CalSAWS

California Statewide Automated Welfare System

Design Document

CA-50300

Update the CalSAWS Transportation Types Dropdown on the Need Detail Page

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/15/2020	1.0	Initial Version	Jimmy Tu
10/27/2020	1.1	Updated the document with imaging form name, imaging document type, added two new transportation types and removed one transportation type removal request.	James Tran

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1 OVERVIEW

This SCR is to update the CalSAWS "Transportation" Need Type dropdown to include additional fields that are currently missing. This has added an additional workload for county staff as they must issue these missing transportation need types as "Other" which requires additional approval.

1.1 Current Design

Workers are currently required to authorize certain Transportation Need Types as "Other" which will require additional county staff review. This impacts the county staff's workload and requires additional wait time for participants to receive their transportation payments.

1.2 Requests

1. Update the Transportation Need Types on the Need Detail Page in the CalSAWS.
2. Update the NA 820 form to reflect the appropriate information.

1.3 Overview of Recommendations

1. Update the Transportation Need Types on the Need Detail Page for county staff to select the appropriate transportation need type.
2. Generate NA 820 to reflect the appropriate information on transportation payment type issued.

1.4 Assumptions

1. This functionality will be inherited by all other 57 counties after migration.
2. The missing Transportation Need Types of Carpool, Vanpool, Provider Transportation Service, Subway/Train/Rail, and Rideshare will be available in CalSAWS for workers to select the appropriate type and enter the value amount.
3. The new Transportation Need Types (Carpool, Vanpool, Provider Transportation Service, Subway/Train/Rail, and Rideshare) being added will be available for the following programs – REP, Cal-Learn, WTW, CFET.
4. The new Transportation Need Types (Carpool, Vanpool, Provider Transportation Service, Subway/Train/Rail, and Rideshare) being added will only be issued as Payment Requests.
5. Adding or removing "Service Type Description" fields for the "Bus Pass – Valid Month" transportation need type on the "Service Arrangement Detail" page can be done through the "Valuable Type Detail" page. Workers will also be able to enter the amount to be issued for Transportation Need Type here.
6. Counties will be able to add configurations and issuance thresholds themselves after the implementation of CA-212943 "Update Issuance Threshold functionality to be County configurable" in 20.11.
7. There are no changes to the NA821 with this SCR.

8. New Transportation Need Types "Vehicle Service" and "DMV Fees / License" will be included with SCR CA-207320 in 21.01.
9. No new Pay Codes will be added in CalSAWS with this system change request.

2 RECOMMENDATIONS

2.1 Need Detail Page

2.1.1 Overview

The Need Detail Page allows the worker to add a specific need for an individual by filling out the webpage. Currently this page is missing Transportation Need Types in the "Type" field when the category "Transportation" is chosen.

Workers have been using the Transportation Need Type "Other" to issue needs for the missing transportation need types, Carpool, Vanpool, Provider Transportation Service, Subway/Train/Rail, and Rideshare. This requires additional review and approval from county staff, giving them a larger workload and requiring extra wait time for participants to receive their benefits.

2.1.2 Need Detail Page Mockup

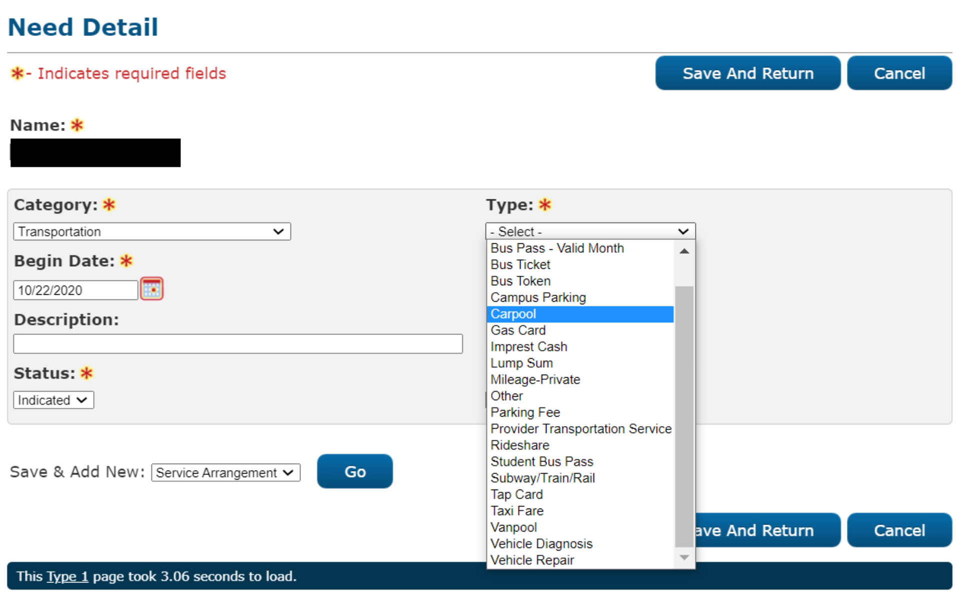

Figure 2.1.1 – Update Transportation Need Type Dropdown

2.1.3 Description of Changes

1. Add the following transportation need types in the "Type" field for the "Transportation" category in CalSAWS:
   a. Carpool
   b. Provider Transportation Service
   c. Vanpool
   d. Subway/Train/Rail
   e. Rideshare

2.1.4 Page Location

- **Global:** Empl. Services
- **Local:** Supportive Services
- **Task:** Needs

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

None.

2.1.7 Page Usage/Data Volume Impacts

None

2.2 Service Arrangement Detail Page

2.2.1 Overview

The Service Arrangement Detail Page allows the worker to create a Payment/Valuable request for individuals to receive benefits.

This section is being added to display how the Service Arrangement Line Item section would display for the new Transportation Need Types being added.

2.2.2 Service Arrangement Detail Page Mockup

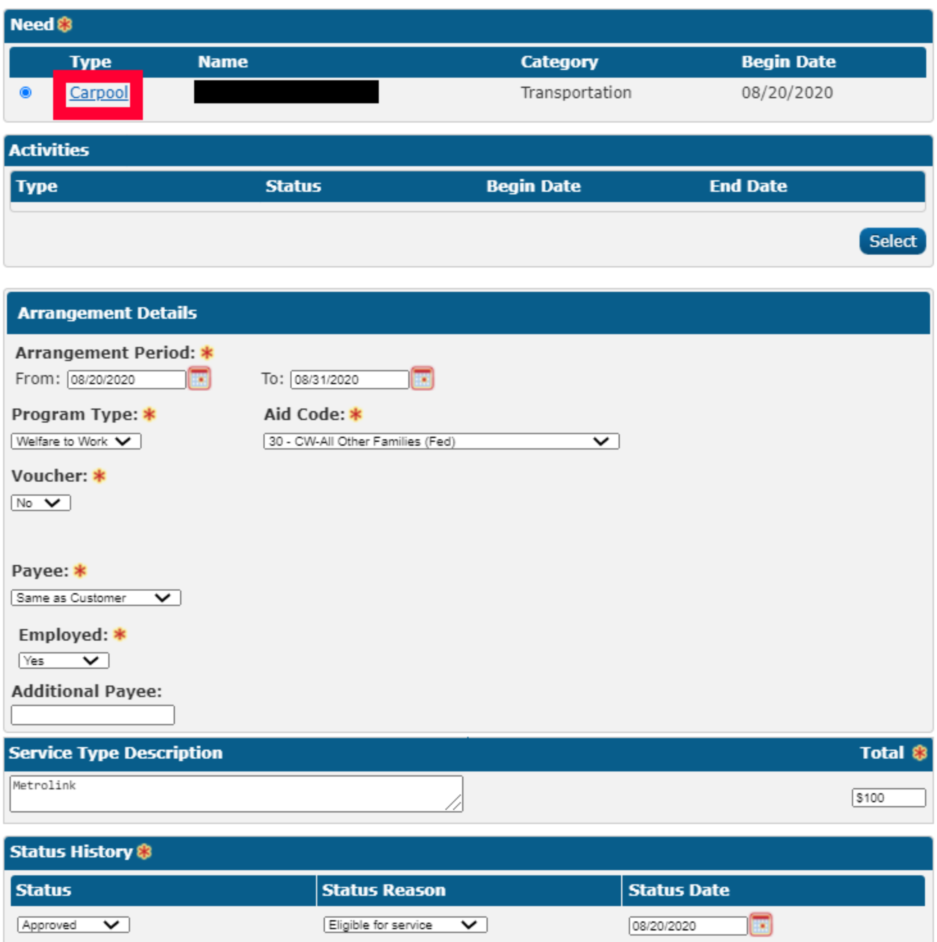

Figure 2.2.1 - Service Arrangement Detail Page Mockup

2.2.3 Description of Changes

1. Update the Service Arrangement Line Item section to display the new Transportation Need Types (Carpool, Vanpool, Provider Transportation Service, Subway/Train/Rail, and Rideshare) being added when users create a Service Arrangement.

2.2.4 Page Location

- **Global:** Empl. Services
- **Local:** Supportive Services
- **Task:** Service Arrangements

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping

4. Security Groups

Security Group	Group Description	Group to Role Mapping

2.2.6 Page Mapping

None.

