CalSAWS

California Statewide Automated Welfare System

Design Document

CA-50978

Add Reissue Logic for FC, KG, AAP Issuances (LA County)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	John B, Naresh B, Kapil S

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/14/2020	1.0	Initial Version	Jimmy Tu
2/22/2021	1.1	Added assumption that this SCR is only for FC, KG, and AAP Issuances	Jimmy Tu

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1 OVERVIEW

1.1 Current Design

Currently, when an EDBC issuance is canceled with reason of 'Post Office Return', the system will suspend the vendor and hold all future issuances. Once the vendor's address is updated and vendor is unsuspended, all held issuances and reissue warrants that were canceled with reason of "Post Office Return" will be released.

The reissue logic only works for EDBC related issuances and not Incidental Payments/Service Arrangements.

1.2 Requests

Follow the same re-issuance logic used for EDBC related issuances for Payment Requests and Incidental Payments:

When a cancellation transaction is received in the post back file for a service arrangement payment, CalSAWS needs to reissue payment based on the same logic as EDBC payments.

If an issuance's cancellation reason is for Post Office Return, then CalSAWS should suspend the vendor and set the payment in reissue status so once the suspension is lifted the payment will go out.

1.3 Overview of Recommendations

1. Create new Reissuance Batch Sweep Job for LA County.
2. Modify and remove the logic for issuances with the cancellation reason of "Post Office Return" in the Foster Care EDBC Sweep.
    a. Note: The new reissuance process being implemented in this SCR will take care of canceled EDBC and Payment Request/Incidental Payments.

1.4 Assumptions

1. This SCR is only for LA County and will not affect the other 57 counties in any way.
2. This new reissuance process will follow the existing skip issuance scenarios for Foster Care and no new skip issuance scenarios will be created.
3. This SCR will only affect issuances for FC, KG, and AAP programs and will not affect other programs in any way.

2 RECOMMENDATIONS

2.1 Reissuance Batch Job

2.1.1 Overview

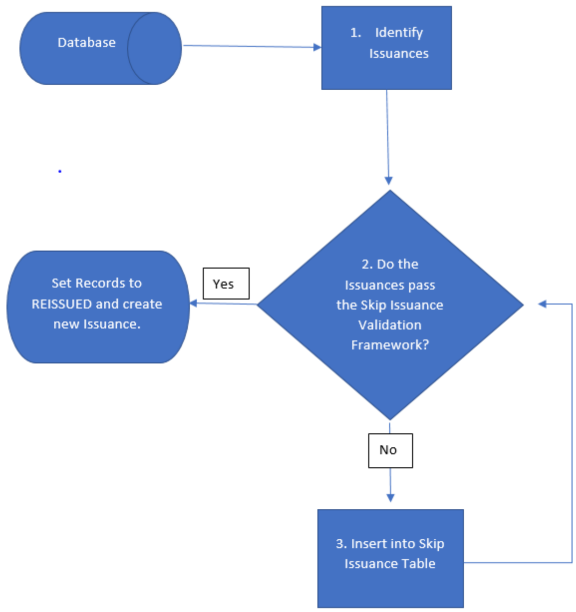
Create new batch sweep job to scan the issuance and issuance detail table for Payment Requests and EDBC issuances that are in cancelled status with the cancellation reason of "Post Office Return" and set them to REISSUED after Vendor Suspension is lifted.

2.1.2 Description of Change

1. Create new Reissuance Batch Sweep Job for LA County. This batch will be scanning issuances associated to EDBC and Payment Requests authorizations with the following criteria:
    a. Look for issuances that have been cancelled with the reason of "Post Office Return".
    b. No subsequent EDBC run for same effective month and same org id.
    c. No new issuances for same the EDBC ID or Payment Request Number.
2. Add the logic in the reissuance batch so that the authorization records (EDBC or Payment Requests) are scanned through the Skip Issuance Framework.
    a. If any of the skip issuance validations are failed, the record will be skipped, and no issuances will be created until the skip reason is cleared and fixed.
3. Reissuance batch will set the above identified records which passed the skip issuance validation successfully to REISSUED status and create a new issuance in ready for issuance status.

2.1.3 Technical Flow

The technical flow for the reissuance process is shown below.



2.1.4 Execution Frequency

Daily.

2.1.5 Key Scheduling Dependencies

1. Schedule the new job to run after the E-caps post office return file.
2. Dependency on first Batch EDBC.

2.1.6 Counties Impacted

This will only impact LA County.

2.1.7 Data Volume/Performance

A few additional records will be inserted into the skip issuance table, depending on the number of vendors unsuspended in each day.

2.1.8 Failure Procedure/Operational Instructions

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

2.2 Foster Care EDBC Sweep

2.2.1 Overview

This change will modify and remove the logic for issuances cancelled with the reason of "Post Office Return" in the Foster Care EDBC sweep. We are removing this logic because EDBC will use the new reissuance batch to take care of issuances cancelled due to Post Office Return. This is only for LA County.

2.2.2 Description of Change

1. Modify and remove the logic for issuances with the cancellation reason of "Post Office Return" in the Foster Care EDBC Sweep.
    a. Note: The new reissuance batch job being implemented in this SCR will take care of canceled EDBC and Payment Request/Incidental Payments.

2.2.3 Execution Frequency

N/A.

2.2.4 Key Scheduling Dependencies

None.

2.2.5 Counties Impacted

This will only impact LA County.

2.3 Database Change Request

2.3.1 Overview

This database change request will be updating database tables to be configured for the new reissuance process and will be used with the issuance and reissuance batch jobs.

2.3.2 Description of Change

1. Update past records that were already processed by the Foster Care EDBC Sweep (old logic) that meet the following criteria's to REISSUED status and populate the original (old) issuance id in the related issuance id column of the reissued issuance:
    a. Different Issuance ID
    b. Same Benefit Month

c. Same EDBC ID
d. Cancelled Status with the Cancellation reason of Post Office Return.

2.3.3 Estimated Number of Records Impacted/Performance

N/A.

2.3.4 Data Volume/Performance

N/A.

2.3.5 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.3.9	The LRS shall include the ability to recognize Vendor payments cancelled by COUNTY s Auditor-Controller and shall issue replacement Vendor payments.	This requirement is being met by putting a process in place to issue replacement vendor payments for issuances that get cancelled due to Post Office Return.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

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

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214755 | DDID 2352

FDS: API - Task API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gabe Trejo
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/17/2020	0.1	Initial Draft	Gabe Trejo
11/30/20	0.2	Updated filters and responses	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

There is no Application Programming Interface (API) available to external partners which allows access to modify and read Task data in CalSAWS.

1.2 Requests

Create an API endpoint that can retrieve, update, and create Tasks in CalSAWS.

1.3 Overview of Recommendations

1. Create a new API endpoint allowing the following operations:
    a. Retrieve Task and Task Type information that meet specified criteria
    b. Update Task
    c. Create Task

1.4 Assumptions

1. Results returned will be paginated to 20 values by default.
2. Limit parameter will allow a maximum of 250 values. Requesting a larger value will result in a 400-error response.
3. Results are limited to county level data.
4. Code Table values in the Appendix are subject to change.
5. Requests and Responses will use Code Table values as described in the Appendix.
6. A modified list of programs is used from CT 18. The available options are generated using the same logic that is found on the Select Program online page.

2 RECOMMENDATIONS

2.1 Task API – Get Tasks

2.1.1 Overview

This API will expose Task data in CalSAWS and allow for retrieval of tasks matching provided request criteria.

2.1.2 Description of Changes

The Task API will include the following data elements. Please refer to the **tasks.html** document for the technical specifications and data element definitions.

2.1.3 Filter

The following data elements are included in the Task API request for the Get Tasks operation.

1. Case Number (required)
2. Program (CT 18)
3. Category Code (CT 10350)
4. Task Type Name (see GET type)
5. Task Sub Type
6. Status Code (CT 137)
7. Start Date
8. End Date

2.1.4 Response

The Get Tasks operation will return the following data elements for each task that meets the criteria specified in the request:

1. task_id
2. case_num
3. worker_num
4. bank_num
5. pgm (CT 18)
6. task_cat_code (CT 10350)
7. task_type_name
8. task_sub_type
9. stat_code (CT 137)
10. create_date
11. assign_date
12. due_date
13. close_date
14. lang_code (CT 145)
15. long_description

2.2 Task API – Get Task Type Configuration

2.2.1 Overview

This API will expose Task data in CalSAWS and allow for retrieval of task type information for the requesting county. This service is intended to refresh the list of available task types for the requesting county.

2.2.2 Description of Changes

The Task API will include the following data elements. Please refer to the **tasks.html** document for the technical specifications and data element definitions.

2.2.3 Filter

The following data elements are included in the Task API request for the Get Task Type Configuration operation.

1. Category Code (CT 10350)

2.2.4 Response

The Get Task Type Configuration operation will return the following data elements for each task type that meets the criteria specified in the request:

1. task_id
2. task_cat_code(CT 10350)
3. task_type_name
4. task_instruction
5. priority (CT 10512)
6. expiration_type
7. expiration_days
8. Sub-Type Information (one or many)
    a. Sub_type_id
    b. task_sub_type
    c. sub_type_priority (CT 10512)
    d. sub_type_exp_type
    e. sub_type_exp_days

2.3 Task API – Update Task

2.3.1 Overview

This API will allow for the update of task data in CalSAWS.

2.3.2 Description of Changes

The Task API will include the following data elements. Please refer to the **tasks.html** document for the technical specifications and data element definitions.

2.3.3 Request Body

The following data elements are included in the Task API request for the Update Tasks operation.

1. task_id (required)
2. worker_num
3. bank_num
4. stat_code (CT 137)
5. task_cat_code (CT 10350)

6. task_type_name
7. task_sub_type
8. due_date
9. long_description

2.3.4 Response

The Update Task operation will return the following data elements:

1. task_id
2. case_num
3. worker_num
4. bank_num
5. pgm (CT 18)
6. task_cat_code (CT 10350)
7. task_type_name
8. task_sub_type
9. stat_code (CT 137)
10. create_date
11. assign_date
12. due_date
13. close_date
14. lang_code (CT 145)
15. long_description

2.4 Task API – Create Task

2.4.1 Overview

This API will allow for the creation of task data in CalSAWS.

2.4.2 Description of Changes

The Task API will include the following data elements. Please refer to the **tasks.html** document for the technical specifications and data element definitions.

2.4.3 Request Body

The following data elements are included in the Task API request for the Create Task operation.

1. case_num (required)
2. worker_num (required)
3. bank_num (required)
4. pgm (CT 18) (required)
5. task_cat_code (CT 10350) (required)
6. task_type_name (required)

7. task_sub_type
8. due_date (required)
9. lang_code (CT 145)
10. long_description

2.4.4 Response

The Create Task operation will return the following data elements:

1. task_id
2. case_num
3. worker_num
4. bank_num
5. pgm (CT 18)
6. task_cat_code (CT 10350)
7. task_type_name
8. task_sub_type
9. stat_code (CT 137)
10. create_date
11. assign_date
12. due_date
13. close_date
14. lang_code (CT 145)
15. long_description

2.5 Error Messages

The Task API will return error messages in the following Scenarios:

1. Bad request. body/parameter {parameter name} is invalid. {Reason}
2. Authorization information is missing or invalid.
3. Bad request. Request body/parameter {parameter name} was not found.
4. Request Timeout.
5. Internal Server Error.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	API	Detailed Endpoint document	tasks.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2352	The CONTRACTOR shall create a service for the 58 Counties that returns, updates, and creates tasks utilizing a CalSAWS API. This service will return a list of tasks for a specific case. Additional filters for task type, task status, program, and due date will be available when returning tasks. This API will update and create tasks when called utilizing required data elements as specified by the CalSAWS system.	The API complexity accounts for including the ability to read, write, and update tasks. It also includes the ability to search for tasks utilizing a variety of parameters.	Create Task API

5 APPENDIX

This section contains the code table (CT) values that are currently used in the system. API users can use and expect these values as specified in the technical design

CT 137: Task Status Code
Assigned
Completed
Expired
In Process
Void

CT 10350: Task Category Code
Application Registration
Batch EDBC
CMIPSII
CSC
CWS

CT 10350: Task Category Code
CalHEERS
Case Update
Computation Request
EBT
EDBC
External Recovery Account
Foster Care RDB
Fraud
IEVS
IEVS Criminal
IEVS Priority
Interest Allocation
Invoice
Issuance Method
Issuance Replacement/Reissue
MC 355
MEDS Alert
MEDS Liaison
Manual
Payment Request
QR7LA
Quality Assurance Assignment
Quality Review
Redetermination
SAR7
Screening Packet
Time Limits
Transaction Refund
Valuable
YBN
YBN E-communications
e-ICT

CT 145: Language Code
Afghani
American Sign Language
Amharic
Arabic
Aramaic

CT 145: Language Code
Armenian
Assyrian
Bengali
Bosnian
Cambodian
Cantonese (Chinese)
Croatian
Egyptian
English
Farsi
French
German
Greek
Hebrew
Hindi
Hmong
Ilocano
Indonesian
Italian
Japanese
Korean
Lao
Mandarin (Chinese)
Mien
Other Chinese Language
Other Non-English
Other Sign Language
Persian
Polish
Portuguese
Punjabi
Romanian
Russian
Samoan
Serbian

CT 145: Language Code
Spanish
Tagalog, Filipino
Thai
Turkish
Urdu
Vietnamese

CT 18: Programs (modified)
AAP
Adult Protective Services
Child Care
Cal-Learn
CAPI
Child Protective Services
CalWORKs
Disaster CalFresh
Diversion
Foster Care
CalFresh
CFET
General Assistance/General Relief
General Assistance (Managed)
General Assistance (Non-Managed)
General Assistance/General Relief (GR)
GROW
Homeless - Perm
Homeless - Temp
IHSS/CMIPS II
Immediate Need
Kin-GAP
Linkages Adult Services
Medi-Cal
Multipurpose Senior Services
Nutrition Benefit
RCA
REP
Welfare to Work

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214987

DDID 2576: Add WTW 6178 – Cure Sanction Appointment Letter (10/20)

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/03/2020	0.1	Initial Draft	Maria Jensen
12/16/2020	0.2	QA Comments fixes for: Imaging Barcode, Online trigger changes, Body variables description and Migration requirements	Maria Jensen
02/19/2021	0.3	Added Staff Appointment variables	Maria Jensen
03/01/2021	0.4	Increased variable font size	Maria Jensen

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1 OVERVIEW

This SCR will add the WTW 6178 – Cure Sanction Appointment Letter (10/20) state form to the CalSAWS system to be used to notify the participant that they have a Cure Sanction Appointment.

1.1 Current Design

Currently the WTW 6178 state form does not exist in the CalSAWS system.

The form to be replaced is GN 6178 - Post Financial Sanction Appointment Letter and it exists in the CalSAWS system in English and Spanish only. It is available only for LA county, via the Template Repository or from the Customer Appointment Detail page for an appointment of category WTW/REP and type Cure Sanction.

1.2 Requests

1. Implement new State Form WTW 6178 - Cure Sanction Appointment Letter in the CalSAWS system. (See Supporting Documents #1-2)
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.
3. This form replaces the existing GN 6178 - Post Financial Sanction Appointment Letter. Hide the GN 6178 in the Template Repository for all counties.
4. Update the online trigger for the GN 6178 on the Customer Appointment Detail page to trigger the WTW 6178 instead for all 58 counties.

1.3 Overview of Recommendations

1. Add the WTW 6178 form in CalSAWS.
2. Make the WTW 6178 form available via the Template Repository in English and Spanish for all counties.
3. Hide GN 6178 from Template Repository.
4. Update the online trigger to generate WTW 6178 instead of GN 6178 for all 58 counties.

1.4 Assumptions

1. 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 Add Form WTW 6178 - Cure Sanction Appointment Letter

2.1.1 Overview

This SCR will add the state form WTW 6178 – Cure Sanction Appointment Letter (revision 10/20) to the CalSAWS system. The form will be used to notify the participant that they have a Cure Sanction Appointment.

State Form: WTW 6178 (10/20)

Programs: Welfare To Work, REP

Attached Forms: None

Forms Category: Appointment Letter

Template Repository Visibility: All Counties

Languages: English, Spanish

2.1.2 Create Form WTW 6178 XDP

1. The new form will have a single impression which will consist of specific verbiage provided by the state, and several input fields. Please see the Supporting Documents #1-2 for details.

   Form Header: CalSAWS Standard Header #1
   Form Title (Document List Page Displayed Name): Cure Sanction Appointment Letter
   Template Description: This form is used to notify the participant that they have a Cure Sanction Appointment. The form identifies the Date, Time, and Place, as well as other information about WTW and its benefits to the client.
   Form Number: WTW 6178
   Include NA Back 9: No
   Imaging Form Name: Cure Sanction Appointment Letter
   Imaging Document Type: Welfare to Work
   Form Mockups/Examples: See Supporting Documents #1-2 for PDF Mockups

2. Barcode options for the WTW 6178 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

3. Add Form WTW 6178 to the Template Repository in English and Spanish for all 58 counties. Hide the GN 6178 in the Template Repository for all counties.

   Required Document Parameters: Case Number, Customer Name, Program, Language

4. Include the following Print Options and Mailing Requirements for Form WTW 6178:

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): Participant selected on the document parameters page
   Mailed From (Return): Standard Population
   Mail-back-to Address: Standard Population
   Outgoing Envelope Type: Standard Outgoing Mail
   Return Envelope Type: N/A

   Additional Requirements:
   Special Paper Stock: N/A
   Enclosures: No
   Electronic Signature: No
   Post to SSP: Yes

5. **Form Variable Population**

   When generated in the context of a case from the Template Repository, only the worker related fields will be prepopulated. When generated in the context of a case from the Customer Appointment Detail page for an appointment of category WTW/REP and type Cure Sanction, the appointment related fields will also be prepopulated. Please see the below figure and table for details.

Thank you for contacting us about your Welfare-to-Work (WTW) Sanction and getting your cash aid back. Our records show that you got a sanction for the period of ___________ to __________ because you failed to do the following: ____.

On ______________________ you contacted us to cure your WTW sanction. You are scheduled for an appointment to discuss how to end your sanction on:

Date: <CUST_APPT_DATE> Time: <CUST_APPT_START_TIME>

Location: <CUSTOMER_APPT_ADDR_ONE_LINE>

Worker Name: <STAFF_APPOINTMENT_NAME>

Worker ID: <STAFF_APPOINTMENT_ID>

Worker Telephone Number: <STAFF_APPOINTMENT_PHONE>

To cure your sanction, you will need to do the activity that you did not do, or figure out a new one. What you need to do to cure your sanction cannot be for more than 30 days. If you think that you had a good reason not to do WTW from __________ to __________, please bring any proof that you have to show why you could not participate.

After you have cured your sanction you have to do WTW unless you are exempt or the County decides you have a good reason ("good cause") for not participating.

Resources are available to:

- Help you find a job that pays more money than your CalWORKs grant.
- Send you to school or training if you cannot find a job and need more job skills.
- Pay for child care and transportation.
- Refer you to professional counseling services (such as mental health counseling).
- Pay for books, supplies, uniforms or any other work or school related expenses.

You can call _________________________ to find out how to use public transportation to get to this meeting.

Please call me at the number below if you have any questions, or if you are not able to come to this meeting.

WTW Case Manager:	Worker ID:	Telephone Number:
<STAFF_NAME>	<WORKER_ID>	<STAFF_PHONE>

*****Please bring this notice to your appointment*****

WTW 6178 (10/20) Required Form - No Substitutes Permitted

Figure 2.1.2.5 – Form WTW 6178 body

Form Body Variables:

Variable Name	Population	Formatting	Editable*	Template Repository Population	Online Population
CUST_APPT_DATE	Customer Appointment Date. Taken from Appointment Details page	Arial Font Size 11 Format: MM/DD/YYYY	Y	N	Y
CUST_APPT_START_TIME	Customer Appointment Start Time.	Arial Font Size 11 Format: HH:MM	Y	N	Y

	Taken from Appointment Details page				
CUSTOMER_APPT_ADDR_ONE_LINE	Customer Appointment Address. Taken from Appointment Details page	Arial Font Size 11	Y	N	Y
STAFF_APPOINTMENT_NAME	Customer Appointment Staff Name. Taken from Appointment Details page	Arial Font Size 11	Y	N	Y
STAFF_APPOINTMENT_ID	Customer Appointment Staff ID. Taken from Appointment Details page	Arial Font Size 11	Y	N	Y
STAFF_APPOINTMENT_PHONE	Customer Appointment Staff Phone. Taken from Appointment Details page	Arial Font Size 11	Y	N	Y
STAFF_NAME	Inherited from header population	Arial Font Size 11	Y	Y	Y
WORKER_ID	Inherited from header population	Arial Font Size 11	Y	Y	Y
STAFF_PHONE	Inherited from header population	Arial Font Size 11	Y	Y	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.

