand selection by a user on the worker performing enquiries of Workload Inventory. The worker can make multiple and various on-line enquiries, then when needed, can export the result of that enquiry.

The update with SCR CA-48348 is to make status options available to select and report the selected status type. Currently, the report export logic is defaulted to "All" and is to be updated to accept the parameter option selected by the worker.

### 2.10.2 Eligibility Workload Inventory Export Sample



Case Number	Primary Applicant	Program	Status	Application Date	Authorization Date	RE Due Date	Incomplete DERs	Carry Forward Status (CFS)
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Figure 2.2.1 – Eligibility Workload Inventory Export Sample

### 2.10.3 Description of Change

1. Update report logic to accept new status parameter selection. As defined in Section 2.5.3, the selection will be one of the below options:
  - b. All
  - c. Active
  - d. Denied
  - e. Discontinued
  - f. Ineligible
  - g. Pending

**Note:** No change to the actual report is required

#### 2.10.4 Report Location

- **Global: Eligibility**
- **Local: Workload Inventory**
- **Task: Workload Inventory**

#### 2.10.5 Counties Impacted

The update will be available to all counties.

### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	Batch Interface	Drop Worker Lookup table	Drop Worker Logic Lookup Table.xlsx

## 4 REQUIREMENTS

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### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.7.1.7	The LRS shall include a method for tracking and maintaining the number of cases assigned to each individual worker or group of workers.	The logic to be used in determining the current case load to determine program assignment/reassignment to the position will be updated to disregard programs with denied, discontinued or deregistered status.
2.7.1.14	The LRS shall include a method for cases to be assigned to a holding file where cases can be maintained by designated workers when there is no worker assigned to a caseload.	Adding validation to the Staff Detail page to prevent a staff from being ended when there are programs still assigned to the position. Secondly, the position information will continue to be displayed on the Case Summary page even when there are no staff assigned to the position.
2.7.1.1	The LRS shall support individual cases assigned to multiple files and to multiple workers, as specified by COUNTY-defined program and policy. Some of these workers continue to provide services and support to a client after the traditional cash benefits, Food Stamp, and/or Medi-Cal cases have been closed.	The Life Cycle Reassignment Batch Job will be updated to configurable by county and program when a worker assignment is to be end dated.