

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-212912 | CIV-106461

CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Threshold (IRT) Tier 2

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/18/2020	1.0	Initial Draft of the artifact	Josias Caveto
12/10/2020	1.1	Added additional NOA SCRs to Assumptions Updated to the forms listed as part of the draft ACL	Nithya Cherreddy
2/15/2021	1.3	Added Content Revision updates	Nithya Cherreddy Jason Francis

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1 OVERVIEW

Per ACL 19-76 effective on June 1, 2021, the Earned Income Disregard (EID) for CalWORKs (CW) applicant and recipients will increase from \$500 to \$550. Under current system functionality, the net non-exempt income (NNI) used to determine the Assistance Unit's (AU) Maximum Aid Payment (MAP) is calculated by disregarding the first \$500 of disability-based unearned income (DBI).

Per Consortium Request for Policy Clarification (CRPC) #2225, the Tier 2 Income Reporting Threshold (IRT) is based on the Assistance Unit Size rather than the Family Unit Size.

1.1 Current Design

1. The CW Disability Based Earned Income Disregard is \$500.
2. The CW Disability Based Unearned Income Disregard is \$500.
3. The NNI that is used to determine the AU's MAP is calculated by disregarding the first \$500 of the Disability Based Income (DBI) and/or any earned income and 50 percent of any remaining earned income.
4. When calculating the MAP, if the AU has earned income only, the first \$500 and 50 percent of the remaining earned income is disregarded.
5. The CW Tier 2 IRT is calculated based on 130% of the Federal Poverty Level (FPL) values for current year, using the Family Unit Size, which includes both active assistance and non-assistance household members.

1.2 Requests

1. Effective June 1, 2021, update the disregard amounts from \$500 to \$550.
2. Regression test the forms/NOAs which populate Disability Based Unearned Income Disregard, Disability Based Earned Income Disregard values.
3. Update the Tier 2 Income Reporting Threshold (IRT) based on the Assistance Unit Size rather than the Family Unit Size.
4. The CW Tier 2 IRT is calculated per the 130% of FPL, based on the Assistance Unit Size, which includes only active assistance household members.

1.3 Overview of Recommendations

1. Effective June 1, 2021, update the CW Disability Based Earned Income Disregard (CT 335 – AI) from \$500 to \$550.
2. Effective June 1, 2021 update CW Disability Based Unearned Income Disregard (CT 335 – 53) from \$500 to \$550.
3. Regression test the forms/NOAs which populate Disability Based Unearned Income Disregard, Disability Based Earned Income Disregard values.
4. Update the Tier 2 IRT based on the Assistance Unit Size rather than the Family Unit Size.

5. Update Tier 2 IRT in New IRT Calculation section of the CalWORKs EDBC Summary Page based on the Assistance Unit Size rather than the Family Unit Size.

1.4 Assumptions

1. The impacted cases in which the user has not yet run EDBC with the new EID will be updated through a batch EDBC process, refer to SCR CA 213719/CIV-106463.
2. A SAR 2 form will be generated to inform households of their new IRT.
3. SCRs CA-217804/CIV-107563 will implement correspondence changes due to ACL 19-76E II.
4. SCRs CA-222540/CIV-108388 will implement new and revised forms to reflect the Income Disregard Increase to \$550, per Senate Bill 80.
5. SCRs CA-209033 CIV-104383 updated the static DBI/EID values to a variable. This SCR will regression test the variable value in all the impacted forms (Recommendation 2.2).

2 RECOMMENDATIONS

2.1 Update the CW Disability Based Earned Income Disregard (CT 335 – AI) and CW Disability Based Unearned Income Disregard (CT 335 – 53) to \$550, effective June 1, 2021.

2.1.1 Overview

The Disability Based Earned and Unearned Income shall reflect the new policy (ACL 19-76). The Disability Based Earned Income and Disability Based Unearned income disregard amounts will be updated from \$500 to \$550. the NNI that is used to determine the AU's MAP is calculated by disregarding the first \$550 of DBI and/or any earned income and 50 percent of any remaining earned income

2.1.2 Description of Changes

1. Effective June 1, 2021, update the values from \$500 to \$550 for the following disregard records,
 - a. CW Disability Based Unearned Income Disregard (CT 335 – 53)
 - b. CW Disability Based Earned Income Disregard (CT 335 – AI)

Note: Per ACL 19-76 effective June 1, 2022, the EID values will be increased \$600, this change will be implemented through SCR CA-212913.

2.1.3 Programs Impacted

1. CW, RCA, DV, IN, KG, HP, HT

2.2 Regression test the Forms/NOAs

2.2.1 Overview

The SCR CA-209033, CIV-104383 updated the EID value to \$500 effective June 1st, 2020. With this SCR the EID value is being updated to \$550 as of June 1st, 2021. This effort is to regression test the forms/NOAs which populate the EID/DBI values to make sure the correct EID/DBI value gets populated on the impacted forms.

2.2.2 Description of changes

1. Following is the list of C-IV NOAs to regression test.
 - a. BUDGT_CW_APPROVAL_AR
 - b. BUDGT_CW_APPROVAL_SAR
 - c. BUDGT_CW_RCA_APPROVAL

- d. BUDGT_CW_RCA_SUPPLEMENT
 - e. BUDGT_CW_SUPPLEMENT_AR
 - f. BUDGT_CW_SUPPLEMENT_SAR
 - g. BUDGT_IN_INCOME_DENIAL
 - h. RSN_INCOMEDISREGARD_CHANGE
 - i. RSN_INCOMEDISREGARD_DISC
 - j. RSN_MAP_INCOMEDISREGARD_CHANGE
 - k. RSN_MAP_INCOMEDISREGARD_DISC
2. Following is the list of forms to regression test in CIV
 - a. M44-316E
 - b. M44-316SAR
 - c. NA1239AR
 - d. NA1242
 - e. NA200
 - f. NA274_E
 - g. NA281
 - h. NA281A
 - i. SAWS2ASAR
 - j. NA845
 - k. CW2218
 - l. NA1239SAR
 3. Following is the list of CalSAWS Fragments to test.
 - a. BUDGT_CW_APPROVAL_SAR_EN
 - b. BUDGT_CW_NA274G_EN
 - c. NA 1242
 - d. NA200
 4. Following is the list of forms to regression test in CalSAWS
 - a. M44-316E
 - b. SAWS2ASAR
 - c. NA840
 - d. NOA290
 - e. OPCALCULATION
 - f. WFPI274
 - g. CW2218
 - h. NA274G
 - i. NA1239SAR

2.3 C-IV Only: DBI/EID Form updates

2.3.1 Overview

The following forms are not populating the updated EID value of \$550 in the forms.

1. NA301_02, NA301_04, NA301_06, NA301_08, NA301_10, NA301_12
2. NA303_02, NA303_04, NA303_06, NA303_08, NA303_10, NA303_12

3. NA 816
4. NA 817
5. NA 840

2.3.2 Description of Changes

Update the population logic to reflect the updated EID value based on the EDBC begin month for the NA 301 CIV and NA 303 CIV forms.

Update the population logic to reflect the updated EID value based on the form generation date for the NA 816, NA 817, NA 840 forms.

2.4 Update the CW Tier 2 IRT based on the Assistance Unit Size rather than the Family Unit Size.

2.4.1 Overview

The CW Tier 2 IRT is calculated based on 130% of Federal Poverty Level (FPL) values for current year. This lookup is based on the Family Unit Size, which includes both active assistance and non-assistance household members.

2.4.2 Description of Changes

1. Update the CW EDBC to determine the Tier 2 IRT by applying the FPL based on the Assistance Unit Size.

Note: The IRT Tier 2 calculation effective prior to 6/2020 (ACL 19-76) is unaffected.

2.4.3 Programs Impacted

CW, RCA

2.5 Update Tier 2 IRT in New IRT Calculation section of the CalWORKs EDBC Summary Page (CalSAWS Only)

2.5.1 Overview

On the CalWORKs EDBC Summary page, a New IRT Calculation section will display if the EDBC recalculated the IRT for the program. This section dynamically displays the Tier 2 calculation based on the 130% FPL for the household size. Currently in CalSAWS, the calculation uses the Family Unit Size for the 130% FPL lookup. This calculation already works as expected in C-IV.

2.5.2 CalWORKs EDBC Summary - New IRT Calculation Section

▼ New IRT Calculation	
Description	IRT
Tier 1(\$243.00 income + 995.50 55% FPL)	\$ 1,239.00
Tier 2 (\$1,868.00 130% FPL)	\$ 1,868.00

Figure 2.5.2 – New IRT Calculation Section

2.5.3 Description of Changes

Update the Tier 2 description in New IRT Calculation section of the CalWORKs EDBC Summary page to display the 130% FPL based on the Assistance Unit Size.

2.5.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: EDBC Results**

2.5.5 Security Updates

N/A

2.6 Automated Regression Test

2.6.1 Overview

Create and update regression test scripts to validate the new Disability Based Earned and Unearned Income Disregard values for the CalWORKs and RCA programs.


2.6.2 Description of Changes

1. Create a new test script(s) to verify the updated values for the CalWORKs program.
 - a. **Scenario Details:** Create a new CalWORKs case with an aged or disabled applicant, add a significant amount of earned income and unearned income, run EDBC, and verify that the

Disability Based Earned and Unearned Income Disregards reflect the new values.

2. Create or update the existing test script(s) to verify the updated values for the RCA program.
 - a. **Scenario Details:** Create a new RCA case with an aged or disabled applicant, add a significant amount of earned income and unearned income, run EDBC, and verify that the Disability Based Earned and Unearned Income Disregards reflect the new values.
 - b. Existing script scope reference: "RCA – IRT Tier 2"

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	CRPC #2225	 CRPC 2225 - ACL 19-76 and ACL 19-76i

4 REQUIREMENTS

The following requirements will be resolved in order to resolve and achieve the desired outcome

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.1.2	The LRS shall include an automated method for implementing mass updates triggered by policy changes or mass participant financial changes, including Social Security or Veterans benefits cost of living adjustments (COLAs)	EID will be updated from \$500 to \$550

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208565 | DDID 1967

Migrate 'Failure to Provide Eligibility Forms' Non-Compliance

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/01/2020	1.0	Initial Document	Jasmine Chen
10/28/2020	1.1	Updated per CA-208565 QA Comments Log	Jasmine Chen
11/18/2020	1.2	Updated Supporting Documents with threshold language XDPs and PDFs per CA-208565 QA Review	Jasmine Chen
12/02/2020	1.3	Updated Section 2.1.3.3 to incorporate technical note; Design Clarification	Jasmine Chen
12/10/2020	1.4	Updated Section 2.5.1.e, 2.6.1.e and Supporting Documents	Jasmine Chen
01/06/2021	1.5	Added recommendation to add the CF, CW, and MC NOA Templates in Arabic, Farsi, Hmong, and Lao	Rainier Dela Cruz
01/11/2021	1.6	Added a design clarification to the Section 2.2	Rainier Dela Cruz
01/25/2021	1.7	Updated formatting of Section 2.6 and Section 2.7	Rainier Dela Cruz
01/28/2021	1.8	Updated the design to remove the Farsi language for the MAGI fragment.	Rainier Dela Cruz
02/19/2021	1.9	Section 2.5.1f listed the incorrect status code that is currently used for Medi-Cal. Updated to match the existing functionality.	Rainier Dela Cruz

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1 OVERVIEW

As the 57 Migration counties are migrating into CalSAWS, DDID 1054: Non-Compliance Research Analysis identified conversion impacts and differences between the systems to be addressed. This SCR CA-208565 will address 'FTP: Eligibility Forms' impacts.

1.1 Current Design

In C-IV, a Worker evaluates a customer's compliance for completing and returning their necessary eligibility forms. If required forms are not returned, the User can create a Non-Compliance record on the Eligibility Non-Compliance page for Type: Failure to Provide (FTP), Reason: Eligibility Forms. When EDBC is run, the rules set the appropriate status for the person or program and a corresponding Denial or Discontinuance Notice of Action (NOA) will generate. The User will append details of the customer's missing eligibility forms and regulations to the NOA.

In CalSAWS, the Non-Compliance reason, FTP: Eligibility Forms does not exist for the CalWORKs (CW) and CalFresh (CF) programs. It exists for the Medi-Cal (MC) program but no NOA is currently generated.

1.2 Requests

Migrate the C-IV FTP: Eligibility Forms Non-Compliance functionality and EDBC logic to CalSAWS and generate the corresponding Denial or Discontinuance NOA.

1.3 Overview of Recommendations

1. Migrate the C-IV Non-Compliance Type: Failure to Provide, Reason: Eligibility Forms to CalSAWS for the CalWORKs and CalFresh programs. Remove the FTP reason: Verifications for the Medi-Cal program.
2. Update EDBC rules to evaluate the Non-Compliance of FTP: Eligibility Forms and set the appropriate status for the person or program for CalWORKs and CalFresh.
3. Migrate the C-IV NOA reason fragment for failure reason, FTP Eligibility Forms to populate on Denial and Discontinuance NOAs for CalWORKs, CalFresh, and Medi-Cal programs. Also migrate the reason fragment in applicable threshold languages.
4. Add the CF, CW, and MC NOA template fragments in Arabic, Farsi, Hmong, and Lao.

1.4 Assumptions

1. There are no changes to the CalSAWS eHIT interface. The new Non-Compliance Reason of FTP Eligibility Forms will not be sent to CalHEERS.

2. There are no changes to current Medi-Cal EDBC rules as the system already evaluates for the existing Medi-Cal Non-Compliance reason of FTP: Eligibility Forms.
3. There will be no MAGI Denial NOA generated for a MAGI Medi-Cal person with EDBC status reason FTP Eligibility Forms.
4. After EDBC generates a FTP Eligibility Forms Denial or Discontinuance NOA, the User is responsible for appending language to the NOA to inform the customer what specific eligibility form was not provided and the applicable regulations.
5. There are no functional impacts when end-dating Medi-Cal Non-Compliance FTP reason: Verifications. This FTP reason will continue to display for historical records.
6. CA-207384 migrated the CMSP NOA fragment associated to a customer not returning their eligibility paperwork.
7. CA-204496 turned off MAGI reason fragments in Farsi that would generate on Mixed MAGI NOAs. Since MAGI FTP Eligibility Forms reason fragment will generate on Mixed MAGI NOAs, CA-214024 will implement the reason fragment in Farsi, instead of this SCR.

2 RECOMMENDATIONS

2.1 Eligibility Non-Compliance Detail

2.1.1 Overview

For CalWORKs (also known as Cash) and CalFresh programs, migrate the Non-Compliance type: Failure to Provide, reason: Eligibility Forms to the Eligibility Non-Compliance Detail page.

For Medi-Cal programs, remove the Failure to Provide reason: Verifications from the page because there is already automated EDBC logic in CalSAWS to evaluate for past-due verifications.

2.1.2 Eligibility Non-Compliance Detail Mockup

N/A for dropdown value changes only

2.1.3 Description of Changes

1. For the Cash/CalWORKs program and after selecting Non-Compliance Type: Failure to Provide – alphabetically add 'Eligibility Forms' to the Reason dropdown list.
2. For the CalFresh program, add 'Failure to Provide' to the end of the Non-Compliance Type dropdown list. Also alphabetically add 'Eligibility Forms' to the Reason dropdown list.
3. For the Medi-Cal program – End-date 'Verifications' non-compliance reason from the CODE_DETL table with code category id: 365.

Note: Historical Non-Compliance records for FTP Verifications will continue to display on the page.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Compliance

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 Update EDBC Rules for CalWORKs and CalFresh programs

2.2.1 Overview

With the Non-Compliance reason, FTP: Eligibility Forms added for the Cash and CalFresh programs, EDBC rules will be updated to evaluate this non-compliance to set the appropriate status for the person or program.

2.2.2 Description of Changes

1. Update Cash and CalFresh EDBC rules to evaluate the Non-Compliance type: Failure to Provide, reason: Eligibility Forms and set the appropriate status, denied, or discontinued, for the person or program.

2.2.3 Programs Impacted

Cash, CalFresh

2.2.4 Performance Impacts

N/A

2.3 Correspondence: Add new Reason Fragment for CalWORKs

2.3.1 Overview

Migrate the C-IV NOA reason fragment and details to generate on the new CalWORKs NOAs for FTP Eligibility Forms.

2.3.2 Description of Change

1. Create the new reason fragment that will generate on a denial or discontinuance NOA when the CalWORKs program is denied or discontinued for failure status reason 'FTP Eligibility Forms'.

NOA Template: NOA 290

Program: CalWORKs

Action Type: Denial, Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes (NA_BACK9_FRAGMENT)

NOA Mockups/Examples: Refer to Section 3: Supporting Documents

Ordering on NOA: The new reason fragment will be after the 'Here's why:' of the action fragment.

Languages (13): English, Spanish, Korean, Tagalog/Filipino, Chinese, Cambodian, Armenian, Hmong, Lao, Russian, Arabic, Farsi, Vietnamese

- a. Create a new reason fragment to be applied for CalWORKs:

NOA	Description	Text	Formatting
CW Denial & Discontinuance	Static	We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.	Arial Font Size 10

- b. Add generation logic for the new fragment. Generate the fragment on a CalWORKs denial or discontinuance NOA when the following is true:
 - a. The CalWORKs program status is Denied or Discontinued
 - b. The program failed for the EDBC status reason of 'FTP Eligibility Forms'
- c. The following are the action and message details for the FTP Eligibility Forms NOA:

NOA	Action Fragment	Message Fragment
CW Denial	CW_DN_ACTION1 (ID: 4015)	CW_DN_MESSAGE4 (ID: 5017)
CW Discontinuance	CW_TN_ACTION4 (ID: 4026)	CW_TN_MESSAGE1 (ID: 5022)

- d. Add the following regulations for the new fragment based on program:

Program	Regulation
CalWORKs	MPP 40-105.1, 40-115, 40-157.2, 40-157.3, 40-181(k), 40-181.2

- e. Add the hyperlink names of the NOAs when viewing from the Distributed Documents page:

NOA	Status Reason	Hyperlink Name
CW Denial	FTP Eligibility Forms	NOA – CW – DE – FTP ELIG FORMS
CW Discontinuance	FTP Eligibility Forms	NOA – CW – DS – FTP ELIG FORMS

2.4 Correspondence: Add new Reason Fragment for CalFresh

2.4.1 Overview

Migrate the C-IV NOA reason fragment and details to generate on the new CalFresh NOAs for FTP Eligibility Forms.

2.4.2 Description of Change

1. Create the new reason fragment that will generate on a denial or discontinuance NOA when the CalFresh program is denied or discontinued for failure status reason 'FTP Eligibility Forms'.

Program: CalFresh

Action Type: Denial, Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes (NA_BACK9_FRAGMENT)

NOA Mockups/Examples: Refer to Section 3: Supporting Documents

Ordering on NOA: The new reason fragment will be after the 'Here's why:' of the action fragment.

Languages (13): English, Spanish, Korean, Tagalog/Filipino, Chinese, Cambodian, Armenian, Hmong, Lao, Russian, Arabic, Farsi, Vietnamese

- a. Create a new reason fragment to be applied for CalFresh:

NOA	Description	Text	Formatting
CF Denial & Discontinuance	Static	We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.	Arial Font Size 10

- b. Add generation logic for the new fragment. Generate the fragment on a CalFresh denial or discontinuance NOA when the following is true:
 - a. The CalFresh program status is Denied or Discontinued
 - b. The program failed for the EDBC status reason of 'FTP Eligibility Forms'
- c. The following are the template, action, and message details for the FTP Eligibility Forms NOA:

NOA	NOA Template	Action Fragment	Message Fragment
CF Denial	DFA 377.1A (3/02)	CF_DN_ACTION1 (ID: 4008)	CF_DN_MESSAGE1 (ID: 5008)
CF Discontinuance	CF 377.4 SAR (6/13)	CF_TN_ACTION1 (ID: 4010)	CF_TN_MESSAGE1 (ID: 5011)

- d. Add the following regulations for the new fragment:

Program	Regulation
CalFresh	MPP 63-300.2

- e. Add the hyperlink names of the NOAs when viewing from the Distributed Documents page:

NOA	Status Reason	Hyperlink Name
CF Denial	FTP Eligibility Forms	NOA – CF – DE – FTP ELIG FORMS
CF Discontinuance	FTP Eligibility Forms	NOA – CF – DS – FTP ELIG FORMS

2.5 Correspondence: Add new Reason Fragment for Non-MAGI Medi-Cal

2.5.1 Overview

Create a NOA reason fragment to generate on the new Non-MAGI Medi-Cal NOAs for FTP Eligibility Forms.

2.5.2 Description of Change

1. Create the new reason fragment that will generate on a denial or discontinuance NOA when a Non-MAGI Medi-Cal person is denied or discontinued for failure status reason of 'FTP Eligibility Forms'.