2.2.7 Page Usage/Data Volume Impacts

None

2.3 Updates to Approval of Transportation Form NA 820

2.3.1 Overview

This form is the Approval of Transportation form and it is used to notify the individual that he or she has been approved for transportation. The individual's hearing rights are also listed on the form.

This form can be generated via Batch or via the Template Repository.

State Form: NA 820 (01/2001)

Current Programs: Cal-Learn, REP, WTW

Current Attached Forms: NA Back 9

Current Forms Category: Form

Existing Languages: English and Spanish

2.3.2 Description of Change

The change outlined in this SCR proposes that five transportation need types be added in the Type dropdown menu.

The transportation need types relevant to this SCR are populated on the NA 820 form within the fourth line with a checkbox. The line begins with the verbiage, "The County has approved the cost of another form of transportation:". Immediately following this verbiage is an underlined section that contains a variable population fill, and it will fill with the transportation type.

The following five transportation need types are being added to the drop down: "Carpool", "Provider Transportation Service", "Vanpool", "Subway/Train/Rail" and "Rideshare". These transportation need types are made available in both English and Spanish.

1. **Updates to Approval of Transportation Form NA 820 Form XDP**

   All text and other items on the form will remain the same with only one exception.

   Next to the fourth checkbox on the left side of the page, there is a line with the following verbiage: "The County has approved the cost of another form of transportation:". Immediately following it is an underline with a pre-population variable field that populates the name of the transportation type.

The only change made to this XDP is that the underline has been extended to accommodate transportation types with longer names. A side effect of this change is that the total number of lines on the left side of the screen will increase by one, which pushes the "Rules" verbiage to the top of the right hand side.

Updated Languages:

English and Spanish

Include NA Back 9: Y

Imaging Form Name: Transportation Approval

Imaging Document Type: Notification/NOA

Form Mockups/Examples: See Supporting Document #1 and #2

2.4 Code Table Change Request

2.4.1 Overview

A CTCR will be created to update Categories 164 and 1870 in the Code Detail table to add the new Transportation Need Types, Carpool, Vanpool, Provider Transportation Service, Subway/Train/Rail, and Rideshare.

2.4.2 Description of Changes

1. Add the following Transportation Need Types to Category 164 of the Code Detail Table.
   i. Carpool
   ii. Provider Transportation Service
   iii. Vanpool
   iv. Subway/Train/Rail
   v. Rideshare
2. Update the Code Hierarchy Table (Code_Hierchy) to add the relationships between the new Transportation Need Types and Need Categories.

PARNT_CODE_ID	Long_Decode_Name for Child Code ID	PARNT_CATGRY_ID
6402	Carpool	163
6402	Provider Transportation Service	163
6402	Vanpool	163

6402	Subway/Trail/Rail	163
6402	Rideshare	163

3. Add the following records to Category 1870 of the Code Detail Table:
    i. Carpool – CL
    ii. Carpool – RE
    iii. Carpool – WT
    iv. Carpool - CFET
    v. Vanpool – CL
    vi. Vanpool – RE
    vii. Vanpool – WT
    viii. Vanpool - CFET
    ix. Provider Transportation Service – CL
    x. Provider Transportation Service – RE
    xi. Provider Transportation Service – WT
    xii. Provider Transportation Service – CFET
    xiii. Subway/Train/Rail – CL
    xiv. Subway/Train/Rail – RE
    xv. Subway/Train/Rail – WT
    xvi. Subway/Train/Rail – FSET
    xvii. Rideshare – CL
    xviii. Rideshare – RE
    xix. Rideshare – WT
    xx. Rideshare – FSET

    Note: All the above records being added to Category 1870 will be issued as Payment Requests.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	State version of NA 820 in English	See "NA820.PDF" attached to the SCR for the English version.
2	Form	State version of NA 820 in Spanish	See "NA820_SP.PDF" attached to the SCR for the Spanish version.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.27	The LRS/CalSAWS shall process and maintain alternative transportation payments (e.g., car pool, taxi vouchers, parking fees).	This requirement is met by updating the Need Detail page to include additional transportation payment need types of Carpool, Vanpool, Provider Transportation Service, Subway/Train/Rail, and Rideshare.

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-58579

ACWDL 17-31 Revisions to the NA Back 9 for all Medi-Cal Notices of Action

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor Gorry
	Reviewed By	Priya Sridharan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/25/2019	1.0	Initial Creation	Connor Gorry
4/9/2021	1.1	Content Revision #3 • Separates Recommendations for MAGI and Non-MAGI NA Back 9 Fragments	Connor Gorry

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1 OVERVIEW

The NA Back 9 is printed on the back of all Medi-Cal NOAs, and serves to inform applicants of their right to a Hearing should they disagree with county action. This SCR updates NA Back 9 in CalSAWS to the 11/2016 version, per ACWDL 17-31.

You can access NA BACK 9 (ACA / Medi-Cal) (11/16) in the Supporting Documents section.

1.1 Current Design

In its current iteration, LRS/CalSAWS generates two different NA BACK 9 forms with all Medi-Cal NOAs, which populate with different address variables in the "Ask for a Hearing" section for MAGI and non-MAGI recipients.

1.2 Requests

The NA Back 9 must be updated for all Medi-Cal NOAs to comply with ACWDL 17-31.

1.3 Overview of Recommendations

1.3.1 Update the MAGI NA BACK 9

1.3.2 Update the NA BACK 9 for Non-MAGI Medi-Cal

1.4 Assumptions

1. NA Back 9 will continue to generate in its current languages. No additional translations are required.
2. No changes to the logic that generates NA Back 9, other than those outlined in the design.
3. No changes to NA Back 9 are required outside of those specifically requested in the design.
4. The Hearing Address population will remain unchanged on the shared NA Back 9 for programs other than Medi-Cal (CF, SNB/TNB, CW, RCA, and CAPI).
5. This change will only impact Medi-Cal NOAs; Medi-Cal Forms will not be impacted with this change.

2 RECOMMENDATIONS

2.1 Update MAGI NA BACK 9

2.1.1 Overview

In the updated NA Back 9 for MAGI has will have a new Form revision, and minor cosmetic updates to the 'Ask for a Hearing' static address.

Fragment Name and ID:

MAGI NA Back 9

NA_BACK_9_MAGI_FRAGMENT

Fragment ID: 672
State Form/NOA: NA BACK 9 (ACA / Medi-Cal) (Revised 11/2016)

Known County NOA: All

Current Program(s): Medi-Cal

Current Action Type: All

Current Fragment Level: Program

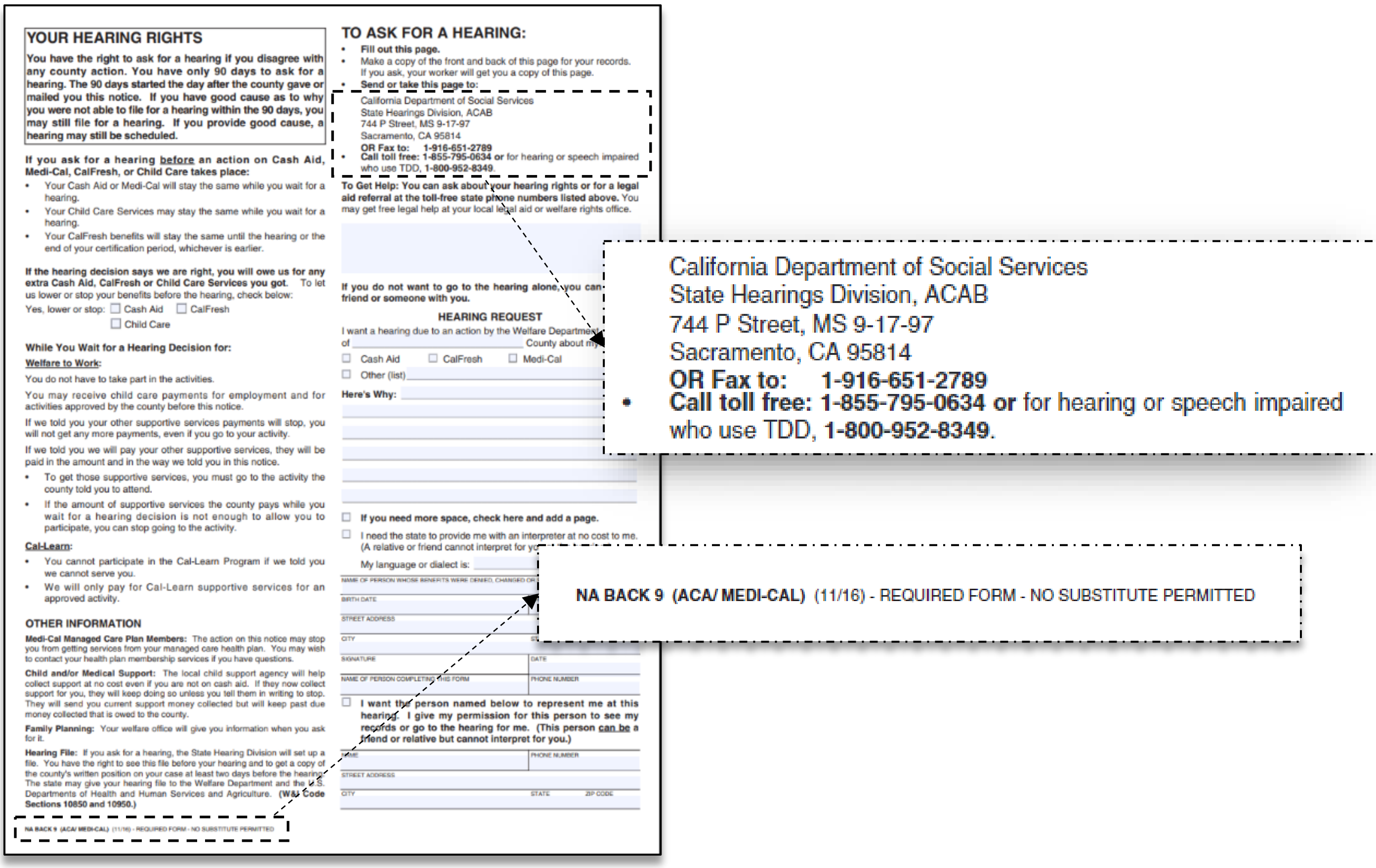
Currently Repeatable: No, only one NA Back 9 is generated per NOA