6. **Update the Online trigger** via Customer Appointment Detail page to generate WTW 6178 instead of GN 6178, for all 58 counties.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	WTW 6178 (English)	WTW6178_EN.pdf
2	Correspondence	WTW 6178 (Spanish)	WTW6178_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2633	The CONTRACTOR shall implement new State form WTW 6178 – Cure Sanction Appointment Letter in the CalSAWS Software as follows: 1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information. 2) This form replaces the existing GN 6178 - Post Financial Sanction Appointment Letter. Hide the GN 6178 in the Template Repository for all counties.	1. Estimate is for updating the form in English and Spanish along with updating the 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.	With SCR CA-214987, form WTW 6178 – Cure Sanction Appointment Letter will be added to the CalSAWS system. The existing form GN 6178 will be hidden from the Template Repository for all counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215056

DDID 2611: Add CSF 179 – WIC Referral (12/20)

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

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01/13/2020	0.1	Initial Draft	Maria Jensen
01/26/2021	0.2	PR comments fixes	Maria Jensen

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1 OVERVIEW

This SCR will add the CSF 179 – WIC Referral (12/20) Non State form to the CalSAWS system.

1.1 Current Design

Currently the CSF 179 – WIC Referral Non State form does not exist in the CalSAWS system.

1.2 Requests

1. Migrate new Non State Form CSF 179 - WIC Referral to the CalSAWS system. (See Supporting Documents #1-2)
2. This form will be available in the Template Repository in all threshold languages, including:
   Arabic, Armenian, Cambodian, Cantonese, Chinese, Farsi, Hmong, Korean, Lao, Other Chinese Language, Russian, Tagalog, Vietnamese.

1.3 Overview of Recommendations

1. Add new Non State Form CSF 179 - WIC Referral.
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information, in all threshold languages.

1.4 Assumptions

1. 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 Add Form CSF 179 - WIC Referral

2.1.1 Overview

This SCR will add the Non State form CSF 179 – WIC Referral (revision 12/20) to the CalSAWS system.

Non State Form: CSF 179 (12/20)

Programs: CalFresh

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages:

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

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

2.1.2 Create Form CSF 179 XDP

1. The new form will have 1 impression which will consist of static verbiage provided by the State. Please see the Supporting Documents #1-2 for details.

   Form Header: CalSAWS Standard Header #1
   Form Title (Document List Page Displayed Name): WIC Referral
   Template Description: This form is used to inform customers that they might be eligible for the Women, Infants and Children program (WIC).
   Form Number: CSF 179
   Include NA Back 9: No
   Imaging Form Name: WIC Referral
   Imaging Document Type: Referrals
   Form Mockups/Examples: See Supporting Documents #1-2 for PDF Mockups

2. Barcode options for the CSF 179 – WIC Referral Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. Add Form CSF 179 – WIC Referral to the Template Repository in all threshold languages for all 58 counties.

   Required Document Parameters: Case Number, Customer Name, Program, Language

4. Include the following Print Options and Mailing Requirements for Form CSF 179 – WIC Referral:

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): Participant selected on the document parameters page
Mailed From (Return): Standard Population
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard Outgoing Mail
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: N/A
Enclosures: No
Electronic Signature: No
Post to SSP: Yes
Clock Indicator: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 179 Existing Languages	CSF179_EN.pdf
2	Correspondence	CSF 179 Threshold Languages	CSF179_AR.pdf CSF179_AE.pdf CSF179_CA.pdf CSF179_CH.pdf CSF179_FA.pdf CSF179_HM.pdf CSF179_KO.pdf CSF179_LA.pdf CSF179_RU.pdf CSF179_SP.pdf CSF179_TG.pdf CSF179_VI.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2611	The CONTRACTOR shall add a new form to the CalSAWS Software based on the Sacramento - CDS 713-0 WIC Referral with the following content: 1) Add the CalSAWS standard header information 2) Add form title "WIC Referral" 3) Add the following language: "The Women, Infants and Children program (WIC) is a food program for pregnant and breastfeeding women, infants, and young children up to 5 years of age. You are receiving this information because you may be eligible. The WIC program provides: <indented bullet> Food assistance <indented bullet> Breastfeeding support <indented bullet> Nutrition education <indented bullet> Referrals to health care and other community services To qualify for the WIC program, please contact your local WIC office. <free form text box> 4) Add form number using CalSAWS standard naming/numbering format NOTE: See template titled "WIC Referral" for formatting and content.	1. Estimate is for implementing the new 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. 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.	With SCR CA-215056, form CSF 179 – WIC Referral will be added to the CalSAWS system.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215116 | DDID 2641

FDS: Non-State Forms - Add New State form CW 54

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/31/2020	1.0	Original	Harish Katragadda
01/20/2021	2.0	Added Imaging Values	Harish Katragadda

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1 OVERVIEW

The purpose of this change is to add State form CW 54 (11/20) Certification of Identification Document Form in CalSAWS system and make this form available for all 58 counties.

1.1 Current Design

State form CW 54 (11/20) is currently not available in CalSAWS Template Repository.

1.2 Requests

1. Add State form CW 54 (11/20) Certification of Identification Document Form to CalSAWS Template Repository and make it available to all 58 counties.

1.3 Overview of Recommendations

1. Add CW 54 (11/20) Form to CalSAWS Template Repository in English and Spanish.
2. Make the CW 54 (11/20) Form available to all 58 counties.

1.4 Assumptions

1. All Form Fields are editable unless specified.
2. CW 54 is state form and will not use the Non-State form CSF XXX naming standard.

2 RECOMMENDATIONS

2.1 CW 54 (11/20) – Certification of Identification Document

2.1.1 Overview

This section will cover the updates needed for CW 54 (11/20) form.

State Form: CW 54 (11/20)

Programs: CalWORKs, Refugee Cash Assistance

Attached Forms: N/A

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: English, Spanish

2.1.2 Description of Change

1. Add CW 54 (11/20) Certification of Identification Document Form in English and Spanish languages.

    a. Create CW 54 (11/20) Certification of Identification Document Form XDPs in English and Spanish.

    Form Header: Cover Page with CalSAWS Standard Header

    Form Title: Certification of Identification Document

    Template Description: CW 54 Form is issued for applicant as Temporary Identification document who is in the process of obtaining a Permanent Identification.

    Form Number: CW 54

    Include NA Back 9: No

    Imaging Form Name: Certification of ID

    Imaging Document Type: Person Verification

    Form Mockup/Example: See Supporting Documents #1

2. CalSAWS standard footer will be used for the form.

3. Add the CW 54 (11/20) – Certification of Identification Document Form to Template Repository. The following parameters will be required:

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

4. Make the CW 54 (11/20) Form available to all 58 counties.

5. Add the following barcode options to the CW 54 (11/20) Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. Add the following print options to the CW 54 (11/20) 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): Case Person selected on the Document parameter page
Mailed From (Return): Worker's Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: N/A
Post to SSP (Self Service Portal): Y
Clock Indicator: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CW 54 (11/20)	CW54_EN.pdf CW54_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2641	The CONTRACTOR shall add State form CW 54 - Certification of Identification Document to the CalSAWS software. The form will be available in the Template	1. Estimate is for implementing the new 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.	With CA-215116 State Form CW 54 will be added in English and Spanish to CalSAWS Template

	Repository for all 58 counties.	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..	Repository. CW 54 will be available to all 58 counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216432

Updates to MAGI, Non-MAGI, and Mixed Medi-Cal Prepopulated RE Packets

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz, Connor Gory
	Reviewed By	Priya Sridharan, William Baretsky, Geetha Ramalingam, Shilpa Suddavanda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/11/2020	1.0	Initial Revision	Rainier Dela Cruz

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1 OVERVIEW

All County Welfare Director Letter (ACWDL) 20-21 and Medi-Cal Eligibility Division Information Letter (MEDIL) 20-39 provided the templates for the prepopulated Medi-Cal (MC) annual renewal forms that are sent to Modified Adjusted Gross Income (MAGI) and Non-MAGI MC beneficiaries who do not have their MC automatically renewed. ACWDL 20-21 provided the updated MAGI MC 216, the updated Non-MAGI MC 210 RV forms and MEDIL 20-39 provided the new Mixed Household MC 217 form.

This system change request (SCR) outlines the updates to the current redetermination (RE) packets and batch processes in CalSAWS and planned for the 21.07 Release. However, the updates will **not** be visible in the system **until the Go-Live of the C-IV counties** in CalSAWS. The updated forms and RE packets will not be available in Template Repository until that date and the updated batch processes will not run until the October 2021 benefit month.

1.1 Current Design

Currently in CalSAWS, there are multiple RE packets available in the Template Repository and are also sent out through the automated batch processes. The following packets are available in the system: MC Redetermination Packet, MC Packet, MAGI MC Packet, Mixed MC RE Packet, MC LTC Packet, MSP Packet, MC 604 IPS Packet, Pre-ACA MC RE Packet.

In C-IV, there are also multiple RE packets available in Template Repository and sent out through the automated batch processes. However, these packets will not be migrated over to the CalSAWS system. The Migration Counties will use the new packets once the counties go live in CalSAWS.

1.2 Requests

Update the MAGI MC Packet, MC Packet, and Mixed MC RE packet with the pre-populated forms provided by ACWDL 20-21 and update the packet names to MAGI RE Packet, Non-MAGI RE Packet and Mixed Household RE Packet.

1.3 Overview of Recommendations

1. Remove the following redetermination packets from Template Repository and associated batch processes: MC Redetermination, MC LTC Packet, MSP Packet, MC 604 IPS Packet and Pre-ACA MC RE Packet.

2. Update the MC 216 form to the 10/20 revision.

3. Update the MC 210 RV form to the 10/20 revision.

4. Add the MC 217 (10/20) form.

5. Update the MC 003 form to the 11/12 revision.

6. Update the PUB 13 to the to the 08/20 revision.

7. Update the PUB 183 to the 09/15 revision and the PUB 184 to the 01/17 revision.

8. Update the MC 216 form in the existing MAGI MC Packet for Los Angeles County and update the name of the packet to MAGI RE Packet.

9. Add a new MAGI RE Packet for the Migration Counties to CalSAWS. The packet will contain the following forms: **MC 216 (10/20), MC 019 (02/15), MC 219 (11/15), MC 372 (09/09), PUB 13 (08/20), PUB 183 (09/15)/PUB 184 (01/17) and MC 003 (11/12)**.

10. Update the MC 210 RV form in the existing MC Packet for Los Angeles County and update the packet name to Non-MAGI RE Packet.

11. Add a new Non-MAGI RE Packet for the Migration Counties to CalSAWS. The packet will contain the following forms: **MC 210 RV (10/20), MC 019 (02/15), MC 219 (11/15), MC 372 (09/09), MC 007 (07/19), DHCS 7077 (12/18), DHCS 7077-A (05/07), PUB 13 (08/20), PUB 183 (09/15)/PUB 184 (01/17) and MC 003 (11/12)**.

12. Update the existing Mixed MC RE Packet to use the new MC 217 form for Los Angeles County and update the packet name to Mixed Household RE Packet.

13. Add a new Mixed Household RE Packet for the Migration Counties to CalSAWS. The packet will contain the following forms: **MC 217 (10/20), MC 019 (02/15), MC 219 (11/15), MC 372 (09/09), MC 007 (07/19), DHCS 7077 (12/18), DHCS 7077-A (05/07), PUB 13 (08/20), PUB 183 (09/15)/PUB 184 (01/17) and MC 003 (11/12)**.

14. Create a new batch process to send out the MAGI RE packet for the Migration Counties.

15. Create a new batch process to send out the Non-MAGI RE packet for the Migration Counties.

16. Create a new batch process to send out the Mixed Household RE packet for the Migration Counties.

17. Update the existing batch process that sends out MAGI, Non-MAGI, and Mixed Household RE packet to remove references to the packets that are being removed.

1.4 Assumptions

1. The updates to the redetermination packets and batch processes outlined by this SCR will be part of the 21.07 Release but the changes will not be visible in the system until the Go Live Date of the C-IV Counties and after the existing packets for Los Angeles County has gone out in September for the RE due in November. The new packets will go out for all counties in October for RE due in December.

2. The MAGI, Non-MAGI, and Mixed Household RE packets will be implemented in only English and Spanish. The packets will be implemented in the other CalSAWS supported threshold languages by SCR **CA-223571**.

3. The PUB 183/PUB 184 will be implemented in the other CalSAWS supported threshold languages by SCR **CA-217134**.

4. The update to the Enclosure functionality for the packets will be implemented with SCR **CA-218612**.

5. Los Angeles County will retain their current process of 'pre-stuffed' RE Packets, with only the Coversheet and renewal forms being generated out of CalSAWS. The remainder of the forms will continue to be pre-stuffed, and Los Angeles County will follow their existing processes to make any updates to the pre-stuffed forms.

6. The MAGI, Non-MAGI, and Mixed Household RE packets for Los Angeles County will use the generic journal entry.

7. The MAGI, Non-MAGI, and Mixed Household RE packets for Los Angeles County will be updated to populate the new portal URL with SCR **CA-224200**.

8. The maximum number of pages that can fit in a flat mail envelope is 25 physical pages (50 impression).

9. The GEN 1365 and the Voter Registration Card will be included at the Print Center.

10. The Medi-Cal RE Packet catch up batch process for the Migration Counties will be implemented with SCR **CA-225011**.

11. Per existing MC RE Packet batch process functionality, if there are multiple MC program blocks on the case, an RE Packet will be sent for each program.

2 RECOMMENDATIONS

2.1 Remove Existing Medi-Cal Redetermination Packets

2.1.1 Overview

This section covers the removal of existing Medi-Cal redetermination packets from Template Repository and turning off the batch processes that sends out the packets.

2.1.2 Description of Change

1. Remove the following redetermination packets from Template Repository the day before the **CalSAWS Go-Live date** of the C-IV counties:
   Technical Note: *The C-IV cutover date is stored in CT2799 – Component Effective Date.*
   a. MC LTC Packet
   b. MSP Packet
   c. MC 604 IPS Packet
   d. MC Redetermination Packet
      Note: *This packet is different from the MC Packet that also currently exists in the system.*
   e. Pre-ACA MC RE Packet

2. Turn off the following redetermination packet batch jobs the day before the **CalSAWS Go-Live date** of the C-IV counties:
   a. Medi-Cal Redetermination Packet - LTC (PB19R531, PB19R525)
   b. MR4 Medi-Cal Redetermination Packet - MSP (PB19R532, PB19R524)
   c. MC 604 IPS Packet (PB00R527, PB19R522)
   d. Medi-Cal Redetermination Packet - DQ (PB19R529)
   e. Medi-Cal Pre ACA Redetermination Packet (PB19R528)

2.2 Add County Contact Number for Mono County

2.2.1 Overview

SCR CA-207432 added the county contact numbers that populate on the existing MC 216. The contact primary number on the County Contact Number listed on the ‘Correspondence’ page for Mono County is blank. Update the contact primary phone number to the phone number provided by the county.

2.2.2 Description of Change

1. Update the contact primary number to **(760) 924-1770** for Mono County.

2.3 Update the MC 216 Form

2.3.1 Overview

This section describes the updates to the MC 216 form.

State Form: MC 216

Current Program: Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese, Korean, Mandarin, Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese.

Current Imaging Category: Customer Reporting

Current Imaging Form Name: MC Renewal Form

Template Repository Visibility: All Counties

2.3.2 Description of Change

1. Update the MC 216 form to the 10/20 revision and turn off the threshold languages. The updated version of the MC 216 is not available in Template Repository **until the CalSAWS Go-Live of the C-IV counties**.

   Form Number: MC 216

   Form Name: MAGI MC Renewal Form

   Updated Languages: English, Spanish

   Updated Imaging Form Name: MAGI MC Renewal Form

   Include NA Back 9: N

   Form Mockups/Examples: Please refer to Supporting Documents #1

2. Update the population logic and add dynamic sections.

a. The variables are populated as follows:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	**RE Due Date**	The field populates with the redetermination due date. Format: Month Day, Year	Y	Y	Y
Page 1 – Cover Page	**County Phone Number**	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y
Page 1 – Cover Page	**County TTY Number**	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)	Y	Y	Y
Page 1 – Cover Page	**Recipient Mailing Address**	This field populates with the mailing address of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository.	Y	Y	Y
Page 1 – Cover Page	**Notice Date**	This field populates with the date when the form was generated.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Format: MM/DD/YYYY			
Page 1 – Cover Page	**Case Number**	This field populates with the case name of the current case.	Y	Y	Y
Page 1 – Cover Page	**Case Name**	This field populates with the case number of the current case.	Y	Y	Y
Page 1 – Cover Page	**Worker Name**	This field populates with the name of the worker.	Y	Y	Y
Page 1 – Cover Page	**Worker Phone Number**	This field populates with phone number of the worker. Format: (###) ###-####	Y	Y	Y
Page 1 – Cover Page	**Name**	This field populates with the name of the person. Format: First, Middle, Last, Suffix	Y	Y	Y
Page 1 – Cover Page	**Date of Birth**	This field populates with the date of birth of the person. Format: MM/DD/YYYY	Y	Y	Y
Page 1 – Cover Page	**Portal Name**	This field populates with the URL of the Self-Service Portal. If the case is managed in a migration county, this field populates with the URL of BenefitsCal (www.BenefitsCal.com). If case is managed in Los Angeles County, this field populates with the URL of YourBenefitsNow.	Y	Y	Y
Page 1 – Cover Page	**Office Name**	This field populates with the name of the office.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	**Office Address**	This field populates with the office address.	Y	Y	Y
Page 1 – Cover Page	**Office Hours Begin**	This field populates with the start time of the office hours. Format: X:XX am	Y	Y	Y
Page 1 – Cover Page	**Office Hours End**	This field populates with the end time of the office hours. Format: X:XX pm	Y	Y	Y
Page 2 – Contact Info	**Name**	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix ***Note:*** *The same person is used to populate the address, phone number, email, language fields on page 2 below.*	Y	Y	Y
Page 2 – Contact Info	**Home Address**	This field populates with the person's physical address.	Y	Y	Y
Page 2 – Contact Info	**Mailing Address**	This field populates with the person's mailing address if it is different from the home address. If it is the same as the home address or if there is no mailing address, this field will be blank.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 2 – Contact Info	**Home Phone Number**	This field populates with the person's home phone number. If there is no home phone number, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	**Cell Phone Number**	This field populates with the person's cell phone number. If there is no cell phone number, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	**Other Phone Number**	This field populates with the person's other phone number. It populates the phone number based on the hierarchy below: • Message • Work • TDD • Fax • Toll Free If no phone number is available, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	**Email**	This field populates with the person's email address. If there is no email address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	**Written Language**	This field populates with the person's written language.	Y	Y	Y
Page 2 – Contact Info	**Spoken Language**	This field populates with the person's spoken language.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 2 – Contact Info	**County Phone Number**	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y
Page 2 – Contact Info	**County TTY Number**	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)	Y	Y	Y
Page 3 – Household Members	**Primary Person Name**	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	**Household Person Name**	This field populates with the name of household member other than the primary person. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	**Relationship Type**	This field populates with the relationship of the household	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		member to the primary person.			
Page 3 – Household Members	**Address**	This field populates with the home address of the household member.	Y	Y	Y
Page 4 – Tax Info	**Tax Filer Name**	This field populates with the name of the tax filer. This information is retrieved from the Tax Household record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 4 – Tax Info	**Plan to File**	This field populates with 'Yes' or 'No' if the person is planning to file taxes. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 4 – Tax Info	**Expected to File**	This field populates with 'Yes' or 'No' if the person is expected to file taxes. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 4 – Tax Info	**Tax Filing Status**	This field populates with the expected filing status of the person. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 6 - Income	**Name**	This field populates with the name (first, middle, last, and suffix) of the person on the income record. Format: First, Middle, Last, and Suffix	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 6 - Income	**Source of Income**	This field populates with the source of the income.	Y	Y	Y
Page 6 - Income	**Income Amount**	This field populates with the income amount. Format: $XX.XX	Y	Y	Y
Page 6 - Income	**Frequency**	This field populates the income frequency.	Y	Y	Y
Page 8 - Expenses	**Name**	This field populates with the name (first, middle, last, and suffix) of the person on the expense record.	Y	Y	Y
Page 8 - Expenses	**Type of Expense**	This field populates with the type of the expense.	Y	Y	Y
Page 8 - Expenses	**Amount**	This field populates with the amount of the expense. Format: $XX.XX	Y	Y	Y
Page 8 - Expenses	**Frequency**	This field populates with the frequency of the expense.	Y	Y	Y
Page 9 – Medicare Coverage	**Name**	This field populates with the name (first, middle, last, and suffix) on the Medicare record.	Y	Y	Y
Page 9 – Medicare Coverage	**Part A Premium**	This field populates with the Part A amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: $XX.XX	Y	Y	Y
Page 9 – Medicare Coverage	**Part B Premium**	This field populates with the Part B amount from the Medicare record. If the payment method is 'State',	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		populate the field with 'Paid by State'. Format: $XX.XX			
Page 9 – Medicare Coverage	**Part C Premium**	This field is blank.	N	N	Y
Page 9 – Medicare Coverage	**Part D Premium**	This field populates with the Part D amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: $XX.XX	Y	Y	Y
Page 10 – Long Term Care	**Name**	The field populates with the name of the person in the LTC facility. This information is retrieved from the Living Arrangement record with the type of 'Nursing Home/Long Term Care'. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 10 – Long Term Care	**Facility Name**	This field populates with the name of the LTC facility.	Y	Y	Y
Page 10 – Long Term Care	**Facility Address**	This field populates with the person's physical address.	Y	Y	Y
Page 11 – Other Health Insurance	**Name**	This field populates with the name of the beneficiary or beneficiaries on the Other Health Care record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 11 – Other	**Insurance Name**	This field populates with the name of the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Health Insurance		insurance company. This is the health insurance company name when the health coverage type is 'All Other Health Coverage'. For the other types, this field is blank.			
Page 11 – Other Health Insurance	**Type of Insurance**	This field populates with the health coverage type.	Y	Y	Y
Page 11 – Other Health Insurance	**Premium Amount**	This field populates with the expense amount. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the expense amount displays under the Health Insurance Premium Expense section. Format: $XX.XX	Y	Y	Y
Page 11 – Other Health Insurance	**Frequency**	This field populates with the frequency. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the frequency displays under the Health Insurance	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Premium Expense section.			
Page 13 – Info Reported	**Incarcerated Name**	This field populates with the name of the person who is incarcerated. This person is listed as incarcerated on the most recent DER but is not verified. ***Technical Note:*** This information can be found on the CalHEERS Verification table. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 13 – Info Reported	**Deceased Name**	This field populates with the name of the person who is deceased. This person is listed as deceased on the most recent DER but is not verified. ***Technical Note:*** This information can be found on the CalHEERS Verification table. Format: First, Middle, Last, and Suffix	Y	Y	Y