NOA Template: MC 239

Program: Non-MAGI Medi-Cal

Action Type: Denial, Discontinuance

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes (NA_BACK9_FRAGMENT)

NOA Mockups/Examples: Refer to Section 3: Supporting Documents

Ordering on NOA: The new reason fragment will be after the action fragment.

Languages (13): English, Spanish, Korean, Tagalog/Filipino, Chinese, Cambodian, Armenian, Hmong, Lao, Russian, Arabic, Farsi, Vietnamese

a. Create new Non-MAGI Medi-Cal reason fragments:

NOA	Description	Text	Formatting
Denial (Non-MAGI MC)	Static	<p>Medi-Cal benefits are denied for: {PersonName}</p> <p>We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.</p>	Arial Font Size 10
Discontinuance (Non-MAGI MC)	Static	<p>Medi-Cal benefits will be discontinued for: {PersonName}</p> <p>We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.</p> <p>You can still get Medi-Cal, but you need to give us more information. We need it within 90 days, by {DueDate}. We can give</p>	Arial Font Size 10

NOA	Description	Text	Formatting
		you Medi-Cal from {DiscDate} if you are still eligible. If we do not get the information by {DueDate}, you must reapply for Medi-Cal.	

- b. Add population logic for the new Non-MAGI Medi-Cal reason fragments:

Variable	Description	Population
PersonName	The name of the person.	<p>This variable will be populated with the name of the person denied or discontinued for 'FTP Eligibility Forms'.</p> <p>If there is more than one person denied or discontinued for this same status reason, the names will be listed as follows: Person 1, Person 2, etc.</p>
DiscDate	The discontinuance date of the person.	This variable will be populated with the discontinuance date of the person denied or discontinued for 'FTP Eligibility Forms'.
DueDate	The due date or deadline for the person.	<p>This variable will be populated with the due date or deadline the person has to provide more information.</p> <p>This due date is currently the end of the month after 90 days from the person's discontinuance date.</p>

- c. Add generation logic for the new fragment. Generate the appropriate fragment on a Non-MAGI Medi-Cal denial or discontinuance NOA when the following is true:
- The Non-MAGI Medi-Cal person status is Denied or Discontinued

- b. The Non-MAGI Medi-Cal person failed for the EDBC status reason of 'FTP Eligibility Forms'
- d. Add the following regulation for the new Non-MAGI Medi-Cal fragments:

NOA	Regulation
Denial (Non-MAGI MC)	Title 22, CCR, Sections 50157, 50175, 50185, 50179
Discontinuance (Non-MAGI MC)	W&I Code Section 14005.37(i); Title 22, CCR, Sections 50157, 50175, 50185, 50179

- e. The following are the action and message details for this FTP Eligibility Forms NOA:

NOA	Action Fragment	Message Fragment
Denial (Non-MAGI MC)	MC_DN_ACTION1 (ID: 4034)	MC_DN_TN_BIC_MESSAGE (ID: 5126) and MC_DN_TN_SEPARATE_NOA_MESSAGE (ID: 5130)
Discontinuance (Non-MAGI MC)	MC_TN_ACTION1 (ID: 4035)	MC_TN_MESSAGE5 (ID: 5058) Technical Note: Per CA-204496, this message fragment is followed by the MC_DN_TN_BIC_MESSAGE fragment.

- f. Add the hyperlink names of the NOAs when viewing from the Distributed Documents page:

NOA	Status Reason	Hyperlink Name
Denial (Non-MAGI MC)	FTP Eligibility Forms	NOA – MC – MD – FTP ELIG FORMS
Discontinuance (Non-MAGI MC)	FTP Eligibility Forms	NOA – MC – MF – FTP ELIG FORMS

2.6 Correspondence: Add new Reason Fragment for MAGI Medi-Cal

2.6.1 Overview

Create a NOA reason fragment to generate on the new MAGI Medi-Cal NOAs for FTP Eligibility Forms.

2.6.2 Description of Change

1. Create the new reason fragment that will generate on a discontinuance NOA when a MAGI Medi-Cal person is discontinued for failure status reason of 'FTP Eligibility Forms'.

NOA Template: MC-MAGI-T (11/2015)

Program: MAGI Medi-Cal

Action Type: Discontinuance

Fragment Level: Person

Repeatable: No

Include NA Back 9: Yes (NA_BACK_9_MAGI_FRAGMENT)

NOA Mockups/Examples: Refer to Section 3: Supporting Documents

Ordering on NOA: The new reason fragment will be after the action fragment.

Languages (10): English, Spanish, Korean, Tagalog/Filipino, Chinese, Cambodian, Armenian, Russian, **Farsi**, Vietnamese

- a. Create a new MAGI Medi-Cal reason fragment:

NOA	Description	Text	Formatting
Discontinuance (MAGI MC)	Static	We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.	Arial Font Size 10

- b. Add generation logic for the new fragment. Generate the appropriate fragment on a MAGI Medi-Cal discontinuance NOA when the following is true:
 - c. The MAGI Medi-Cal person status is Discontinued
 - d. The MAGI Medi-Cal person failed for the EDBC status reason of 'FTP Eligibility Forms'

For example: A customer is initially granted MAGI eligibility. A worker processed the referral with 'Full Medi-Cal Hierarchy' and EDBC is run to make them active for MAGI Medi-Cal. The customer was later discontinued from MAGI. Additionally, as the customer

did not provide required Non-MAGI eligibility forms, the worker added a non-compliance record for FTP: Eligibility Forms. Due to the non-compliance record, the EDBC logic will discontinue them from Medi-Cal and generate a MAGI Discontinuance NOA populated with the FTP Eligibility Forms reason fragment.

- c. Add the following regulation for the new MAGI Medi-Cal fragment:

NOA	Regulation
Discontinuance (MAGI MC)	W&I Code Section 14005.37(i); Title 22, CCR, Sections 50157, 50175, 50185, 50179

- d. The following are details for this FTP Eligibility Forms NOA:

NOA	Type of Fragment	Fragment
Discontinuance (MAGI MC)	Header	H_STATIC_HEADER (ID: 4093)
	Action	H_TN_ACTION1 (ID: 4092)
	Message	H_TN_MESSAGE1 (ID: 5072)
	Footer	H_STATIC_FOOTER (ID: 5083)

- e. Add the hyperlink names of the NOAs when viewing from the Distributed Documents page:

NOA	Status Reason	Hyperlink Name
Discontinuance (MAGI MC)	FTP Eligibility Forms	NOA – MC – HT – MAGI Termination

2.7 NOA Template Fragments

2.7.1 Overview

The CF, CW, and MC NOA template fragments are not available in Arabic, Farsi, Hmong, and Lao. Add the template fragment in those languages.

2.7.2 Description of Change

1. Add the CF, CW, and MC NOA template fragments in Arabic, Farsi, Hmong, and Lao.

3 SUPPORTING DOCUMENTS

#	Functional Area	Description	Attachment
1	Client Correspondence	CW Denial Mockup NOA	208565_CW_FTPEligForm_DenialNOA.pdf
2	Client Correspondence	CW Discontinuance Mockup NOA	208565_CW_FTPEligForm_DiscNOA.pdf
3	Client Correspondence	CF Denial Mockup NOA	208565_CF_FTPEligForm_DenialNOA.pdf
4	Client Correspondence	CF Discontinuance Mockup NOA	208565_CF_FTPEligForm_DiscNOA.pdf
5	Client Correspondence	Non-MAGI MC Denial Mockup NOA	208565_NonMAGI MC_FTPEligForm_DenialNOA.pdf
6	Client Correspondence	Non-MAGI MC Discontinuance Mockup NOA	208565_NonMAGI MC_FTPEligForm_DiscNOA.pdf
7	Client Correspondence	MAGI MC Discontinuance Mockup NOA	208565_MAGI MC_FTPEligForm_DiscNOA.pdf
8	Client Correspondence	Folder containing (new) .xdp files of English, Spanish and applicable threshold languages for the FTP Eligibility Forms reason fragment of CW, CF, MC programs	CA 208565 – Reason XDPs.zip
9	Client Correspondence	Folder containing .pdf files of English, Spanish and applicable threshold languages for the FTP Eligibility Forms reason fragment of CW, CF, MC programs	CA 208565 – Reason PDFs.zip
10	Client Correspondence	Folder of other (new) .xdp components to compiling the FTP Eligibility Forms NOAs	CA 208565 - Other XDPs.zip

#	Functional Area	Description	Attachment
11	Client Correspondence	Folder of other .pdf files that are components of the FTP Eligibility Forms NOAs	CA 208565 - Other PDFs.zip

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<p>- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>- For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.</p>	<p>Workers will be able to fail a person or program with the following migrated into CalSAWS:</p> <ol style="list-style-type: none"> 1) The Non-Compliance type: Failure to Provide, reason: Eligibility Forms and 2) The corresponding NOA reason fragment for new FTP NOAs.



California Statewide Automated Welfare System

Design Document

SCR CA-209754 Add Threshold Languages for
GN 6050 RP and GN 6053-R

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor Gorry
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/16/20	1.0	Initial Draft	Connor Gorry
11/17/20	1.0.1	Updated per R6 comments <ul style="list-style-type: none"> • Updates to Vietnamese verbiage in mockups for both forms • Added recommendation to update GN 6050 RP title in EN, SP 	Connor Gorry
11/23/20	1.0.2	Updated per R6 translation feedback	Connor Gorry
11/25/20	1.0.3	Additional Translation updates	Connor Gorry
12/30/20	1.0.4	Updated Arabic mockup of the GN 6050 RP in Supporting Documents with the correctly formatted footer.	Connor Gorry
2/9/21	1.1.1	Content Revision 1: <ul style="list-style-type: none"> • Corrected Armenian Mockup for GN 6050 RP • Fixed consistency issues in footers/form names for GN 6050RP • Fixed consistency issues in footers for GN 6053-R in Cambodian, Chinese, and Tagalog • Added Assumption #5: All translations of the GN 6050 RP and GN 6053-R will use the translated Header_1_XX. 	Connor Gorry

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1 OVERVIEW

GN 6050 RP and GN 6053-R were implemented as LA County-only Forms in SCR CA-208834, released with 19.09.

This SCR will add Threshold Language translations for both Forms. These changes will only be implemented to LRS/CalSAWS.

1.1 Current Design

GN 6050 RP (5/19) and GN 6053-R (5/19) currently exist in the CalSAWS template repository in English and Spanish.

1.2 Requests

Create Threshold Languages for the GN 6050 RP (5/19) and GN 6053-R (5/19).

1.3 Overview of Recommendations

1.3.1 Add Threshold Language Translations for GN 6050 RP (5/19)

1.3.2 Add Threshold Language Translations for GN 6053-R (5/19)

1.4 Assumptions

1. No additional changes will be made to either Form beyond adding threshold language support.
2. When the GN 6053-R is generated through the Template Repository page or through the Customer Appointment Detail page, the GN 6050 RP is included as the second page.
3. When the GN 6050 RP is generated through the Template Repository page, the GN 6053-R is not included.
4. The GN 6050 RP generated from the Template Repository should be the same as the GN 6050 RP that is attached to the GN 6053-R, with the exceptions of formatting changes made to accommodate the mailing header.
5. All translations of the GN 6050 RP and GN 6053-R will use the translated Header_1_XX.
6. Characters in Armenian, Cambodian, and Farsi will not appear in bold.

2 RECOMMENDATIONS

2.1 Correct GN 6050 RP Title in English and Spanish

Update the XDPs and database to change the title of the GN 6050 RP (5/19) to 'Optional Transfer to New REP Location Notice'.

2.1.1 Update GN 6050 RP XDP

Correct the title of the GN 6050 RP (5/19) in English and Spanish as it appears in the mailing header.

English	OPTIONAL TRANSFER TO NEW REP LOCATION NOTICE
Spanish	AVISO DE TRANSFERENCIA OPCIONAL A UNA NUEVA UBICACIÓN DE REP

2.1.2 DCR to update GN 6050 RP Form Title

Update the data entry for GN 6050 RP's Form Title to: 'Optional Transfer to New REP Location Notice'

2.2 Add Threshold Language Translations for GN 6050 RP (5/19)

2.2.1 Overview

Implement GN 6050 RP – Optional Transfer to New REP Location* Notice – in threshold languages.

*Note: Currently the GN 6050 RP (5/19) is titled 'Optional Transfer to New REP Provider Notice'. This will be updated with Recommendation 2.2 later in this document.

State Form: N/A

Current Programs: REP

Current Attached Forms: N/A

Current Forms Category: Form

Visibility: LA County Only

Existing Languages: English, Spanish

2.2.2 Add Threshold Languages for GN 6050 RP

The GN 6050 RP will be added in all required Threshold Languages.

Languages Added:

Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

Form Mockups/Examples: See Supporting Documents

2.3 Add Threshold Language Translations for GN 6053-R (5/19)

2.3.1 Overview

Implement updated GN 6053-R – REP Appraisal Appointment Notice – in threshold languages.

State Form: N/A

Current Programs: REP

Current Attached Forms: GN 6050 RP (5/19)

Current Forms Category: Form

Visibility: LA County Only

Existing Languages: English, Spanish

2.3.2 Add Threshold Languages for GN 6053-R (5/19)

The GN 6053-R (5/19) will be added in all required Threshold Languages.

Languages Added:










Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

Form Mockups/Examples: See Supporting Documents










2.4 CTCR to add languages for GN 6050 RP and GN 6053-R

3 SUPPORTING DOCUMENTS



3.1 GN 6050 RP Translations

Ref. #	Document	Attachment
1	GN 6050 RP – Armenian	 GN 6050RP (05/2019) - Armenian
2	GN 6050 RP – Arabic	 GN 6050RP (05/2019) - Arabic
3	GN 6050 RP – Cambodian	 GN 6050RP (05/2019) - Cambodian
4	GN 6050 RP – Chinese	 GN 6050RP (05/2019) - Chinese
5	GN 6050 RP – Farsi	 GN 6050RP (05/2019) - Farsi
6	GN 6050 RP – Korean	 GN 6050RP (05/2019) - Korean
7	GN 6050 RP – Russian	 GN 6050RP (05/2019) - Russian
8	GN 6050 RP – Tagalog	 GN 6050RP (05/2019) - Tagalog
9	GN 6050 RP – Vietnamese	 GN 6050RP (05/2019) - Vietnamese

3.2 GN 6053-R Translations

Ref. #	Document	Attachment
1	GN 6053-R – Armenian	 GN 6053-R (5/19) - Armenian
2	GN 6053-R – Arabic	 GN 6053-R (5/19) - Arabic
3	GN 6053-R – Cambodian	 GN 6053-R (5/19) - Cambodian
4	GN 6053-R – Chinese	 GN 6053-R (5/19) - Chinese
5	GN 6053-R – Farsi	 GN 6053-R (5/19) - Farsi
6	GN 6053-R – Korean	 GN 6053-R (5/19) - Korean
7	GN 6053-R – Russian	 GN 6053-R (5/19) - Russian
8	GN 6053-R – Tagalog	 GN 6053-R (5/19) - Tagalog
9	GN 6053-R – Vietnamese	 GN 6053-R (5/19) - Vietnamese

3.3 GN 6050 RP English and Spanish Updated Title

Ref. #	Document	Attachment
1	GN 6050 RP – Updated Title (EN)	 GN 6050 RP - Updated Title - EN
2	GN 6050 RP – Updated Title (SP)	 GN 6050 RP - Updated Title - SP

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214059

DDID 2520 Imaging Reports

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Greg Deogracia
	Reviewed By	Thao Ta, Ravneet Bhatia, Christopher Vasquez, Cory Wozniak, Rhiannon Chin, Erick Arreola, Logan Pratt

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/03/2020	1.0	Initial document release	Greg Deogracia
12/23/20 20	1.01	Design Clarification 2.2.2.b	Greg Deogracia
02/41/2021	1.02	Design update to utilize Qlik applications 2.2 a) Added column	Greg Deogracia

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1 OVERVIEW

Perform Migration of the C-IV, Los Angeles, and CalWIN Imaging systems into the new CalSAWS Imaging Solution. The goal being to centralize all documents into one location in order to unify the counties into a cloud-based statewide Imaging Solution.

This migration will populate the CalSAWS Imaging Solution with images and metadata provided by the counties. This metadata will need to contain required indexing information for the migrated images. Once metadata has been acquired, the data will be processed.

CA-214059 DDID 2520 was created to implement the requirements for imaging reports.

1.1 Current Design

The C-IV System contains a series of existing Imaging report considered as a baseline for review by the consortium. These reports consist of:

1. Imaging - Routed in Default Report
2. Imaging – Document Captured Report
3. Imaging – Documents in Batch Grid Report
4. Imaging – Exception Queues Aging Report
5. Imaging – Workflow Aging Report

1.2 Requests

Per CA-214059 DDID 2520, The CONTRACTOR shall create up to five (5) imaging reports in the CalSAWS Software that will be determined during detailed design.

1.3 Overview of Recommendations

Based upon several CalSAWS Imaging Committee Meetings and Consortium reviews, the following three reports shall be created for CalSAWS:

1. Imaging - Document Captured Report
2. Imaging - Initial QA Report
3. Imaging – Exception Queues Aging Report

1.4 Assumptions

1. No Impact to other reports.
2. Reports shall be updated and formatted to be operational with Qlik applications.
3. Functionality will not be available to counties that have not been enabled on the new imaging solution (Hyland).

2 RECOMMENDATIONS

2.1 Imaging Reports

2.1.1 Imaging - Documents Captured Report – Mockup

CalSAWS Staff Documents Captured

[Return to Filters](#)

[Staff Documents Captured](#)

[External Documents Captured](#)

County

-

Run Date

2/10/2021

Data as of

8/1/2020

Staff Documents Captured

Created By	Staff Name	Office Number	Number of Documents	Number of Pages Captured	Single Case	Multi Case	SIU	Hearl...	RDB	Retur... Mail	CWS	AAP	IHSS	QA/QC	Ignore Barco...	Import / Virtual Captur...
Totals			0	0	0	0	0	0	0	0	0	0	0	0	0	0
-	-	-	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Figure 2.1.1.1- Imaging - Documents Captured Report – Staff Documents Captured Mockup

CalSAWS External Documents Captured

[Return to Filters](#)

[Staff Documents Captured](#)

[External Documents Captured](#)

County

-

Run Date

2/10/2021

Data as of

8/1/2020

External Documents Captured

6/30/2020

Captured Source	Office Number	Number of Documents Captured	Number of Pages Captured
Totals		0	0
-	-	0	0

Figure 2.1.1.2- Imaging - Documents Captured Report – External Documents Captured Mockup

2.1.2 Imaging - Initial QA Report - Mockup

CalSAWS Initial QA Report

Return to Filters

County
San Bernardino

Run Date
2/10/2021

Data as of
7/1/2020

Total
1

Initial QA Report

User	Staff Name	Office	Document ID	Bundle ID	Creation Time	Applicable Date	Received Date
-	-	-	-	-	-	-	-

Figure 2.1.2.1- Imaging - Initial QA Report – Mockup

2.1.3 Imaging - Exception Queues Aging Report - Mockup

CalSAWS Summary

Return to Filters

County
San Bernardino

Run Date
2/10/2021

Data as of
7/1/2020

Barcode Verification

No Case

Exception

Reindex

Full Reindex

Person Select

Queue	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
-	0	0	0	0	0	0

Figure 2.1.3.1- Imaging - Exception Queues Aging Report – Summary Mockup

CalSAWS Barcode Verification

Return to Filters

County
San Bernardino

Run Date
2/9/2021

Data as of
7/1/2020

Barcode Verification

No Case

Exception

Reindex

Full Reindex

Person Select

Barcode Verification

Office Queue Number	Confidential	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
Totals		0	0	0	0	0	0
-	-	0	0	0	0	0	0

Figure 2.1.3.2- Imaging - Exception Queues Aging Report – Barcode Verification Mockup

CalSAWS

No Case

Return to Filters

Return to Summary

County

San Bernardino

Run Date

2/9/2021

Data as of

7/1/2020

Barcode Verification

No Case

Exception

Reindex

Full Reindex

Person Select

No Case

Office Queue Number	Q	Confidential	Q	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
Totals				0	0	0	0	0	0
-	-			0	0	0	0	0	0

Figure 2.1.3.3- Imaging - Exception Queues Aging Report – No Case Mockup

CalSAWS

Exception

Return to Filters

Return to Summary

County

San Bernardino

Run Date

2/10/2021

Data as of

7/1/2020

Barcode Verification

No Case

Exception

Reindex

Full Reindex

Person Select

Exception

Office Queue Number	Q	Confidential	Q	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
Totals				0	0	0	0	0	0
-		-		0	0	0	0	0	0

Figure 2.1.3.4- Imaging - Exception Queues Aging Report – Exception Mockup

CalSAWS Reindex

Return to Filters

Return to Summary

County
San Bernardino

Run Date
2/9/2021

Data as of
7/1/2020

Barcode Verification

No Case

Exception

Reindex

Full Reindex

Person Select

Reindex

Office Queue Number	Confidential	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
Totals		0	0	0	0	0	0
-	-	0	0	0	0	0	0

Figure 2.1.3.5- Imaging - Exception Queues Aging Report – Reindex Mockup

CalSAWS

Full Reindex

Return to Filters

Return to Summary

County

San Bernardino

Run Date

2/9/2021

Data as of

7/1/2020

Barcode Verification

No Case

Exception

Reindex

Full Reindex

Person Select

Full Reindex

Office Queue Number

Q

Confidential

Q

0-7 Days

8-14 Days

15-30 Days

31-45 Days

45+ Days

Total in Queue

Totals

0

0

0

0

0

0

-

-

0

0

0

0

0

0

Figure 2.1.3.6- Imaging - Exception Queues Aging Report – Full Reindex Mockup

CalSAWS

Person Select

Return to Filters

Return to Summary

County

San Bernardino

Run Date

2/9/2021

Data as of

7/1/2020

Barcode Verification

No Case

Exception

Reinders

Full Reinders

Person Select

Person Select

Office Queue Number	Confidential	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
Totals		0	0	0	0	0	0
-	-	0	0	0	0	0	0

Figure 2.1.3.7- Imaging - Exception Queues Aging Report – Person Select Mockup

2.2 Description of Changes

1) Imaging - Document Captured Report

The Imaging – Document Captured Report shows the count of Documents as would be seen in the image repository known as Drawers. There is a Staff Documents Captured **sheet** and an External Documents Captured **sheet** as shown below:

- a) Create the Staff Documents Captured **sheet** layout per the Imaging – Documents Captured mockup.