Existing Languages:
English, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese.

Note: NA Back 9 (ACA / Medi-Cal)(11/16) will not be updated in LRS/CalSAWS in Arabic, Hmong, or Lao

2.1.2 Description of Changes

The updated NA Back 9 introduced with ACWDL 17-31 will be implemented in the CalSAWS system for Medi-Cal MAGI. The only front-facing changes are to the "Ask for a Hearing" section, and a new revision footer.



YOUR HEARING RIGHTS

You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh benefits will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing, check below:

Yes, lower or stop: ☐ Cash Aid ☐ CalFresh ☐ Child Care

While You Wait for a Hearing Decision for:

Welfare to Work:

You do not have to take part in the activities.

You may receive child care payments for employment and for activities approved by the county before this notice.

If we told you your other supportive services payments will stop, you will not get any more payments, even if you go to your activity.

If we told you we will pay your other supportive services, they will be paid in the amount and in the way we told you in this notice.

- To get those supportive services, you must go to the activity the county told you to attend.
- If the amount of supportive services the county pays while you wait for a hearing decision is not enough to allow you to participate, you can stop going to the activity.

Cal-Learn:

- You cannot participate in the Cal-Learn Program if we told you we cannot serve you.
- We will only pay for Cal-Learn supportive services for an approved activity.

OTHER INFORMATION

Medi-Cal Managed Care Plan Members: The action on this notice may stop you from getting services from your managed care health plan. You may wish to contact your health plan membership services if you have questions.

Child and/or Medical Support: The local child support agency will help collect support at no cost even if you are not on cash aid. If they now collect support for you, they will keep doing so unless you tell them in writing to stop. They will send you current support money collected but will keep past due money collected that is owed to the county.

Family Planning: Your welfare office will give you information when you ask for it.

Hearing File: If you ask for a hearing, the State Hearing Division will set up a file. You have the right to see this file before your hearing and to get a copy of the county's written position on your case at least two days before the hearing. The state may give your hearing file to the Welfare Department and the U.S. Departments of Health and Human Services and Agriculture. **(W&I Code Sections 10850 and 10950.)**

NA BACK 9 (ACA/ MEDI-CAL) (11/16) - REQUIRED FORM - NO SUBSTITUTE PERMITTED

TO ASK FOR A HEARING:

- **Fill out this page.**
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- **Send or take this page to:**
  California Department of Social Services
  State Hearings Division, ACAB
  744 P Street, MS 9-17-97
  Sacramento, CA 95814
  OR Fax to: 1-916-651-2789
- **Call toll free: 1-855-795-0634 or** for hearing or speech impaired who use TDD, **1-800-952-8349**.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

If you do not want to go to the hearing alone, you can friend or someone with you.

HEARING REQUEST

I want a hearing due to an action by the Welfare Department of ____ County about my

☐ Cash Aid ☐ CalFresh ☐ Medi-Cal

☐ Other (list) ____

Here's Why: ____

☐ **If you need more space, check here and add a page.**

☐ I need the state to provide me with an interpreter at no cost to me. (A relative or friend cannot interpret for yo

My language or dialect is: ____

NAME OF PERSON WHOSE BENEFITS WERE DENIED, CHANGED OR

BIRTH DATE

STREET ADDRESS

CITY

SIGNATURE | DATE

NAME OF PERSON COMPLETING THIS FORM | PHONE NUMBER

☐ **I want the person named below to represent me at this hearing. I give my permission for this person to see my records or go to the hearing for me. (This person can be a friend or relative but cannot interpret for you.)**

NAME | PHONE NUMBER

STREET ADDRESS

CITY | STATE | ZIP CODE

NA BACK 9 (ACA / Medi-Cal) (11/16)

2.2 Update NA BACK 9 for Non-MAGI Medi-Cal

2.2.1 Overview

The NA Back 9 used for Non-MAGI Medi-Cal uses a dynamic section to populate its hearing address. For Medi-Cal, this section will be updated to populate with the new address. Population will remain unchanged for other programs – CF, SNB/TNB, CW, RCA, CAPI – that share the same NA Back 9.

Fragment Name and ID:

NA Back 9

NA_Back9_FRAGMENT

Fragment ID: 670
State Form/NOA: NA BACK 9 (REPLACES NA BACK 8 AND EP 5)(REVISED 4/2013) - REQUIRED FORM - NO SUBSTITUTE PERMITTED

Known County NOA: All

Current Program(s): *MC, CF, SNB/TNB, CW, RCA, CAPI*

Current Action Type: All

Current Fragment Level: Program

Currently Repeatable: No, only one NA Back 9 is generated per NOA

Existing Languages:
English, Armenian, Cambodian, Chinese, Korean, Russian, Spanish, Tagalog, and Vietnamese.

2.2.2 Description of Changes

Update the address population in the 'Ask for a Hearing' section for Non-MAGI Medi-Cal using the shared NA Back 9. The contact numbers for Phone, TDD, and Fax will remain unchanged on the shared NA Back 9.

Variable Name	Population	Formatting	Editable*	Template Repository Population	Populates with Form Generation
Hearing Address	California Department of Social Services State Hearings Division, ACAB 744 P Street, MS 9-17-97 Sacramento, CA 95814	Use Existing Formatting	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.

3 SUPPORTING DOCUMENTS

Ref #	Document	Functional Area	Description	Attachment
1	NA BACK 9 (ACA/Medi-Cal) (11/16)	Client Correspodence	The updated iteration of NA Back 9 to be implemented for MAGI Medi-Cal.	NA BACK 9 (ACA / Medi-Cal) (11/16)
2	NA Back 9 For Non-MAGI Medi-Cal Program	Client Correspodence	NA Back 9 used by non-MAGI Medi-CAL program NOAs. This will dynamically populate with the provided address for Medi-Cal Programs only; The address population for other programs, and the contact numbers, will remain unchanged.	NA Back 9 (populated for Non-MAGI Medi-C

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1208	The [CalSAWS] shall accommodate and generate State-mandated forms, notices, and NOAs that cannot be changed.	CalSAWS will generate NA Back 9 in fulfillment of policy ACWDL 17-31.
CAR-1211	The [CalSAWS] shall include reference to the local legal aid office and administrative hearing/appeals office on the reverse side of NOAs, based on program.	Per requirements section, NA Back 9 will continue to populate the "Contact Local Legal Aid" section with localized contact information in CalSAWS.

5 MIGRATION IMPACTS

5.0 Migration Impact

None.

5.1 Migration Impact Description

These changes have already been completed and implemented in C-IV, so there will be minimal migration impacts when they are duplicated in CalSAWS.

5.2 Migration Impact Analysis

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200366

Migration SCR for CCR

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

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/2/2020	1.01	Content Revision 1: • Added "Foster Family Home-Shelter Care" to Auto Regression test Section 2.25.2 Item 2 b. iv. • Updated FC EDBC so SCIs can pay on FFA placements. See highlighted changes in sections 1.1, 1.3, and 2.9. • Added section: 2.26 Client Correspondence - Regression Test SCI FFA NOAs • Clarified validation of non-numeric values in numeric fields in Section 2.3.3 • Corrected reference to 'Back' button to say 'Close' button in two instances in Section 2.3.3	• William Baretsky • Paul Galloway • Connor Gorry • Gillian Bendicio
12/17/2020	1.01.1	Design Clarification • Added note in section 2.26 that an identified fragment is turned off in LRS, and cannot be regression tested	Connor Gorry
12/30/2020	1.02	Content Revision 2: • In section 2.7.1 and 2.7.3 remove 'Standard State Rate' from Type field dropdown for new 'Foster Family Agency' placement type. • Remove reference to 'Standard State Rate' for FFA placements in Section 2.9.1 Overview, and Section 2.25.2 item 4, iii.	Paul Galloway
1/13/2021	1.02.1	Design Clarification • Added note in section 2.26 that three fragments cannot be regression tested. • Corrected page numbering on NOA mockup in 2.18.2	Connor Gorry
1/19/2021	1.02.2	Design Clarification • Updated "Dual Agency" rate descriptions to include (P1) and (P2) in 2.7.3 and 2.25.2 • Updated Section 2.12.2 regarding updates to Placement Types	Paul Galloway

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1 OVERVIEW

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

1.1 Current Design

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

- LRS updated EDBC logic to identify NRLG placements using a matrix of Placement Type and Caregiver Relation to Child values that are considered NRLG to continue paying the older age-based rates to NRLG placements established prior to CCR.