b. Make the following sections dynamic:

Section	Dynamic Section	Conditions
Page 1 – Cover Page	List of persons under the 'It's time to renew benefits for:' section.	This section contains a repeating row that repeats for each person active program person. The section will expand to fit the list of persons.
Page 3 – Household Members	List of household members under the 'Review your household member information' section.	This section initially contains four rows. If there are more than four persons, the row will repeat for each additional person.

Section	Dynamic Section	Conditions
Page 4 – Tax Info	List of tax filers under the 'Review your tax information' section.	This section initially contains two rows. The first row always displays the primary tax filer. If there are more than one non-primary tax filer, the row will repeat for each tax filer.
Page 6 - Income	List of incomes under the 'Review of income information' section.	This section initially contains three rows. If there are more than three income records, the row will repeat for each additional income record.
Page 8 - Expenses	List of expenses under the 'Review you expenses and deduction information' section.	This section initially contains two rows. If there are more than two expense records, the row will repeat for each additional expense record.
Page 9 – Medicare Coverage	The Medicare Coverage section.	This section displays on the form only if there is at least one Medicare record. If there are no records, the section is hidden.
Page 9 – Medicare Coverage	List of Medicare information under 'Review your Medicare information' section.	This section initially contains two rows. If there are more than two Medicare records, the row will repeat for each additional Medicare record.
Page 10 – Long Term Care	The Long Term Care section	This section displays on the form only if there is at least one Living Arrangement record for LTC.
Page 10 – Long Term Care	List of Long Term Care facilities under the 'Review your long-term care information' section.	This section initially contains two rows. If there are more than two Living Arrangement records for LTC, the row will repeat for each additional record.
Page 11 – Other Health Insurance	List of Other Health Insurance information under the 'Review your health insurance information' section.	This section initially contains two rows. If there are more than two Other Health Care records, the row will repeat for each additional record.
Page 12 – Household Changes	The Medicare section.	This section displays on the form if the Medicare Coverage section is hidden, otherwise, this section is hidden.
Page 12 – Household Changes	The Long Term Care section.	This section displays on the form if the Long Term Care section is hidden, otherwise, this section is hidden.
Page 13 – Info Reported	The Incarcerated Person Section.	This section displays if there is data population, otherwise, this section is hidden.
Page 13 – Info Reported	The Deceased Person Section	This section displays if there is data population, otherwise, this section is hidden.
Page 13 – Info Reported	List of the name of the persons who is incarcerated or deceased.	This section initially contains one row for incarcerated person and one row for the deceased person. If there are additional

Section	Dynamic Section	Conditions
		records, the row will repeat for each additional record.

3. The form has the following print options:

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

4. The form has the following mailing options:

Mailing Options	Option for MC 216
Mail-To (Recipient)	N/A – the form cannot be printed centrally.
Mailed From (Return)	N/A – the form cannot be printed centrally.
Mail-back-to Address	N/A – the form cannot be printed centrally.
Outgoing Envelope Type	N/A – the form cannot be printed centrally.
Return Envelope Type	N/A – the form cannot be printed centrally.

5. The form has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. The form has the following additional options:

Additional Options	Option for MC 216
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

2.4 Update the MC 210 RV Form

2.4.1 Overview

This section describes the updates to the MC 210 RV form.

State Form: MC 210 RV

Current Program: Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Languages: English, Spanish, Arabic, Armenian, Cambodian, Cantonese, Farsi, Hmong, Korean, Mandarin, Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Current Imaging Category: Customer Reporting

Current Imaging Form Name: MC Annual Redetermination Form

Template Repository Visibility: All Counties

2.4.2 Description of Change

1. Update the MC 210 RV to the 10/20 revision and turn off the threshold languages. The updated version of the MC 210 RV is not available in Template Repository **until the CalSAWS Go-Live of the C-IV counties**.

   Form Number: MC 210 RV

   Updated Form Title: Non-MAGI MC Renewal Form

   Updated Languages: English, Spanish

   Updated Imaging Form Name: Non-MAGI MC Renewal Form

   Include NA Back 9: N

   Form Mockups/Examples: Please refer to Supporting Documents #2

   a. Include the following parameters for the packet on the Document Parameters page:
      Technical Note: *The name of the document parameter is REPacket.jsp. This is the current document parameter used by the MC 216.*
      i. Case Number
      ii. Customer Name
      iii. Program
      iv. RE Month
      v. Language

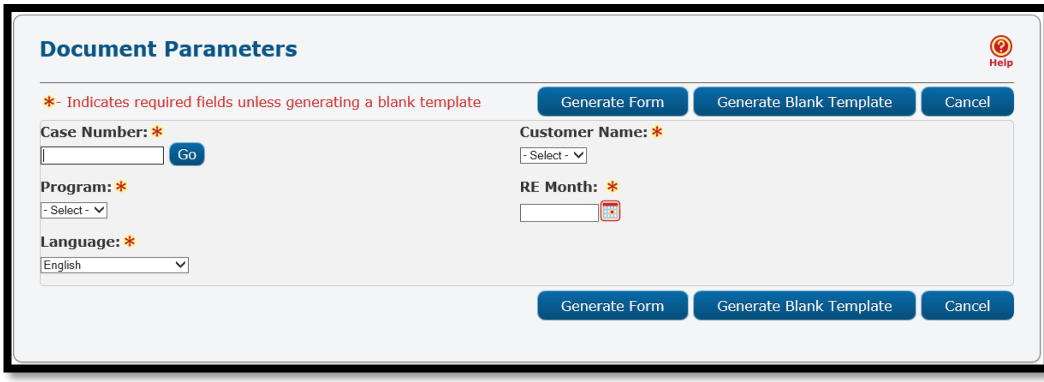

Figure 2.4.1 – Document Parameters Page

2. Update the population logic and add dynamic sections.
    a. The variables are populated as follows:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	**RE Due Date**	The field populates with the redetermination due date. Format: Month Day, Year	Y	Y	Y
Page 1 – Cover Page	**County Phone Number**	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y
Page 1 – Cover Page	**County TTY Number**	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)	Y	Y	Y
Page 1 – Cover Page	**Recipient Mailing Address**	This field populates with the mailing address of the primary applicant	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository.			
Page 1 – Cover Page	**Notice Date**	This field populates with the date when the form was generated. Format: MM/DD/YYYY	Y	Y	Y
Page 1 – Cover Page	**Case Number**	This field populates with the case name of the current case.	Y	Y	Y
Page 1 – Cover Page	**Case Name**	This field populates with the case number of the current case.	Y	Y	Y
Page 1 – Cover Page	**Worker Name**	This field populates with the name of the worker.	Y	Y	Y
Page 1 – Cover Page	**Worker Phone Number**	This field populates with phone number of the worker. Format: (###) ###-####	Y	Y	Y
Page 1 – Cover Page	**Name**	This field populates with the name of the person. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 1 – Cover Page	**Date of Birth**	This field populates with the date of birth of the person. Format: MM/DD/YYYY	Y	Y	Y
Page 1 – Cover Page	**Portal Name**	This field populates with the URL of the Self-Service Portal. If the case is managed in a migration county, this field populates with the URL of BenefitsCal	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		(www.BenefitsCal.com). If case is managed in Los Angeles County, this field populates with the URL of YourBenefitsNow.			
Page 1 – Cover Page	**Office Name**	This field populates with the name of the office.	Y	Y	Y
Page 1 – Cover Page	**Office Address**	This field populates with the office address.	Y	Y	Y
Page 1 – Cover Page	**Office Hours Begin**	This field populates with the start time of the office hours. Format: X:XX am	Y	Y	Y
Page 1 – Cover Page	**Office Hours End**	This field populates with the end time of the office hours. Format: X:XX pm	Y	Y	Y
Page 2 – Contact Info	**Name**	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix ***Note:*** *The same person is used to populate the address, phone number, email, language fields on page 2 below.*	Y	Y	Y
Page 2 – Contact Info	**Home Address**	This field populates with the person's physical address.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 2 – Contact Info	**Mailing Address**	This field populates with the person's mailing address if it is different from the home address. If it is the same as the home address or if there is no mailing address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	**Home Phone Number**	This field populates with the person's home phone number. If there is no home phone number, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	**Cell Phone Number**	This field populates with the person's cell phone number. If there is no cell phone number, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	**Other Phone Number**	This field populates with the person's other phone number. It populates the phone number based on the hierarchy below: • Message • Work • TDD • Fax • Toll Free If no phone number is available, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	**Email**	This field populates with the person's email address. If there is no	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		email address, this field will be blank.			
Page 2 – Contact Info	**Written Language**	This field populates with the person's written language.	Y	Y	Y
Page 2 – Contact Info	**Spoken Language**	This field populates with the person's spoken language.	Y	Y	Y
Page 2 – Contact Info	**County Phone Number**	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y
Page 2 – Contact Info	**County TTY Number**	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)	Y	Y	Y
Page 3 – Household Members	**Primary Person Name**	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	**Household Person Name**	This field populates with the name of household	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		member other than the primary person. Format: First, Middle, Last, and Suffix			
Page 3 – Household Members	**Relationship Type**	This field populates with the relationship of the household member to the primary person.	Y	Y	Y
Page 3 – Household Members	**Address**	This field populates with the home address of the household member.	Y	Y	Y
Page 4 - Income	**Name**	This field populates with the name of the person on the income record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 4 - Income	**Source of Income**	This field populates with the source of the income.	Y	Y	Y
Page 4 - Income	**Income Amount**	This field populates with the income amount. Format: $XX.XX	Y	Y	Y
Page 4 - Income	**Frequency**	This field populates the income frequency.	Y	Y	Y
Page 6 - Expenses	**Name**	This field populates with the name of the person on the expense record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 6 - Expenses	**Type of Expense**	This field populates with the type of the expense.	Y	Y	Y
Page 6 - Expenses	**Amount**	This field populates with the amount of the expense. Format: $XX.XX	Y	Y	Y
Page 6 - Expenses	**Frequency**	This field populates with the frequency of the expense.	Y	Y	Y
Page 8 - Property	**Name**	This field populates with the name(s) of the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		owner(s) on the Property record. Format: First, Middle, Last, and Suffix			
Page 8 - Property	**Type of Property**	This field populates with the type of the property. If the category is 'Transferred Property/Income and type is 'Income', populate the field with 'Transferred Property/Income'. If the category is 'Unallowable Withdrawal', populate the field with 'Unallowable Withdrawal'. For the other categories, populate the field with the property type.	Y	Y	Y
Page 8 - Property	**Property Detail**	This field populates with the property detail. If the category is 'Liquid', populate the field with the 'Company Name'. If the category is 'Motor Vehicle', populate the field with the vehicle type, make, model and year. If the category is 'Transferred Property/Income', populate the field with program and type. If the category is 'Unallowable Withdrawal', populate	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		the field with the description. If the category is 'Personal' or 'Real', this field is blank.			
Page 8 - Property	**Amount**	This field populates with the property value. If the status of the property is 'Exempt', populate the field with 'Not counted'. Format: $XX.XX	Y	Y	Y
Page 10 – Medicare Coverage	**Name**	This field populates with the name on the Medicare record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 10 – Medicare Coverage	**Part A Premium**	This field populates with the Part A amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: $XX.XX	Y	Y	Y
Page 10 – Medicare Coverage	**Part B Premium**	This field populates with the Part B amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: $XX.XX	Y	Y	Y
Page 10 – Medicare Coverage	**Part C Premium**	This field is blank.	N	N	Y
Page 10 – Medicare Coverage	**Part D Premium**	This field populates with the Part D amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Format: $XX.XX			
Page 11 – Long Term Care	**Name**	The field populates with the name of the person in the LTC facility. This information is retrieved from the Living Arrangement record with the type of 'Nursing Home/Long Term Care'. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 11 – Long Term Care	**Facility Name**	This field populates with the name of the LTC facility.	Y	Y	Y
Page 11 – Long Term Care	**Facility Address**	This field populates with the person's physical address.	Y	Y	Y
Page 12 – Other Health Insurance	**Name**	This field populates with the name of the beneficiary or beneficiaries on the Other Health Care record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 12 – Other Health Insurance	**Insurance Name**	This field populates with the name of the insurance company. This is the health insurance company name when the health coverage type is 'All Other Health Coverage'. For the other types, this field is blank.	Y	Y	Y
Page 12 – Other Health Insurance	**Type of Insurance**	This field populates with the health coverage type.	Y	Y	Y
Page 12 – Other	**Premium Amount**	This field populates with the expense amount.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Health Insurance		When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the expense amount displays under the Health Insurance Premium Expense section. Format: $XX.XX			
Page 12 – Other Health Insurance	**Frequency**	This field populates with the frequency. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the frequency displays under the Health Insurance Premium Expense section.	Y	Y	Y

b. Make the following sections dynamic:

Section	Dynamic Section	Conditions
Page 1 – Cover Page	List of persons under the 'It's time to renew benefits for:'	This section contains a repeating row that repeats for each person active program person. The section will expand to fit the list of persons.
Page 3 – Household Members	List of household members under the 'Review your household member information' section.	This section initially contains four rows. If there are more than four persons, the row will repeat for each additional person.

Section	Dynamic Section	Conditions
Page 4 - Income	List of incomes under the 'Review of income information' section.	This section initially contains three rows. If there are more than three income records, the row will repeat for each additional income record.
Page 6 - Expenses	List of expenses under the 'Review you expenses and deduction information' section.	This section initially contains two rows. If there are more than two expense records, the row will repeat for each additional expense record.
Page 8 - Property	List of properties under the 'Review your resources and property information' section.	This section initially contains three rows. If there are more than three property records, the row will repeat for each additional expense records.
Page 10 – Medicare Coverage	The Medicare Coverage section.	This section displays on the form only if there is at least one Medicare record. If there are no records, the section is hidden.
Page 10 – Medicare Coverage	List of Medicare information under 'Review your Medicare information' section.	This section initially contains two rows. If there are more than two Medicare records, the row will repeat for each additional Medicare record.
Page 11 – Long Term Care	The Long-Term Care section	This section displays on the form only if there is at least one Living Arrangement record for LTC.
Page 11 – Long Term Care	List of Long-Term Care facilities under the 'Review your long-term care information' section.	This section initially contains two rows. If there are more than two Living Arrangement records for LTC, the row will repeat for each additional record.
Page 12 – Other Health Insurance	List of Other Health Insurance information under the 'Review your health insurance information' section.	This section initially contains two rows. If there are more than two Other Health Care records, the row will repeat for each additional record.
Page 14 – Household Changes	The Medicare section.	This section displays on the form if the Medicare Coverage section is hidden, otherwise, this section is hidden.
Page 14 – Household Changes	The Long-term care section.	This section displays on the form if the Long-Term Care section is hidden, otherwise, this section is hidden.

3. The form has the following print options:

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

4. The form has the following mailing options:

Mailing Options	Option for MC 210 RV
Mail-To (Recipient)	N/A – the form cannot be printed centrally.
Mailed From (Return)	N/A – the form cannot be printed centrally.
Mail-back-to Address	N/A – the form cannot be printed centrally.
Outgoing Envelope Type	N/A – the form cannot be printed centrally.
Return Envelope Type	N/A – the form cannot be printed centrally.

5. The form has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. The form has the following additional options:

Additional Options	Option for MC 210 RV
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

2.5 Add the MC 217 Form

2.5.1 Overview

This section describes the creation of the MC 217 form and the addition of the form to Template Repository.

Program: Medi-Cal

Forms Category: Forms

Current Languages: English, Spanish

Template Repository Visibility: All Counties

2.5.2 Description of Change

1. Create the MC 217 form. The new form is not available in Template Repository **until the CalSAWS Go-Live of the C-IV counties**.