Staff Documents Captured Tab

Column Name	Column Description
Created By	Persons system username formatted as: aaaaaaa.a@CXX
Staff Name	Persons given name formatted as: Last name, First name
Office Number	CalSAWS office number of the person performing the capture
Number of Documents Captured	Total number of Documents
Number of Pages Captured	Total number of Pages
Single Case	Count of documents captured by capturing one or more documents for a single case
Multi Case	Count of documents captured by capturing multiple documents from different cases
SIU	Count of documents captured by Cases pertaining to "Special Investigations Unit" or "Fraud" will utilize the SIU capture mode to scan documents into the County SIU Drawer
Hearings	Count of documents captured by "Hearings" capture mode used to scan documents into the County Hearings Drawer
RDB	Count of documents captured by (Resource Data Bank) RDB capture mode is used to scan documents into the Resource Drawer
Returned Mail	Count of documents captured by Documents being scanned to a single case as returned

	mail will use the "Returned Mail Single-Case" or "Returned Mail Multi-Case" scan mode
CWS	Count of documents captured by Child Welfare Services (CWS)
AAP	Count of documents captured by Adoptions (AAP)
IHSS	Count of documents captured by Adult Aging Services (IHSS)
QA/QC	Count of documents captured by Quality Assurance/Quality Control (QA/QC)
Ignore Barcode	Count of documents captured by System capture mode that ignores any barcodes on the document when processing.
Import / Virtual Captured	Count of documents captured by import, drag and drop, or virtual capture

- b) Create the External Documents Captured sheet layout per the Imaging – Documents Captured Report mockup. External documents are identified by the System User Name "CalSAWSServiceAcct".

External Documents Captured tab

Column Name	Column Description
Captured Source	Any external capture source by named (variable) source
Office Number	Based on fixed scan source location (or null)
Number of Documents Captured	Total number of Documents
Number of Pages Captured	Total number of Pages

2) Imaging - Initial QA Report

The Imaging – Initial QA Report is to identify unworked/submitted documents. The report has a single Summary **sheet**.

- a) Create the Initial QA Report Summary sheet layout per the Imaging – Initial QA Report mockup.

Initial QA Report Tab (Single sheet)

Column Name	Column Description
User	Person's system username formatted as: aaaaaa.a@CXX
Staff Name	Person's given name formatted as: Lastname, Firstname
Office	CalSAWS office number of the person performing the capture.
Document ID	Unique assigned Document number
Bundle ID	User input value at scan time (if used)
Creation Time	Time of Creation formatted as: 07/01/2020 01:35 PM
Applicable Date	Date document is applicable to a specific case formatted as: mm/dd/yyyy
Received Date	Date doc was received by County formatted as: mm/dd/yyyy

3) Imaging - Exception Queues Aging Report

The Imaging – Exception Queues Aging Report captures the count of documents in the defined queues and further segregated by the number of days in the queue. There is a Summary **sheet** and six queue detail **sheets** in the report.

- a) Create the Summary **sheet** layout per the Imaging - Exception Queues Aging Report mockup.

Summary sheet (Single sheet)

Column Name	Column Description
Queue	Defined Queue Names: <ul style="list-style-type: none"> • Barcode Verification • No Case • Exception • Reindex • Full Reindex • Person Select
0-7 Days	Count in queue
8-14 Days	Count in queue
15-30 Days	Count in queue
31-45 Days	Count in queue
45+ Days	Count in queue
Total In Queue	Total Count in queue

b) Create the Detail **sheets** layout per the Imaging – Exception Queues Aging Report mockup

Detail **sheets** (Multiple **sheets**)

- Barcode Verification
- No Case
- Exception
- Reindex
- Full Reindex
- Person Select

Column Name	Column Description
Office Queue Number	Office Name, Queue Name, Office Number. Format example: San Bernardino, Barcode Verification, 01

Confidential	True/False
0-7 Days	Count in queue
8-14 Days	Count in queue
15-30 Days	Count in queue
31-45 Days	Count in queue
45+ Days	Count in queue
Total in Queue	Total Count in queue

2.3 Report Location

2.3.1 Report selection

Global Navigation: Reports

Local Navigation: On Request*

Task Navigation: Administrative

Name: Imaging - Document Capture Report

Description: This report displays the number of staff documents captured by type and external documents captured by location for the date range specified

Global Navigation: Reports

Local Navigation: On Request*

Task Navigation: Administrative

Name: Imaging - Initial QA Report

Description: The Initial QA Report is used to identify unworked/submitted documents

Global Navigation: Reports

Local Navigation: On Request*

Task Navigation: Administrative

Name: Imaging - Exception Queues Aging Report

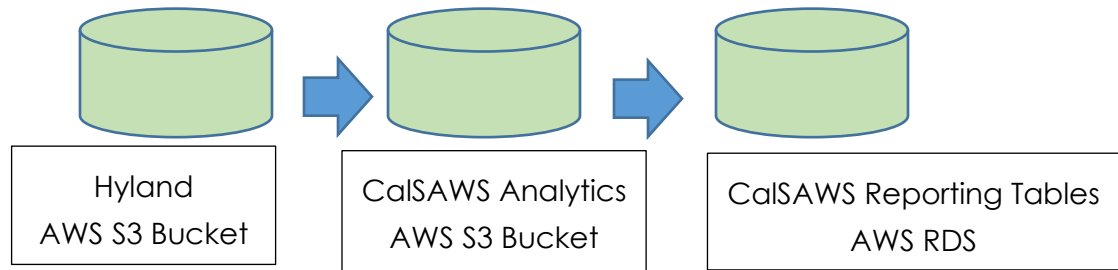
Description: This report shows the total number of documents displayed by increasing day increments in the defined workflow queues. Each tab displays the number of incremental days documents created by a specific office have been in the queue

***NOTE:** The reporting data will be based on the latest data transfer provided by Hyland. This transfer is currently set to be run nightly, thus the currently day's reporting data for Imaging reports is as of the previous day.

2.3.2 Imaging Data Flow

The imaging data for the report does not originate from the CalSAWS system since the data is captured by the Hyland imaging system. In order to report on this information, Hyland will provide a nightly refresh of the reporting data that is to be transferred and ingested into the CalSAWS reporting tables.

High level flowchart of Imaging database



High level steps for the nightly data consumption

1. Hyland will prepare their data and load the final files into their AWS S3 bucket.

Technical Note: Hyland will keep the data on their S3 bucket for up to a week in case the transfer process needs to be rerun. Data will be deleted by Hyland after the 1 week time period.

2. The files will be copied over into the CalSAWS Analytics S3 bucket using S3-to-S3 data transfer.

Technical Note: A folder will be created for each report. The files pertaining to its respective reports will be stored inside its folder. Depending on data volume, a report dataset may contain multiple files. After data ingestion, files are being maintained on S3 at the discretion of the Consortium.

3. Once it is in the CalSAWS data bucket, the data will be ingested and curated into the final CalSAWS RDS reporting tables where it will be available for reporting usage.

Technical Note: This will be an incremental load when the data is brought into CalSAWS RDS tables. The new data will be appended to the existing reporting table, with its appropriate report start and end date timestamp. Records retention rules are at the discretion of the Consortium.

2.3.3 Imaging Data Format

Data will be received from Hyland daily in CSV file format. For each of the reports, it will have its own separate file with its respective header and data.

Technical Note: The CSV file will be comma-delimited to separate the columns and its respective data. See below for each report type CSV Header and various data content examples:

1) Documents Captured Report

[HEADER]-DRAWER NAME, USER, LAST NAME, FIRST NAME, OFFICE, DOCUMENTS, PAGES, CAPTURE INFORMATION, REPORT DATE/TIME, REPORT START, REPORT END

Data:

San Bernardino Case, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, Single Case Imported, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, Multi Case Scanned, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, Single Case Virtual, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, Single Case Scanned, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino SIU, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, SIU, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, [CalSAWSServiceAcct](#), System, Imaging, San Bernardino - 20, 50, San Bern Office 10 Kiosk 10, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, [CalSAWSServiceAcct](#), System, Imaging, San Bernardino - 05, 10, Mobile App, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, [CalSAWSServiceAcct](#), System, Imaging, San Bernardino - 30, 50, San Bern Office 10 Kiosk 12, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

Report Datapoints Tab 1:

- Hyland Drawer Name (This would be used to identify what county's report this information belongs in)
- Created By (Imaging User Name)

- Staff Name (Last Name, First Name)
- County/Office (Hyland Custom Property – Exception Routing)
- Number Of Document Captured (Sum of document captured by User)
- Number of Pages Capture (Sum of paged capture by User)
- Single Case (Sum of Documents captured using Single Case Capture Mode (Hyland Custom Property – Capture Information))
- Multi Case (Sum of Documents captured using Multi Case Capture Mode (Hyland Custom Property – Capture Information))
- SIU (Sum of Documents captured using SIU Capture Mode (Hyland Custom Property – Capture Information))
- Hearings (Sum of Documents captured using Hearings Capture Mode (Hyland Custom Property – Capture Information))
- RDB (Sum of Documents captured using RDB Capture Mode (Hyland Custom Property – Capture Information))
- Returned Mail (Sum of Documents captured using Returned Mail Capture Mode (Hyland Custom Property – Capture Information))
- CWS (Sum of Documents captured using CWS Capture Mode (Hyland Custom Property – Capture Information))
- AAP (Sum of Documents captured using AAP Capture Mode (Hyland Custom Property – Capture Information))
- IHSS (Sum of Documents captured using IHSS Capture Mode (Hyland Custom Property – Capture Information))
- QA/QC (Sum of Documents captured using QA/QC Capture Mode (Hyland Custom Property – Capture Information))
- Import/Virtual Captured (Sum of Documents captured using Import, Drag and Drop, and Virtual Printer Capture Mode (Hyland Custom Property – Capture Information))
- Report Run Date/Time
- Report Start Time
- Report End Time

Report Datapoints Tab 2:

- Hyland Drawer Name (This would be used to identify what county's report this information belongs in)
- Captured Source (Hyland Custom Property – Capture Information)
- County/Office (Hyland Custom Property – Exception Routing)
- Number Of Document Captured (Sum of document captured)
- Number of Pages Capture (Sum of paged capture)
- Report Run Date/Time
- Report Start Time
- Report End Time

Note: External Documents are identified by the System User Name: "CalSAWSServiceAcct".

2) Initial QA Report

[HEADER]-DRAWER NAME, USERNAME, LAST NAME, FIRST NAME, OFFICE, DOCUMENT ID, BUNDLE ID, CREATION TIME, APPLICABLE DATE, RECEIVED DATE, REPORT DATE/TIME, REPORT START, REPORT END

Data:

San Bernardino Case, chris.v@c90, Vasquez, Christopher, San Bernardino - 01, 321Z457_00RZ1CK2Q003PRL, 987654321, 07/01/2020 03:24 PM, 07/01/2020, 07/01/2020, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, chris.v@c90, Vasquez, Christopher, San Bernardino - 01, 321Z457_00RZ1CK2Q003ZZZ, , 07/01/2020 05:00 PM, 07/01/2020, 07/02/2020, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

Report Datapoints Items In Queue

- User Name
- Staff Name (Last Name, First Name)
- County/Office (Hyland Custom Property – Exception Routing) (This will need to be split on the CalSAWS side)
- Hyland Document ID
- Bundle ID (Hyland Custom Property – Bundle ID)
- Hyland Creation Time
- Applicable Date (Hyland Field 4)
- Received Date (Hyland Field 5)
- Report Run Date/Time ➔ RDS RPT_MONTH
- Report Start Time
- Report End Time

3) Exception Queues Aging Report

[HEADER]-DRAWER NAME, QUEUE NAME, CONFIDENTIAL FLAG, 0 – 7 DAYS, 8 – 14 DAYS, 15 – 30 DAYS, 31 – 45 DAYS, 45+ DAYS, NUMBER OF ITEMS IN QUEUE, REPORT DATE/TIME, REPORT START, REPORT END

Data:

San Bernardino Case, Office 10 (36 - Exception), False, 5, 10, 2, 0, 0, 17, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, Office 10 (36 - Exception), False, 3, 5, 2, 0, 0, 10, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, Office 10 (36 – Exception Confidential), True, 5, 10, 0, 0, 0, 15, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

Report Datapoints

- Hyland Drawer Name (This would be used to identify what county's report this information belongs in)
- Hyland Queue Name
- Confidential (Hyland Custom Property – Confidential Flag)
- Time In Queue
- Number of Items in Queue
- Report Run Date/Time
- Report Start Time
- Report End Time

2.3.4 Report Filters

1) Imaging - Document Captured Report Filters

CalSAWS Report Filters

Begin Month	Begin Date	Office	County
May-20	5/28/2020	01	Los Angeles
Jun-20	6/3/2020	02	San Bernardino
	6/28/2020		
	6/29/2020		
	6/30/2020		

Generate Results

2) Imaging – Initial QA Report Filters

CalSAWS Report Filters

Office	County
01	San Bernardino

Generate Results

3) Imaging – Exception Queues Aging Report **Filters**

CalSAWS

Report Filters

<div>Office</div> <div>10</div>	<div>County</div> <div>San Bernardino</div>

Generate Results

2.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingDocumentCaptureReport	ImagingDocumentCaptureReport	Imaging - Document Capture Report
ImagingInitialQAResult	ImagingInitialQAResult	Imaging - Initial QA Report
ImagingExceptionQueuesAgingReport	ImagingExceptionQueuesAgingReport	Imaging - Exception Queues Aging Report

Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging - Document Capture Report	Allows a User to retrieve and view the Imaging - Document Capture Report	N/A
Imaging - Initial QA Report	Allows a User to retrieve and view the Imaging - Initial QA Report	N/A
Imaging - Exception Queues Aging Report	Allows a User to retrieve and view the Imaging - Exception Queues Aging Report	N/A

Note: Reference Section 3 Supporting Documents, **Item 1**

2.5 Report Mapping


N/A

2.6 Report Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

This section includes any supporting documents for the design as an imbedded document.

Number	Functional Area	Description	Attachment
1	Online Security	Security matrix for the capture button being added to the Case Summary page.	Online Security Matrix
2	Reports	CalSAWS Logo Sample	

4 MIGRATION REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2520	The CONTRACTOR shall create up to five (5) imaging reports in the CalSAWS Software that will be determined during detailed design.	None	Three Reports are created to meet these requirements: Imaging - Document Captured Report Imaging - Initial QA Report Imaging – Exception Queues Aging Report

5 OUTREACH

N/A

6 APPENDIX

N/A



California Statewide Automated Welfare System

Design Document

CA-214181

Lobby Management Migrate Device
Management admin pages

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
11/09/2020	1.0	Initial	G. Limbrick
2/17/2021	1.1	Removed Recommendation to Migrate Kiosk table data	G. Limbrick

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1 OVERVIEW

Migrate the administrative pages to allow CalSAWS project staff to manage county Kiosk and FACT inventory. This includes viewing current county inventory, editing existing Kiosk reading and writing attachments, and adding new devices to the system.

1.1 Current Design

The SCR approval process is a bottleneck to the rolling out of lobby management hardware once it is obtained or changed. Each Kiosk and FACT requires certain information to be added to the System before it is available for use. This information includes the type of the device, its device number, and its attached reading and writing hardware, such as printers, scanners, and magnetic stripe readers.

An SCR is created to apply the necessary DCR every time a Kiosk or FACT is added to a county's inventory, or changes are made to an existing device's configuration.

1.2 Requests

Migrate the C-IV device management administrative pages to alleviate this bottleneck, such that newly acquired, and reconfigured, devices can be used with a shorter turnaround time.

1.3 Overview of Recommendations

The Lobby Management section of the Office Admin task navigation panel contains links to the pages that give access to all Lobby Management functionality in the System. Add the 'Device Management' link to this section to provide access to the pages added by this enhancement.

Add the Device Management List page to the System. The Device Management List page displays a listing of the selected county's Kiosk and FACT inventory, and provides access to the Device Management Detail page.

Upon first load, the page executes a default search for devices in the county matching the user's current county context.

Search results will be sorted by the Device Number field in ascending order by default.

Add the Device Management Detail page to the System. This page captures and displays the details of a piece of lobby management hardware, including the type of the device, the device number and its attached reading and writing hardware.

2 RECOMMENDATIONS

Migrate the administrative pages to allow CalSAWS project staff to manage county Kiosk and FACT inventory. This includes viewing current county inventory, editing existing Kiosk reading and writing attachments, and adding new devices to the system.

2.1 Office Admin Task Navigation

2.1.1 Overview

The Lobby Management section of the Office Admin task navigation panel contains links to the pages that give access to all Lobby Management functionality in the System. Add the 'Device Management' link to this section to provide access to the pages added by this enhancement.

2.1.2 Office Admin Task Navigation Mockup

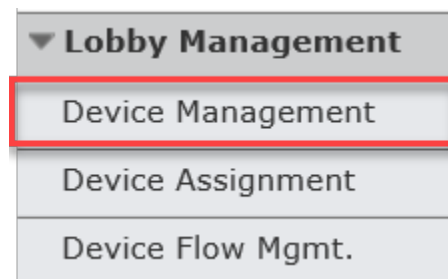


Figure 2.1.2.1 - Office Task Navigation

2.1.3 Description of Changes

1. Add the 'Device Management' link to the collapsible Lobby Management section of the Office Admin task navigation panel.
 - a. This link navigates the user to the Device Management List page
 - b. The Device Management link is only visible to those with a universal (county 90) login and the LobbyDeviceAdmin security right

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Device Management**

2.1.5 Security Updates

N/A

Note: The **LobbyDeviceAdmin** security right and the **Lobby Device Admin** security group have already been migrated.

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Device Management List

2.2.1 Overview

Add the Device Management List page to the System. The Device Management List page displays a listing of the selected county's Kiosk and FACT inventory, and provides access to the Device Management Detail page.

Upon first load, the page executes a default search for devices in the county matching the user's current county context. Search results will be sorted by the Device Number field in ascending order by default.