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

1.2 Requests

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

1.3 Overview of Recommendations

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

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

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

1.4 Assumptions

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

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

2 RECOMMENDATIONS

2.1 Foster Care Facility Ratio Side Navigation

2.1.1 Overview

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

2.1.2 Side Navigation Mockup

2.1.3 Description of Change

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

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

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Foster Care Facility Ratio List Page

2.2.1 Overview

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

2.2.2 Foster Care Facility Ratio List Mockup

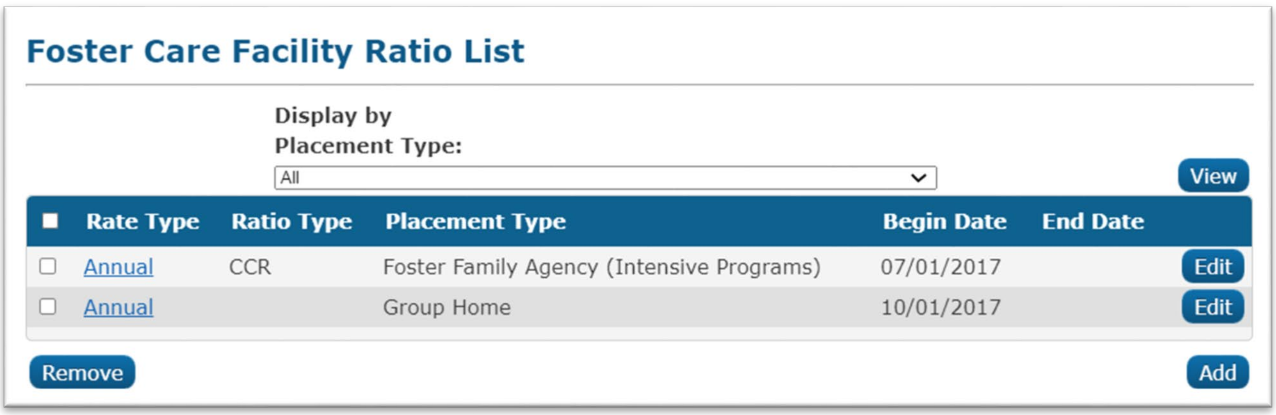


Figure 2.2.1 – Foster Care Facility Ratio List

2.2.3 Description of Changes

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

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

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

2.2.4 Page Location

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

2.2.5 Security Updates

1. Security Rights

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

2. Security Groups

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

2.2.6 Page Mapping

Create the page mapping to include this page.

2.2.7 Page Usage/Data Volume Impacts

Approximately 2,000 records are created per year.