Form Header: N/A

Form Footer: CalSAWS Standard Footer (Footer 1)

Form Title: Mixed MC Renewal Form

Form Number: MC 217

Imaging Form Name: Mixed MC Renewal Form

Imaging Document Type: Customer Reporting

Include NA Back 9: No

Form Mockup/Example: Please refer to Supporting Documents #3

a. Include the following parameters for the packet on the Document Parameters page:
   Technical Note: *The name of the document parameter is REPacket.jsp. This is the current document parameter used by the MC 216.*
   i. Case Number
   ii. Customer Name
   iii. Program
   iv. RE Month
   v. Language

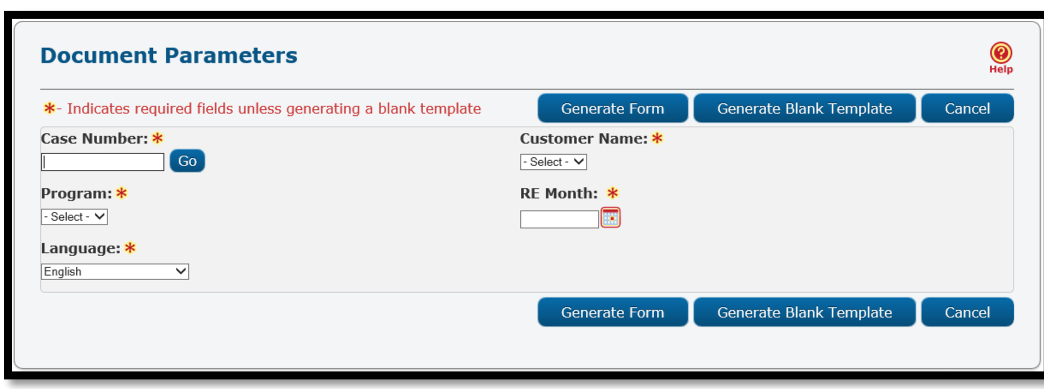

Figure 2.5.1 – Document Parameters Page

2. Update the population logic and add dynamic sections.
   a. The variables are populated as follows:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	**RE Due Date**	The field populates with the redetermination due date. Format: Month Day, Year	Y	Y	Y
Page 1 – Cover Page	**County Phone Number**	The field populates with the contact primary number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX	Y	Y	Y
Page 1 – Cover Page	**County TTY Number**	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)	Y	Y	Y
Page 1 – Cover Page	**Recipient Mailing Address**	This field populates with the mailing address of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository.	Y	Y	Y
Page 1 – Cover Page	**Notice Date**	This field populates with the date when the form was generated. Format: MM/DD/YYYY	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	**Case Number**	This field populates with the case name of the current case.	Y	Y	Y
Page 1 – Cover Page	**Case Name**	This field populates with the case number of the current case.	Y	Y	Y
Page 1 – Cover Page	**Worker Name**	This field populates with the name of the worker.	Y	Y	Y
Page 1 – Cover Page	**Worker Phone Number**	This field populates with phone number of the worker. Format: (###) ###-####	Y	Y	Y
Page 1 – Cover Page	**Name**	This field populates with the name of the person. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 1 – Cover Page	**Date of Birth**	This field populates with the date of birth of the person. Format: MM/DD/YYYY	Y	Y	Y
Page 1 – Cover Page	**Portal Name**	This field populates with the URL of the Self-Service Portal. If the case is managed in a migration county, this field populates with the URL of BenefitsCal (www.BenefitsCal.com). If case is managed in Los Angeles County, this field populates with the URL of YourBenefitsNow.	Y	Y	Y
Page 1 – Cover Page	**Office Name**	This field populates with the name of the office.	Y	Y	Y
Page 1 – Cover Page	**Office Address**	This field populates with the office address.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 1 – Cover Page	**Office Hours Begin**	This field populates with the start time of the office hours. Format: X:XX am	Y	Y	Y
Page 1 – Cover Page	**Office Hours End**	This field populates with the end time of the office hours. Format: X:XX pm	Y	Y	Y
Page 2 – Contact Info	**Name**	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix ***Note:*** *The same person is used to populate the address, phone number, email, language fields on page 2 below.*	Y	Y	Y
Page 2 – Contact Info	**Home Address**	This field populates with the person's physical address.	Y	Y	Y
Page 2 – Contact Info	**Mailing Address**	This field populates with the person's mailing address if it is different from the home address. If it is the same as the home address or if there is no mailing address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	**Home Phone Number**	This field populates with the person's home phone number.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		If there is no home phone number, this field will be blank. Format: (###) ###-####			
Page 2 – Contact Info	**Cell Phone Number**	This field populates with the person's cell phone number. If there is no cell phone number, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	**Other Phone Number**	This field populates with the person's other phone number. It populates the phone number based on the hierarchy below: • Message • Work • TDD • Fax • Toll Free If no phone number is available, this field will be blank. Format: (###) ###-####	Y	Y	Y
Page 2 – Contact Info	**Email**	This field populates with the person's email address. If there is no email address, this field will be blank.	Y	Y	Y
Page 2 – Contact Info	**Written Language**	This field populates with the person's written language.	Y	Y	Y
Page 2 – Contact Info	**Spoken Language**	This field populates with the person's spoken language.	Y	Y	Y
Page 2 – Contact Info	**County Phone Number**	The field populates with the contact primary number on	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX			
Page 2 – Contact Info	**County TTY Number**	The field populates with the Toll-Free number on the County Contact Number listed on the Correspondence page. Format: 1-XXX-XXX-XXXX (excluding 711 phone number)	Y	Y	Y
Page 3 – Household Members	**Primary Person Name**	This field populates with the name of the primary applicant when generated through batch or the person selected in the Customer Name dropdown on the documents parameter page when generating from Template Repository. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	**Household Person Name**	This field populates with the name of household member other than the primary person. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 3 – Household Members	**Relationship Type**	This field populates with the relationship of the household member to the primary person.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 3 – Household Members	**Address**	This field populates with the home address of the household member.	Y	Y	Y
Page 4 – Tax Info	**Tax Filer Name**	This field populates with the name of the tax filer. This information is retrieved from the Tax Household record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 4 – Tax Info	**Plan to File**	This field populates with 'Yes' or 'No' if the person is planning to file taxes. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 4 – Tax Info	**Expected to File**	This field populates with 'Yes' or 'No' if the person is expected to file taxes. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 4 – Tax Info	**Tax Filing Status**	This field populates with the expected filing status of the person. This information is retrieved from the Tax Household record.	Y	Y	Y
Page 6 - Income	**Name**	This field populates with the name of the person on the income record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 6 - Income	**Source of Income**	This field populates with the source of the income.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 6 - Income	**Income Amount**	This field populates with the income amount. Format: $XX.XX	Y	Y	Y
Page 6 - Income	**Frequency**	This field populates the income frequency.	Y	Y	Y
Page 8 - Expenses	**Name**	This field populates with the name of the person on the expense record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 8 - Expenses	**Type of Expense**	This field populates with the type of the expense.	Y	Y	Y
Page 8 - Expenses	**Amount**	This field populates with the amount of the expense. Format: $XX.XX	Y	Y	Y
Page 8 - Expenses	**Frequency**	This field populates with the frequency of the expense.	Y	Y	Y
Page 10 - Property	**Name**	This field populates with the name(s) of the owner(s) on the Property record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 10 - Property	**Type of Property**	This field populates with the type of the property. If the category is 'Transferred Property/Income and type is 'Income', populate the field with 'Transferred Property/Income'. If the category is 'Unallowable Withdrawal', populate the field with	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		'Unallowable Withdrawal'. For the other categories, populate the field with the property type.			
Page 10 - Property	**Property Detail**	This field populates with the property detail. If the category is 'Liquid', populate the field with the 'Company Name'. If the category is 'Motor Vehicle', populate the field with the vehicle type, make, model and year. If the category is 'Transferred Property/Income', populate the field with program and type. If the category is 'Unallowable Withdrawal', populate the field with the description. If the category is 'Personal' or 'Real', this field is blank.	Y	Y	Y
Page 10 - Property	**Amount**	This field populates with the property value. If the status of the property is 'Exempt', populate the field with 'Not counted'. Format: $XX.XX	Y	Y	Y
Page 12 – Medicare Coverage	**Name**	This field populates with the name on the Medicare record.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Format: First, Middle, Last, and Suffix			
Page 12 – Medicare Coverage	**Part A Premium**	This field populates with the Part A amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: $XX.XX	Y	Y	Y
Page 12 – Medicare Coverage	**Part B Premium**	This field populates with the Part B amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: $XX.XX	Y	Y	Y
Page 12 – Medicare Coverage	**Part C Premium**	This field is blank.	N	N	Y
Page 12 – Medicare Coverage	**Part D Premium**	This field populates with the Part D amount from the Medicare record. If the payment method is 'State', populate the field with 'Paid by State'. Format: $XX.XX	Y	Y	Y
Page 13 – Long Term Care	**Name**	The field populates with the name of the person in the LTC facility. This information is retrieved from the Living Arrangement record with the type of 'Nursing Home/Long Term Care'. Format: First, Middle, Last, and Suffix	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
Page 13 – Long Term Care	**Facility Name**	This field populates with the name of the LTC facility.	Y	Y	Y
Page 13 – Long Term Care	**Facility Address**	This field populates with the person's physical address.	Y	Y	Y
Page 14 – Other Health Insurance	**Name**	This field populates with the name of the beneficiary or beneficiaries on the Other Health Care record. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 14 – Other Health Insurance	**Insurance Name**	This field populates with the name of the insurance company. This is the health insurance company name when the health coverage type is 'All Other Health Coverage'. For the other types, this field is blank.	Y	Y	Y
Page 14 – Other Health Insurance	**Type of Insurance**	This field populates with the health coverage type.	Y	Y	Y
Page 14 – Other Health Insurance	**Premium Amount**	This field populates with the expense amount. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the expense amount displays under the Health Insurance	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Premium Expense section. Format: $XX.XX			
Page 14 – Other Health Insurance	**Frequency**	This field populates with the frequency. When the health coverage type is 'All Other Health Coverage' and the 'Is this Employer Sponsored Insurance Outside Exchange?' question is answered 'Yes', the frequency displays under the Health Insurance Premium Expense section.	Y	Y	Y
Page 16 – Info Reported	**Incarcerated Name**	This field populates with the name of the person who is incarcerated. This person is listed as incarcerated on the most recent DER but is not verified. ***Technical Note:*** This information can be found on the CalHEERS Verification table. Format: First, Middle, Last, and Suffix	Y	Y	Y
Page 16 – Info Reported	**Deceased Name**	This field populates with the name of the person who is deceased. This person is listed as deceased on the most recent DER but is not verified. ***Technical Note:*** This information can be found on the	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		CalHEERS Verification table. Format: First, Middle, Last, and Suffix			

b. Make the following sections dynamic:

Section	Dynamic Section	Conditions
Page 1 – Cover Page	List of persons under the 'It's time to renew benefits for:' section.	This section contains a repeating row that repeats for each person active program person. The section will expand to fit the list of persons.
Page 3 – Household Members	List of household members under the 'Review your household member information' section.	This section initially contains four rows. If there are more than four persons, the row will repeat for each additional person.
Page 4 – Tax Info	List of tax filers under the 'Review your tax information' section.	This section initially contains two rows. The first row always displays the primary tax filer. If there are more than one non-primary tax filer, the row will repeat for each tax filer.
Page 6 - Income	List of incomes under the 'Review of income information' section.	This section initially contains three rows. If there are more than three income records, the row will repeat for each additional income record.
Page 8 - Expenses	List of expenses under the 'Review you expenses and deduction information' section.	This section initially contains two rows. If there are more than two expense records, the row will repeat for each additional expense record.
Page 10 - Property	List of properties under the 'Review your resources and property information' section.	This section initially contains three rows. If there are more than three property records, the row will repeat for each additional expense records.
Page 12 – Medicare Coverage	The Medicare Coverage section.	This section displays on the form only if there is at least one Medicare record. If there are no records, the section is hidden.
Page 12 – Medicare Coverage	List of Medicare information under 'Review your Medicare information' section.	This section initially contains two rows. If there are more than two Medicare records, the row will repeat for each additional Medicare record.
Page 13 – Long Term Care	The Long-Term Care section	This section displays on the form only if there is at least one Living Arrangement record for LTC.

Section	Dynamic Section	Conditions
Page 13 – Long Term Care	List of Long-Term Care facilities under the 'Review your long-term care information' section.	This section initially contains two rows. If there are more than two Living Arrangement records for LTC, the row will repeat for each additional record.
Page 14 – Other Health Insurance	List of Other Health Insurance information under the 'Review your health insurance information' section.	This section initially contains two rows. If there are more than two Other Health Care records, the row will repeat for each additional record.
Page 16 – Household Changes	The Medicare section.	This section displays on the form if the Medicare Coverage section is hidden, otherwise, this section is hidden.
Page 16 – Household Changes	The Long-term care section.	This section displays on the form if the Long-Term Care section is hidden, otherwise, this section is hidden.
Page 16 – Info Reported	The Incarcerated Person Section.	This section displays if there is data population, otherwise, this section is hidden.
Page 16 – Info Reported	The Deceased Person Section	This section displays if there is data population, otherwise, this section is hidden.
Page 16 – Info Reported	List of the name of the persons who is incarcerated or deceased.	This section initially contains one row for incarcerated person and one row for the deceased person. If there are additional records, the row will repeat for each additional record.

3. The form has the following print options:

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

4. The form has the following mailing options:

Mailing Options	Option for MC 217
Mail-To (Recipient)	N/A – the form cannot be printed centrally.
Mailed From (Return)	N/A – the form cannot be printed centrally.
Mail-back-to Address	N/A – the form cannot be printed centrally.
Outgoing Envelope Type	N/A – the form cannot be printed centrally.
Return Envelope Type	N/A – the form cannot be printed centrally.

5. The form has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

6. The form has the following additional options:

Additional Options	Option for MC 217
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

2.6 Update the MC 003

2.6.1 Overview

The current version of the MC 003 in CalSAWS is the 06/07 version. Update the form to the 11/12 version.

State Form: MC 003

Current Program: Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Farsi, Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Template Repository Visibility: All Counties

2.6.2 Description of Change

1. Update the MC 003 to the 11/12 version.
   Note: *Apart from Spanish, the version for the threshold languages is 05/13.*

   Form Number: MC 003

Form Name: Early Periodic Screening, Diagnostic, and Treatment (EPSDT)

Updated Languages: English, Spanish, Arabic, Armenian, Cambodian, Cantonese (Chinese), Farsi, Hmong, Korean, Lao, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Include NA Back 9: N

Form Mockups/Examples: Please refer to Supporting Documents #4

2.7 Update the PUB 13

2.7.1 Overview

The current version of the PUB 13 in CalSAWS is the 08/16 version. Update the form to the 08/20 version.

State Form: PUB 13

Current Program: Welfare to Work

Current Attached Form(s): N/A

Current Forms Category: Forms

Current Languages: English, Spanish, Arabic, Armenian, Cambodian, Cantonese (Chinese), Farsi, Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Template Repository Visibility: All Counties

2.7.2 Description of Change

1. Update the PUB 13 to the 08/20 version.

   Form Number: PUB 13

   Form Name: Your Rights Under California Welfare Programs

   Updated Languages: English, Spanish

   Include NA Back 9: N

   Form Mockups/Examples: Please refer to Supporting Documents #5

2. Update the CF RE, CW RE, and the CW/CF RE Packets with the updated version of the PUB 13.

2.8 Update the PUB 183/PUB 184

2.8.1 Overview

The current version of the PUB 183/PUB 184 in CalSAWS is the 01/04 version. Update the PUB 183 to the 09/15 version and the PUB 184 to the 01/17 version.

State Form: PUB 183/PUB 184

Current Program: CalWORKs, CalFresh, Medi-Cal

Current Attached Form(s): N/A

Current Forms Category: Brochure/Flyer

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Farsi, Korean, Lao, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Template Repository Visibility: All Counties

2.8.2 Description of Change

1. Update the PUB 183 to the 09/15 version and update the PUB 184 to the 01/17 version.

   Form Number: PUB 183

   Form Name: CHDP Information

   Updated Languages: English, Spanish

   Include NA Back 9: N

   Form Mockups/Examples: Please refer to Supporting Documents #6

2. Update the CF RE, CW RE, and the CW/CF RE Packets with the updated version of the PUB 183/PUB 184.

2.9 Update the MAGI Redetermination Packet for Los Angeles County

2.9.1 Overview

This section describes the update to the existing MAGI MC packet for Los Angeles County.

Current Program: Medi-Cal

Current Forms Category: Application

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Current Imaging Category: Customer Reporting

Current Imaging Form Name: MAGI MC Packet

Template Repository Visibility: Los Angeles County

2.9.2 Description of Change

1. Update the form name and form number of the packet. Turn off the threshold languages. The updated form title and number and languages is not visible **until the CalSAWS Go-Live date of the C-IV counties**.
   a. **Form Title:** MAGI RE Packet
   b. **Form Number:** MAGI RE Packet
   c. **Updated Languages:** English, Spanish
   d. **Updated Imaging Form Name:** MAGI RE Packet

2. Update the Document Parameters to have the following fields:
   Technical Note: *The name of the document parameter is REPacket.jsp.*
   a. Case Number
   b. Customer Name
   c. Program
   d. RE Month
   e. Language

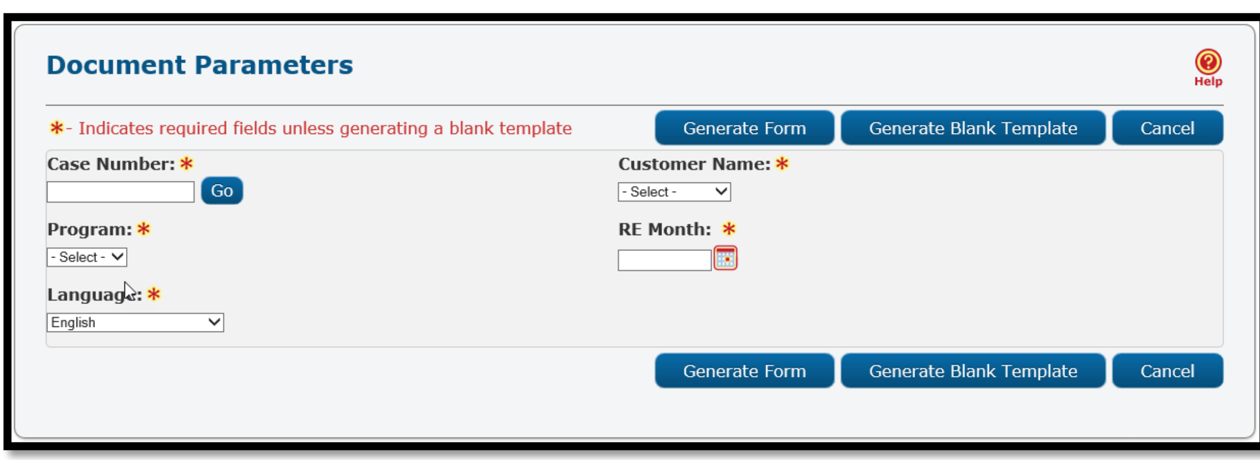

Figure 2.9.1 – Document Parameters Page

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

3. Update the packet to use the updated version of the MC 216. The updated packet is not available until the CalSAWS Go-Live date of the C-IV counties.

Form
Coversheet
MC 216

2.10 Add the MAGI Redetermination Packet for the Migration Counties

2.10.1 Overview

This section describes the creation of the MAGI MC Packet for the Migration Counties.

Program: Medi-Cal

Forms Category: Application

Template Repository Visibility: Migration Counties

Languages: English, Spanish

2.10.2 Description of Change

1. Create the MAGI RE packet for the Migration Counties with the forms in the following order:

Form
Coversheet
MC 216
MC 019
MC 219
MC 372
PUB 13

PUB 183/PUB 184
MC 003

2. Add the MAGI RE Packet to Template Repository for the Migration Counties. The new packet is not available in Template Repository **until the CalSAWS Go-Live date of the C-IV counties.**

   Form Header: N/A

   Form Footer: CalSAWS Standard Footer (Footer 1)

   Form Title: MAGI RE Packet

   Form Number: MAGI RE Packet

   Imaging Form Name: MAGI RE Packet

   Imaging Document Type: Customer Reporting

   Include NA Back 9: No

   a. Include the following parameters for the packet on the Document Parameters page:
      Technical Note: *The name of the document parameter is REPacket.jsp.*
      i. Case Number
      ii. Customer Name
      iii. Program
      iv. RE Month
      v. Language

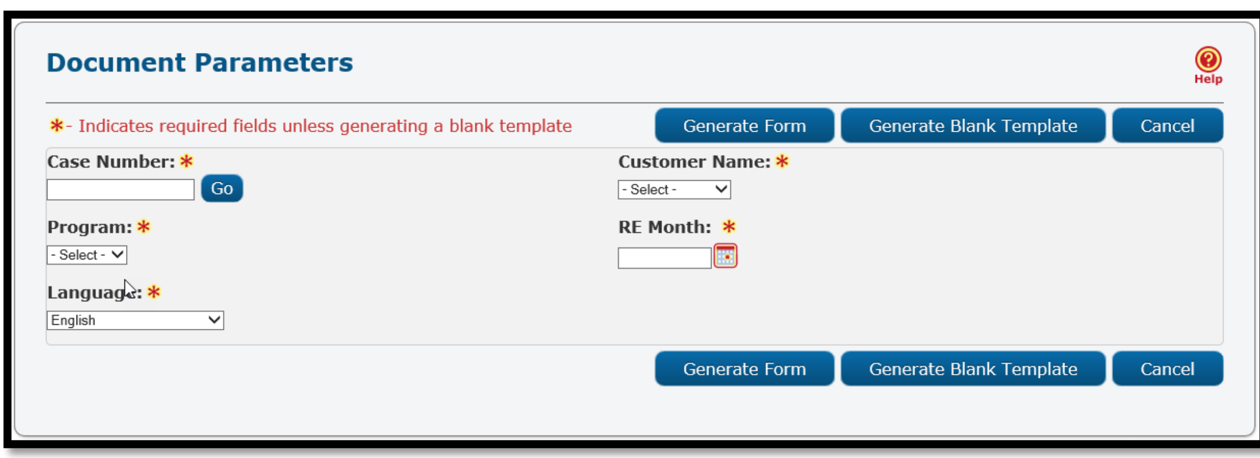

Figure 2.10.1 – Document Parameters Page

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

3. Add population logic for the packet. The population logic for the MC 216 will be used to populate the form within the packet.