2.2.2 Device Management List Mockup

Device Management List

County: 04 - Butte Search

Kiosks and FACT Add Device

Device Number	Device Name	
DUK 248685	Butte-01	Edit
DUK 248686	Butte-02	Edit

Add Device

Figure 2.2.2.1 - Device Management List

2.2.3 Description of Changes

1. Add the Device Management List page comprised of the following:
 - a. **County:** The county field allows the user to select which county's Lobby Management devices to display when the next search is executed.
 - i. The values in this field are comprised of each county's two-digit county code, followed by a hyphen, and then the county name, such as "04 – Butte"
 - ii. On first load, this field defaults to the county that matches the user's current county context
 - b. **Search Button:** The search button executes a search for all Kiosk and FACT devices in the county, selected in the County field
 - c. **Add Device Button:** When clicked, the Add Device button navigates the user to the Device Management Detail page in Add Mode
 - d. **Device Number:** The Device Number field displays the type of each device followed by a space, and then its unique identifying device number (This is consistent with the Device Number field of the Device Assignment page)
 - i. The Device Number is displayed in a sortable table column
 - ii. When clicked, the Device Number hyperlink navigates the user to the Device Management Detail page in View Mode for the selected device
 - e. **Device Name:** The Device Name field displays the name that has been assigned to each device
 - i. The Device Name is displayed in a sortable table column
 - ii. This field is blank for any device that has been added to the System, but has not yet been assigned to an office by county staff
 - f. **Edit Button:**
 - i. The Edit button is displayed in a non-sortable table column
 - ii. When clicked, the Edit button navigates the user to the Device Management Detail page in Edit Mode for the associated device
2. Upon first load, execute a default search for devices in the county matching the user's current county context. Sort the results by the Device Number field in ascending order by default.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Device Management**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Add page mapping for each field on the Device Management List page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Device Management Detail

2.3.1 Overview

Add the Device Management Detail page to the C-IV System. The Device Management Detail page captures and displays a Kiosk or FACT's detailed information and configurable options.

2.3.2 Device Management Detail Mockup

Device Management Detail

*** - Indicates required fields**

County:
Butte

Device Type: *
FACT

FACT 2: *
- Select -

Device Number:

Hardware

Scanner Type: *
- Select -

Printer Type: *
- Select -

Barcode Scanner Type: *
- Select -

Magnetic Stripe Reader Type: *
- Select -

Save

Cancel

Save

Cancel

Figure 2.3.2.1 - Device Management Detail – Add Mode

Device Management Detail

* - Indicates required fields

Save Cancel

County: San Bernardino	Device Type: * FACT
FACT 2: * Yes	Device Number: <input type="text" value="R52K507J1WP"/>

Hardware

Scanner Type: * <input type="text" value="No Scanner"/>	Printer Type: * <input type="text" value="No Printer"/>
Barcode Scanner Type: * <input type="text" value="No Barcode Scanner"/>	Magnetic Stripe Reader Type: * <input type="text" value="No MSR"/>

Save Cancel

Figure 2.3.2.2 - Device Management Detail – Edit Mode

Device Management Detail

* - Indicates required fields

Edit Close

County: Butte	Device Type: * DUK
FACT 2: No	Device Number: 248685

Hardware

Scanner Type: * fi-6140Zdj/6130Zdj	Printer Type: * ZDesigner KR403
Barcode Scanner Type: * CODE CR1000 Barcode scanner	Magnetic Stripe Reader Type: * MagTek SureSwipe MSR

Edit Close

Figure 2.3.2.3 - Device Management Detail – View Mode

2.3.3 Description of Changes

Add the Device Management Detail page comprised of the following:

1. **Save Button:** The Save button is visible on the page in Add and Edit Modes. Clicking the Save button saves the device's information to the System and reloads the page in View Mode.
2. **Edit Button:** The Edit button is visible on the page in View Mode. Clicking the Edit button reloads the page in Edit Mode.

3. **Cancel Button:** The Cancel button is visible on the page in Add and Edit Modes. Clicking the Cancel button does not save any changes made to the device and navigates the user to the Device Management List page.
4. **Close Button:** The Close button is visible on the page in View Mode. Clicking the Close button navigates the user to the Device Management List page.
5. **County:** Displays the county the device belongs to. When viewed in Add Mode, this field is set to the county the user last searched for on the Device Management List page, and is not editable.
6. **Device Type:** This field captures and displays the type of the device. Editable only in Add Mode, the values in this field are:
 - a. DUK
 - b. FACT

This is a required field.

Note: The C-IV System has a value "C-DUK" which is not used and will not be migrated.

7. **FACT 2:** This field captures and displays whether the device is a FACT 2. This field is editable when the page is in Add Mode and the value "FACT" is selected in the Device Type field. The values in this field are:
 - a. Yes
 - b. No

In all other scenarios the field is not editable.

This field is required when the value "FACT" is selected in the Device Type field.

8. **Device Number:** This field captures and displays the device number of the device.

This field is not editable, and is automatically populated by the system after it is saved in the following situations:

- a. The value "DUK" is selected in the Device Type field.
- b. The value "FACT" is selected in the Device Type field and the FACT 2 field has the value "No."

The value of this field is manually entered when the value "FACT" is selected in the Device Type field and the FACT 2 field has the value "Yes." In this scenario, the field is required, and is editable in both Add and Edit Modes. The maximum length of a manually entered device number is 50 characters.

9. **Scanner Type:** This field captures and displays the type of the device's attached scanner. It is editable in Add and Edit Modes. The values in this field are:
 - a. ImageScan 490i
 - b. fi-6130dj
 - c. fi-6140Zdj/6130Zdj
 - d. No Scanner

This is a required field.

10. **Printer Type:** This field captures and displays the type of the device's attached printer. It is editable in Add and Edit Modes. The values in this field are:

- a. ZDesigner KR403
- b. ZDesigner GC420T
- c. Zebra QLn220
- d. No Printer

This is a required field.

Note: The Zebra QLn220 printer type exists in the C-IV System and will be added to CalSAWS.

11. **Barcode Scanner Type:** This field captures and displays the type of the device's attached barcode scanner. It is editable in Add and Edit Modes. The values in this field are:

- a. HP ElitePad Barcode Scanner
- b. CODE CR1000 Barcode scanner
- c. No Barcode Scanner

12. **Magnetic Stripe Reader Type:** This field captures and displays the type of the device's attached magnetic stripe reader. It is editable in Add and Edit Modes. The values in this field are:

- a. JCommUSB MSR
- b. MagTek SureSwipe MSR
- c. HP ElitePad MSR
- d. No MSR

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Device Management**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Add page mapping for each field on the Device Management Detail page.

2.3.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.1.8	LRS shall isolate software from hardware layers (and with exceptions approved by County Project Director) by allowing upgrades or changes to operating system software or hardware without requiring extensive change to the LRS Application Software.	This enhancement allows certain hardware to be added to CalSAWS without the need for an SCR.

3.2 Migration Requirements

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215063

DDID 2614: Update NOA (CF) Free Format

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Jensen
	Reviewed By	Pramukh Karla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/02/2020	0.1	Initial Draft	Maria Jensen
11/05/2020	0.2	Review fixes	Maria Jensen
11/09/2020	0.3	BA review corrections	Maria Jensen
11/13/2020	0.4	Added form number change	Maria Jensen
11/20/2020	0.5	QA comments fixes	Maria Jensen
11/25/2020	0.6	Added County variable	Maria Jensen
02/03/2021	1.0	Content Revision: Made County variable read-only when populated Updated Assumptions with latest standard	Maria Jensen

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1 OVERVIEW

The Free Format NOA (CF) is a non-state form that is used in the CalSAWS system as a blank Notice of Action for the CalFresh program. This SCR will renumber the form as per CalSAWS naming/numbering format standard, and will update the existing verbiage to make it a generic Blank Notice of Action Form.

1.1 Current Design

Currently the NOA (CF) form is available in the CalSAWS system via the Template Repository in English and Spanish, for LA county. It can be generated either as a Blank Template, or in the context of a case. Its 4 pages consist of 2 notices, and only the first notice features the CalSAWS Standard Header. Each notice has 2 input columns on the front and the NA Back 9 fragment on the back. The NA Back 9 is available in all threshold languages and will not be updated with this SCR.

1.2 Requests

1. Update form number from NOA (CF) to CalSAWS standard naming/numbering format.
2. Update the verbiage of the form title and content.
3. Make the form available in the Template Repository in all threshold languages.

1.3 Overview of Recommendations

1. Update NOA (CF) form number to CSF 166.
2. Update the verbiage of the form title and content.
3. Make the form available in the Template Repository for all 58 counties in all threshold languages.

1.4 Assumptions

1. The CSF 166 form will use the CalSAWS Standard Header with the standard variable population. When generated in the context of a case, the body fields will be editable for all counties, as per CalSAWS standards.

2 RECOMMENDATIONS

2.1 Updates to the CSF 166 form

2.1.1 Overview

This SCR will renumber NOA (CF) form to CSF 166 (revision 11/20).

The SCR will also update the Free Format NOA (CF) in the CalSAWS system. The updates will bring title and content verbiage changes to make it a generic Blank Notice of Action Form. Please see the attached Supporting Documents #1-2 for details.

Non-State Form: NOA (CF)

Current Programs: CalFresh

Current Attached Form(s): NA Back 9 fragment

Current Forms Category: NOA

Current Template Repository Visibility: LA County

Existing Languages:

English, Spanish

2.1.2 Update NOA (CF) form number to CSF 166

Update NOA (CF) form number to CSF 166, as per CalSAWS naming/numbering format standard.

2.1.3 Update the CSF 166 form XDP

1. The following title and content verbiage updates will be made:
 - a. Update the form title from "Notice of Action CalFresh" to "Notice of Action".
 - b. Add the following text in the left column of the blank NOA:

"As of <text line>, the County has <text line> your <text line>.
Here's why: <editable text box>"

- c. Update the verbiage of the Questions and State Hearing sections to:

Questions? Ask your worker.

State Hearing: If you think this action is wrong, you can ask for a hearing. The back page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

2. Updated Languages:

English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese

**One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin.*

Form Header: CalSAWS Standard Header #1

Form Title: Free Format NOA (CF)

Form Number: CSF 166

Forms Category: NOA

Template Repository Visibility: All 58 Counties

Include NA Back 9: Yes

Imaging Form Name: N/A

Imaging Document Type: N/A

Form Mockups/Examples: See Supporting Documents #1-2 for PDF Mockups

3. Updates to Form Variable Population

In the title of the 3rd page of the form, replace the static text 'Los Angeles' with a <COUNTY> variable. When generated as Blank Template, if this field is edited, the value of it will be reflected on the Page 1 county variable in the header, and vice versa.

Please see Figure 2.1.3.3 for details.

Form Body Variable:

Variable Name	Population	Formatting	Editable*	Template Repository Population
COUNTY	Populated using case information	Arial Font Size 12	N	Y

* Note: The Editable column of the table above refers to if the variable will be editable when populated. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 166 with NA Back 9 Existing Languages	CSF166_EN.pdf CSF166_SP.pdf
2	Correspondence	CSF 166 with NA Back 9 Threshold Languages	CSF166_AE.pdf CSF166_AR.pdf CSF166_CA.pdf CSF166_CH.pdf CSF166_FA.pdf CSF166_HM.pdf CSF166_KO.pdf CSF166_LA.pdf CSF166_RU.pdf CSF166_TG.pdf CSF166_VI.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2614	<p>The CONTRACTOR shall update the NOA (CF) Free Format NOA as follows:</p> <p>1) Update the form title from "Notice of Action CalFresh" to "Notice of Action"</p> <p>2) Add the following text in the left column of the blank NOA: "As of <text line>, the County has <text line> your <text line>. Here's why: <editable text box>"</p>	<p>Original:</p> <ol style="list-style-type: none">1. Estimate is for updating the 2 page version of form in English and Spanish along with creating a 4 page version and adding ability for the user to select 2 page or 4 page version of this form from the documenter parameter page.2. Spanish translations will be provided by the Consortium.3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. <p>Revised:</p> <ol style="list-style-type: none">1. Estimate is for updating the current 4 impression version of the form in English and Spanish.2. Spanish translations will be provided by the Consortium.3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.	<p>With SCR CA-215063, form NOA (CF) Free Format will be renumbered to CSF 166 and will have title and content verbiage updates to make it a generic Blank Notice of Action Form.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	

DRAFT



California Statewide Automated Welfare System

Design Document

CA-215095 | DDID 2630

Update PA 2492 - Payment Verification System (PVS)
Participant Contact Letter Form in CalSAWS System

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pramukh Karla
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/26/2020	1.0	Original	Pramukh Karla
01/19/2021	2.0	Updated design document to mention CSF 162 instead of CalSAWS Numbering Format	Pramukh Karla
02/04/2021	3.0	Updated design document to remove batch recommendation 2.2	Pramukh Karla

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1 OVERVIEW

The purpose of this change is to Update the PA 2492 – Payment Verification System (PVS) Participant Contact Letter form in existing languages and add the PA 2492 – Payment Verification System (PVS) Participant Contact Letter form in threshold languages which are currently not in CalSAWS Template Repository.

1.1 Current Design

The PA 2492 – Payment Verification System (PVS) Participant Contact Letter form can only be generated from Template Repository for Los Angeles county in English, Spanish and Chinese languages.

1.2 Requests

Update PA 2492 – Payment Verification System (PVS) Participant Contact Letter form in the existing languages and add the form in all threshold languages.

1.3 Overview of Recommendations

1. Update PA 2492 – Payment Verification System (PVS) Participant Contact Letter form number to CSF 162.
2. Update PA 2492 – Payment Verification System (PVS) Participant Contact Letter form to make to available from Template Repository for all 58 counties.
3. Update PA 2492 – Payment Verification System (PVS) Participant Contact Letter form in existing languages.
4. Add the PA 2492 – Payment Verification System (PVS) Participant Contact Letter form in all threshold languages.

1.4 Assumptions

1. CA-216321 will update the PIXXC400 batch trigger conditions to not generate CSF 162 form for CalWORKs, CalFresh, or RCA programs.

2 RECOMMENDATIONS

2.1 Update and Add PVS Participant Contact Letter Form

2.1.1 Overview

This section will cover the updates needed to update the PA 2492 – Payment Verification System (PVS) Participant Contact Letter form to CalSAWS system.

Non-State Form: CSF 162

Programs: General Assistance/General Relief, CAPI, and Medi-Cal programs

Attached Forms: N/A

Forms Category: Forms

Existing Languages: English, Spanish, and Chinese*

New Languages: Armenian, Arabic, Cambodian, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese

**One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.*

2.1.2 Description of Change

1. Update PA 2492 – Payment Verification System (PVS) Participant Contact Letter form number to CSF 162 on Template Repository Search page.
2. Update existing PVS Participant Contact Letter form XDPs to make the following updates. – see supporting document #1
 - a. Decouple General Relief/CAPI check box and add a check box for "General Assistance/General Relief" and "CAPI"
 - b. Delete "CalWORKs" and "CalFresh" check boxes
 - c. Replace the second to last paragraph with the following text:
"The information we got is considered to be verified upon receipt because the information comes directly from the benefit issuing agencies. Therefore, it may be used to determine your ongoing benefit levels. It may also be used to determine if there was an overpayment on your case. If this information is incorrect, please contact your county at the number listed above by <text line> to resolve the discrepancy in the information reported. Failure to resolve the discrepancy may result in your aid being reduced/denied/stopped."
 - d. Update "contact your Eligibility Worker" to "contact your county"
3. Create PVS Participant Contact Letter form XDPs in threshold languages.

Form Header: Existing PVS Participant Contact Letter Form Header

Form Title: Payment Verification System (PVS) Participant Contact Letter

Template Description: This form is used to resolve the discrepancies between the income of the applicant which the State Department of Social Services has on the file and the income reported by the participant.

Form Number: CSF 162

Imaging Document Type: IEVS

Imaging Form Name: PVS Participant Contact Letter

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #2

4. Add the new CSF 162 in threshold languages to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, and Language.

5. Update CSF 162 pre-population logic as below when the CSF 162 form is generated from Template Repository and Batch.

Field Name	Description	Editable
General Assistance/General Relief – Checkbox Field	Populate the checkbox if the form is generated for General Assistance/General Relief program.	Y
CAPi – Checkbox Field	Populate the checkbox if the form is generated for CAPi program.	Y

Note: All other fields will follow the existing PA 2492 pre-population logic

6. Add the following barcode options to the CSF 162 form for the new threshold languages like existing versions:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Note: This is already implemented in the existing versions in XDP and the code. This should be implemented only in the new XDP's being created for the new languages.

7. Add the following print options to the CSF 162 Form:

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

Mailing Requirements:

Mail-To (Recipient): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Clock Indicator: N/A

Post to SSP (Self Service Portal): Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 162 Existing languages	CSF162_EN.pdf CSF162_CH.pdf CSF162_SP.pdf
2	Correspondence	CSF 162 Threshold Languages	CSF162_AE.pdf CSF162_AR.pdf CSF162_CA.pdf CSF162_FA.pdf CSF162_HM.pdf CSF162_KO.pdf CSF162_LA.pdf CSF162_RU.pdf CSF162_TG.pdf CSF162_VI.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2630	<p>Original:</p> <p>The CONTRACTOR shall update the PA 2492- - Payment Verification System Participant Contact Letter in the CalSAWS Software as follows:</p> <p>1) Add a program check box for "RCA"</p> <p>2) Decouple General Relief/CAPI check box and add a check box for "General Relief" and "CAPI"</p> <p>3) Replace the second to last paragraph with the following text:</p> <p>"The information we got is considered to be verified upon receipt because the information comes directly from the benefit issuing agencies. Therefore, it may be used to determine your ongoing benefit levels. It may also be used to determine if there was an overpayment/overissuance on your case.</p> <p>If this information is incorrect, please contact the county at the number listed above by <text line> to resolve the discrepancy in the information reported. Failure to resolve the discrepancy may result in</p>	<p>1. Estimate is for updating the form in English and Spanish along with updating the batch trigger.</p> <p>2. Spanish translations will be provided by the Consortium.</p> <p>3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.</p> <p>4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.</p>	<p>With SCR CA-215095, Payment Verification System Participant Contact Letter form will be updated and added to CalSAWS repository in all threshold languages and update Batch trigger to not generate the form for CalFresh, CalWORKs, or RCA program.</p>

<p>your aid being reduced/denied/stopped."</p> <p>4) Update "contact your Eligibility Worker" to "contact your county"</p> <p>5) Update the form number from "PA 2492" to CalSAWS standard naming/numbering format</p> <p>6) Update PIXXC400 batch job to not generate PA 2492 job for CalWORKs, CalFresh, or RCA Programs.</p> <p>Revised:</p> <p>The CONTRACTOR shall update the PA 2492 - Payment Verification System Participant Contact Letter in the CalSAWS Software as follows:</p> <p>1) Decouple General Relief/CAPL check box, delete "CalWORKs" and "CalFresh" check boxes, and add a check box for "General Relief" and "CAPL"</p> <p>2) Replace the second to last paragraph with the following text:</p> <p>"The information we got is considered to be verified upon receipt because the information comes directly from the benefit issuing agencies. Therefore, it may be used to determine your ongoing benefit levels. It may also be used to determine if there was an overpayment on your case.</p> <p>If this information is incorrect, please contact your county at the number</p>		
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	<p>listed above by <text line> to resolve the discrepancy in the information reported. Failure to resolve the discrepancy may result in your aid being reduced/denied/stopped."</p> <p>3) Update "contact your Eligibility Worker" to "contact your county"</p> <p>4) Update the form number from "PA 2492" to CalSAWS standard naming/numbering format</p> <p>The CONTRACTOR shall update the batch trigger for the Payment Verification Participant contact letter to not generate the form CalWORKs, CalFresh, or RCA.</p>		
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California Statewide Automated Welfare System

Design Document

CA-215180 | DDID 2675

Add FIN 200 – Approved New Direct Deposit Letter
Form to CalSAWS System

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pramukh Karla
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/09/2020	1.0	Original	Pramukh Karla
02/03/2021	2.0	Updating design document to generate FIN 200 for Resources	Pramukh Karla

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1 OVERVIEW

The purpose of this change is to add the FIN 200 – Approved New Direct Deposit Letter (08/2020) to CalSAWS System.

1.1 Current Design

The FIN 200 – Approved New Direct Deposit Letter (08/2020) state form does not exist in CalSAWS System. Currently, PBXXF200 batch job only exists for 39 C-IV Counties in CalSAWS System.

1.2 Requests

1. Add the FIN 200 – Approved New Direct Deposit Letter (08/2020) to CalSAWS System in English and Spanish languages for all 57 Migration Counties.
2. Add PBXXF200 batch job for 18 CalWIN counties and update PBXXF200 batch trigger to generate FIN 200 – Approved New Direct Deposit Letter (08/2020) if the Direct Deposit account status is updated to Active.

1.3 Overview of Recommendations

1. Add the FIN 200 – Approved New Direct Deposit Letter (08/2020) to CalSAWS System for all 57 Migration Counties.
2. Update PBXXF200 batch job to generate FIN 200 – Approved New Direct Deposit Letter (08/2020) form if the Direct Deposit account status is updated to Active and add PBXXF200 batch job for 18 CalWIN counties in CalSAWS System

1.4 Assumptions

1. Currently PBXXF200 batch job is available for 39 C-IV counties in CalSAWS System.
2. CA-217791 will be adding the Direct Deposit Account information for Resources.
3. PBXXF200 will be scheduled to run in CalSAWS system as the corresponding counties go live.