2.3 Foster Care Facility Ratio Detail Page

2.3.1 Overview

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

2.3.2 Foster Care Facility Ratio Detail Mockup

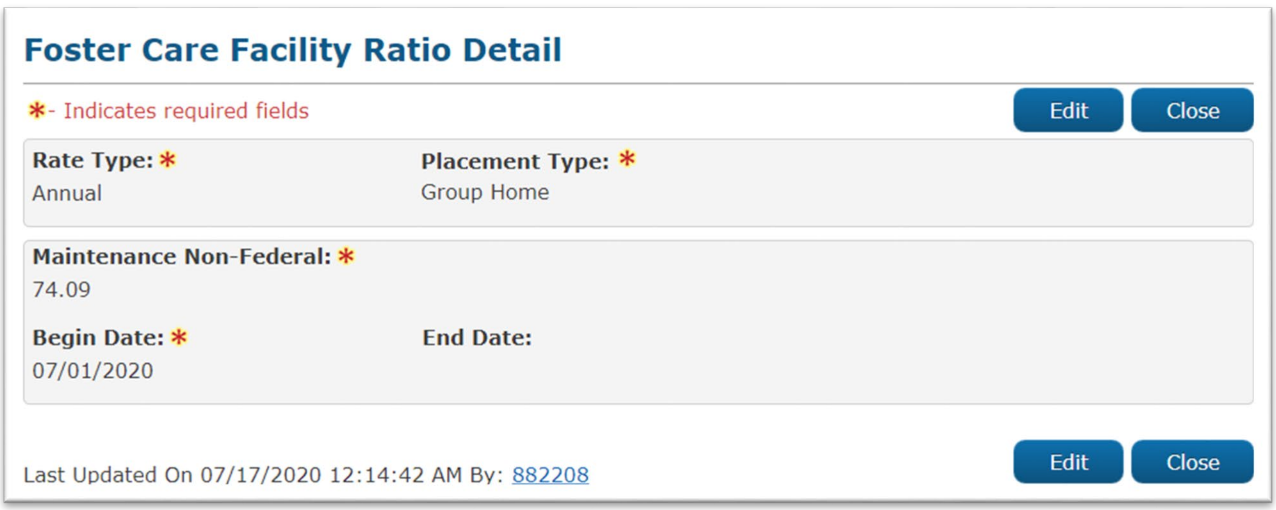


Figure 2.3.1 – Foster Care Facility Ratio Detail/View Mode/Single Ratio Resource

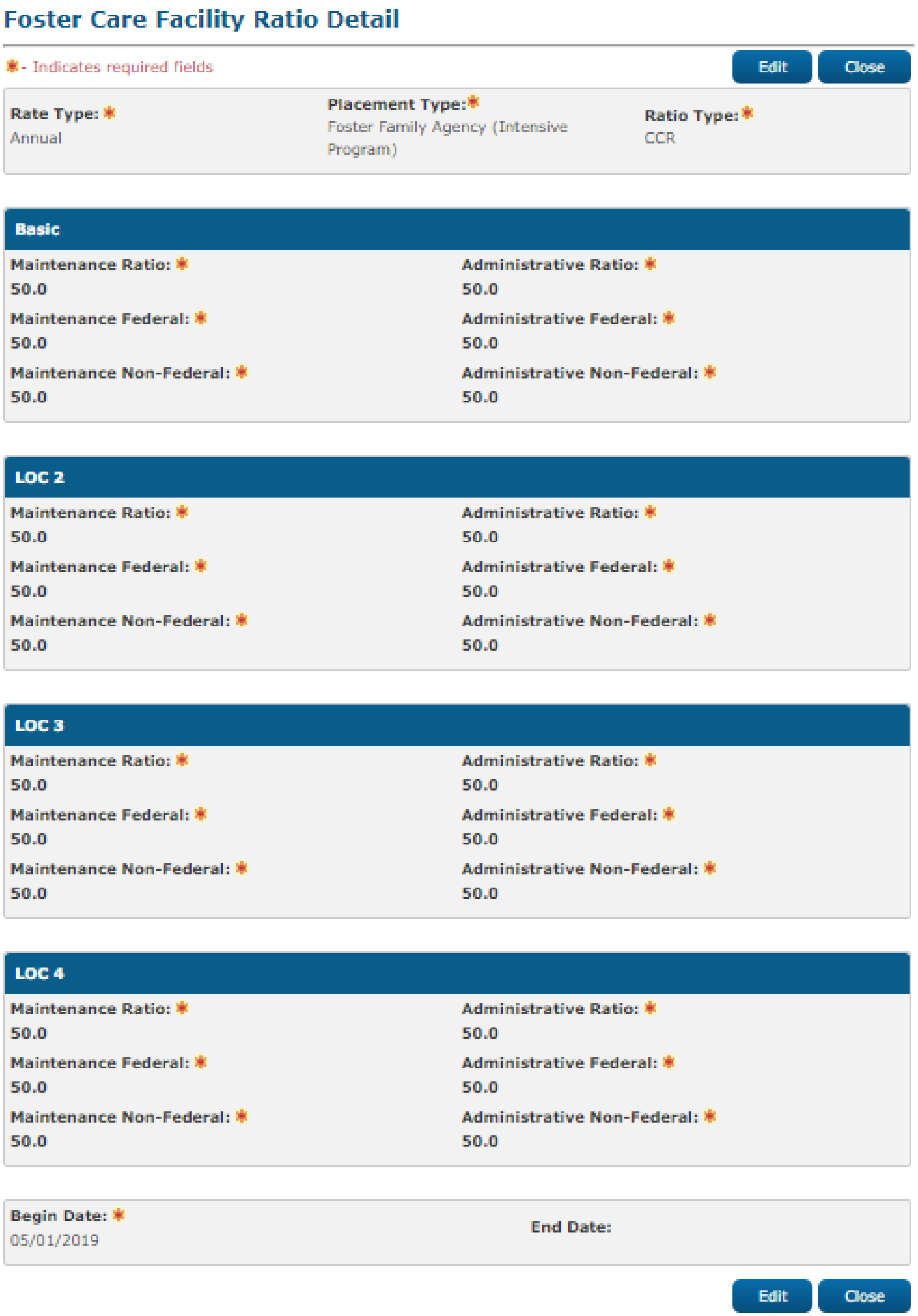
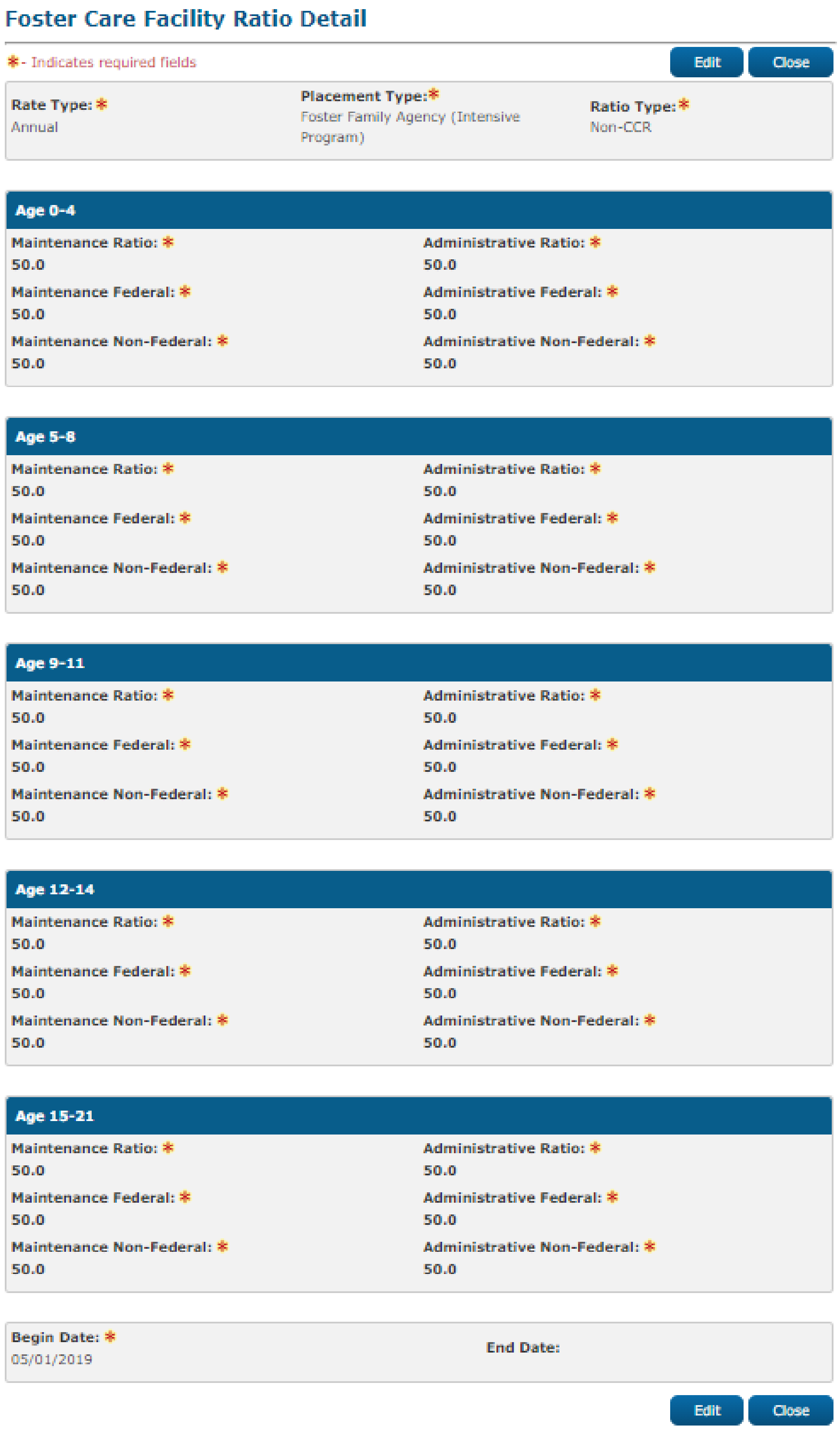


Figure 2.3.2 – Foster Care Facility Ratio Detail/View Mode/CCR Ratios



Foster Care Facility Ratio Detail

*- Indicates required fields

Edit | Close

Rate Type: *
Annual

Placement Type: *
Foster Family Agency (Intensive Program)

Ratio Type: *
Non-CCR

Age 0-4

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

Age 5-8

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

Age 9-11

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

Age 12-14

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

Age 15-21

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

Begin Date: *
05/01/2019

End Date:

Edit | Close

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

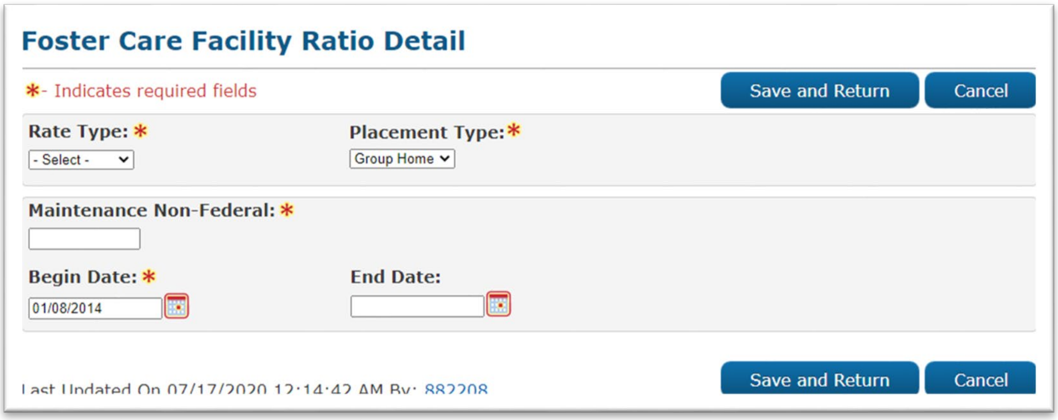


Figure 2.3.4 – Foster Care Facility Ratio Detail/Create Mode/Single Ratio Resource