4. Add the Business Reply Mail (BRM) header on the second page of the Coversheet. The existing population logic will be used to populate the case information and address on the BRM header.

5. The packet has the following print options:

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

   a. The 'Print Local without Save' option is only available when a blank template is generated.
   b. The 'Print and Save' options are only available when generating the packet in the context of the case.

6. The packet has the following mailing options:

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the Medi-Cal Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	Medi-Cal Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	6"x10" Flat Mail Envelope
Return Envelope Type	BRM

7. The packet has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode

Y	Y	Y

8. The packet has the following additional options:

Additional Options	Option for RE Packet
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

9. Create a Customer Reporting entry when the packet is generated and saved with the following information:

Field to Populate	Population for RE Packet
Type	MAGI RE Packet ***Technical Note:*** *The existing type code is MG. Update the short decode name to match the packet name.*
Submit Month - when generated from Template Repository	Submit Month from Document Parameters page
Submit Month - when generated through Batch	Current Medi-Cal Program RE Due Date
Program	MC
Status	Customer Reporting Tracking Status Customer Reporting Statuses: • Generated • Sent • Received • Incomplete • Not Applicable • Reviewed – Ready to Run EDBC • Compete – EDBC Accepted For example: The status will be set to "Sent" if the Packet is generated and sent to the recipient through Batch.
Status Date	Date of the latest Status Date

10. Create a Journal entry when the packet is generated and saved with the following information:

Field to Populate	Population for RE Packet

Case Id	The case associated to the packet.
Type	Document
Short Description	MAGI RE Packet
Long Description	The following forms were included for the {redeterDate} RE: Coversheet, MC 216, MC 019, MC 219, MC 372, PUB 183/PUB 184, and MC 003. These items are due in 60 days.
Created by	Batch or User
Updated by	Batch or User

2.11 Update the Non-MAGI Redetermination Packet for Los Angeles County

2.11.1 Overview

This section describes the update to the existing MC packet for Los Angeles County.

Current Program: Medi-Cal

Current Forms Category: Application

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Current Imaging Category: Customer Reporting

Current Imaging Form Name: MC Packet

Template Repository Visibility: Los Angeles County

2.11.2 Description of Change

1. Update the form name and form number of the packet. Turn off the threshold languages. The updated form title and number and languages is not visible **until the CalSAWS Go-Live date of the C-IV counties**.
    a. **Form Title:** Non-MAGI RE Packet
    b. **Form Number:** Non-MAGI RE Packet
    c. **Updated Languages:** English, Spanish
    d. **Updated Imaging Form Name:** Non-MAGI RE Packet

2. Update the Document Parameters to have the following fields:
   Technical Note: *The name of the document parameter is REPacket.jsp.*
   a. Case Number
   b. Customer Name
   c. Program
   d. RE Month
   e. Language

Figure 2.11.1 – Document Parameters Page

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

3. Update the packet to use the updated version of the MC 210 RV. The updated packet is not available until the CalSAWS Go-Live date of the C-IV counties.

Form
Coversheet
MC 210 RV

2.12 Add the Non-MAGI Redetermination Packet for the Migration Counties

2.12.1 Overview

This section describes the creation of the Non-MAGI RE Packet for the Migration Counties.

Program: Medi-Cal

Forms Category: Application

Template Repository Visibility: Migration Counties

Languages: English, Spanish

2.12.2 Description of Change

1. Create the Non-MAGI RE Packet for the Migration Counties with the forms in the following order:

Form
Coversheet
MC 210 RV
MC 019
MC 219
MC 372
MC 007
DHCS 7077
DHCS 7077-A
PUB 13
PUB 183/PUB 184
MC 003

2. Add the Non-MAGI RE Packet to Template Repository. The new packet is not available in Template Repository **until the CalSAWS Go-Live date of the C-IV counties**.

   Form Header: N/A

   Form Footer: CalSAWS Standard Footer (Footer 1)

   Form Title: Non-MAGI RE Packet

   Form Number: Non-MAGI RE Packet

   Include NA Back 9: No

   Imaging Form Name: Non-MAGI RE Packet

   Imaging Document Type: Customer Reporting

   a. Include the following parameters for the packet on the Document Parameters page:

Technical Note: *The name of the document parameter is REPacket.jsp.*

i. Case Number
ii. Customer Name
iii. Program
iv. RE Month
v. Language

Figure 2.12.1 – Document Parameters Page

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

3. Add population logic for the packet. The population logic for the MC 210 RV will be used to populate the form within the packet.

4. Add the Business Reply Mail (BRM) header on the second page of the Coversheet. The existing population logic will be used to populate the case information and address on the BRM header.

5. The packet has the following print options:

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

a. The ‘Print Local without Save’ option is only available when a blank template is generated.
b. The ‘Print and Save’ options are only available when generating the packet in the context of the case.

6. The packet has the following mailing options:

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the Medi-Cal Primary Applicant. When generated through Template Repository, the individual selected on the ‘Customer Name’ dropdown on the Document Parameters page.
Mailed From (Return)	Medi-Cal Worker’s Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	6”x10” Flat Mail Envelope
Return Envelope Type	BRM
Special Paper Stock	N/A

7. The packet has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

8. The packet has the following additional options:

Additional Options	Option for RE Packet
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

9. Create a Customer Reporting entry when the packet is generated and saved with the following information:

Field to Populate	Population for RE Packet
Type	Non-MAGI RE Packet ***Technical Note:*** *The existing type code is MR. Update the short decode name to match the packet name.*
Submit Month - when generated from Template Repository	Submit Month from Document Parameters page

Field to Populate	Population for RE Packet
Submit Month - when generated through Batch	Current Medi-Cal Program RE Due Date
Program	MC
Status	Customer Reporting Tracking Status Customer Reporting Statuses: • Generated • Sent • Received • Incomplete • Not Applicable • Reviewed – Ready to Run EDBC • Compete – EDBC Accepted For example: The status will be set to "Sent" if the Packet is generated and sent to the recipient through Batch.
Status Date	Date of the latest Status Date

10. Create a Journal entry when the packet is generated and saved with the following information:

Field to Populate	Population for RE Packet
Case Id	The case associated to the packet.
Type	Document
Short Description	Non-MAGI RE Packet
Long Description	The following forms were included for the {redeterDate} RE: Coversheet, MC 210 RV, PUB 13, MC 372, MC 007, DHCS 7077, DHCS 7077-A, PUB 183/PUB 184 and MC 003. These items are due in 60 days.
Created by	Batch or User
Updated by	Batch or User

2.13 Update the Mixed Household Redetermination Packet for Los Angeles County

2.13.1 Overview

This section describes the update to the existing Mixed Household RE packet for Los Angeles County.

Current Program: Medi-Cal

Current Forms Category: Application

Current Languages: English, Spanish, Armenian, Cambodian, Cantonese (Chinese), Korean, Mandarin (Chinese), Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

Current Imaging Category: Customer Reporting

Current Imaging Form Name: Mixed MC RE Packet

Template Repository Visibility: Los Angeles County

2.13.2 Description of Change

1. Update the form name and form number of the packet. Turn off the threshold languages. The updated form title and number and languages is not visible **until the CalSAWS Go-Live date of the C-IV counties**.
    a. **Form Title:** Mixed Household RE Packet
    b. **Form Number:** Mixed Household RE Packet
    c. **Updated Languages:** English, Spanish
    d. **Updated Imaging Form Name:** Mixed Household RE Packet
    Technical Note: *This packet currently uses the REPacket.jsp. No update is necessary for the Document Parameter page.*

2. Update the packet to use the new MC 217 form. The updated packet is not available **until the CalSAWS Go-Live date of the C-IV counties**.

Form
Coversheet
MC 217

2.14 Add the Mixed Household Redetermination Packet for the Migration Counties

2.14.1 Overview

This section describes the creation of the Mixed Household RE Packet for the Migration Counties.

Program: Medi-Cal

Forms Category: Forms

Template Repository Visibility: Migration Counties

Languages: English, Spanish

2.14.2 Description of Change

1. Create the Mixed Household RE packet for the Migration Counties with the forms in the following order:

Form
Coversheet
MC 217
MC 019
MC 219
MC 372
MC 007
DHCS 7077
DHCS 7077-A
PUB 13
PUB 183/PUB 184
MC 003

2. Add the Mixed Household RE Packet to Template Repository for the 57 Migration Counties. The new packet is not available in Template Repository **until the CalSAWS Go-Live date of the C-IV counties**.

   Form Header: N/A

   Form Footer: CalSAWS Standard Footer (Footer 1)

   Form Title: Mixed Household RE Packet

   Form Number: Mixed Household RE Packet

   Include NA Back 9: No

Imaging Form Name: Mixed Household RE Packet

Imaging Document Type: Customer Reporting

a. Include the following parameters for the packet on the Document Parameters page:
   Technical Note: *The name of the document parameter is REPacket.jsp.*
   i. Case Number
   ii. Customer Name
   iii. Program
   iv. RE Month
   v. Language

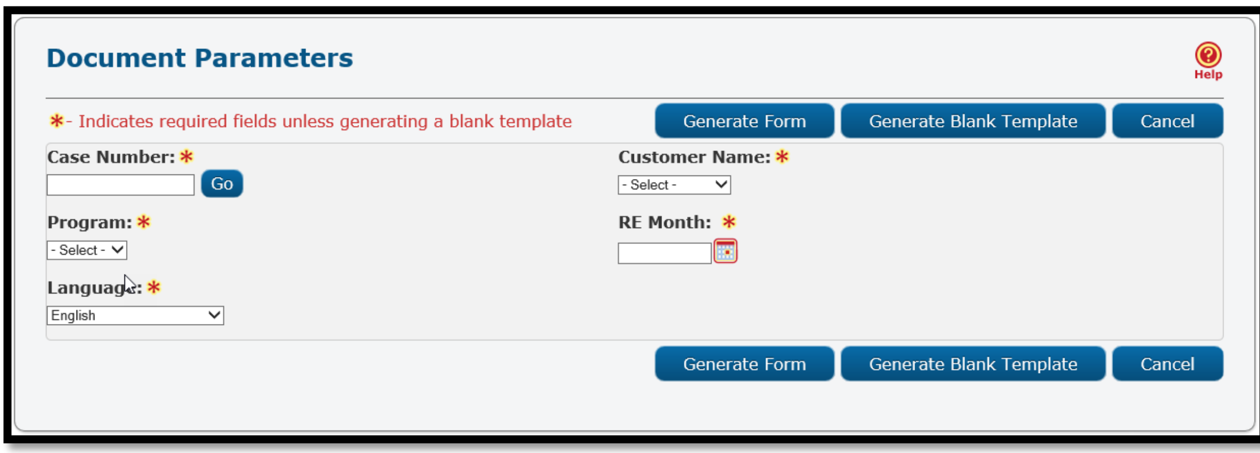

Figure 2.14.1 – Document Parameters Page

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

3. Add population logic for the packet. The population logic for the MC 217 will be used to populate the form within the packet.

4. Add the Business Reply Mail (BRM) header on the second page of the Coversheet. The existing population logic will be used to populate the case information and address on the BRM header.

5. The packet has the following print options:

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

a. The ‘Print Local without Save’ option is only available when a blank template is generated.
b. The ‘Print and Save’ options are only available when generating the packet in the context of the case.

6. The packet has the following mailing options:

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the Medi-Cal Primary Applicant. When generated through Template Repository, the individual selected on the ‘Customer Name’ dropdown on the Document Parameters page.
Mailed From (Return)	Medi-Cal Worker’s Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	6”x10” Flat Mail Envelope
Return Envelope Type	BRM

7. The packet has the following barcodes:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

8. The packet has the following additional options:

Additional Options	Option for RE Packet
Special Paper Stock	N/A
Enclosures	No
CW/CF e-sign	No
Check to Sign	No
Post to Self Service Portal	Yes

9. Create a Customer Reporting entry when the packet is generated and saved with the following information:

Field to Populate	Population for RE Packet
Type	Mixed Household RE Packet ***Technical Note:*** *The existing type code is MI. Update the short*

	decode name to match the packet name.
Submit Month - when generated from Template Repository	Submit Month from Document Parameters page
Submit Month - when generated through Batch	Current Medi-Cal Program RE Due Date
Program	MC
Status	Customer Reporting Tracking Status Customer Reporting Statuses: • Generated • Sent • Received • Incomplete • Not Applicable • Reviewed – Ready to Run EDBC • Compete – EDBC Accepted For example: The status will be set to “Sent” if the Packet is generated and sent to the recipient through Batch.
Status Date	Date of the latest Status Date

10. Create a Journal entry when the packet is generated and saved with the following information:

Field to Populate	Population for RE Packet
Case Id	The case associated to the packet.
Type	Document
Short Description	Mixed Household RE Packet
Long Description	The following forms were included for the {redeterDate} RE: Coversheet, MC 217, MC 019, MC 219, PUB 13, MC 372, MC 007, DHCS 7077, DHCS 7077-A, PUB 183/PUB 184 and MC 003. These items are due in 60 days.
Created by	Batch or User
Updated by	Batch or User

2.15 Update to Aid Code Category

2.15.1 Overview

The Packet Type column in the Aid Code category (CT 184) defines which packet is send out for a certain aid code. The column is currently populated with the following values: MR1 (Medi-Cal Redetermination Packet), MR3 (Medi-Cal Redetermination Packet – LTC), MR4 (Medi-Cal Redetermination Packet – MSP0), and MR9 (Medi-Cal Pre ACA Redetermination Packet). Since these packets will be replaced with the Non-MAGI RE packet, update the values in the column with a common value.

2.15.2 Description of Change

1. Update the values in the Packet Type column with 'Non-MAGI Packet'. Please refer to **Section 3.0 Supporting Documents #8** for the list of aid codes.
   Technical Note: *The codes table change request to update the values in the Packet Type column should not* ***run until the CalSAWS Go-Live date of the C-IV counties****.*

2.16 Update to Existing MC RE Packet Batch Jobs for Los Angeles County

2.16.1 Overview

The existing MC RE Packet batch jobs for Los Angeles find cases that have an RE due in two months and are sent either a MAGI, Non-MAGI or Mixed Household RE packet. The existing MC RE Packet Catch Up batch jobs run the month after the initial packets are sent out to find cases that were not sent an RE packet and sends one out. These jobs have references to the packet that are being removed. Update the driving queries of the existing MAGI, Non-MAGI, and Mixed Household RE packet batch jobs to remove the references of the packets mentioned in Section 2.1 and to use the new values defined in Section 2.15.

2.16.2 Description of Change

1. Update the driving query for the following batch jobs to remove references to the packets that are being removed. Updates to the driving query is not effective **until the CalSAWS Go-Live date of the C-IV counties**.
   a. PB00525 (MAGI RE Packet)
   b. PB19523 (MAGI RE Packet – Catch up)

c. PB00R526 (Mixed Household RE Packet)
d. PB19R521 (Mixed Household RE Packet – Catch up)
e. PB19R530 (Non-MAGI RE Packet)
f. PB19R526 (Non-MAGI RE Packet – Catch up)

2. Update the driving query for the following batch jobs to use the new value in the Aid Code category (CT 184). Updates to the driving query is not effective **until the CalSAWS Go-Live date of the C-IV counties**.
    a. PB00R526 (Mixed Household RE Packet)
    b. PB19R521 (Mixed Household RE Packet – Catch up)
    c. PB19R530 (Non-MAGI RE Packet)
    d. PB19R526 (Non-MAGI RE Packet – Catch up)

3. Update the driving query for the following batch jobs to remove the condition for a 'Delinquent Medical RE' case flag. This case flag is no longer available and cannot be added to a case, therefore the condition in the query is being removed. Update driving query to add a condition for an 'SSI Only' OPA record. Updates to the driving query is not effective **until the CalSAWS Go-Live date of the C-IV counties**.
    a. PB19R530 (Non-MAGI RE Packet)
    b. PB19R526 (Non-MAGI RE Packet – Catch up)

4. Remove the PB00R530 (MC Redeter Forms Filter batch job) as a successor for the PB19R530 batch job.

2.17 Create the MAGI RE Packet Batch Job for the Migration Counties

2.17.1 Overview

Create a new batch job to send out the MAGI RE Packet for the Migration Counties.

2.17.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions. The effective month referenced below is two months following the batch date.
    a. The current program is Medi-Cal.
    b. The current program is Active.
    c. The current program's RE due month is the same month as the effective month and the completion date is not set.
    d. The most current accepted and saved regular EDBC for the current MC program has a passing MAGI budget where there is at least one person receiving a MAGI aid code.

e. There does not exist a record in the system transaction table for the case with a type code of 'FR', a sub type code for the MAGI RE Packet or Mixed Household RE packet and is for the same effective month for the current program.
f. There does not exist a MAGI RE or Mixed Household RE packet generated for the same effective month and the Customer Reporting record is not in status of 'Not Applicable' for the current program.
Technical Note: *The driving query for this batch job is the same as the driving query in the existing MAGI RE Packet batch job in CalSAWS.*
The C-IV driving query will check to see if there is a successful EDR/DER that was sent or received to determine if a packet will be sent. The CalSAWS driving query will send a packet regardless of the EDR/DER.

2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values:

Field to Populate	Population for RE Packet
Case Id	The case Id associated to the current MC program.
Program Id	The program Id of the current MC program.
Person Id	The primary applicant of the current MC program.
Type Code	FR
Sub Type Code	TDB
Effective Date	The begin date of the current RE Due Month of the MC program.

2.17.3 Execution Frequency

This batch job runs monthly.

2.17.4 Key Scheduling Dependencies

The PB00CH103 batch job and Mixed Household RE packet batch job for the Migration Counties runs before this job.

The PB00R600 form balancer job will run after this batch job and distribute the system transaction records among the form generation thread jobs. The PB00R550 - PB00R599 form generation thread jobs will run after the balancer and is responsible for generating the packets.

This batch job is not scheduled to run **until the CalSAWS Go-Live date of the C-IV counties**.

2.17.5 Counties Impacted

Migration Counties

2.17.6 Data Volume/Performance

The estimated number of record this batch processes is 50,000 per month.

2.17.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.18 Create the Non-MAGI RE Packet Batch Job for the Migration Counties

2.18.1 Overview

Create a new batch job to send out the Non-MAGI RE Packet for the Migration Counties.

2.18.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions. The effective month referenced below is two months following the batch date.
    a. The program is Medi-Cal.
    b. The program is Active.
    c. The program RE due month is the same month as the effective month and the completion date is not set.
    d. There does not exist an 'Other Program Assistance' (OPA) record for 'SSI/SSP', 'SSI Only', 'Adoption Assistance Program', or 'Foster Care' for the effective month.
    e. There does not exist a person with Requested Medi-Cal Type of 'Minor Consent (12-21) FP/STD/D&A', 'Minor Consent (<21) Pregnancy', 'Minor Consent (12-21) FP/MntlHlth', or 'Minor Consent (<12) FP/STD'.
    f. The most current accepted and saved regular EDBC for the current MC program has a passing MC budget where there is at least one person receiving a primary MC aid code and the packet type for the aid code is 'Non-MAGI'.
    g. The most current accepted and saved regular EDBC for the current MC program does not have a passing MAGI budget.
    h. There does not exist a record in the system transaction table for the case with a type code of 'FR', a sub type code for the Non-

MAGI RE packet for the same effective month for the current program.

i. There does not exist a Non-MAGI RE packet generated for the same effective month and the Customer Reporting record is not in status of 'Not Applicable' for the current program.
Technical Note: *The driving query for this batch job is the same as the driving query in the existing Non-MAGI RE Packet batch job in CalSAWS.*

2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values:

Field to Populate	Population for RE Packet
Case Id	The case Id associated to the current MC program.
Program Id	The program Id of the current MC program.
Person Id	The primary applicant of the current MC program.
Type Code	FR
Sub Type Code	TDB
Effective Date	The begin date of the current RE Due Month of the MC program.