2 RECOMMENDATIONS

2.1 Add FIN 200 – Approved New Direct Deposit Letter (08/2020)

2.1.1 Overview

This section will cover the updates needed to add FIN 200 – Approved New Direct Deposit Letter (08/2020) form to CalSAWS System for all 57 Migration Counties.

State Form: FIN 200

Programs: All

Attached Forms: N/A

Forms Category: Forms

Template Repository Visibility: All 57 Migration Counties

Languages: English and Spanish

2.1.2 Description of Change

1. Add FIN 200 – Approved New Direct Deposit Letter (08/2020) to CalSAWS System for all 57 Migration Counties.

Form Header: CalSAWS Standard Header

Form Title: Approved New Direct Deposit Letter

Form Template Description: This form is used by counties to notify Customers that the direct deposit has been approved.

Form Number: FIN 200

Include NA Back 9: No

Imaging Form Name: Approved New Direct Deposit Letter

Imaging Document Type: Fiscal

Form Mockup/Example: See Supporting Document #1

2. New FIN 200 form will be available for all 57 Migration Counties excluding Los Angeles county.
3. Add the new FIN 200 form to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, Resource ID, and Language.

4. Following fields will be prepopulated on the FIN 200 form when generated from Template Repository and Batch Job.

Section	Field	Description	Editable Y/N
<1>	Payee Name	Payee Name from Issuance Method Detail page Note: Issuance Type should be Direct Deposit	Y
<2>	Completed on (Date Field)	Status Date from Issuance Method Detail page. Format: MM/DD/YYYY	Y
<3>	Financial Institution	Bank name from Issuance Method Detail page.	Y
<4>	Routing Number	Routing Number from Issuance Method Detail page.	Y
<5>	Account Number	Account Number from Issuance Method Detail page.	Y
<6>	Account Type	Account Type from Issuance Method Detail page.	Y

Technical Note: Data model for Direct Deposit Account information for a resource will be added with CA-217791.

5. Add the following barcode options to the FIN 200 form:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

6. Add the following print options to the FIN 200 Form:

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

Mailing Requirements:

Mail-To (Recipient): Person tied to Direct Deposit Account

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Clock Indicator: N/A

Post to SSP (Self Service Portal): Yes

2.2 Batch – Update and Add PBXXF200 (Direct Deposit Account Update) Batch Job

2.2.1 Overview

The Direct Deposit Account Update batch job (PBXXF200) updates the Direct Deposit Account status to Active. Currently PBXXF200 batch job is available for only 39 C-IV counties. With this effort PBXXF200 will be added to 18 CalWIN migration counties.

2.2.2 Description of Change

- 1) Add PBXXF200 Batch job for all 18 CalWIN migration counties to generate FIN 200 – Approved New Direct Deposit Letter (08/2020) form when Direct Deposit Account status is updated to Active.
- 2) Modify PBXXF200 Batch trigger conditions for all 57 migration counties excluding LA county to generate FIN 200 – Approved New Direct Deposit Letter (08/2020) form when a person's Direct Deposit Account status is updated to Active.

2.2.3 Execution Frequency

No Change.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

All 57 Migration Counties

2.2.6 Data Volume/Performance

N/A

2.2.7 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...)

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	FIN 200 Mockups	FIN200_EN.pdf FIN200_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2675	The CONTRACTOR shall add State Form FIN 200 - Approved New Direct Deposit Letter and a batch trigger when a Direct Deposit Account is approved.	<ol style="list-style-type: none">1. Estimate is for adding the State Form in English and Spanish along with adding a batch trigger.2. Spanish translations will be provided by the State.3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created.	With SCR CA-215180, FIN 200 – Approved New Direct Deposit Letter (08/2020) form is added to the CalSAWS System in English and Spanish languages and PBXXF200 batch job will be updated to generate FIN 200 form when Direct Deposit Account status is updated to Active.

		Consortium staff will be modifying or creating FDDs.	
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California Statewide Automated Welfare System

Design Document

CA-215194 | DDID 2682 FDS

Add CSF 144 - Billing Statement (08/2020)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sureshnaidu Mullaguri
	Reviewed By	Pramukh Karla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/15/2020	1.0	Initial Revision	Sureshnaidu Mullaguri
02/11/2020	2.0	Content Revision design document update to update program and removing LA count from batch process	Pramukh Karla

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1 OVERVIEW

The purpose of this change is to add the CSF 144 - Billing Statement Form version (08/2020) to the LRS/CalSAWS and make this form available for all 58 counties.

1.1 Current Design

The Non state form CSF 144 - Billing Statement Form version (08/2020) Form currently does not exist in LRS/CalSAWS System.

1.2 Requests

Add CSF 144 - Billing Statement Form version (08/2020) in all CalSAWS correspondence languages and make it available for all 58 counties.

1.3 Overview of Recommendations

1. Add CSF 144 - Billing Statement Form version (08/2020) form in all CalSAWS correspondence languages to LRS/CalSAWS Template Repository for all 58 counties.
2. Add monthly batch jobs to send mail CSF 144 - Billing Statement Form version (08/2020) form to customers.

1.4 Assumptions

1. All fields on the CSF 144 form are editable unless specified explicitly.
2. CSF 144 form will be available for all 58 counties.
3. New CSF 144 monthly batch job will not be available for Los Angeles county.

2 RECOMMENDATIONS

2.1 Add CSF 144 - Billing Statement Form to the Template Repository

2.1.1 Overview

Currently CSF 144 - Billing Statement Form version (08/2020) Form is not available in LRS/CalSAWS System. Add the Non-State Form CSF 144 to the LRS/CalSAWS in all CalSAWS correspondence languages. The CSF 144 form will be made available from the Template Repository in the LRS/CalSAWS System for all 58 Counties.

CalSAWS Form: CSF 144

Programs: All Programs except Foster Care

Attached Forms: NA

Forms Category: Forms

Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Korean, Hmong, Lao, Tagalog, Russian, Vietnamese

2.1.2 Description of Change

1. Add CSF 144 - Billing Statement Form version (08/2020) Form in English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Korean, Hmong, Lao, Tagalog, Russian and Vietnamese languages that can be generated from the Template Repository.

Form Header: New Collection Header

Form Title/Name: Billing Statement

Form Description: Notice to responsible parties that they owe money on their recovery account(s). It displays the amount due and how to make the payments. This form is generated through a scheduled monthly batch job. Users can generate a blank CSF 144 from the Template Repository.

Form Number: CSF 144

Include NA Back 9: No

Form Mockups: Please refer to Supporting Document #1 for CSF 144 form mockup with New Collection Header

2. Add the following DPSS Collection Mailing Address for Los Angeles county.

Department of Public Social Services
Central Cashier -Various Remittances
P.O Box 2276
Bassett, CA 91746-2276

3. Create new Collection Header that will be used for the new CSF 144 Form. The Mailed From address will be on the upper left, the case information fields will be on the upper right. The Mail-To address will be on the right side below case Information fields.

Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Korean, Hmong, Lao, Tagalog, Russian, Vietnamese

Form Mockup/Example: See Supporting Document #1 (Header)

- a. Header fields population

Section: Header (CalSAWS New Collection Header Header)

1

2

Case Number:
4

Responsible Party:
5

Date:
6

3

Field	Field Name	Description
1	From Address Section	Populate Collection Office Name and Mailing Address.
2	Agency Name	County of <County_Name>
3	Recipient Address Section	CalSAWS Standard Recipient Full name and Mailing Address
4	Case Number	Case Number on the Case
5	Responsible Party	CalSAWS Standard Recipient Full Name
6	Date	Date on which CSF 144 form generated

4. Add CSF 144 - Billing Statement Form to the Template Repository with the following parameters.

Required Form Input: Case Number, Customer Name and Language.

Form Parameters Page Mockup:

5. Populate fields as below when CSF 144 - Billing Statement Form version (08/2020) Form is generated from Template Repository or Batch.

Form Population

Section: Form Page 1

Billing Statement

Total Current Balance: Current Amount Due:

If you do not have a payment agreement or think your balance is wrong, contact the County Collections Department at:

If you do not have a signed Repayment Agreement, and/or we do not get your payments, we can take your state tax return for a CalWORKs overpayment, or your state or federal tax return for a CalFresh Overissuance. If you are presently aided in another county, please call us with the name and phone number of your worker.

Please see page 3 of this letter for payment stub and return instructions.

NOTE: You are not required to use SSI or any other exempt funds to repay these debts.

Field Number	Field Name	Type	Value
1	Total Current Balance	Text Field	Blank when form generated from Template Repository. Display sum of Current balances on all active recovery accounts for selected person in Dollar Format up to two decimals

			<p>when form generated by Batch. Current Balance on each Recovery Account is displayed in Recovery Accounts Details Table and defined in Recommendation 2.1.2, point 4.b.</p> <p>Ex: \$99,999.99</p>
2	Current Amount Due	Text Field	<p>Blank when form generated from Template Repository.</p> <p>Display sum of Current Minimum Amount Due on all active recovery accounts for selected person in Dollar Format up to two decimals when form generated by Batch. Minimum Due on each Recovery Account is displayed in Recovery Accounts Details Table and defined in Recommendation 2.1.2, point 4.b.</p> <p>Ex: \$99,999.99</p>
3	County Collections Department Phone Number	Text Field	Populate County Collections Office Primary Phone Number when

			form generated from Template Repository or by Batch. (Collection Office Name, Address and Primary Number listed on Correspondence Detail page for all counties and Correspondence type is Collection Mail.)
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- b. Recovery Accounts Details Table will be blank and editable when form generated from Template Repository. Populate Details of All recovery accounts details that matches with batch criteria for a selected responsible party as mentioned below when form generated by Batch. Display each recovery account details in one row and fill up to 35 recovery account details. Users are expected to generate blank CSF 144 Form from Template Repository and fill details manually If there are more than 35 Recovery Accounts details. When CSF 144 form generated via Batch, Form is populated with Recovery Accounts list sorted based on Recovery Account Number ascending order.

Form Population

Section: Form Page 1 and 2 (Recovery Accounts Details table)

Account Number	Program	Current Balance	Minimum Due	Payment Due Date	Last Payment Date	Total Payments In Last 31 Days
<1>	<2>	<3>	<4>	<5>	<6>	<7>

Field Number	Field Name	Type	Value
1	Account Number	Text Field	Display Recovery Account Number.

			(Recovery Account Detail page)
2	Program	Text Field	Display name of Program associated to Recovery Account. (Recovery Account Detail page)
3	Current Balance	Text Field	Display Current balances on Recovery Account in Dollar Format up to two decimals. Ex: \$99,999.99 (Recovery Account Detail page)
4	Minimum Due	Text Field	<p>Display Current Minimum Balance due on Recovery Account in Dollar Format up to two decimals. Ex: \$99,999.99</p> <p>Note: Recovery Account Minimum Due amount listed on Repayment Term Detail page i.e. Repayment Amount field on Repayment Term Detail with status other than Closed. If Repayment Amount field is not available,</p>

			then consider 0 as due amount.
5	Payment Due Date	Date	<p>Display Current Payment Due Date on Recovery Account and it is calculated based on <i>Day Payment Due</i> field on Repayment Term Detail page.</p> <p>Ex: if Day Payment Due is 8, then Payment Due Date is next month 8th.</p> <p>if Day Payment Due is not available, then Default Payment Due Date to next month 15th.</p> <p>Display Date in MM/DD/YYYY Format.</p>
6	Last Payment Date	Date	<p>Display date when most recent successful transaction posted to Recovery Account. Display Date in MM/DD/YYYY Format. (Posted Date field on Transaction Detail page)</p>

7	Total Payments In Last 31 Days	Text Field	Display sum of successful payments posted to Recovery Account in last 31 days in Dollar Format up to two decimals. Ex: \$99,999.99.
---	--------------------------------	------------	----------------------------------------------------------------------------------------------------------------------------------------

- c. Payment Details Page population (Page 3)
Payment Details page section populates all fields as mentioned below when form is generated from Template Repository or by Batch Jobs.

Form Population			
Section: Payment Details Page population (Page 3)			
<div> <div>Case Number: <1></div> <div><5></div> <div>Current Amount Due: <2></div> <div><6></div> <div><7></div> <div><8></div> </div> <p>Please make check or money order payable to <3></p> <p>Please write your Case Number on your check or money order and send this stub with your payment, keep the first page for your records. Do not mail cash. Payments can be made in person at <4></p> <div> <div>Date:</div> <div>Payment Amount:</div> </div> <div> <div><9></div> <div><10></div> <div><11></div> <div><12></div> </div>			
Serial Number	Field Name	Type	Value
1	Case Number (Text Field 1)	Text Field	Display Case Number.
2	Current Amount Due (Text Field 2)	Text Field	Blank when form generated from Template Repository. Display sum of Current Minimum Amount Due on all active recovery accounts for selected person in Dollar Format up to two decimals when form generated by Batch. Minimum Due on each Recovery

			Account is displayed in Recovery Accounts Details Table and defined in Recommendation 2.1.2, point 4.b. Ex: \$99,999.99
3	Payable to / Person At fields (Text Fields 3 and 4)	Text Fields	Populate two fields with Collection Office Name. Collection Office Name, Address and Primary Number listed on Correspondence Detail page for all counties and Correspondence type is Collection Mail.
4	Customer Name and Address (Text Fields 5, 6, 7 and 8)	Text Fields	Populate Customer Name and Mailing Address that populated in form header.
5	Collection Office Name and Address (Text Fields 9, 10, 11, and 12)	Text Fields	Populate Collection Office Name and Mailing Address. Collection Office Name, Address and Primary Number listed on Correspondence Detail page for all counties and Correspondence type is Collection Mail.

6. Add the following barcode options to the CSF 144 - Billing Statement Form version (08/2020) Form.

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

7. Add the following print options to the CSF 144 - Billing Statement Form version (08/2020) Form:

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

Mailing Requirements:

Mail-To (Recipient): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Mailing Priority: Same Day Priority

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Post to YBN/C4Y: Yes

Clock Indicator: N/A

2.2 Add Batch Jobs to Generate CSF 144

2.2.1 Overview

A monthly batch job will be created to send CSF 144 - Billing Statement Form version (08/2020) from LRS/CalSAWS once per month to customers who meet business criteria.

2.2.2 Description of Change – CSF 144 Form Sweep and Generation Jobs

1. Create county specific batch sweep jobs for all 57 migration counties to send CSF 144 - Billing Statement Form version (08/2020) to the customers. Create these batch jobs to mail CSF 144 (08/2020) to customers who meet business criteria to receive Billing Statement and customers who manually requested Billing Statement.
2. Create a first sweep module to mail CSF 144 - Billing Statement Form version (08/2020) form to the customers when the following conditions are true:
 - a. Recovery Account type is Regular
 - b. Customers who have an Active Recovery Account or Suspended Recovery Account with Status Reason of *Admin Decision* or *Collection Agency* or *Expired Statute* or *Social Security* or *Tax Intercept*
 - c. Customer status is active on Recovery Account

- d. Responsible Party is not currently aided on the same program as the Recovery Account and persons involvement in a program is anything other than Family Size Only (i.e. Responsible Party program person role code is other than Family Size Only). (Applicable only if Responsible Party is Person. This condition is not applicable if Responsible Party is Organization.)
 - e. Recovery Account is not created for Foster Care Program.
 - f. Responsible Party (Person or Organization) has a valid Mailing Address
 - g. Responsible parties have made a payment on a recovery account in the last 90 days
 - h. Current Balance on Recovery Account is more than \$0
 - i. Responsible party's bill indicator is yes on recovery Account.
3. For each Responsible Party (Person or Organization) met above criteria, a record will be inserted into the batch transaction table (FIN_COLLECT_TRANSACTION) with following details to generate one CSF 144 form per case during forms processing.

Transaction values:

- Case ID: Case associated to Recovery Account
 - Program Code: Program Code associated to Recovery Account
 - Person ID/ Org Id: Responsible Party Person Id or Organization Id
 - County Code: Case County Code associated to Recovery Account
 - Recovery Account Id: Recovery Account Id
 - Balance Amount: Current Balance on Recovery Account
 - Minimum Due Amount: Minimum due amount for the current batch month.
 - Created By: Batch
 - Updated By: Batch
 - Thread Number: Distribute Records equally among available threads based on distinct case count. Number of form generation thread jobs is 50.
4. If any Responsible Party (Person or Organization) has requested Billing Statements manually from Responsible Party Detail page for the benefit month same as batch month, update its status to Yes indicating that CSF 144 form has been sent by batch.
5. Create a second sweep module to mail CSF 144 form manual requests when customers meet following conditions:
- a. Recovery Account type is Regular
 - b. Clients requested CSF 144 form from Recovery Account manually in current batch month and CSF 144 form is not yet

generated for Manually requested Billing Statements request.
(CSF 144 Manual request is created from Responsible Party Detail page)

- c. Recovery Account is not created for Foster Care Program.
 - d. Responsible Party (Person or Organization) who have an Active Recovery Account or Suspended Recovery Account with Status Reason of *Admin Decision* or *Collection Agency* or *Expired Statute* or *Social Security* or *Tax Intercept*
 - e. Responsible Party (Person or Organization) status is active on Recovery Account
 - f. Responsible Party (Person or Organization) has a valid Mailing Address
 - g. If Responsible Party is a person, then person must be Head of Household or person age must be 18 years or older.
 - h. Current Balance on Recovery Account is more than \$0
 - i. Responsible party's bill indicator is yes on recovery Account.
 - j. If Recovery Account, Recovery Account Case Number and Recovery Account's Responsible Party (Person or Organization) is not selected by batch module defined in point 2 (Section 2.2.2.1, Point 2) to mail CSF 144 form.
- 6. For each Responsible Party (Person or Organization) met above criteria, a record will be inserted into the batch transaction table (FIN_COLLECT_TRANSACTION) with details mentioned in point 3 (Section 2.2.2.1, Point 3, Transaction values) to generate one CSF 144 form per case during forms processing.
 - 7. Update manually requested Billing Statements status to yes to the manual requests created for the benefit month same as current Batch Month and are selected by batch second module and CSF 144 form being sent by batch.
 - 8. Create Form generation thread job with 50 threads to generate CSF 144 form for all the cases picked by CSF 144 form sweep jobs. Form generation jobs mail one CSF 144 form per case per responsible party. This CSF 144 form includes all recovery accounts related to responsible party and case number.
 - 9. Populate CSF 144 form fields as mentioned in Section 2.1.2, Recommendation 3 when form is generated by thread job.

2.2.3 Execution Frequency

These county specific batch sweep jobs run once in every Month and scheduled as specified below.

- 1. CSF 144 form batch sweep job and CSF 144 form generation thread jobs will run on 20th of every month, if the 20th is a Sunday or a holiday, batch job will run on the next business day.

2.2.4 Key Scheduling Dependencies

1. predecessors to CSF 144 form batch sweep jobs are PBXXF105, PBXXF106, PBXXF109.
2. CSF 144 form generation thread jobs run after CSF 144 form batch sweep job.

2.2.5 Counties Impacted

CSF 144 form batch sweep jobs are county specific job and these jobs will run for all 57 migration counties.

2.2.6 Data Volume/Performance

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CSF 144 Form	CSF144_EN.pdf CSF144_SP.pdf CSF144_AE.pdf CSF144_AR.pdf CSF144_CA.pdf CSF144_CH.pdf CSF144_FA.pdf CSF144_KO.pdf CSF144_HM.pdf CSF144_TG.pdf CSF144_LA.pdf CSF144_VI.pdf CSF144_RU.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2682	<p>Original:</p> <p>The CONTRACTOR shall migrate FIN 107 - Billing Statement with batch to the CalSAWS Software.</p> <p>Revised:</p> <p>The CONTRACTOR shall migrate FIN 107 - Billing Statement with batch to the CalSAWS Software and update FIN 107 form name to CSF 144.</p>	<ol style="list-style-type: none">1. Estimate is for migrating the form in English and Spanish along with batch and online trigger.2. Spanish translations will be provided by the Consortium.3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	<p>With SCR CA-215194 the functionality to generate the CSF 144 - Billing Statement Form version (08/2020) Form from the Template Repository page and from batch process is added and form is available in English, Spanish and other all threshold languages.</p>



California Statewide Automated Welfare System

Design Document

CA-215294

DDID 1631: Modify DHCS Renewals Master Request Report

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Ravneet Bhatia; Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/06/2020	1.0	Initial version	Esequiel Herrera-Ortiz
02/04/2021	2.0	Update to the report mockup. The report has been converted to a Qlik Nprint report after the initial version of this design.	Esequiel Herrera-Ortiz
02/15/2021	2.1	Updated the SAWS header value to display CalSAWS rather than LRS.	Esequiel Herrera-Ortiz

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1 OVERVIEW

In preparation for migration of C-IV to LRS as part of CalSAWS, detailed code analysis work was conducted from DDID 1061 (CAR-3125) to identify logic gaps that may impact county business processes, to address code gaps between the two systems, and to identify batch scheduling needs and data entry requirements.

DDID 1631 was created to implement the changes identified by the outcome of DDID 1061. Design differences were found for the CMS Renewals Master Request report. This SCR is to implement the respective design changes for this report.

1.1 Current Design

The Renewals Master Request report provides counts on: Medi-Cal renewals, Medi-Cal renewals processing, and Medi-Cal continuance and discontinuance as a result of renewal processing.

In C-IV, the state version of the report which contains county summary information, is sent directly to DHCS via FTP process. A county specific version containing the summary and detail information is provided to counties for data validation.

1.2 Requests

The following updates will be made to the LRS/CalSAWS version of the report to resolve design differences:

1. Update the path to the county detailed version of the report from G: Reports L: Scheduled T: Case Activity to G:Reports L:Scheduled T: State
2. Update the report template to incorporate some design differences found in the C-IV template. The C-IV template includes totals by county that are transferred/sent to DHCS by C-IV. The template with totals for all counties is not viewable through the application.

1.3 Overview of Recommendations

1. Update the county detailed version of the report to take the place of the state version of the report.
2. Send the state version of the report directly to DHCS with all the CalSAWS counties' information via FTP.
3. Update the report template to incorporate some elements found in the C-IV version of the report.

1.4 Assumptions

1. The DDID 1061 analysis was completed as of release 19.03 for this report.

The DHCS Renewals Master Data Request report will be updated to resolve some design differences identified between the LRS/CalSAWS version of the report and the C-IV version of the report.

2.1.1 Overview

The county version of the DHCS Renewals Master Data Request report will now take the place of the state version of the report. The state version of the DHCS Renewals Master Data Request report will be sent directly to DHCS with all CalSAWS counties' data included. The report templates will be updated.

[illegible]

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Global: Reports
Local: Scheduled
Task: State

All historical versions of the report will remain accessible and unchanged through the old navigation:

Global: Reports
Local: Scheduled
Task: Case Activity

- b. Update the 'MAGI / Non-MAGI' column to display the value 'Non-MAGI' rather than 'NON-MAGI' when applicable. This update only affects the displayed value not the logic that determines MAGI / Non-MAGI.
- c. Update 'Sheet3' to include a dynamic total below the static Total. The dynamic total will be a row count over the Case Number column which are displayed on the sheet. The number will dynamically change when filters are applied.
- d. Update the 'Sheet3' title found in the header to display 'DHCS Renewals Master Request' rather than 'DHCS Renewals Master Request Detail'.
- e. Update all tabs to include a tab name. The tab names will be as follows:
 - Sheet1 = Case Summary
 - Sheet2 = Individual Summary
 - Sheet3 = Detail
- f. Update the Detail sheet to replace the old LRS logo with the new CalSAWS logo.
- g. Update the 'SAWS:' header field found in the 'Case Summary' and 'Individual Summary' sheet to display 'CalSAWS' rather than 'LRS'.



2.1.4 Report Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** State

2.1.5 Counties Impacted

All CalSAWS counties will be impacted by the changes outlined in this section.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	DHCS Renewals Master Request State Template Mockup	 State Report Mockup.xls
2	Reports	DHCS Renewals Master Request County Template Mockup	 County NPrinting Template.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1631	<p>1. Update path of the report in G: Reports L: Scheduled T: State to G:Reports L:Scheduled T: State</p> <p>2.Transfer the C-IV report template instead of using existing LRS/CalSAWS. The C-IV template includes totals by county that are transferred/sent to CDSS by C-IV. The template with totals for all counties is not viewable through the application.</p>	None	The report will be updated according the requirements outlined in DDID 1631.

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
N/A					

6 OUTREACH

None

7 APPENDIX

None



California Statewide Automated Welfare System

Design Document

CA-215676

DDID 2329 FDS: GA GR Customer Reporting Page Changes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Amber Brune
	Reviewed By	Himanshu Jain, Chitra Barsagade, Michael Wu, Srividhya Sivakumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/01/2020	1.0	Initial Draft	Amber Brune
12/04/2020	1.1	Added Assumptions 5 and 6. 5. This functionality will be tested with SCR CA-215917 in 21.11 release once all EDBC rules are implemented 6. The new forms listed in this SCR will not impact the existing functionality for Los Angeles County.	Taylor Fitzhugh

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1 OVERVIEW

In this SCR, we will be adding the new forms that pertain to the General Assistance/General Relief (GA/GR) program viewable in list form on the Customer Reporting List Page, as well as making the new forms viewable and editable on the Customer Reporting Detail Page. We will also be adding the unique Periodic Reporting (PR) Types to the respective Counties as it pertains to the GA/GR program.

1.1 Current Design

The GA/GR program is new to the system and the required forms are not currently in the system. The Counties associated to the new GA/GR program, currently do not have the unique PR type in the system.

1.2 Requests

The system will have the ability to view and edit the new forms that are not currently in the system because they pertain to the GA/GR program. Each County will have a unique periodic reporting type that pertains to the GA/GR program.

1.3 Overview of Recommendations

1. On the Customer Reporting List page, we will be adding the ability to view the new forms that pertain to the General Relief/General Assistance program. This way when the customer has these forms added into their casefile it will be accessible for the program user to View and/or Edit them. These forms will be viewable and editable in the same manner as any of the other forms that are currently in the system.
2. The newly added forms will be displayed using the current Customer Reporting Detail view and edit page designs. Any of the new forms will follow current "status" labeling practices. The main things that we are addressing here is the added new forms, all other functionality will be the same as the current system uses.
3. The GA/GR Periodic Reporting type will be added for each county using the GA/GR program with the program code of "GR".

1.4 Assumptions

1. The County Administration page will be updated in a future SCR.
2. CalSAWS Eligibility Authorization logic will be modified to advance periodic / Redetermination dates automatically in the future SCR CA-215917.
3. Form generation logic related to the periodic reporting will be added in the future SCR CA-215670.
4. Changes will be hidden based on the indicator for all General Assistance/General Relief changes related to the CalWIN migration effort.
5. This functionality will be tested with SCR CA-215917 in 21.11 release once all EDBC rules are implemented

6. The new forms listed in this SCR will not impact the existing functionality for Los Angeles County.

2 RECOMMENDATIONS

2.1 Customer Reporting List Page

2.1.1 Overview

On the Customer Reporting List page, we will be adding the ability to view the new forms that pertain to the General Relief/General Assistance program. These forms will be viewable and editable in the same manner as any of the other forms that are currently in the system.

In figure 2.1.1 we are showing how some of the new forms will be visible on the list page.

2.1.2 Customer Reporting List Mockup

Customer Reporting List

Search Results Summary				Results 1 - 10 of 10	
Display Type:		From:	To:	<button>View</button>	
<input type="text"/>		<input type="text"/>	<input type="text"/>		
Type	Submit Month	Program	Status	Status Date	
CSC 66	02/2020	GA	Sent	12/10/2021	<button>Edit</button>
CSF 34	02/2020	CW	Sent	01/24/2021	<button>Edit</button>
		GA	Sent	01/24/2021	
CSF 35	02/2020	CW	Sent	01/24/2021	<button>Edit</button>
		GA	Sent	01/24/2021	
GA 3007 34N	02/2020	GA	Sent	01/24/2021	<button>Edit</button>

Figure 2.1.1 – Customer Reporting List

2.1.3 Description of Changes

1. The following forms will be added to the **Customer Reporting List** page (If Applicable) and listed by their Form Name as the Type;
 - a. GA Income/Job Search Report

- i. **Form Name:** 48-70-20
- b. CAAP Monthly Earned Income & Asset Report
 - i. **Form Name:** CAAP 1
- c. Attendance Sheet
 - i. **Form Name:** CSC 66
- d. Daily Tip Statement
 - i. **Form Name:** CSF 34
- e. Self-Employment Sworn Statement
 - i. **Form Name:** CSF 35
- f. Monthly Eligibility Report
 - i. **Form Name:** CW 7
- g. Eligibility Report - General Assistance
 - i. **Form Name:** DSS GA 213
- h. GRWP Job Search Report
 - i. **Form Name:** F063-08-71A
- i. GA Disc - Citizenship Status/Lawful Resident
 - i. **Form Name:** GA 3007_34N
- j. GA Mid-Quarter Change Report
 - i. **Form Name:** GA-QR3
- k. GA Quarterly Status Report
 - i. **Form Name:** GA-QR7
- l. General Assistance Job Search Verification
 - i. **Form Name:** SC 1527
- m. GR Work Search Report
 - i. **Form Name:** W 48
- n. GA Monthly Eligibility Report
 - i. **Form Name:** YC58

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer Reporting**

2.1.5 Security Updates

There are no updates to the security settings.

2.1.6 Page Mapping

There are no updates that require new page mapping.

2.1.7 Page Usage/Data Volume Impacts

There are no updates that impact the page usage or data volume.

2.2 Customer Reporting Detail Page

2.2.1 Overview

The newly added forms will be displayed using the current Customer Reporting Detail page (View & Edit) designs (Figure 2.2.1 & Figure 2.2.2). The new forms will follow current "Status" labeling practices.

2.2.2 Customer Reporting Detail Mockup

Customer Reporting Detail

*- Indicates required fields

EditClose

Report Type:CSF 35Submit Month:02/2021Date Received:

Personal Contact:
No

Status			
Program	Status	Status Detail	Date
GA	Sent		01/31/2020

General Assistance/General Relief Status History

Status	Status Date	Action Date	Updated By
Sent	01/31/2020	02/01/2021 00:00:00 AM	19

EditClose

Figure 2.2.1 – Customer Reporting Details (View)

Customer Reporting Detail

*- Indicates required fields

Save and ReturnCancel

Report Type:CSF 35Submit Month:02/2021Date Received:

Personal Contact:

No

Status			
Program	Status	Status Detail	Date
GA	<div>Received</div>	<div>No Change</div>	<div>02/01/2021</div>

General Assistance/General Relief Status History

Status	Status Date	Action Date	Updated By
Sent	01/31/2021	02/01/2021 00:00:00 AM	19

Save and ReturnCancel

Figure 2.2.2 – Customer Reporting Details (Edit)

Report Type:
CSF 35

Submit Month:
02/2021

Date Received:
02/01/2021

Personal Contact:

No ▼

Status			
Program	Status	Status Detail	Date
GA	Incomplete ▼	Pending Incomplete ▼	<input type="text"/>

PR – Incomplete Reasons

<input type="checkbox"/> No signature	<input type="checkbox"/> All boxes were not checked
<input type="checkbox"/> Complete circled items	<input type="checkbox"/> Did not date
<input type="checkbox"/> Information provided earlier not reported	<input type="checkbox"/> Dated before first of the month
<input type="checkbox"/> Failed to provide information related to Income and Eligibility Verification System	<input type="checkbox"/> Income Change-Need proof
<input type="checkbox"/> Missing pay stubs	<input type="checkbox"/> Need proof of information reported
<input type="checkbox"/> Not signed by appropriate persons	<input type="checkbox"/> 1 of 2 required signatures missing
<input type="checkbox"/> Information not provided for Y-N answer	

General Assistance/General Relief Status History

Figure 2.2.3 – Customer Reporting Details (Edit with Incomplete Status)

2.2.3 Description of Changes

1. The following statuses will show in the “Status” section for the new forms on the view page when the form has been designated as such.
 - a. Generated
 - b. Sent
 - c. Received
 - d. Incomplete
 - e. Reviewed – Ready to run EDBC
 - f. Not Applicable
2. The following statuses will have the respective Status options in the “Status” dropdown for the new forms on the edit page.
 - a. Generated
 - i. Received
 - ii. Not applicable
 - b. Sent
 - i. Received
 - ii. Not applicable
 - c. Received
 - i. Reviewed – Ready to run EDBC

- ii. Incomplete
 - iii. Not applicable
 - d. Incomplete
 - i. Reviewed – Ready to run EDBC
 - ii. Not applicable
 - e. Not Applicable
- 3. The following status options will have the respective status detail options in the “Status Detail” dropdown for the new forms on the edit page.
 - a. Received
 - i. No Change
 - ii. Action Required
 - b. Incomplete - Will cause the PR-Incomplete Reasons section to show (**Figure 2.2.3**)
 - i. Pending Incomplete
- 4. The following incomplete reasons will be available, in the PR-Incomplete Reasons section, if the status is changed to “Incomplete”.
 - a. No signature
 - b. Complete circled items
 - c. Information provided earlier not reported
 - d. Failed to provide information related to Income and Eligibility Verification System
 - e. Missing pay stubs
 - f. Not signed by appropriate persons
 - g. Information not provided for Y-N answer
 - h. All boxes were not checked
 - i. Did not date
 - j. Dated before first of the month
 - k. Income Change-Need proof
 - l. Need proof of information reported
 - m. 1 of 2 required signatures missing

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer Reporting**

2.2.5 Security Updates

There are no updates to the security settings.

2.2.6 Page Mapping

There are no updates that require new page mapping.

2.2.7 Page Usage/Data Volume Impacts

There are no updates that impact the page usage or data volume.

2.3 County Reporting Type

2.3.1 Overview

Each County sends out a form periodically based on the county's PR type. The system will be modified to have a unique PR type for the GA/GR program.

2.3.2 Description of Change

1. The following counties will have SAR Reporting:
 - a. Alameda
 - b. Santa Clara
 - c. Tulare
2. The following counties will have Quarterly Reporting:
 - a. Contra Costa
 - b. Fresno
 - c. Orange
 - d. Sacramento
 - e. San Mateo
3. The following counties will have Monthly Reporting:
 - a. Orange
 - b. Placer
 - c. San Diego
 - d. San Francisco
 - e. San Luis Obispo
 - f. Santa Barbara
 - g. Santa Cruz
 - h. Solano
 - i. Yolo
4. The following counties do not have Periodic Reporting:
 - a. Sonoma
 - b. Ventura

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2329	<p>The CONTRACTOR shall update the GA/GR reporting types on the Customer Reporting pages to be county specific based on each county's reporting requirements for their GA/GR program.</p> <p>The CONTRACTOR shall make the GA/GR forms customizable that goes out for each of the 58 Counties and the frequency (i.e. monthly, quarterly) for each type (i.e. employable/unemployable).</p> <p>The CONTRACTOR shall allow the 58 Counties that do not have reporting ability to opt in/out of this functionality for GA/GR.</p>	<p>Online:</p> <p>1) The County Administration page must be modified to allow the frequency of the GR specific periodic reporting forms to modified by County Admins.</p> <p>2) CalSAWS Eligibility Authorization logic will be modified to advance periodic / Redetermination dates automatically.</p>	<p>We will meet these requirements by making the new forms viewable in list form on the Customer Reporting List Page, as well as adding the new forms to be viewable and editable on the Customer Reporting Detail Page.</p> <p>We will also be adding the respective Periodic Reporting Types to their respective Counties.</p>



California Statewide Automated Welfare System

Design Document

CA-217804 | CIV-107563

Implement Correspondence changes in Errata
19-76E II

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Cherreddy
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/01/2020	1.0	Initial Design	Nithya Cherreddy
10/19/2020	1.1	Revisions based on BAs and Build review	Nithya Cherreddy
11/3/2020	1.2	Revisions based on BAs review	Nithya Cherreddy
11/19/2020	1.3	Revisions based on the initial Committee Review	Nithya Cherreddy
11/23/2020	1.4	Revisions based on comments form LA County	Nithya Cherreddy
1/25/2020	1.5	Content Revision 1 updates	Nithya Cherreddy
<u>2/9/2021</u>	<u>1.6</u>	<u>Content Revision 2 updates</u>	<u>Nithya Cherreddy</u>

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1 OVERVIEW

This document details the changes necessary in CalSAWS and C-IV to implement the updated/added NOAs as part of the 19-76 Errata II.

1.1 Current Design

1. Currently CalSAWS has the following NOAs/forms
 - NOA - M44-207K (Discontinuance due to Over Income)
 - Form - NA 274G Overpayment Computations
2. Batch job PB19F107 and PB19F108 generates NA 274G form along with M44-350I and M44-352A forms respectively.
3. CalSAWS – NA 274G incorrectly populates the Disability Based Income (DBI) Disregard value when generated from the Recovery Account Detail Page and Template Repository.
4. Currently C-IV has the following NOAs/forms
 - NOA - M44-315A (\$10 Minimum Payment, Change NOA)
5. C-IV - NA 301 and NA 303 incorrectly populates the Disability Based Income (DBI) Disregard value when generated from the Recovery Account Detail Page and Template Repository.

1.2 Requests

1. CalSAWS – Update the M44-207K NOA(Discontinuance due to Over Income - taken from Errata 19-76 E II)
2. CalSAWS - Add Form NA 274H, this form should be used for overpayments occurring on or after 6/1/2020
3. CalSAWS – Add the CalWORKs Overpayment Packet with M44-350I and NA 274H.
4. CalSAWS – Add the Demand NOA Packet with M44-352A and NA 274G /NA 274H.
5. CalSAWS – Update NA 274G form population for Section A, line items 5, 7 and 10.
6. CalSAWS - Update the Recovery Account Activation batch job to generate CalWORKs Overpayment Packet based on the oldest EDBC associated to the Recovery Account.
7. CalSAWS - Update the Demand NOA batch job to generate Demand NOA Packet based on the oldest EDBC associated to the Recovery Account.
8. CalSAWS – Update the 'Generate Form' button logic on Recovery Account Detail page to generate the CalWORKs overpayment packet with either NA 274G or NA 274H depending on the overpayment months.
9. CalSAWS - Update the existing Income increase NOA to account for the \$10 minimum payment verbiage.
10. C-IV - Update the M44-315A (\$10 Minimum Payment, Change NOA)
11. C-IV - Update the NA 301 and NA 303 Form to populate the correct DBI Disregard value.

1.3 Overview of Recommendations

1. CalSAWS - Update the M44-207K NOA
2. CalSAWS - Add the NA 274H form
3. CalSAWS – Add the CalWORKs Overpayment Packet with M44-350I and NA 274H.
4. CalSAWS – Add the Demand NOA Packet with M44-352A and NA 274G /NA 274H.
5. CalSAWS – Update NA 274G form population for Section A, line items 5, 7 and 10.
6. CalSAWS - Update the Recovery Account Activation batch job to generate CalWORKs Overpayment Packet based on the oldest EDBC associated to the Recovery Account.
7. CalSAWS - Update the Demand NOA batch job to generate Demand NOA Packet based on the oldest EDBC associated to the Recovery Account.
8. CalSAWS – Update the 'Generate Form' button logic on Recovery Account Detail page to generate the CalWORKs overpayment packet with either NA 274G or NA 274H depending on the overpayment months.
9. CalSAWS - Update the existing Income increase NOA to account for the \$10 minimum payment verbiage.
10. C-IV – Update the M44-315A (\$10 Minimum Payment, Change NOA).
11. C-IV - Update the NA 301 and NA 303 Form to populate the correct DBI Disregard value.

1.4 Assumptions

1. Over income reason in C-IV has different verbiage compared to M44-207K. Over income reason verbiage will not be updated in C-IV as part of this SCR. C-IV will inherit the updated verbiage at migration.
2. NA 274G is currently not available in C-IV.
3. NA 274H form's variable population will be the same as NA 274G form.
4. While generating the Continuation Page - Overpayment Computations NOA from template repository, worker should determine whether to generate NA 274G or NA 274H based on the benefits months the over payment occurred for.
 - a. Example: If the overpayment is for benefit months March through July, worker should generate NA 274G, as there exists a benefit month before June 2020.
 - b. If the overpayment is for benefit months June through July, worker should generate NA 274H, as overpayment is for benefit months on or after June 2020.
5. Current trigger conditions and variable value calculations will not be updated for NA 301 and NA 303 forms. Only the DBI value look up will be updated.
6. All the variable fields in the NA 274G and NA 274H form body will be editable. Form header and Form Footer variable fields will not be editable. The fields will be editable when the fields are blank or pre-populated.
7. SCR CA-214198 will update the name of the PB19F108 batch job to PB00F108.
8. Demand NOA Packet will be available in Template Repository and cannot be generated using the 'Generate Form' button on the 'Recovery Account Detail

page'. Worker can generate the M44-352A and NA 274G/ NA 274H forms separately from Template Repository.

9. For External Recovery accounts the forms will be generated manually by the user from the Recovery Account Detail page.
10. SCR CA-221914 will add threshold translations for the NOAs/Forms updated/added as part of this SCR.
11. CalSAWS – A GEN 1365 will be added to every outbound envelope at Central print.

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2 RECOMMENDATIONS

The following NOAs/Forms will be updated/added to implement the changes from 19-76 Errata II.

2.1 CalSAWS - Update the Over Income Discontinuance NOA

2.1.1 Overview

This effort is to update the M44-207K NOA. M44-207K is the CalWORKs discontinuance NOA for Over Income reason. 19-76 Errata II made verbiage updates to this reason.