2.18.3 Execution Frequency

This batch job runs monthly.

2.18.4 Key Scheduling Dependencies

The PB00R600 form balancer job will run after this batch job and distribute the system transaction records among the form generation thread jobs. The PB00R550 - PB00R599 form generation thread jobs will run after the balancer and is responsible for generating the packets.

This batch job is not scheduled to run **until the CalSAWS Go-Live date of the C-IV counties**.

2.18.5 Counties Impacted

Migration Counties

2.18.6 Data Volume/Performance

The estimated number of record this batch processes is 18,000 per month.

2.18.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.19 Create the Mixed Household RE Packet Batch Job for the Migration Counties

2.19.1 Overview

Create a new batch job to send out the Mixed Household RE Packet for the Migration Counties.

2.19.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions. The effective month referenced below is two months following the batch date.
    a. The program is Medi-Cal.
    b. The program is Active.
    c. The program RE due month is the same month as the effective month and the completion date is not set.
    d. The most current accepted and saved regular EDBC for the current MC program has a passing MC budget where there is at least one person receiving a primary MC aid code and the packet type for the aid code is 'Non-MAGI' and there is a passing MAGI budget.
    e. There does not exist a record in the system transaction table for the case with a type code of 'FR', a sub type code for the Mixed Household RE packet for the same effective month for the current program.
    f. There does not exist a Mixed Household RE packet generated for the same effective month and the Customer Reporting record is not in status of 'Not Applicable' or for the current program.
    Technical Note: *The driving query for this batch job is the same as the driving query in the existing Mixed Household RE Packet batch job in CalSAWS.*

2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values:

Field to Populate	Population for RE Packet
Case Id	The case Id associated to the current MC program.

Field to Populate	Population for RE Packet
Program Id	The program Id of the current MC program.
Person Id	The primary applicant of the current MC program.
Type Code	FR
Sub Type Code	TDB
Effective Date	The begin date of the current RE Due Month of the MC program.

2.19.3 Execution Frequency

This batch job runs monthly.

2.19.4 Key Scheduling Dependencies

The PB00R600 form balancer job will run after this batch job and distribute the system transaction records among the form generation thread jobs. The PB00R550 - PB00R599 form generation thread jobs will run after the balancer and is responsible for generating the packets.

This batch job is not scheduled to run **until the CalSAWS Go-Live date of the C-IV counties**.

2.19.5 Counties Impacted

Migration Counties.

2.19.6 Data Volume/Performance

The estimated number of record this batch processes is 2,200 per month.

2.19.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	MC 216 Mockup	MC216_EN.pdf MC216_SP.pdf
2	Client Correspondence	MC 210 RV Mockup	MC210RV_EN.pdf MC210RV_SP.pdf
3	Client Correspondence	MC 217 Mockup	MC217_EN.pdf MC217_SP.pdf
4	Client Correspondence	MC 003 Mockup	MC003_EN.pdf MC003_SP.pdf
5	Client Correspondence	PUB 13 Mockup	PUB13_EN.pdf PUB13_SP.pdf
6	Client Correspondence	PUB 183/PUB 184 Mockup	PUB183.pdf PUB184.pdf
7	Client Correspondence	Migration Counties RE Packet Coversheet Mockup	COVERSHEET_EN.pdf COVERSHEET_SP.pdf
8	Client Correspondence	Aid Code Packet Types Update	CA-216432 Aid Code Packet Type.xlsx
9	Client Correspondence	Type Code Translation	CA-216432 Translations.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	The updated and new MC renewal forms are implemented in CalSAWS. The MAGI, Non-MAGI, and Mixed Household RE packets are created for the migration counties and the existing packet for Los Angeles County were updated with the new forms. New batch process were also implemented to send out the packets for the migration counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-222515

Add State Form GEN 111 (11/20) - Employer Statement Form

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Raj Devidi
	Reviewed By	Pramukh Karla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/17/2020	1.0	Initial Revision	Raj Devidi

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1 OVERVIEW

The purpose of this change is to add the GEN 111 (11/20) - Employer Statement Form to LRS/CalSAWS and generate this form from the Template Repository.

1.1 Current Design

The purpose of this change is to add GEN 111 (11/20) - Employer Statement form to the LRS/CalSAWS and make this form available for all 58 counties.

1.2 Requests

The GEN 111 (11/20) - Employer Statement form will be available in English and Spanish languages.

- This form will be available in the Template Repository for all 58 counties.

1.3 Overview of Recommendations

Add GEN 111 (11/20) - Employer Statement form to LRS/CalSAWS Template Repository in English and Spanish languages. Make the form available for 58 counties.

1.4 Assumptions

1. Page numbers will be added on the form.
2. GEN 111 (11/20) - Employer Statement form will be available for all 58 counties.
3. All form fields are editable unless specified.
4. BRM barcode will be added on GEN 111(11/20) - Employer Statement form with SCR CA-222353.

2 RECOMMENDATIONS

2.1 Add the GEN 111 (11/20)- Employer Statement form to CalSAWS

2.1.1 Overview

Add the Form GEN 111 (11/20) - Employer Statement form to LRS/CalSAWS.

State Form: GEN 111 (11/20)
Programs: All programs
Attached Forms: N/A
Forms Category: Form
Languages: English and Spanish.
Template Repository Visibility: All 58 counties

2.1.2 Description of Change

1. Add GEN 111 (11/20) form in English and Spanish languages to the LRS/CalSAWS Software.

   Form Header: Add CalSAWS State Standard Header
   Form Title/Name: Employer Statement Form
   Form Description: This form is used for the Employee to authorize the release of information and for the Employer to provide information about the Customer's employment.
   Form Number: GEN 111
   Include NA Back 9: N/A
   Imaging Form Name: Employer Statement Form
   Imaging Document Type: Verification Requests
   Form Mockups: Please refer to Section 3.0 – Supporting Document #1.

2. Add the GEN 111 (11/20) - Employer Statement form to Template Repository. The following parameters will be required:

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

3. Populate fields as below when GEN 111 (11/20) - Employer Statement form is generated from Template Repository.

   a. Header fields population

Field	Description
Section: Header (CalSAWS Standard Header), Page 1	
Worker Name	Name of Worker who is assigned to the Program
Worker ID	ID of Worker who is assigned to the Program
Worker Phone Number	Phone Number of Worker who is assigned to the Program
Case Name	Case Name on the Case
Date	Date on which GEN 111 (11/20) form generated
Customer ID	Customer Id of the Participant
Case Number	Case Number on the Case

4. Footer requirements

   As mentioned in mockup.

5. Agency name requirements

   As mentioned in mockup.

6. Add the following barcode options to the GEN 111 (11/20) form

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

7. Add the following print options to the GEN 111 (11/20) 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): Primary Applicant of the Program selected on the Document parameter page.
Mailed From (Return): Program Worker's Office Address
Mail-back-to Address: Program Worker's Office Address
Outgoing Envelope Type: Standard
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Clock Indicator: N
Electronic Signature: Yes
Post to Self Service Portal: Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	GEN 111 (11/20) Form	GEN111_EN.pdf GEN111_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
N/A	Add State Form GEN 111 - Employer Statement Form to the Template Repository for all 58 Counties.	1. Estimate is for updating the form in English and Spanish along with updating the batch and online triggers. 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.	SCR CA-222515 updates GEN 111 (11/20)- Employer Statement Form and implement in English and Spanish languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-222903

Update the Reception Log Purpose functionality and edit capability.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Srividhya Sivakumar, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/21/2021	1.0	Initial	Erika Kusnadi-Cerezo

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1 OVERVIEW

The Reception Log List page is used by County workers to manage/track participants/beneficiary who are visiting the County offices. Workers can make updates or changes to the Reception Log by editing the Reception Log Record. This SCR will update the Reception Log List to hide the ‘Edit’ button, so only Reception Log records from the same day are able to be updated or changed. Secondly, the Reception Log List will be updated to allow workers to make multiple selection on the Purpose field.

The Reception Log Detail page allows the workers to record and edit reception log entries for contact with a participant/beneficiary. This SCR will update the Reception Log Detail page to not display an option on the Detail field if it is not applicable.

1.1 Current Design

Currently in CalSAWS, the ‘Edit’ button displays on the Reception Log List page for Reception Log Records that were created in the past. This allows the worker to make updates or changes to the Reception Log record even though it’s not created on the same day. Secondly, workers are only able to select one option at a time from the Purpose field when inputting a search criteria.

On the Reception Log Detail page, the Detail field is a sortable column that displays a variety of reasons an Individual would contact an office if it’s applicable. The value(s) that display on the Detail field is dependent on the value selected from the Purpose field.

1.2 Requests

Update the Reception Log List page to only display the ‘Edit’ button for Reception Log Records that are created on the same day and allow workers to select more than one option from the Purpose field when inputting the search criteria in order to pull up the appropriate Reception Log records under the Search Results Summary section.

Update the Reception Log Detail page to not display a drop down field under the column titled ‘Detail’ if it’s not applicable.

1.3 Overview of Recommendations

1. Update the Reception Log List page to only display the ‘Edit’ button for Reception Log Records that are created on the same day.
2. Update the Purpose field to allow workers to make multiple selection on the Reception Log List page.
3. Update the Detail field to be greyed out when multiple values are selected on the Purpose field on the Reception Log List page.
4. Update the Reception Log Detail page to not display a drop down field under the column titled ‘Detail’ if it’s not applicable.

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Reception Log List

2.1.1 Overview

The Reception Log List page is used by county workers to manage/track participants who are visiting the County offices. Workers can make updates or changes to the Reception Log by editing the Reception Log Record. This SCR will update the Reception Log List to hide the 'Edit' button, so only Reception Log records from the same day are able to be updated or changed. Secondly, the Purpose field will be updated to be multi select to allow workers the ability to select more than one value.

2.1.2 Reception Log List Mockup

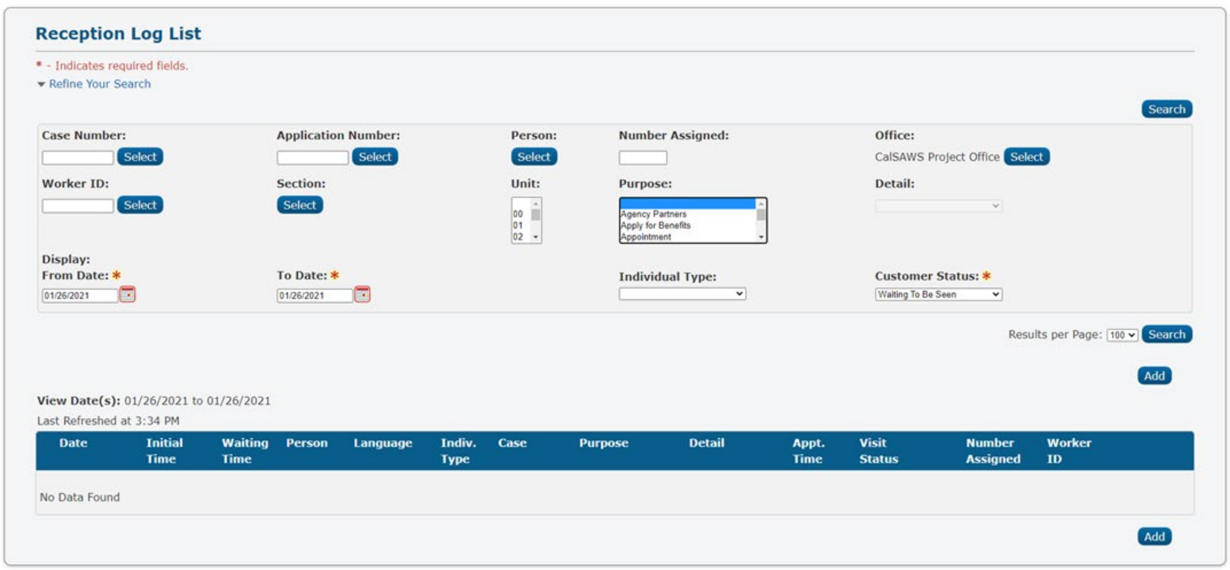

Figure 2.1.1a – Reception Log List

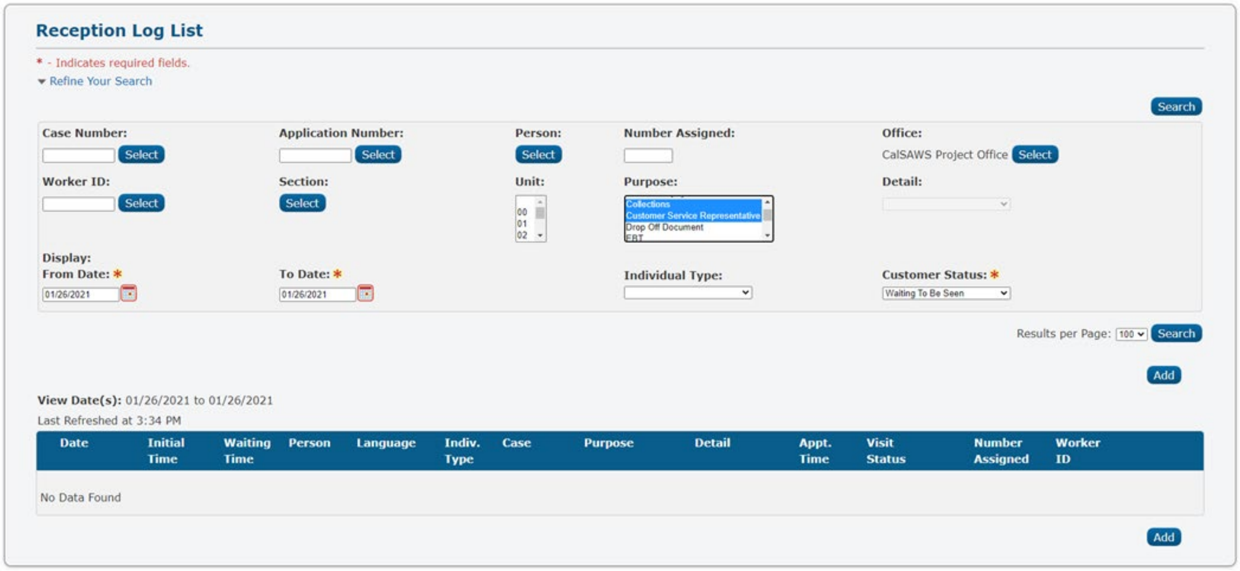

Figure 2.1.1b – Reception Log List

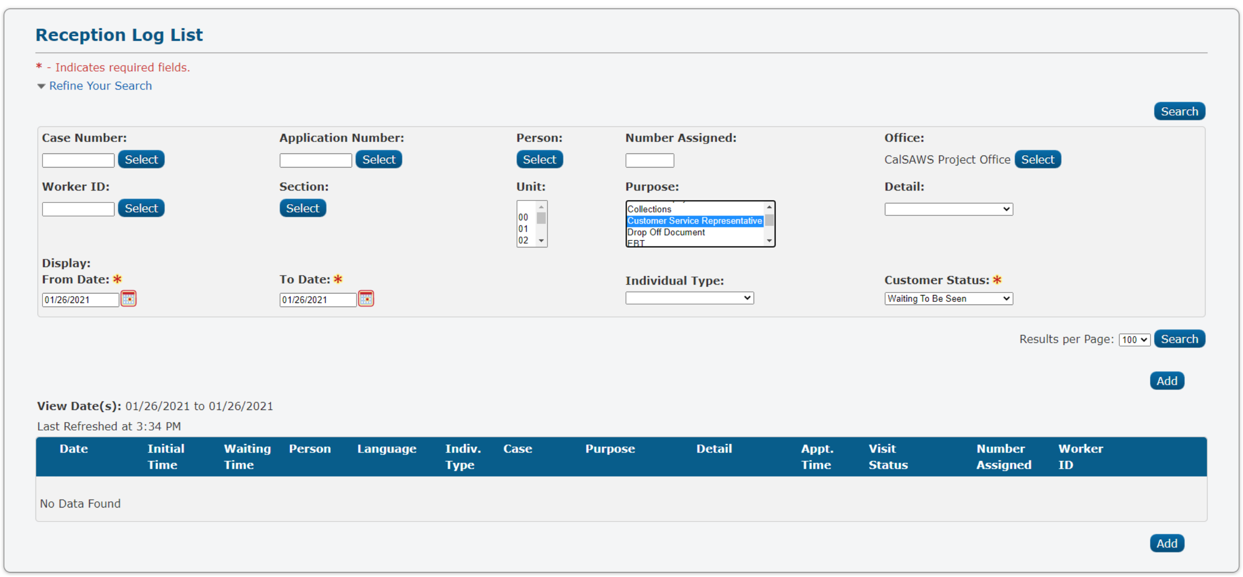

Figure 2.1.1c – Reception Log List

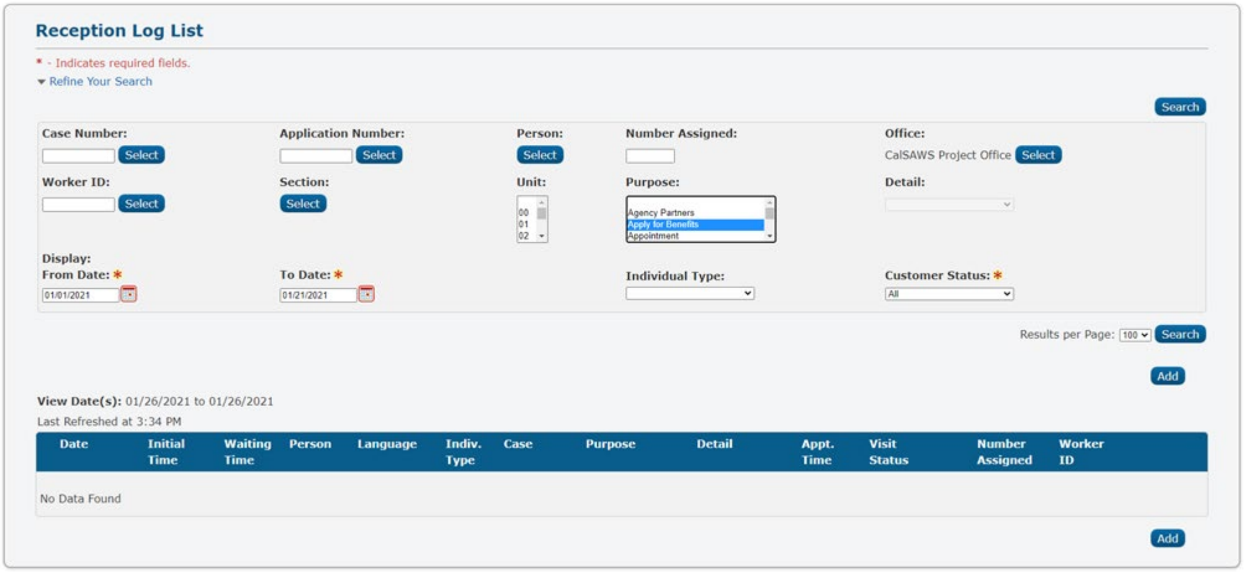

Figure 2.1.1d – Reception Log List

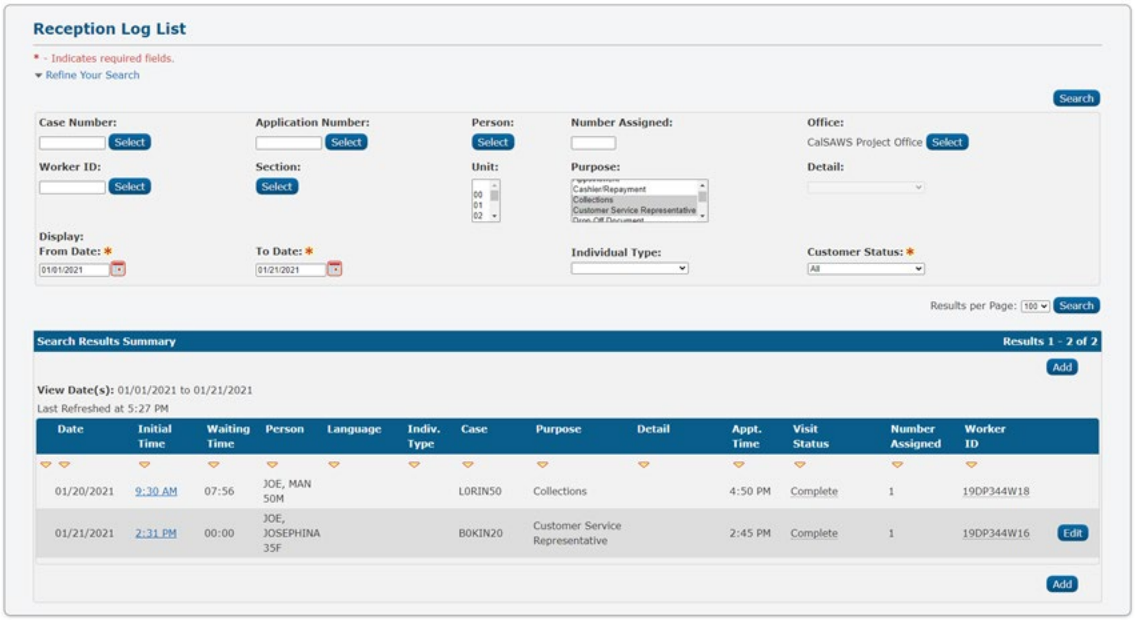

Figure 2.1.1e – Reception Log List

2.1.3 Description of Changes

1. Update the Reception Log List page to hide the 'Edit' button for Reception Log entries that were created in the past as shown on Figure 2.1.1e.
   a. For Reception Log entries that are created on the same day, the 'Edit' button will continue to display.