Reason Fragment Name and ID: CW_TN_INC_GRT_MAX_AID_A233, 6212

State Form/NOA: M44-207K

Current NOA Template: CW_NOA_TEMPLATE

Current NOA Template Name: NA 290

Current Program(s): CW

Current Action Type: Discontinuance

Current Fragment Level: Programs

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA 1239 SAR

Existing Languages: English and Spanish

2.1.2 Update Fragment XDP

Update the Over Income discontinuance fragment verbiage as listed below (CW_TN_INC_GRT_MAX_AID_A233)

Updated Languages: English and Spanish

Updated NOA Template Name: M44-207K (5/20)

NOA Mockups: See Supporting Document #1

Description	Existing Text	Updated Text	Formatting
Static Section - English	<p>You can not get cash aid if your family's net countable income is more than the Maximum Aid Payment set by the State.</p> <p>Your family's needs and income are figured on this notice.</p>	<p>You cannot get cash aid if your family's gross income is more than the CalWORKs Tier 2 Income Reporting Threshold and is expected to continue at this level.</p> <p>Your family size is <AU_Size></p> <p>The Tier 2 Income Reporting Threshold for your family size is <Tier2_IRT>.</p> <p>Your family's needs and income are figured on this page.</p>	Arial Font 10

Note: Spanish translation for the updated verbiage is attached in Supporting Document #5.

2.1.3 Variable population

Following is the variable population for the updated over income discontinuance NOA.

Variable Name	Population	Formatting
<AU_Size>	<p>Size of the Assistance Unit</p> <p>Note: AU size could sometimes be 0</p>	Arial Font 10
<Tier2_IRT>	<p>Tier 2 IRT for AU Size</p> <p>Note: If the AU size 0, the Tier 2 IRT for AU size 1 should be populated i.e. \$1,354.</p>	Arial Font 10

2.2 CalSAWS - Add NA 274H form

2.2.1 Overview

This effort is to add NA 274H form to CalSAWS system. NA 274H form is used to calculate the overpayment amount for an AU after all applicable income disregards, sanctions, and penalties have been applied. NA 274H should be used for overpayments occurring on or after 6/1/2020. This was provided with 19-76 Errata II.

State Form: NA 274H

Current Programs: CalWORKs

Current Attached Forms: NA Back 9

Current Forms Category: NOA

Existing Languages: English and Spanish

2.2.2 Add NA 274H form XDP

1. Add the NA 274H form to the CalSAWS system.

Form Title (Document List Page Displayed Name): Continuation Page - Overpayment Computations

Form Number: NA 274H

Include NA Back 9: Yes

Template Repository Visibility: All counties

Post to SSP (Self Service Portal): Yes

Form Mockups/Examples: See Supporting Documents #2 for English and #6 for Spanish forms.

Note: Form population remains the same as NA 274G form

Cosmetic Update: Increase the spacing between Rules and State Hearing for NA 274H form.

2. Update 'County of Los Angeles' to 'County of <CountyName>', where '<CountyName>' is a variable. This update will be applicable for NA 274G form, NA 274H form, Demand NOA packet and CalWORKs Overpayment packet.

Note: Users must be logged in using their county login (i.e. @36 or @19) for the county name to be populated.

2.2.3 Add Form Control

The following barcodes will be used for NA 274H form.

Tracking Barcode	BRM Barcode	Imaging Barcode
------------------	-------------	-----------------

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List,FooterText,numbered,List Paragraph1,Paragraphe de liste1,Bulletr List Paragraph,列出段落,列出段落1,List Paragraph2,List Paragraph21,Listeafsnit1,Parágrafo da Lista1, Numbered + Level: 1 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 1" + Indent at: 1.25"

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List,FooterText,numbered,List Paragraph1,Paragraphe de liste1,Bulletr List Paragraph,列出段落,列出段落1,List Paragraph2,List Paragraph21,Listeafsnit1,Parágrafo da Lista1, Indent: Left: 1.75"

N	N	N
---	---	---

2.2.4 Add form to Template Repository

NA 274H form will be added to Template Repository. The form will have pre-population same as NA 274G.

Required Document Parameters: Case Number, Customer Name, Recovery Account Number, Language and Program

2.2.5 Add Form Print Options and Mailing Requirements

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

2.3 CalSAWS – CalWORKs Overpayment Packet

2.3.1 Overview

As part of the SCR CA-207159 CalWORKs Overpayment Packet was added to CalSAWS which contains M44-350I and NA 274G forms.

This effort is to add a new CalWORKs Overpayment Packet which will have M44-350I and NA 274H forms.

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

Form Number: CalWORKs Overpayment Packet

Language: English, Spanish

Template Repository Visibility: Not visible

2.3.2 Description of Change

1. Create the CalWORKs Overpayment Packet. The packet will contain the M44-350I and NA 274H forms for all counties (Los Angeles and the 57 Migration Counties).
2. The existing population logic for the M44-350I and NA 274G will be used to populate the forms (M44-350I and NA 274H) within this packet as NA 274G and NA 274H has the same population.
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
XN/A	XN/A	XN/A	XN/A	XN/A	XN/A

4. The packet will have the following mailing options:

Mailing Requirements:

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 Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Clock Indicator: N/A

Post to Self Service Portal: Yes

Image Title Name: N/A

5. The packet will have the following barcodes options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

2.4 CalSAWS – Demand NOA Packet (M44-352A and NA 274G)

2.4.1 Overview

This effort is to add Demand NOA Packet which will have the M44-352A and NA 274G forms.

Form Name: Demand NOA Packet (M44-352A and NA 274G)

Form Number: Demand NOA Packet

Language: English, Spanish

Template Repository Visibility: Not visible

2.4.2 Description of Change

1. Create the Demand NOA Packet (M44-352A and NA 274G) to be used if the oldest overpayment month associated to the recovery account is before 06/2020. This packet will contain the M44-352A and NA 274G forms for all counties (Los Angeles and the 57 Migration Counties).
2. The existing population logic for the M44-352A and NA 274G will be used to populate the Demand NOA Packet (M44-352A and NA 274G).
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
X N/A	X N/A	X N/A	X N/A	X N/A	X N/A

4. The packet will have the following mailing options:

Mailing Requirements:

Mail-To (Recipient): When generated through the batch process, the CalWORKs Primary Applicant.

Mailed From (Return): CalWORKs Worker's Office/District Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Clock Indicator: N/A

Post to Self Service Portal: Yes

Image Title Name: N/A

5. The packet will have the following barcodes options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

2.5 CalSAWS – Demand NOA Packet (M44-352A and NA 274H)

2.5.1 Overview

This effort is to add Demand NOA Packet which will have the M44-352A and NA 274H forms.

Form Name: Demand NOA Packet (M44-352A and NA 274H)

Form Number: Demand NOA Packet

Language: English, Spanish

Template Repository Visibility: Not visible

2.5.2 Description of Change

1. Create the Demand NOA Packet (M44-352A and NA 274H) to be used if the oldest overpayment month associated to the recovery account is on or after 06/2020. This packet will contain the M44-352A and NA 274H forms for all counties (Los Angeles and the 57 Migration Counties).
2. The existing population logic for the M44-352A and NA 274G will be used to populate the forms within the Demand NOA Packet (M44-352A and NA 274H). This is because NA 274G and NA 274H has the same variable population logic.

3. The packet will have the following mailing options:

Mailing Requirements:

Mail-To (Recipient): When generated through the batch process, the CalWORKs Primary Applicant.

Mailed From (Return): CalWORKs Worker's Office/District Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Clock Indicator: N/A

Post to Self Service Portal: Yes

Image Title Name: N/A

4. The packet will have the following barcodes options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

2.6 CalSAWS - Update NA 274G form population

2.6.1 Overview

2.6.1 NA 274G currently populates the highlighted columns based on the oldest EDBC month associated to the recovery account.

NA 274G currently populates the DBI value for highlighted sections below (Section A, line items 5, 7 and 10) based on the oldest EDBC associated to the recovery account.

As part of the SCR CA-209033 the DBI value has been updated to \$500 for benefit months 06/2020 or later.

Example: If the recovery account is for benefit months March through July 2020, the DBI value (highlighted below) used in the calculations (for the below highlighted columns) in NA 274 G from is 225 currently.

If the recovery account is for benefit months starting after June 2020, the DBI value (highlighted below) used in the NA 274 G from is 500 currently.

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Overpayment Month and Year				
Section A. Countable Income, Month of 03/2020 - 07/2020				
1. Total Self-Employment Income	\$ 0	0	0	0
2. Self-Employment Expenses:				
a. 40% Standard	- 0	0	0	0
OR				
b. Actual	- 0	0	0	0
3. Net Earnings from Self-Employment	= 0	0	0	0
4. Total Disability-Based Unearned Income (DBI) (Assistance Unit + Non-Assistance Unit Members)	\$ 0	0	0	0
5. \$225 DBI Disregard (if #4 is greater than \$225)	- 0	0	0	0
6. Nonexempt Unearned Disability-Based Income	= 0.00	0.00	0.00	0.00
OR				
7. Unused DBI Disregard	= 225	225	225	225
8. Net Earnings from Self-Employment (from above)	+ 0	0	0	0
9. Total Other Earned Income	+ 1560.24	1560.24	1560.24	1560.24
10. Unused Amount of \$225 (from #7)	- 225	225	225	225
11. Subtotal	= 1335.24	1335.24	1335.24	1335.24
12. Earned Income Disregard 50%	- 667.62	667.62	667.62	667.62
13. Subtotal	= 667.62	667.62	667.62	667.62
14. Nonexempt Unearned Disability-Based Income (from #6)	+ 0.00	0.00	0.00	0.00
15. Subtotal	= 667.62	667.62	667.62	667.62
16. Other Nonexempt Income (Assistance Unit + Non- Assistance Unit Members)	+ 0	0	0	0
Net Countable Income	= 667.00	667.00	667.00	667.00

2.6.2 Description of Change

Modify the NA 274G population module for Section A, line items 5, 7 and 10 to use the DBI value based on the EDBC month for that column to populate the values in the columns based on the month the column is associated to.

Example: If the recovery account is for benefit months March through June 2020, column 1's EDBC month should be March, Column 2's EDBC month should be April and so on 1 through 3 should have the DBI value

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as 225 as the first 3 columns correspond to benefit months March, April and May. 4th column should have the DBI value 500 as it for the benefit month June.

Note: NA 274H will have the same population logic as NA 274G form.

2.7 CalSAWS – 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.

This effort will update the Recovery Account Activation batch job to send out the new OP/OI packets, i.e. either M44-350I and NA 274G or M44-350I and NA 274H.

2.7.2 Description of Change

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

Trigger the CalWORKs Overpayment packet (M44-350I and NA 274G) if the oldest overpayment month associated to the recovery account is before 6/2020.

Trigger the CalWORKs Overpayment packet (M44-350I and NA 274H) if the oldest overpayment month associated to the recovery account is on or after 6/2020.

Note: Exiting batch transaction values will not be updated with this effort.

2.7.3 Execution Frequency

No Change.

2.7.4 Key Scheduling Dependencies

No Change.

2.7.5 Counties Impacted

All Counties.

2.7.6 Data Volume/Performance

N/A.

2.7.7 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....)

2.8 CalSAWS – Demand NOA Batch Job

2.8.1 Overview

Currently Demand NOA batch job triggers the M44-352A and NA 274G forms. M44-352A states that although the cash aid for the participant has stopped, the participant still owes the county for the overpayment.

This effort will update the Demand NOA batch job to send out the new Demand NOA Packets, i.e. either M44-352A and NA 274G or M44-352A and NA 274H depending on the oldest overpayment month.

2.8.2 Description of Change

Update the logic to send out the new Demand NOA packet when the program is CalWORKs.

Trigger the Demand NOA packet (M44-352A and NA 274G) if the oldest overpayment month associated to the recovery account is before 6/2020.

Trigger the Demand NOA packet (M44-352A and NA 274H) if the oldest overpayment month associated to the recovery account is on or after 6/2020.

Note: Existing batch transaction values will not be updated with this effort.

2.8.3 Execution Frequency

No Change.

2.8.4 Key Scheduling Dependencies

No Change.

2.8.5 Counties Impacted

All Counties.

2.8.6 Data Volume/Performance

N/A.

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....)

2.8.8 Execution Frequency

No Change.

2.8.9 Key Scheduling Dependencies

No Change.

2.8.10 Counties Impacted

All Counties opted into the Batch jobs. Currently Los Angeles County only.

2.8.11 Data Volume/Performance

N/A.

2.8.12 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 CalSAWS – Recovery Account Detail Page

2.9.1 Overview

As part of SCR CA-207159, the logic of the 'Generate Form' button has been updated to generate the CalWORKs Overpayment packet when the program is CalWORKs, Diversion, Child Support, Immediate Need, or Refugee Cash Assistance.

2.9.2 Description of Change

Update the logic for 'Generate Form' button to generate the CalWORKs Overpayment packet containing either NA 274G or NA 274H depending on the oldest overpayment month associated to the Recovery Account.

If the oldest Overpayment month is before 6/2020, the CalWORKs Overpayment packet with NA 274G form should generate when the 'Generate Form' button is clicked.

If the oldest Overpayment month is on or after 6/2020, the CalWORKs Overpayment packet with NA 274H form should generate when the 'Generate Form' button is clicked.

Note: This logic mimics the batch job functionality.

2.9.3 Page Location

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

2.9.4 Security Updates

N/A

2.9.5 Page Mapping

N/A

2.9.6 Page Usage/Data Volume Impacts

N/A

2.10 CalSAWS - Add \$10 Minimum Payment Change reason fragment

2.10.1 Overview

This effort is to add the M44-315A NOA to CalSAWS system. M44-315A is to notify recipients that they will not receive cash aid because their monthly cash aid is less than \$10.

Known County NOA: Derived from M44-315A

NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)

Program(s): CalWORKs

Action Type: Change and Supplement

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: NA 1239 SAR

Languages: English and Spanish

2.10.2 Update the Countable Income Increased NOA

1. Update the Countable Income Increased NOA (CW_CH_CNTBL_INCOME_INC_A752) to populate the dynamic added text (mentioned below) when the benefit amount is less than \$10.

NOA Mockup: See supporting Document #4

Description	Text	Formatting
Static and Existing Text	Your family income has changed. When your income changes, your cash aid amount also changes.	Arial Font Size 10
Dynamic added text	<p>The monthly cash aid amount figured on this notice is less than \$10.00.</p> <p>We can't pay aid for an amount less than \$10.00.</p> <p>Months in which we do not pay aid do not count against your 48-month time limit, unless:</p> <ul style="list-style-type: none">• we are collecting an overpayment, or• you are eligible for less than \$10 because of a penalty, or• you get a non-recurring special need payment. <p>Contact the County if you would like more details about time on aid.</p> <p>You can still get other CalWORKs programs and services, if you are eligible, including:</p> <ul style="list-style-type: none">• Welfare to Work;• Child care;• Transportation supportive services to go to work, school, training or approved activities;• Being paid back for work and school related expenses; and• Homeless assistance <p>Contact the County for specific details about the above programs or services.</p>	Arial Font Size 10

Description	Text	Formatting
	Although you won't get a cash aid payment, you are still on the CalWORKs program and must continue to send in your reports by the dates the County tells you they are due and you must do this to keep your Medi-Cal and can always contact the County if things change to see if you can get a cash aid payment.	

Note: Spanish translation for the dynamic text is attached in Supporting Document #5.

Updated Languages: English and Spanish

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Updated NOA Template Name: M44-315A (5/20)

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2.11 C-IV - Update \$10 Minimum Payment Change NOA

2.11.1 Overview

M44-315A is to notify recipients that they will not receive cash aid because their monthly cash aid is less than \$10.

Currently MSG_ZERO_BENEFIT_AR populates on the NOA if the grant amount is less than \$10 and the reporting type is 'Annual Reporting', Currently MSG_ZERO_BENEFIT_SAR populates on the NOA if the grant amount is less than \$10 and reporting type is 'Semi Annual Reporting'.

Note: Verbiage for both MSG_ZERO_BENEFIT_AR and MSG_ZERO_BENEFIT_SAR fragments is listed in the section below.

Reason Fragment Name and ID: MSG_ZERO_BENEFIT_SAR (1297), MSG_ZERO_BENEFIT_AR (1298)

State Form/NOA: M44-315A

Current NOA Template: TEMPLATE_SINGLE_BUDGET

Current Program(s): CW or RCA

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English and Spanish

2.11.2 Update Fragment XDP

Add the following new verbiage in place of the current Zero benefit SAR or AR fragments (MSG_ZERO_BENEFIT_SAR and MSG_ZERO_BENEFIT_AR)

Updated Languages: English and Spanish

NOA Mockups: See Supporting Document #3

Description	Existing Text	Updated Text	Formatting
MSG_ZERO_BENEFIT_SAR - Static Section	The monthly cash aid amount figured on this notice is less than \$10. We can't pay aid for an amount less than \$10. Although you won't get cash aid, you must continue to send your semi-annual report (SAR 7) by the 11th of the month. You must do this to keep getting cash based Medi-Cal and see if you can get a cash aid payment.	The monthly cash aid amount figured on this notice is less than \$10.00. We can't pay aid for an amount less than \$10.00. Months in which we do not pay aid do not count against your 48-month time limit, unless: <ul style="list-style-type: none"> • we are collecting an overpayment, or • you are eligible for less than \$10 because of a penalty, or 	Arial Font 10
MSG_ZERO_BENEFIT_AR - Static Section	The monthly cash aid amount figured on this notice is less than \$10. We can't pay aid for an amount less than \$10. Although you won't get cash aid, you must continue to report changes verbally, electronically, or in writing to your Worker within 10 days of the change. You must do this to keep getting cash based Medi-Cal and see if you can get a cash aid payment.	<ul style="list-style-type: none"> • you get a non-recurring special need payment. <p>Contact the County if you would like more details about time on aid.</p> <p>You can still get other CalWORKs programs and services, if you are eligible, including:</p> <ul style="list-style-type: none"> • Welfare to Work; • Child care; • Transportation supportive services to go to work, school, training or approved activities; • Being paid back for work and school related expenses; and 	Arial Font 10

Description	Existing Text	Updated Text	Formatting
		<ul style="list-style-type: none"> • Homeless assistance <p>Contact the County for specific details about the above programs or services.</p> <p>Although you won't get a cash aid payment, you are still on the CalWORKs program and must continue to send in your reports by the dates the County tells you they are due and you must do this to keep your Medi-Cal and can always contact the County if things change to see if you can get a cash aid payment.</p>	

*Formatting for threshold will generate based on project standards for that language

Note: Spanish translation for the dynamic text is attached in Supporting Document #5.

2.11.3 Updates to Fragment Generation

Populate the newly added message fragment when the following conditions are true.

- Program is CalWORKs or RCA
- Benefit Change NOA is generated (Change Action)
- Grant amount is less than \$10
- Reporting type is 'Annual Reporting' or 'Semi Annual Reporting'

2.12 C-IV - Updates to NA 301 and NA 303 Forms

2.12.1 Overview

This effort is to update the NA 301 and NA 303 Forms. These forms are currently populating DBI Disregard value (highlighted below) with either 112 or 225 amount when generated from Recovery Account Detail Page and Template Repository.

Overpayment Month and Year:		04/20	05/20	06/20		
A	Net Countable Income					
	Total Business Income	\$ 0.00	0.00	0.00		
	Business Expenses					
	A. 40% Standard OR	- 0.00	0.00	0.00		
	B. Actual	- 0.00	0.00	0.00		
	Net Earnings from Self Employment	= 0.00	0.00	0.00		
	Total Disability-Based Unearned Income (DBI)					
	(Assistance Unit (AU) + Non Assistance					
	Unit (Non-AU) Members)	\$ 0.00	0.00	0.00		
	\$225 DBI Disregard (if DBI is greater than \$225) -	0.00	0.00	0.00		
	Nonexempt Unearned Disability-Based					
	Income OR	= 0.00	0.00	0.00		
	Unused DBI Disregard	= 225.00	225.00	225.00		
	Total Earned Income	\$ 3,693.60	3,714.03	3,345.27		
	Net Earnings from Self-Employment	+ 0.00	0.00	0.00		
	(from above) Subtotal	= 3,693.60	3,714.03	3,345.27		
	Unused Amount of \$225 (from above) or	- 225.00	225.00	225.00		
	Earned Income Disregard 50%	- 1,734.30	1,744.52	1,560.13		
	Nonexempt Unearned Disability-Based					
	Income (from above)	+ 0.00	0.00	0.00		
	Other Nonexempt Income (AU + Non-AU					
	Members)	+ 0.00	0.00	0.00		
	Net Countable Income	= 1,734.00	1,744.00	1,560.00		

2.12.2 Updates to NA 301 and NA 303 Forms Variable Population

Update the NA 301 and NA 303 Form to populate the correct DBI Disregard value with EID Amount based on following conditions:

Form Body Variables:

Variable Name	Population	Formatting	Template Repository Population	Populates with Form Generation
<VAR> DBI Disregard (if DBI is greater than <VAR>)	The disregarded Disability Based income is calculated and stored in BDG_PERS_INC table. Populate this value based on the Class Code 20 and Type code 35 from BDG_PERS_INC table. Example: If the DBI is 250 and the overpayment is for March 2020(Disregard is \$225), this field will populate \$225 as all of	Arial Font Size 10	Y	Y

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Formatted: Highlight

Variable Name	Population	Formatting	Template Repository Population	Populates with Form Generation
	the disregard has been applied.			
Unused DBI Disregard	<p>Total DBI disregard minus Disability based income. Look up the DBI value from CT335_AI based on the EDBC quarter begin date.</p> <p>If this value is negative, it will populate 0</p> <p>Example: If quarter begin date is 01/01/2012, DBI value from CT335_AI will be 112. If quarter begin date is 11/01/2013, DBI value from CT335_AI will be 225. If quarter begin date is 07/01/2020, DBI value from CT335_AI will be 500.</p>	Arial Font Size 10	Y	Y
Unused Amount of <VAR>\$225 (from above) or	<p>This value will be same as 'Unused DBI Disregard'. Look up the DBI value from CT335_AI based on the EDBC quarter begin date.</p> <p>Example: If quarter begin date is 01/01/2012, DBI value from CT335_AI will be 112. If quarter begin date is 11/01/2013, DBI value from CT335_AI will be 225. If quarter begin date is 07/01/2020, DBI value from CT335_AI will be 500.</p>	Arial Font Size 10	Y	Y

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Client Correspondence	M44-207K NOA Mockup	CalSAWS Updated CW Over Income NOA.pdf
2.	Client Correspondence	NA 274H	NA 274H Mock up.pdf
3.	Client Correspondence	C-IV \$10 Minimum Payment Change NOA	CIV \$10 Min Payment NOA.pdf
4.	Client Correspondence	CalSAWS \$10 Minimum Payment Change NOA	CalSAWS \$10 Min Payment NOA.pdf
5.	Client Correspondence	Spanish Translations	Spanish Translations.pdf
6.	Client Correspondence	NA 274H Spanish Form	NA 274H Spanish.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.11	The LRS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	Notices has been updated and added as part of the Errata 19-76 E II.
2.18.3.7	The LRS shall identify case actions that require a notice, NOA, form, letter, stuffer, or flyer, and shall generate that appropriate notice, NOA, form, letter, stuffer, or flyer, using variable case-specific information.	Overpayment Notice (NA 274H) will be mailed to the customer in appropriate scenarios.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA- 221629

DDID 34

Task Management Continuation

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/1/2020	1.0	Initial Revision	Mayuri Srinivas
2/1/2020	1.1	Content Revision #1 <ul style="list-style-type: none"> • Clarified verbiage for display of customer need information in the Task long description in section 2.4.3.2. • Clarified scenario in section 2.7. • Updated 2.5.1 Mockup. • Clarified that Clearance Task Types are not impacted by the Sub-Type modifications. • Added examples to 2.1.3.6 	Mayuri Srinivas

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1 OVERVIEW

This design outlines modifications to native Task Management functionality within the CalSAWS System to incorporate additional functionalities introduced with the initial phase of DDID 34 (CA-214928).

1.1 Current Design

The CalSAWS System contains a series of Worklist pages allowing county staff to view, manage and work Tasks. SCR CA-214928 introduced additional Task Management functionality to the CalSAWS System such as customizable Task Types, Task Banks, and enhanced Task Reassignment capabilities. The Homepage My Tasks panel, Worklist Summary, Worklist and Worklist PR RE pages were modified to incorporate a portion of the functionality introduced with CA-214928.

SCR CA-214929 introduced a set of dedicated Task pages within a Task Pop Up window allowing staff to search, edit, create, and request Tasks.

1.2 Requests

Update the functionality of the Homepage My Tasks panel, Worklist Summary, Worklist and Worklist PR RE pages to incorporate additional functionality for customizable Task Types and Sub-Types.

Modify the display of Clearance Tasks in the Task Pop Up pages to incorporate an additional data point associated to Clearance Tasks that is currently visible on the Worklist page.

1.3 Overview of Recommendations

1. Update Worklist page to evaluate and display customized Task Type and Task Sub-Type information.
2. Update Worklist PR RE page to evaluate and display customized Task Type and Task Sub-Type information.
3. Update the Worklist Summary page to evaluate and display customized Task Type and Sub-Type information.
4. Update the Pending Authorizations page to label the Task Category dropdown menu accordingly.
5. Update the Task Detail page accessible through the Worklist and Worklist PR RE pages to incorporate customized Task Types and Sub-Types.
6. Update Homepage My Tasks panel to evaluate for the In Process Task Status.
7. Update the Task Pop Up – Task Detail page to include an additional reference attribute for Clearance Tasks.

Assumptions

1. The only Task Types that contain the reference attribute to be displayed on the Task Pop Up – Task Detail page are the 4 Clearance Task Types described in 2.7.3.1.

2 RECOMMENDATIONS

2.1 Worklist

2.1.1 Overview

The Worklist page allows workers to search for and view Tasks as well as create and/or request new Tasks. This page requires modifications to fully function with customizable Task Types and Task Sub-Types.

2.1.2 Worklist Mockup

Worklist

*- Indicates required fields

Search

Category: SAR7 **Status:** Assigned **Priority:** Critical

Type: SAR7 Received

Sub-Type: Jan 2021

Case Number: **Select**

Organization Level: Worker **Organization Number:** 36LS00C300 **Select**

Organization Name: Mayuri Srinivas

Search By: Created Date

From: 11/24/2020 **To:**

Primary Case Language:

- English
- Spanish
- Afghani

Results per Page: 50 Search

Search Results Summary

Results 1 - 1 of 1

Add Task

Type / Sub-Type	Worker ID	Case Number	Status	Assigned Date	Due Date	Language
SAR7 Received / Jan 2021	36LS00C300	I400DD3	Assigned	12/04/2020	12/31/2020	

Complete Add Task

Assign: * **Reassign** **Assign To:** **Select**

Get Next

Category: All

Primary Case Language:

- English
- Spanish
- Afghani

Get Next

Figure 2.1.1 – Worklist Mockup

2.1.3 Description of Changes

Modify the Worklist page as follows:

1. Update the "Status" dropdown to include an option of "Assigned/In Process" between the "All" and "Assigned" options. This option allows a search for Tasks that have a Status of "Assigned" or "In Process".
2. Update the search options section to include a "Sub-Type" field that will display if the selected Task Type in the "Type" field includes one or more Task Sub-Types. This field will not display if the value in the Category dropdown is "All", the value in the Type dropdown is "All" or if the selected Task Type in the "Type" field does not include any Sub-Types.
3. Update the population logic of the page to include custom Task Types and Sub-Types that have been created through the Task Type Detail/Task Sub-Type Detail pages.
4. Update the "Type" column label in the Search Results Summary panel to "Type / Sub-Type".
5. Update the population logic of the "Type / Sub-Type" column (formerly the "Type" column) to format as "Task Type / Task Sub-Type".

For Example: If a Task is created with a Type of "SAR 7 Received" and a Sub-Type of "Jan 2020", this column will display "SAR7 Received / Jan 2020". If the Task does not have a Sub-Type, only the Task Type will display.

This column currently concatenates an additional value if the Task Type is one of the following Clearance Task Types for Los Angeles county:

- Clearance
- Clearance YBN
- Clearance ICT
- Clearance CMIPSI

For example, if a displayed Task has a "Clearance ICT" Task Type, this column will display "Clearance ICT –1234567" where "1234567" is the ICT ID. Display for Clearance Tasks will not be impacted because these Types will not be eligible for Task Sub-Types per SCR CA-214896.

Existing guided navigation configurations if this column displays as a hyperlink will display based on the Task Type and Sub-Type. The Guided Navigation process is still based on Task Type only.

6. Update the search processing for the Priority field to search for Tasks based on priority as follows:
 - a. If a Task only has a Task Type, the Task Type priority will be compared to the Priority search value.
 - b. If a Task has a Task Type and Task Sub-Type, the Task Sub-Type priority will be compared to the Priority search value.

- c. If a Task has a Task Type and Task Sub-Type and the Task Sub-Type does not have a priority on the Task Sub-Type Detail page, the Task Type priority will be compared to the Priority search value.

The following table illustrates the above 3 scenarios. The Task priority column is what will be compared against the value specified in the Priority search field:

Scenario	Task Type Priority	Task Sub-Type Priority	Task Priority
a	Low	N/A – No Sub-Type	Low
b	Medium	Critical	Critical
c	High	N/A – Sub-Type exists, but the Sub-Type Priority field is blank	High

2.1.4 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Worklist PR RE

2.2.1 Overview

The Worklist PR/RE page allows workers to search, view, work and/or request outstanding Periodic Report (PR) or Redetermination (RE) Tasks. This page

requires modifications to fully function with customizable Task Types and Task Sub-Types.

2.2.2 Worklist PR RE Mockup

Worklist PR / RE

*- Indicates required fields

Case Number:

Select

Status:

Assigned/In Process ▼

Organization Level:

Worker ▼

Organization Number:

90LS00CB00

Select

Organization Name:

Mayuri Srinivas

Program:

▼

Program Status:

▼

Due Date

Submit Month:

From:

To:

Primary Case Language:

English

Spanish

Afghani

Search

YBN	Type / Sub-Type	Worker ID	Case Number	Program	Status	Submit Month	Appointment Date	Language
No Data Found								

Get Next

Category:

All ▼

Primary Case Language:

English

Spanish

Afghani

Get Next

Figure 2.2.1 – Worklist PR/RE Mockup

2.2.3 Description of Changes

Modify the Worklist PR/RE page as follows:

1. Update the "Status" dropdown to include an option of "Assigned/In Process" between the "All" and "Assigned" options. This option allows a search for Tasks that have a Status of "Assigned" or "In Process".
2. Update the "Type" column in the Search Results Summary panel to be called "Type / Sub-Type". This column will populate formatted as

"TaskType / TaskSubType". If Task results do not have a Task Sub Type, only the Task Type will display.

For Example: If a Task is created with a Type of "SAR 7 Received" and a Sub-Type of "Jan 2020", this column will display "SAR7 Received / Jan 2020".

Existing guided navigation configurations if this column displays as a hyperlink will display based on the Task Type and Sub-Type. The Guided Navigation process is still based on Task Type only.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist PR RE

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update page mapping.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Worklist Summary

2.3.1 Overview

The Worklist Summary page includes a summary display of Tasks in an Assigned Status by priority and an age, grouped within the following categories:

- 0-10 Days
- 11-30 Days
- 31-60 Days
- Over 60 Days

Each numeric count within the age columns that is greater than 0 will navigate to the Worklist page with the appropriate search filters pre-loaded to display the list of applicable Tasks.

2.3.2 Worklist Summary Mockup

Worklist Summary

*- Indicates required fields

Worker ID: *
90LS00FD00 [Select](#)

Priority:

All

Display By:
Task Age

[Search](#)

[Search](#)

Task Type / Sub-Type	Priority	0-10 Days	11-30 Days	31-60 Days	Over 60 Days
No Data Found					

Figure 2.3.1 – Worklist Summary Mockup

2.3.3 Description of Changes

Modify the Worklist Summary page as follows:

1. Update the logic of the page to Include the Task Status of “In Process” in addition to “Assigned”.
2. Update the hyperlink processing to pass a Status search value of “Assigned/In Process” when one of the hyperlinks is clicked and navigates to the Worklist page.
3. Update the “Task Type” column to be called “Task Type / Sub-Type”. This column will populate formatted as “Task Type / Task Sub-Type”. If Task results do not have a Task Sub Type, only the Task Type will display.

For Example: If a Task is created with a Type of “SAR 7 Received” and a Sub-Type of “Jan 2020”, this column will display “SAR7 Received / Jan 2020”.

4. Update the Priority column to populate the Priority as follows:
 - a. If the “Task Type / Sub-Type” column value only contains a Task Type, this column will populate with the Priority value for the Task Type.
 - b. If the “Task Type / Sub-Type” column value contains a Task Type and Task Sub-Type and the Task Sub-Type has a priority on the Task Sub-Type Detail page, the Task Sub-Type priority will display.
 - c. If the “Task Type / Sub-Type” column value contains a Task Type and Task Sub-Type and the Task Sub-Type does not have a priority on the Task Sub-Type Detail page, the Task Type priority will display.

2.3.4 Page Location

- **Global:** Case Info

- **Local:** Tasks
- **Task:** Worklist Summary

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update page mapping.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Pending Authorizations

2.4.1 Overview

The Pending Authorizations page allows Supervisors to view authorization Tasks. This page requires modifications to fully function with customizable Task Types and Task Sub-Types.

2.4.2 Pending Authorizations Mockup

Pending Authorizations

*- Indicates required fields

Case Number:

Select

Category:

▼

Organization Level:

Worker ▼

Organization Number:

90LS00CB00

Select

Organization Name:

Mayuri Srinivas

Program:

▼

Search

Search

Case Number	Case Name	Type	Date	Program	ES	Month(s)	Worker ID
No Data Found							

Figure 2.4.1 – Pending Authorizations Mockup

2.4.3 Description of Changes

Modify the Pending Authorizations page as follows:

1. Update the "Type:" label in the search criteria section to be labeled "Category:". The dropdown menu for this field contains a list of Task Categories. This modification is strictly cosmetic.
2. If the results section of the page includes rows with a Category of "Payment Request", the value in the "Type" column will be formatted to display the Customer Need Type and Amount (when available). For example, an entry may display as "PR – Student Bus Pass - \$24.00". The formatting of this display occurs in real time on render of the page. When viewing these particular tasks in the Task Pop Up pages, the Need Type and Amount are not attributes that are available for display.

Modify the creation of Payment Request Category Tasks to include the Need Type and Amount in the Long Description of the Task formatted as "Need Type: <Type> Amount: <Amount \$0.00>". For example:

Long Description:

Need Type: Student Bus Pass Amount: \$24.00

If a particular attribute is not available, the attribute and label will be omitted from the Long Description.

This adjustment will allow the Need Type and Amount associated to Payment Request authorization Tasks to be displayed on the Pop Up Task pages.

2.4.4 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Approvals

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update page mapping.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Task Detail

2.5.1 Overview

The Task Detail page that is accessible through the Worklist and Worklist PRE pages allows workers to view, create and edit Task information. This page requires modifications to fully function with customizable Task Types and Task Sub-Types.

2.5.2 Task Detail Mockup

Task Detail

*- Indicates required fields

Case Number: * Select


Case Name:

Save and Add Another Save and Return Cancel

Worker Assigned: * Select

Type: *

Sub-Type:

Due Date: * 

Long Description:

Category: *

Expiration Date:

Save and Add Another Save and Return Cancel

Figure 2.5.1 – Task Detail Create Mode Mockup

Task Detail

*- Indicates required fields

Case Number: * B0GJH79

Save and Return

Cancel

Category:

Manual

Status:

Assigned

Type:

ASH Results - Require Corrective Action

Sub-Type:

Jan 2021

Created Date:

12/17/2020

Worker Assigned: *

90LS00FD00

Select

Assigned Date:

12/17/2020

Due Date: *

12/31/2020

Expiration Date:

Long Description:

☐ Mark Task as Complete?

Task History

Save and Return

Cancel

Figure 2.5.2 – Task Detail Edit Mode Mockup

2.5.3 Description of Changes

Modify the Task Detail page as follows:

1. Update the Category value to be a dropdown list containing Task Categories associated to at least one Task Type indicated as "Available Online". This listing will be in alphabetical order.
2. Update the "Type" dropdown menu to display the Task Types associated to the selected Task Category that are indicated as "Available Online". This field will display dynamically once an input has been entered to the "Category" field. This listing will be in alphabetical order.
3. Add a "Sub-Type" dropdown menu that will display if the selected Task Type in the "Type" field includes one or more Task Sub-Types indicated as being "Available Online". This field will not display if the selected Task Type in the "Type" field does not include at least one Task Sub-Type indicated as "Available Online".

Reference Figure 2.5.1 for the layout and placement of fields.

2.5.4 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist > Task Detail

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

Update page mapping.

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Homepage

2.6.1 Overview

The CalSAWS Homepage includes a “My Tasks” panel that displays a count of overdue and due within 5 days Tasks assigned to the logged in worker. The counts are limited to Tasks in a status of “Assigned”. The numeric counts display as hyperlinks that navigate to the Worklist page to display the appropriate Tasks.

2.6.2 Homepage – My Tasks Example

▼ My Tasks	
Overdue	6
Due In 5 Days	0

Figure 2.6.1 – Homepage – My Tasks Example

2.6.3 Description of Changes

Modify the processing of the Homepage My Tasks panel to:

1. Include the Task Status of “In Process” in addition to “Assigned”.

2. Evaluate for custom Task Types that have been created through the Task Type Detail page.
3. Pass a Status search value of "Assigned/In Process" when one of the hyperlinks is clicked and navigates to the Worklist page. (See Recommendation 2.1.3.1)

2.6.4 Page Location

The Homepage is accessible as the default page at login, or by clicking the CalSAWS logo toward the upper left side of a 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 Task Pop Up – Task Detail

2.7.1 Overview

Los Angeles county utilizes multiple types of Clearance Tasks, which are Tasks that are not associated to a Case as the intent of the Task is to review and create a resulting Case as necessary. The Worklist page will concatenate an attribute, such as an Application Number, to the Task Type so the user has reference to the application that is to be processed by the Task. The Task Pop Up – Task Detail page does not display an attribute for the User to reference while working these Clearance Tasks. This section includes recommendations to update the Task Pop Up – Task Detail page to include this attribute.

2.7.2 Task Pop Up – Task Detail Mockup

←

Task Detail

→

Result 9 of 1 - 9

Help

*- Indicates required fields

Edit

Print

Close

Case Number:	Case Name:	Program(s): *	Status: *	Reference Number:
			Assigned	1234567
Category: *	Type: *	Sub-Type:	Priority:	
e-ICT	Clearance ICT		High	
Due Date: *	Date Created:	Worker Assigned Date:		
12/31/2020	12/03/2020	12/03/2020		
Assign to Program Worker:	Worker ID:	Bank ID:	Automated Action:	
Yes	19DP83BZ0W		No	

Long Description:

▶ Instructions

▶ Task History

Figure 2.7.1 – Task Pop Up – Task Detail

2.7.3 Description of Changes

Modify the Task Pop Up – Task Detail page to:

1. Add a "Reference Number" field to the page that will display when the page is in View or Edit mode. The field will display the appropriate attribute value that pertains to the Clearance Task Type. This field will be read only and will not be editable. The field will populate as follows:

Task Type	Reference Number Value
Clearance	Application Number
Clearance YBN	e-App Number
Clearance ICT	ICT ID
Clearance CMIPSII	IHSS Case Number

Technical: Each of the attributes described above will be stored and associated to the Task with an attribute label of "applicationId". When the Task Detail page is viewed, the Reference Number attribute will populate with the value within the "applicationId" attribute if a value exists, otherwise the label will display with a blank value.

2. Update logic of the Task Type dropdown for the following scenario: A Task has been created via an Automated Action, and the Task Type associated to the Task is not indicated as being "Available Online". A user has clicked Edit to edit this Task on the Task Detail page. The Type dropdown will include the listing of Task Types associated to the Category value that are indicated as "Available Online" AND the Task Type currently associated to the task when it was initially created. This is important because, if the user selects a different Category value in Edit mode, the Type dropdown will refresh and the user may want to return to the original Task Type. This same scenario applies to Tasks created via Automated Action with a Task Sub-Type.

2.7.4 Page Location

The Task Detail page is accessible by clicking the "Tasks" option in the Utilities navigation menu. Within the Task Pop Up window, the Task Detail page can be accessed by clicking the Edit button or Due Date hyperlink for a Task.

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

Update page mapping.

2.7.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
34	<p>The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows:</p> <ol style="list-style-type: none">1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base2) Create a common task management data model3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution)4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing methodologies6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker7) Update the LRS Task	<ul style="list-style-type: none">- CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV.- CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks.- OBIEE Task Dashboard will be migrated over to new tool prior to Task Management implementation.	<p>This design makes updates to the CalSAWS pages that existed prior to the 20.11 release to incorporate custom task type functionality.</p>

	Management Dashboard (OBIEE) to account for the system modifications being made as part of migration		
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5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A