2. Remove the red asterisk that is located next to the word 'Display:' and update the spacing between 'Display:' and 'From Date:' as shown on Figure 2.1.1a through Figure 2.1.1e.
3. Update the Purpose field to display all the values within a box as shown on Figure 2.1.1a through Figure 2.1.1e.
    a. Within the box there will be a vertical scroll bar that will allow the workers to scroll through all the values listed.
    b. Purpose field will be updated to allow worker to select multiple values from the list as shown on Figure 2.1.1b.
    c. Purpose field will default to 'Blank' as shown on Figure 2.1.1a.
4. Update the Detail field to be greyed out when the value selected on the Purpose field is 'Blank' (as shown on Figure 2.1.1a) or when there are multiple values selected on the Purpose field (as shown on Figure 2.1.1b).

    Note: The Detail field will continue to behave the way it is currently, if there is only one value selected on the Purpose field.

2.1.4 Page Location

- **Reception Log Link on the CalSAWS Home Page**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Reception Log Detail

2.2.1 Overview

The Reception Log Detail page allows the workers to record and edit reception log entries for contact with a participant/beneficiary. This SCR will update the Reception Log Detail page to not display an option on the Detail field if it is not applicable.

2.2.2 Reception Log Detail Mockup

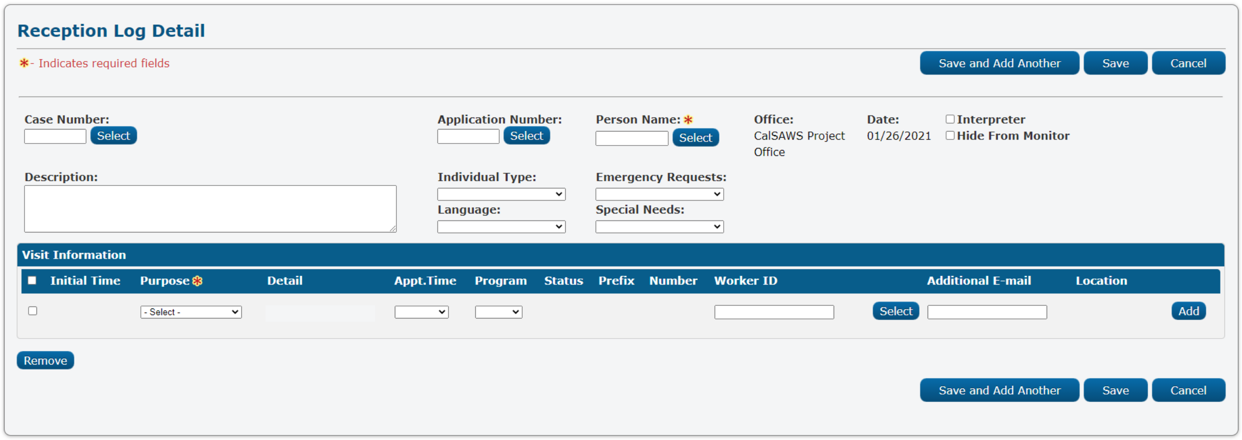

Figure 2.2.1a – Reception Log Detail

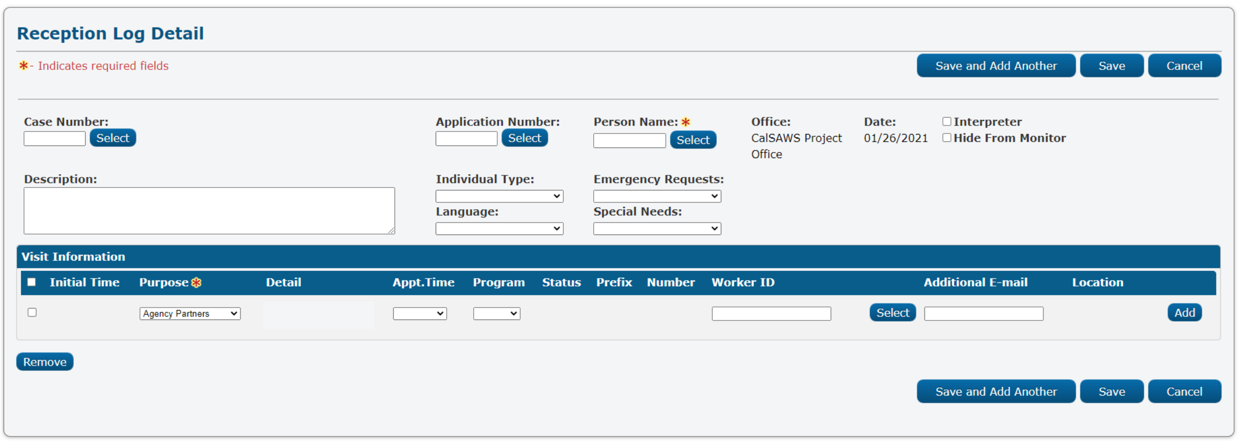

Figure 2.2.1b – Reception Log Detail

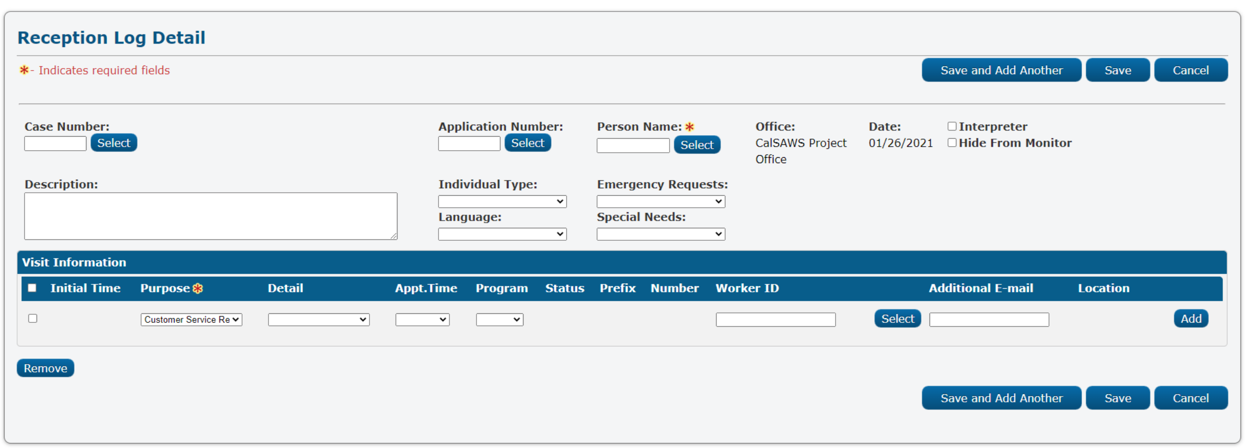

Figure 2.2.1c – Reception Log Detail

2.2.3 Description of Changes

1. Update the Reception Log Detail page to dynamically display a drop down field under the column titled 'Detail'.
   a. When there is no value(s) to be displayed on the Detail field (this is dependent on the value selected on the Purpose field), do not display the drop down field as shown on Figure 2.2.1a and Figure 2.2.1b.
   b. When there are value(s) to be display on the Detail field (this is dependent on the value selected on the Purpose field), display the drop down field as it currently is (as shown on Figure 2.2.1c).

2.2.4 Page Location

- **Reception Log Link on the CalSAWS Home Page**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-223487

DDID 1233 - Update Office dropdown on MAGI Referral Search page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	M. Feliciano-Nelson
	Reviewed By	Derek Goering, Prashant Goel, Geetha Ramalingam, Akira Moriguchi, William Baretsky, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/17/2021	.5	Draft Design	M. Feliciano
2/23/2021	1.0	Reviewed with Consortia BA	M. Feliciano

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1 OVERVIEW

This document details the updates to the System in the MAGI Referral Search page to only show the offices based on logged in county when searching MAGI Referrals by Office.

1.1 Current Design

The MAGI Referral Search page allows the user to search for MAGI Determinations by MAGI Case Number, Case Number, Status, Referral Date, Type, Office, and Zip Code.

If the user logs into the System in Los Angeles County, the MAGI Referral Search page 'Office' dropdown displays a list of the District offices in Los Angeles County as well as all other Counties' offices that have the same office identifier to the District office code in Los Angeles.

With SCR CA-207366, there is an option for County Administrators to activate a new MAGI Referral assignment process and to maintain office assignments by zip code. After migration, for any of the 57 Migration counties who activate this new functionality, the MAGI Referral Search page will allow filtering of transactions by office. Los Angeles County's current office dropdown list and referral assignment process will remain unchanged.

1.2 Requests

Update logic in the MAGI Referral Search page 'Office' dropdown to filter and display locations based on logged in county.

1.3 Overview of Recommendations

Update logic in the MAGI Referral Search page 'Office' dropdown to filter and display locations based on logged in county.

1.4 Assumptions

Los Angeles County's current referral assignment process will remain unchanged.

2 RECOMMENDATIONS

2.1 MAGI Referral Search Page

2.1.1 Overview

Update logic in the MAGI Referral Search page 'Office' dropdown to filter and display locations based on the user's logged in county.

2.1.2 MAGI Referral Search

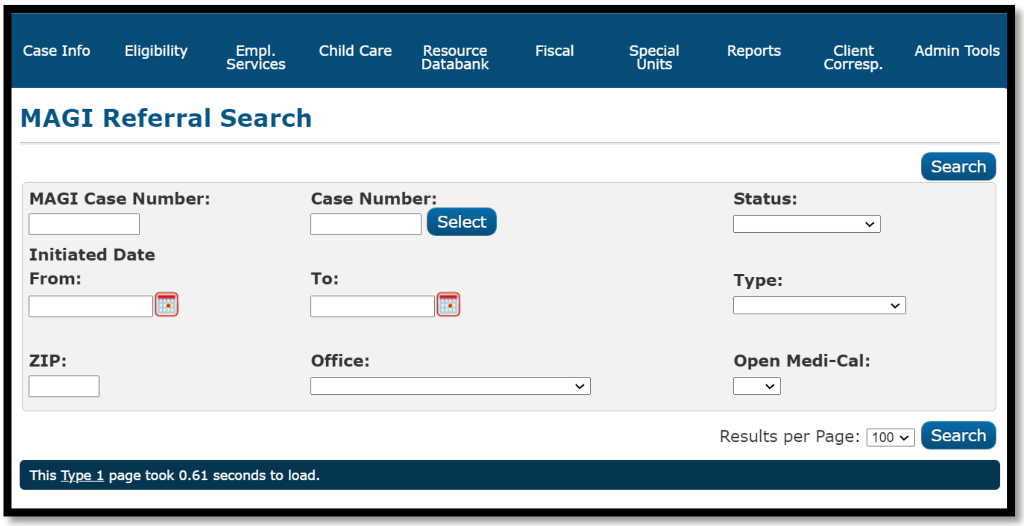

Figure 2.1.1 – MAGI Referral Search

2.1.3 Description of Changes

1. Update logic in the MAGI Referral Search page 'Office' dropdown to filter and display locations based on logged in county.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI

2.1.5 Security Updates

No updates.

2.1.6 Page Mapping

No updates.

2.1.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.2 Automated Regression Test

2.2.1 Overview

Create a new automated regression test script to verify that the contents of the Office dropdown on the MAGI Referral Search page are restricted to the county in context.

2.2.2 Description of Change

Create a new automated regression test script to verify that the Office dropdown on the MAGI Referral Search page:

1. Contains values from the county currently in context
2. Does not contain values from a county not currently in context

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1233	The CONTRACTOR shall create new Admin pages and referral assignment logic for the 57 Migration Counties to maintain assignments of MAGI Referral zip code to an office. Migration Counties with the activated referral assignment functionality will have the MAGI Referral Search page's 'Office' filter display offices derived from the new Admin pages. Los Angeles County will maintain utilizing their existing shape files for their District Offices on the MAGI Referral Search Page.	Los Angeles County will continue to utilize existing LRS functionality to assign MAGI Referrals based on office boundaries/shape file. The 57 Counties will utilize the new referral assignment logic to assign MAGI Referrals to offices based on zip code.	Updating logic to only show Los Angeles County District offices on MAGI Referral Search page when Los Angeles County user is logged in.

California Statewide Automated Welfare System

Design Document

CA-224255

Task Mgt - CSC Task Closure from My Task/Task Search

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/01/2021	1.0	Initial Revision	Mayuri Srinivas

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1 OVERVIEW

1.1 Current Design

Currently, the Worklist Pages are communicating with the County Call Center Solution to close associated call center tickets when Tasks are completed.

CA-214929 DDID 655 implemented a set of Pop Up pages to assist with management of Tasks. The Task Pop Up pages do not interact with the County Call Center Solution.

1.2 Requests

Update the Task Pop-Up pages to communicate with the County Call Center Solution when Tasks are completed, similar to Worklist page functionality.

1.3 Overview of Recommendations

1. Update Task Pop Up Task – Search Page's Complete Button to make the request to close Call Center tickets as necessary.
2. Update Task Pop Up – Task Detail Page to make the request to close the Call Center tickets as necessary.
3. Update Task Pop Up Task – My Tasks Page's Complete Button to make the request to close Call Center tickets as necessary.

1.4 Assumptions

1. This design is limited to the current Los Angeles County Call Center Solution.
2. The logic that interacts with the County Call Center Solution will not be modified.
3. Interaction with the County Call Center Solution is limited to Task completion actions.
4. This design will not process historical transactions. This functionality only applies to Task completion actions that occur after release.
5. This design impacts real time processes. There is no impact to Batch processes.

2 RECOMMENDATIONS

2.1 Task Pop Up – Task Search Page

2.1.1 Overview

The Task Pop Up – Task Search page allows the User to search and manage Tasks that have been created within the CalSAWS System. Task completion processing requires updates to communicate with the County Call Center Solution.

2.1.2 Task Pop Up – Task Search Page Reference Example

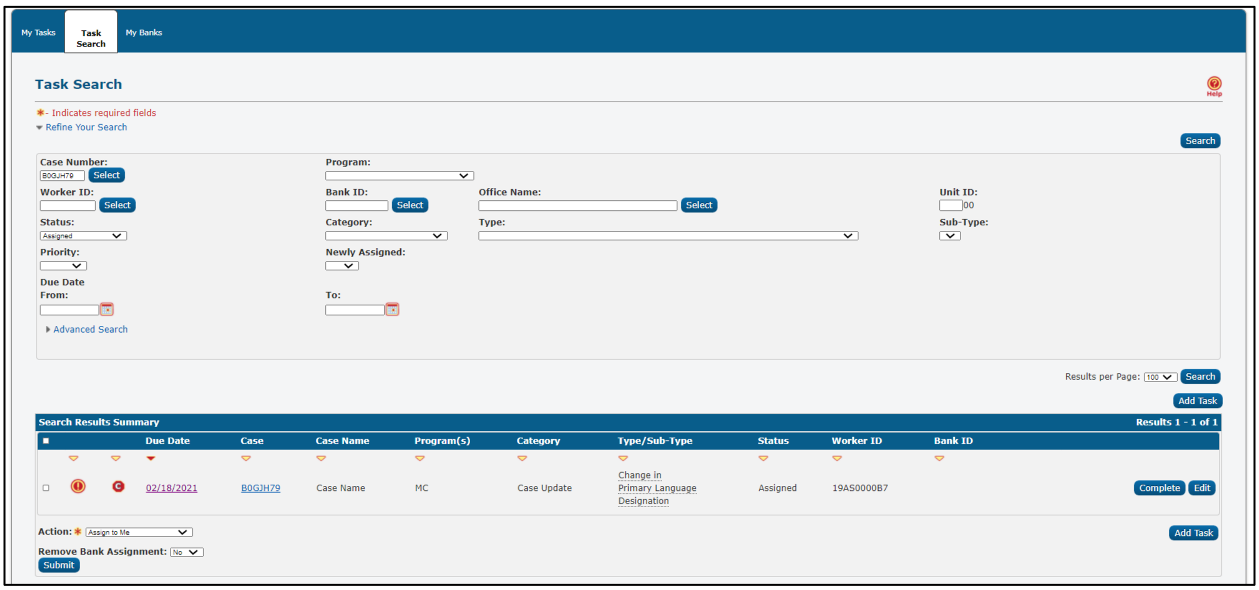

Figure 2.1.2.1 – Reference to Task Pop Up – Search Page

2.1.3 Description of Changes

1. Update page functionality to send a real-time web service Task completion transaction to the County Call Center Solution when a Task is completed, and the Task is associated to a Call Center ticket. A Task is considered completed when the Status becomes "Completed" via the Complete Button.

2.1.4 Page Location

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

Page is accessed through Utility bar's Tasks Option. Through the Pop-Up, click Task Search page.

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 Task Pop Up – Task Detail Page

2.2.1 Overview

The Task Pop Up - Task Detail page is accessible from the Task Pop Up - Task Search page. This page can be used to view, edit, or create Tasks. Manual Status change functionality will be updated.

2.2.2 Task Pop Up – Task Detail Page

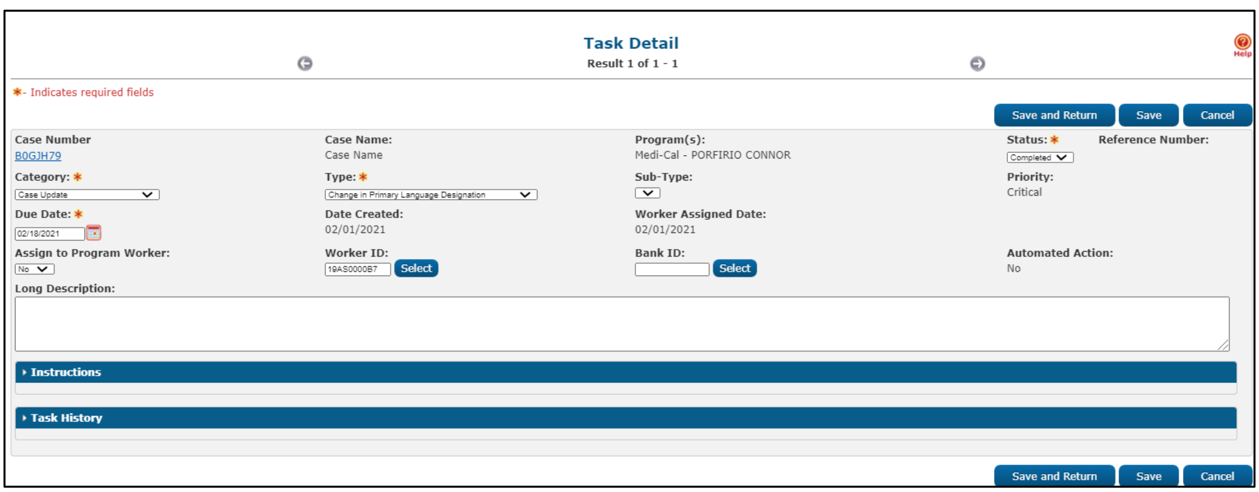

Figure 2.2.2.1 – Reference to Task Pop Up – Task Detail Page

2.2.3 Description of Changes

1. Update page functionality to send a real-time web service Task completion transaction to the County Call Center Solution when a Task is completed, and the Task is associated to a Call Center ticket. A Task is considered completed when the Status becomes "Completed" from the Worklist and Task Pop-Up pages.

2.2.4 Page Location

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

Page is accessed through Utility bar's Tasks Option. Through the Pop-Up, click Task Search page and either create or edit a Task to navigate to this page.

2.2.5 Security Updates

N/A.

2.2.6 Page Mapping

N/A.

2.2.7 Page Usage/Data Volume Impacts

N/A.

2.3 Task Pop Up – My Tasks Page

2.3.1 Overview

The Task Pop Up – My Tasks page allows the User to manage Tasks that have been created within the CalSAWS System and assigned to the User. Task completion processing requires updates to communicate with the County Call Center Solution.

2.3.2 Task Pop Up – My Tasks Page

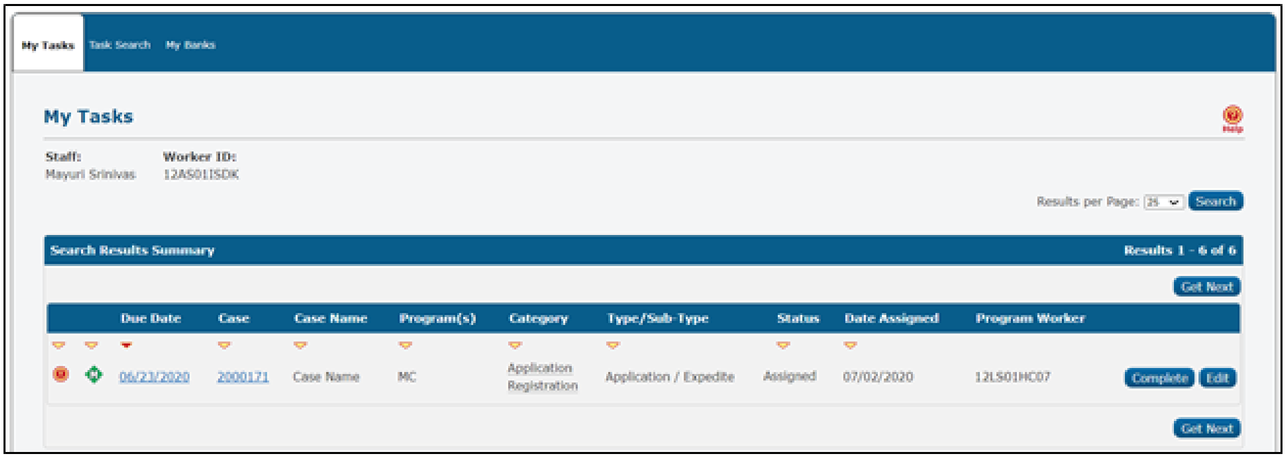

Figure 2.3.2.1 – Reference to Task Pop Up – My Tasks Page

2.3.3 Description of Changes

1. Update page functionality to send a real-time web service Task completion transaction to the County Call Center Solution when a Task is completed, and the Task is associated to a Call Center ticket. A Task is considered completed when the Status becomes "Completed" via the Complete Button.

2.3.4 Page Location

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

Page is accessed through Utility bar's Tasks Option. Through the Pop-Up, click My Tasks page.

2.3.5 Security Updates

N/A.

2.3.6 Page Mapping

N/A.

2.3.7 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
655	The CONTRACTOR shall migrate the Task icon link on the Utilities Navigation Bar to provide access to the My Task and Task Search pages.	None	This design preserves communication with the County Call Center Solution when Tasks are completed.

5 MIGRATION IMPACTS

N/A.

6 OUTREACH

N/A.

7 APPENDIX

N/A.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-224600

Disable Reception Log 3-phase escalation process for 57 counties.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Himanshu Jain, Srividhya Sivakumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/9/2021	1.0	Initial	Erika Kusnadi-Cerezo

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1 OVERVIEW

The Reception Log is used to track Applicants/Participants visits to County offices. When a Reception Log record is created an electronic message is automatically sent to Message Center (a worker will need to be associated to the Reception Log record). Message Center/E-mail notification, informs the worker that the Applicants/Participants are checked-in and is currently waiting. In the event that the customer status for the Reception Log record is still in Waiting to be Seen status after 30 minutes from when the Reception Log record was created, the system proceeds with the 1st level of escalation. When the customer status remained in Waiting to be Seen status 30 minutes after the 1st level of escalation occured, the system proceeds with the 2nd level of escalation and then proceed to the 3rd level of escalation when the customer status remain in Waiting to be Seen status 30 minutes after the 2nd level of escalation. Lastly, a 4th level of escalation occurs if the customer status remained in Waiting to be Seen status 30 minutes after the 3rd level escalation. During the escalation process the Person's name is also bolded and underlined along with the hourglass icon being displayed at different interval process. This SCR will disable all four levels of escalation process in CalSAWS and not update the Person's name to be bolded, underlined and not display the hourglass icon for all the Counties (57 counties) except for Los Angeles County.

1.1 Current Design

Currently in CalSAWS there are four different levels of escalation when the customer status for the Reception Log record is in Waiting to be Seen for longer than 30 minutes. Each escalation process will happen every 30 minutes from when the Reception Log record was created and the customer status remained in Waiting to be Seen. The Reception Log List page also displays an hourglass icon on the Waiting Time column when the customer status is in Waiting to be Seen after 30 minutes.

- 1st level of escalation occurs 30 minutes after the Reception Log was first created and the customer status remains in Waiting to be Seen. A Message Center/E-mail notification is sent to the following staffs and the Person's name in the Person column is bolded on the Reception Log List page.
    - Send Message Center/E-mail Notification to the Worker assigned to the Reception Log record (if there is one) and to the Duty Worker.
- 2nd level of escalation occurs 30 minutes after the 1st level of escalation and the customer status remains in Waiting to be Seen. A Message Center/E-mail notification is sent to the following staffs and the Person's name under the Person column is underlined on the Reception Log List page (Person's name will be bolded and underlined on the Reception Log list page after the 2nd level of escalation occurs).
    - Send Message Center/E-mail Notification to the Worker Assigned to the Reception Log Record (if there is one), Duty Worker and Supervisor.
- 3rd level of escalation occurs 30 minutes after the 2nd level of escalation and the customer status remains in Waiting to be Seen. A Message Center/E-mail notification is sent to the following staffs:

    - Send Message Center/E-mail Notification to the Worker Assigned to the Reception Log Record (if there is one), Duty Worker, Supervisor and Deputy Director.
- 4th level of escalation occurs 30 minutes after the 3rd level of escalation and the customer status remains in Waiting to be Seen. A Message Center/E-mail notification is sent to the following staffs:
    - Send Message Center/E-mail Notification to the Worker Assigned to the Reception Log Record (if there is one), Duty Worker, Supervisor, Deputy Director and Director.

1.2 Requests

Update CalSAWS 4 level escalation process to be disabled for all the Counties except for Los Angeles County and to update the Reception Log list page to no longer display the hourglass icon, bold & underlined the Person's name on the Reception Log List.

1.3 Overview of Recommendations

1. Disable the Reception Log escalation process for all the counties except of Los Angeles.
2. Update the Reception Log List to not bold the Person's name under the Person column after the 1st level of escalation for all the Counties except for Los Angeles.
3. Update the Reception Log List to not underline the Person's name under the Person column after the 2nd level of escalation for all the Counties except for Los Angeles.
4. Update the Reception Log List to not display the hourglass icon under the Waiting Time column when the Reception Log record is in Waiting to be Seen status for longer then 30 minutes for all Counties except for Los Angeles.

1.4 Assumptions

1. All existing functionality will remain unchanged unless it's part of this design.

2 RECOMMENDATIONS

The Reception Log four levels of escalation process will be disabled for all the Counties except for Los Angeles county. The Reception Log List will also be updated to no longer display the hourglass icon under the Waiting Time column, bold and underline the Person's name under the Person column when the customer status for the Reception Log record are in Waiting to be Seen for too long for all the Counties except for Los Angeles.

2.1 Reception Log List

2.1.1 Overview

Currently in CalSAWS the Reception Log List page displays an hourglass icon and the Person's name is bolded and underlined for reception log records where the customer status are in Waiting to be Seen for to long. This SCR will update the Reception Log List to no longer display the hourglass icon, bold and underline the Person's name for all the Counties except for Los Angeles.

2.1.2 Reception Log List Mockup

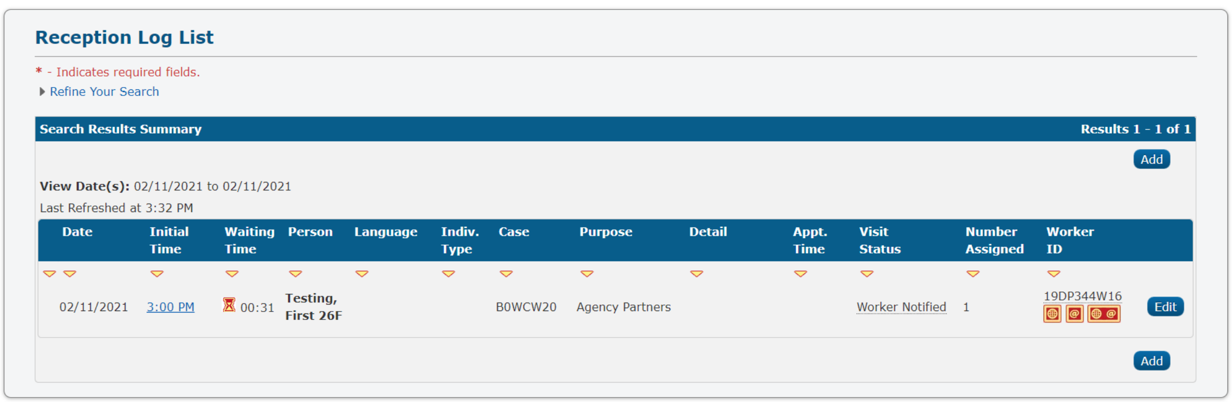

Figure 2.1.1 – Reception Log List Page with Hourglass icon (30 minutes after Reception Log was created and customer status is still in Waiting to be Seen Status) and Person's Name being bolded after the 1st level of escalation (For LA County – This is currently existing in CalSAWS)

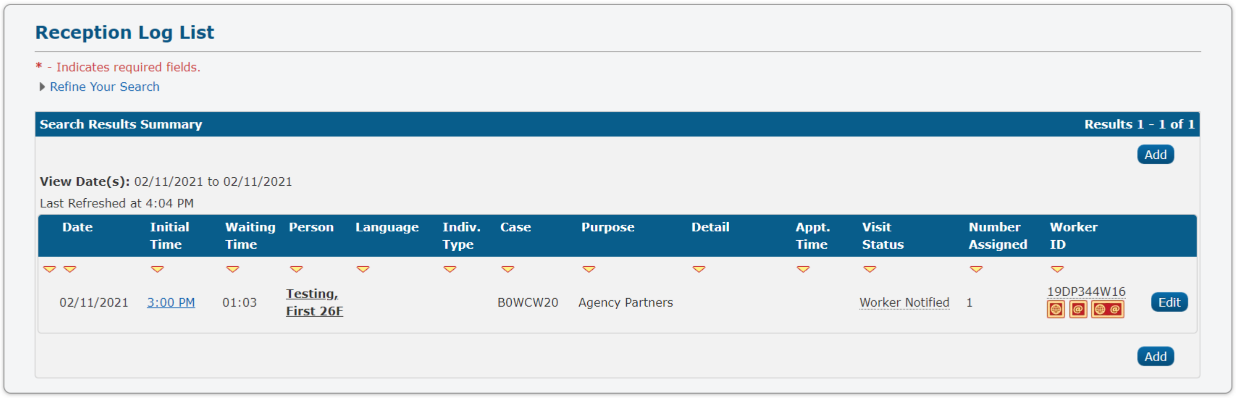

Figure 2.1.2 – Reception Log List Page with Person's Name underlined after 2nd level of escalation (Person's Name was bolded after the 1st level of escalation). (For LA County – This is currently existing in CalSAWS)

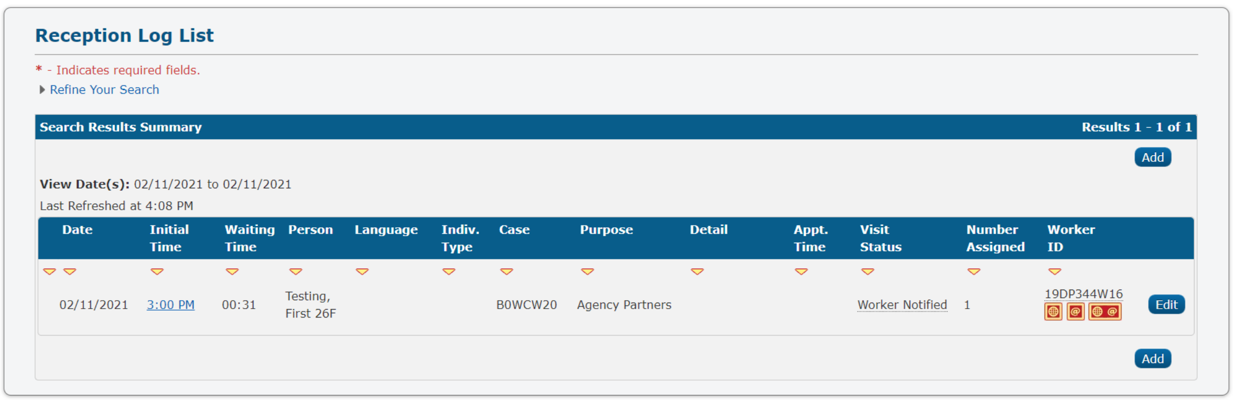

Figure 2.1.3 Reception Log List Page for Reception Log Record for Waiting to be Seen customer status for more than 30 minutes.

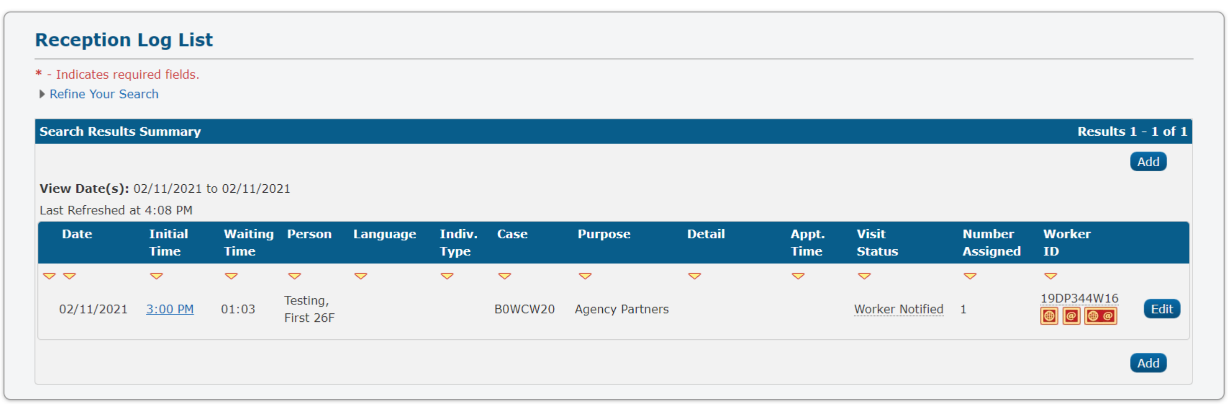

Figure 2.1.4 Reception Log List Page with Reception Log Record for customer status in Waiting to be Seen for more than 1 hour.

2.1.3 Description of Changes

1. Update the Reception Log List page to no longer display the hourglass icon under the Waiting Time column when the customer status for the

reception log record is in Waiting to be Seen, 30 minutes after the reception log record was created as shown on Figure 2.1.3.

    a. This applies to all the Counties except for Los Angeles (for Los Angeles county this process will remain unchanged).

   Note: Hourglass icon disappears after 30 minutes.

2. Update the Reception Log List page to no longer bold the Person's name under the Person column after the 1st level of escalation (this occurs 30 minutes after the reception log record is created and customer status remains in Waiting to be Seen) as shown on Figure 2.1.3.
    a. This applies to all the Counties except for Los Angeles (for Los Angeles county this process will remain unchanged).
3. Update the Reception Log List page to no longer underline the Person's name under the Person column after the 2nd level of escalation (this occurs 30 minutes after the 1st level of escalation and customer status remains in Waiting to be Seen) as shown on Figure 2.1.4.
    a. This applies to all the Counties except for Los Angeles (for Los Angeles county this process will remain unchanged).

2.1.4 Page Location

- **CalSAWS Homepage**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Reception Log 4 levels of escalation

2.2.1 Overview

Currently in CalSAWS the Reception Log have four levels of escalation process for when the customer status for the Reception Log record is in Waiting to be Seen for a long time. Each level of escalation occurs every 30 minutes from when the Reception Log record was created. For each level of escalation the system will send a Message Center/E-mail notification to the appropriate staffs. This SCR will disable the four levels of escalation for all the Counties except for Los Angeles.

2.2.2 Mockup

N/A

2.2.3 Description of Changes

1. Update the Reception Log four levels for escalation to be disabled for all the Counties except for Los Angeles (for Los Angeles county this process will remain unchanged).
    a. Update the logic used for the 1st level of escalation to not send a Message Center/E-mail notification when the customer status remains in Waiting to be Seen for longer than 30 minutes from when the Reception Log record is first created.
        i. Message Center/E-mail notification will not be sent to the Worker assigned to the Reception Log record (if there is one) and to the Duty Worker.
        ii. This will apply to all Counties except for Los Angeles county (for Los Angeles, 1st level escalation will still be in place).
    b. Update the logic used for the 2nd level of escalation to not send a Message Center/E-mail notification when the customer status remains in Waiting to be Seen for longer than 1 hour.
        i. Message Center/E-mail notification will not be sent to the Worker Assigned to the Reception Log Record (if there is one), Duty Worker and Supervisor.
        ii. This will apply to all Counties except for Los Angeles county (for Los Angeles, 2nd level escalation will still be in place).
    c. Update the logic used for the 3rd level of escalation to not send a Message Center/E-mail notification when the customer status remains in Waiting to be Seen for longer than 1.5 hours.
        i. Message Center/E-mail notification will not be sent to the Worker Assigned to the Reception Log Record (if there is one), Duty Worker, Supervisor and Deputy Director.
        ii. This will apply to all Counties except for Los Angeles county (for Los Angeles, 3rd level escalation will still be in place).
    d. Update the logic used for the 4th level of escalation to not send a Message Center/E-mail notification when the customer status remains in Waiting to be Seen for longer than 2 hours.
        i. Message Center/E-mail notification will not be sent to the Worker Assigned to the Reception Log Record (if there is one), Duty Worker, Supervisor, Deputy Director and Director.

ii. This will apply to all Counties except for Los Angeles county (for Los Angeles, 4th level escalation will still be in place).

2.2.4 Page Location

N/A

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.2.4	The LRS shall, upon request, display a traffic log summary, including the time in hours and minutes that an individual has been waiting for services.	The system will continue to monitor the amount of time an individual has been waiting for service and will continue with the escalation process for Los Angeles County. For all the other 57 counties, this is being tracked through the Dashboard, thus the escalation process are being disabled for them.