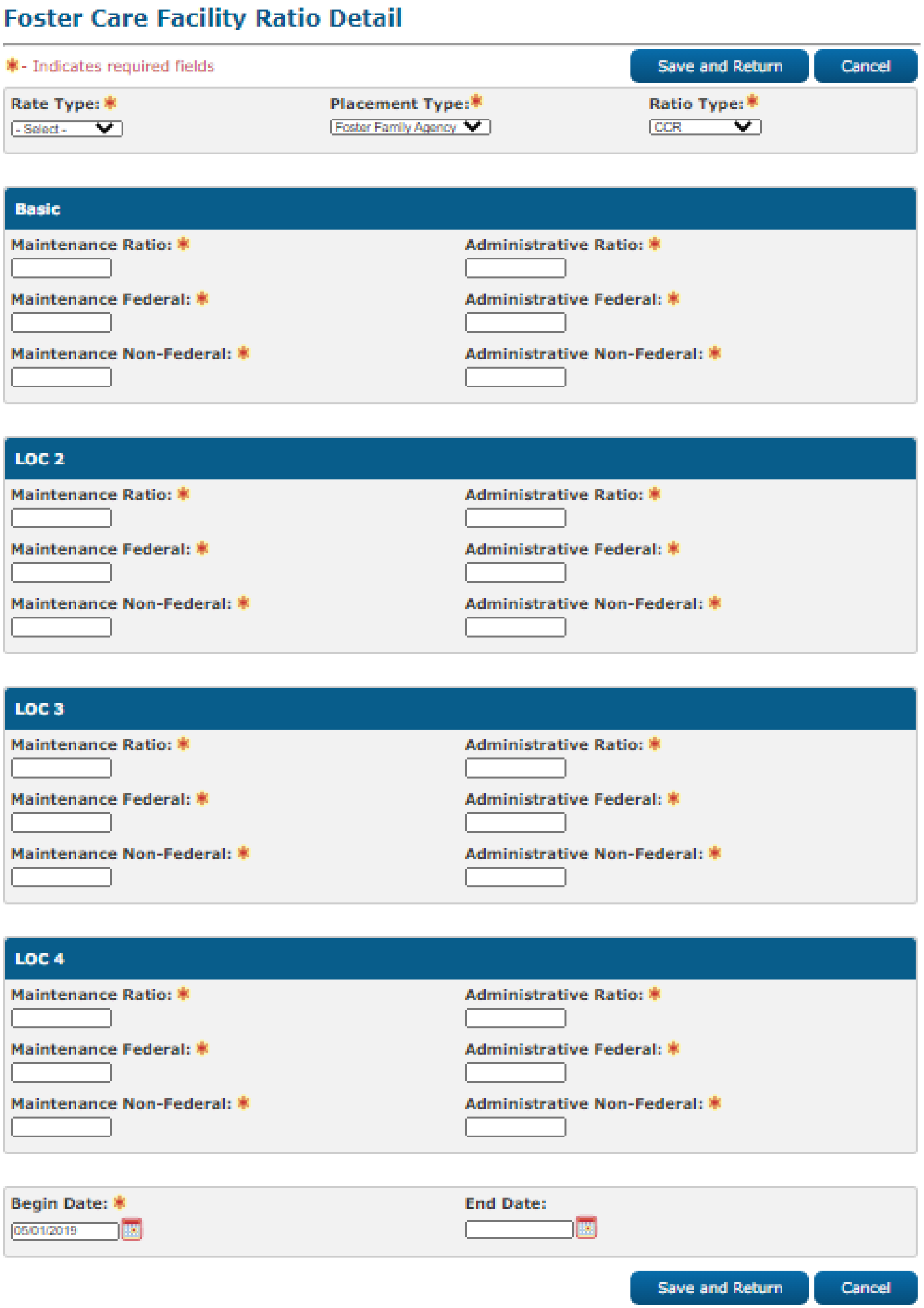
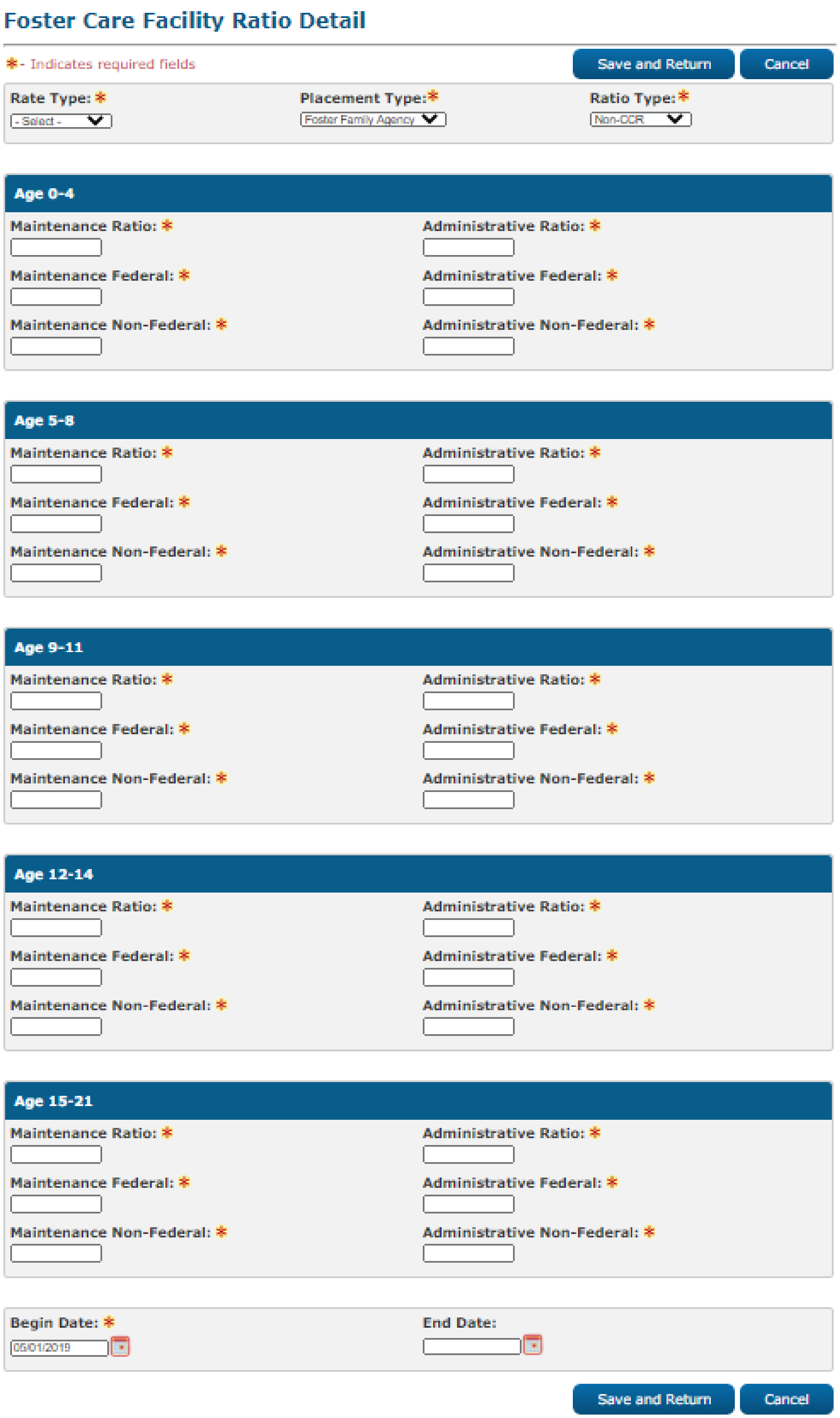


Figure 2.3.5 – Foster Care Facility Ratio Detail/Create Mode/CCR Ratios



Foster Care Facility Ratio Detail

*- Indicates required fields | Save and Return | Cancel

Rate Type: * - Select -
Placement Type: * Foster Family Agency
Ratio Type: * Non-CCR

Age 0-4

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

Age 5-8

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

Age 9-11

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

Age 12-14

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

Age 15-21

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

Begin Date: * 05/01/2019
End Date:

Save and Return | Cancel

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

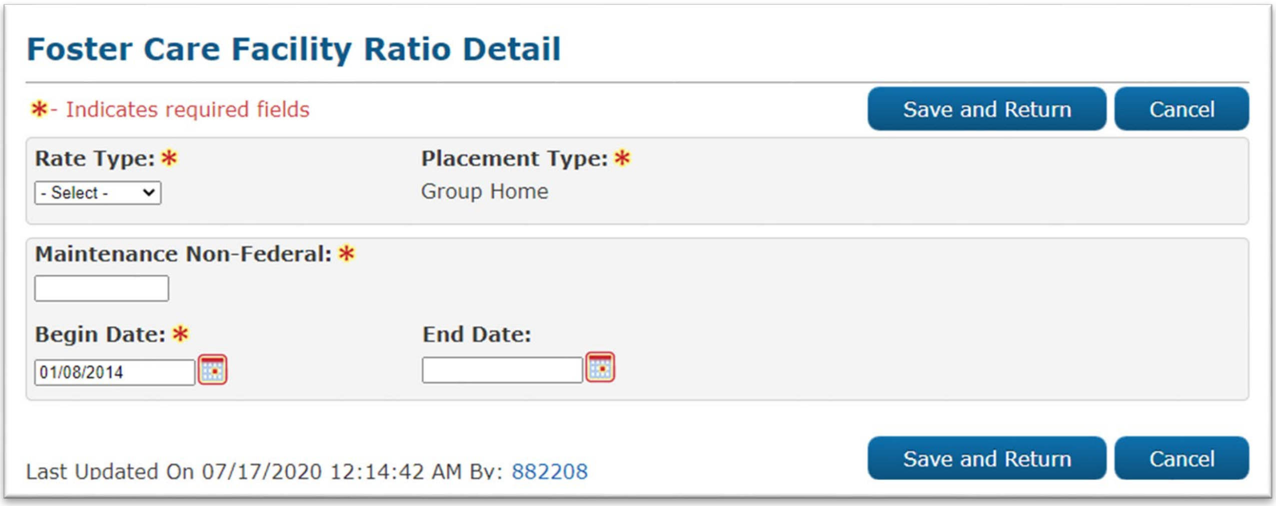


Figure 2.3.7 – Foster Care Facility Ratio Detail/Edit Mode/Single Ratio Resource

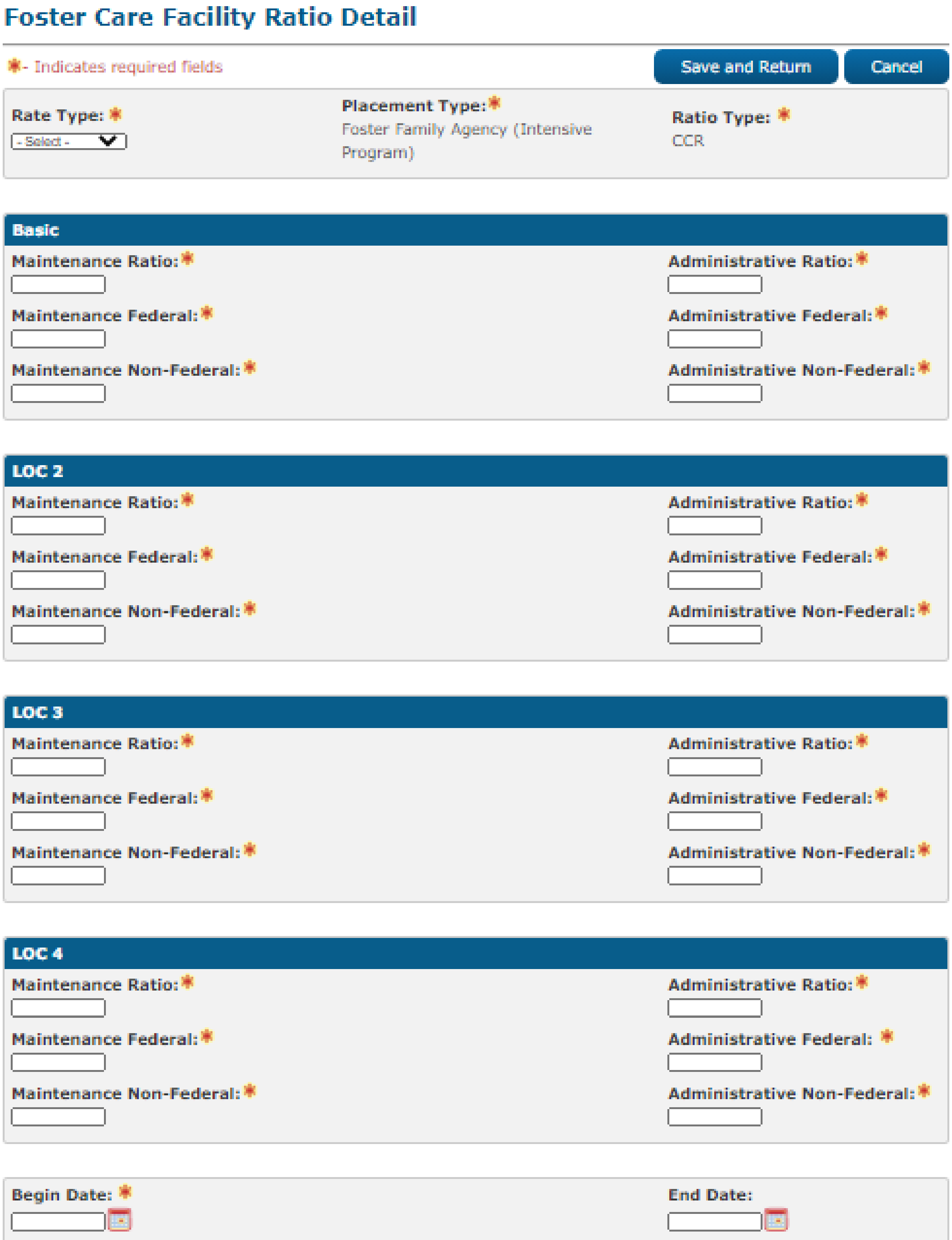
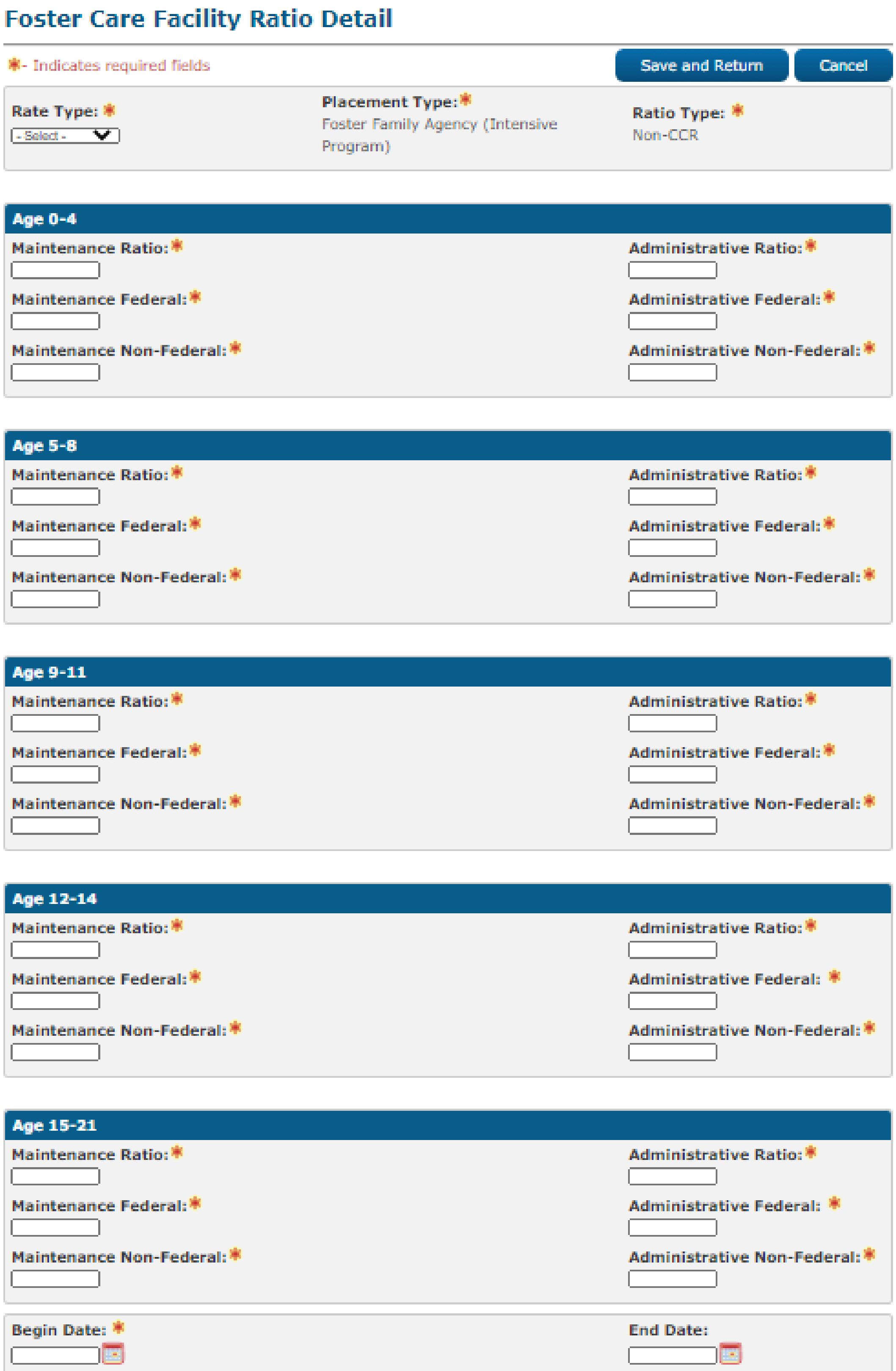


Figure 2.3.8 – Foster Care Facility Ratio Detail/Edit Mode/CCR Ratios



Foster Care Facility Ratio Detail

- Indicates required fields

Save and Return | Cancel

Rate Type: - Select -

Placement Type: Foster Family Agency (Intensive Program)

Ratio Type: Non-CCR

Age 0-4

Maintenance Ratio: | Administrative Ratio:

Maintenance Federal: | Administrative Federal:

Maintenance Non-Federal: | Administrative Non-Federal:

Age 5-8

Maintenance Ratio: | Administrative Ratio:

Maintenance Federal: | Administrative Federal:

Maintenance Non-Federal: | Administrative Non-Federal:

Age 9-11

Maintenance Ratio: | Administrative Ratio:

Maintenance Federal: | Administrative Federal:

Maintenance Non-Federal: | Administrative Non-Federal:

Age 12-14

Maintenance Ratio: | Administrative Ratio:

Maintenance Federal: | Administrative Federal:

Maintenance Non-Federal: | Administrative Non-Federal:

Age 15-21

Maintenance Ratio: | Administrative Ratio:

Maintenance Federal: | Administrative Federal:

Maintenance Non-Federal: | Administrative Non-Federal:

Begin Date: | End Date:

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

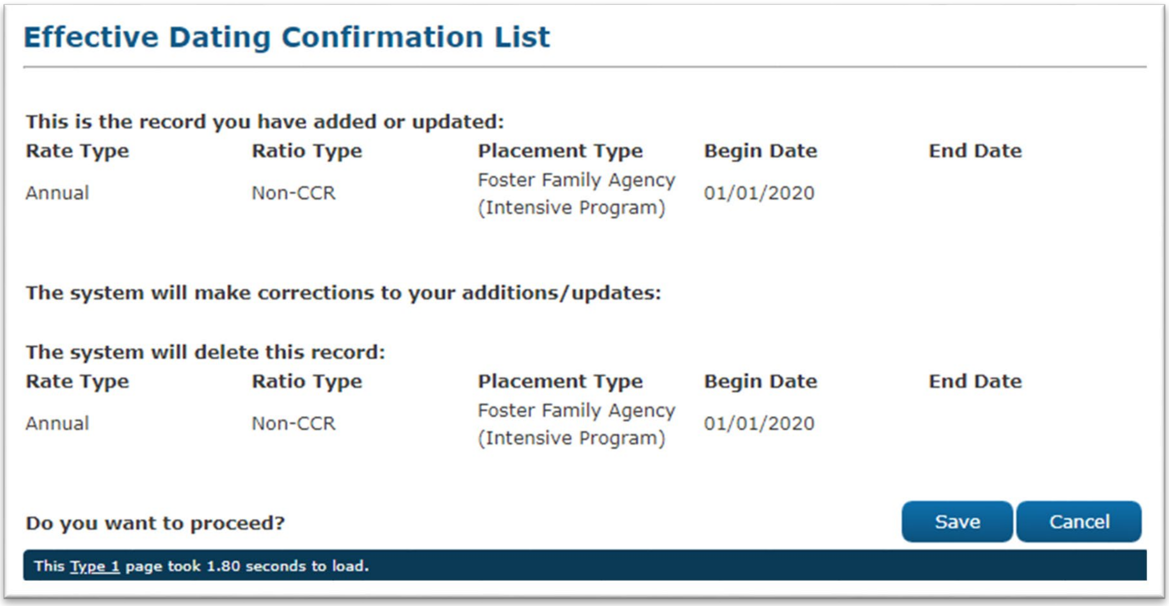


Figure 2.3.10 – Effective Date Confirming List

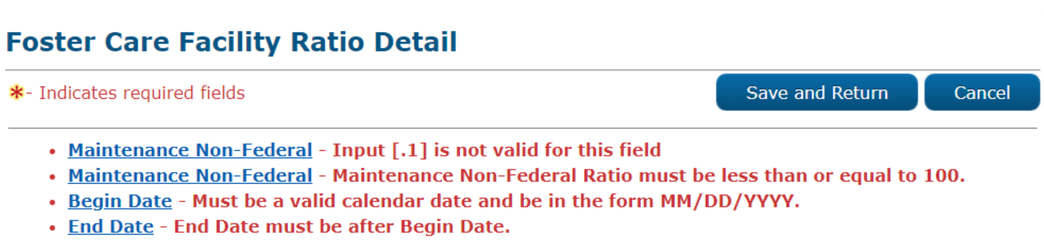


Figure 2.3.11 – Foster Care Facility Ratio Detail Validation Message

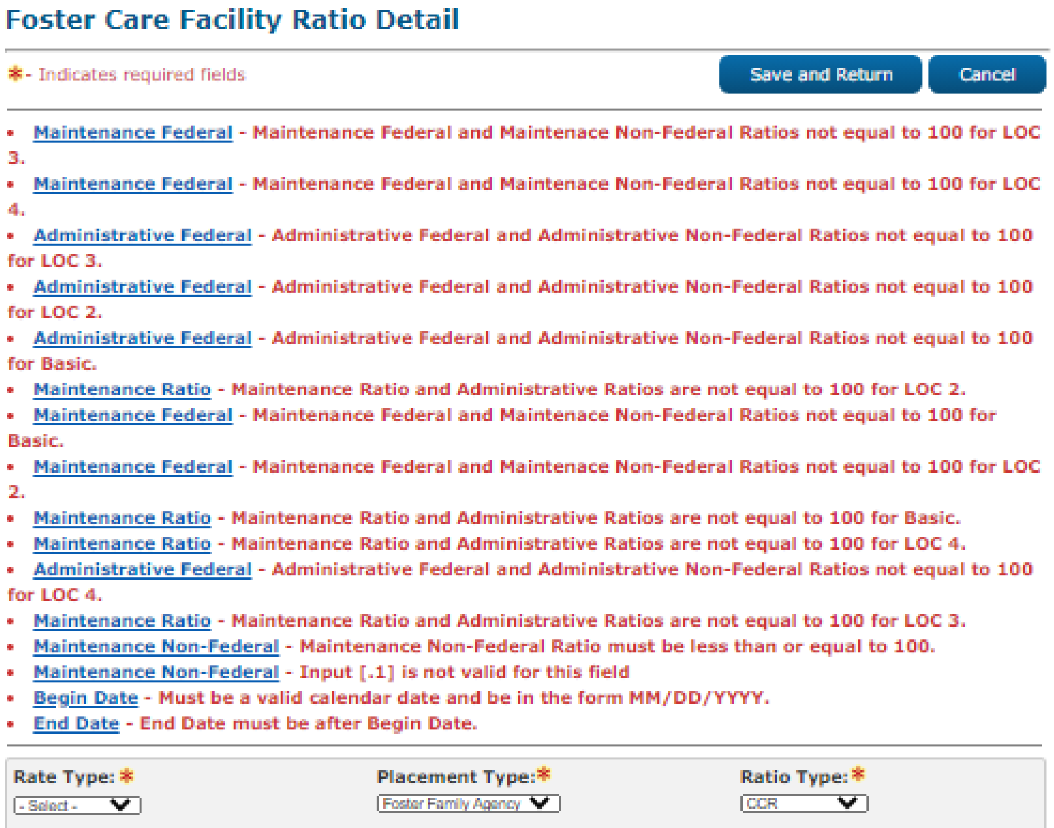


Figure 2.3.12 – Foster Care Facility Ratio Detail Validation Message

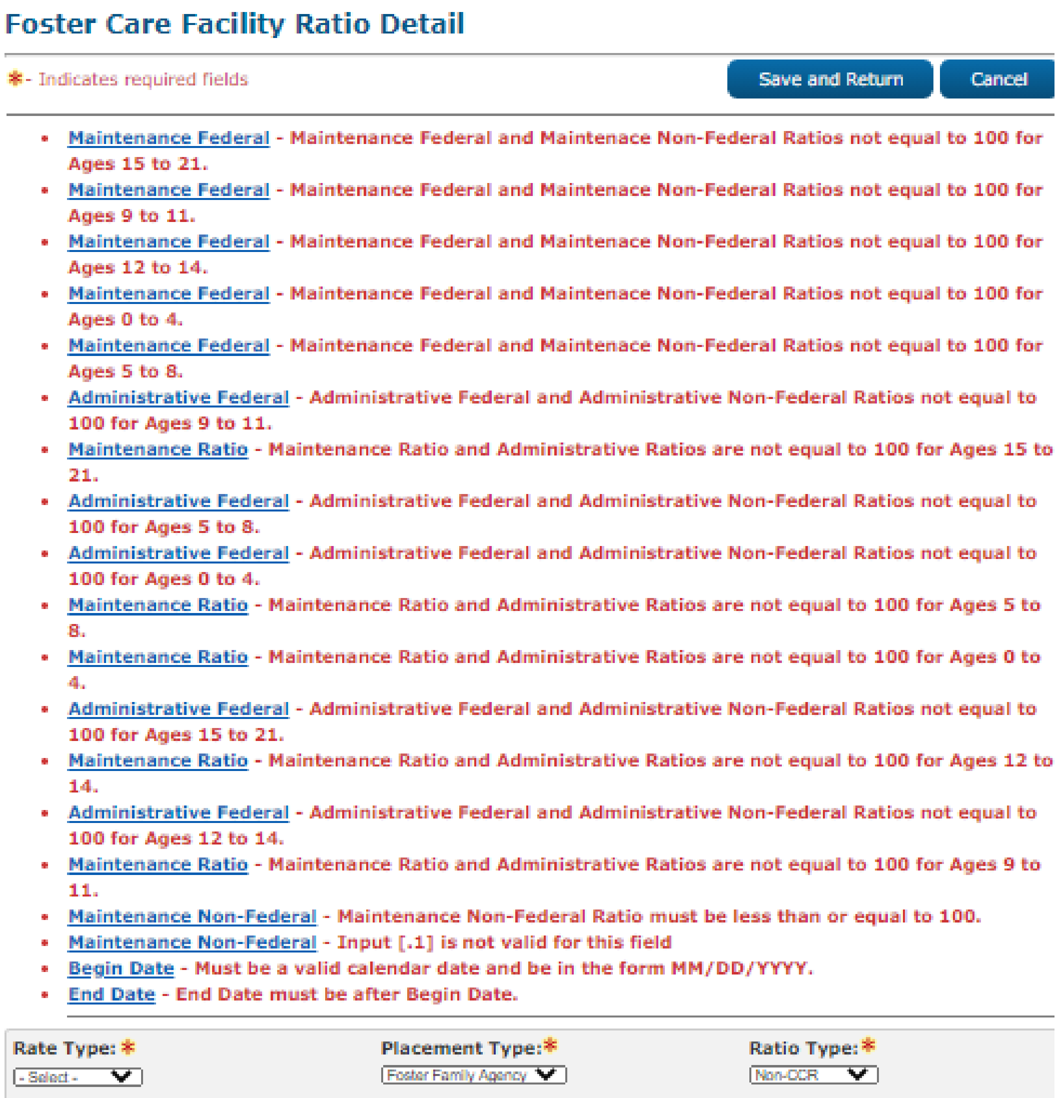


Figure 2.3.13– Foster Care Facility Ratio Detail Validation Message

2.3.3 Description of Changes

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

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

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

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

iii. This page will have the following components:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

2.3.4 Page Location

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

2.3.5 Security Updates

1. Security Rights

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

2. Security Groups

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

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

2.3.6 Page Mapping

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

2.3.7 Page Usage/Data Volume Impacts

Approximately 2,000 records will be created per year.

2.4 Foster Care Resource Search Page

2.4.1 Overview

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

2.4.2 Description of Changes

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

2.4.3 Page Location

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

2.4.4 Security Updates

N/A

2.4.5 Page Usage/Data Volume Impacts

No impact to this section.

2.4.6 Page Mapping

Update the State Program Number page mapping.

2.5 Foster Care Resource Detail Page

2.5.1 Overview

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

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

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

2.5.2 Foster Care Resource Detail Mockup

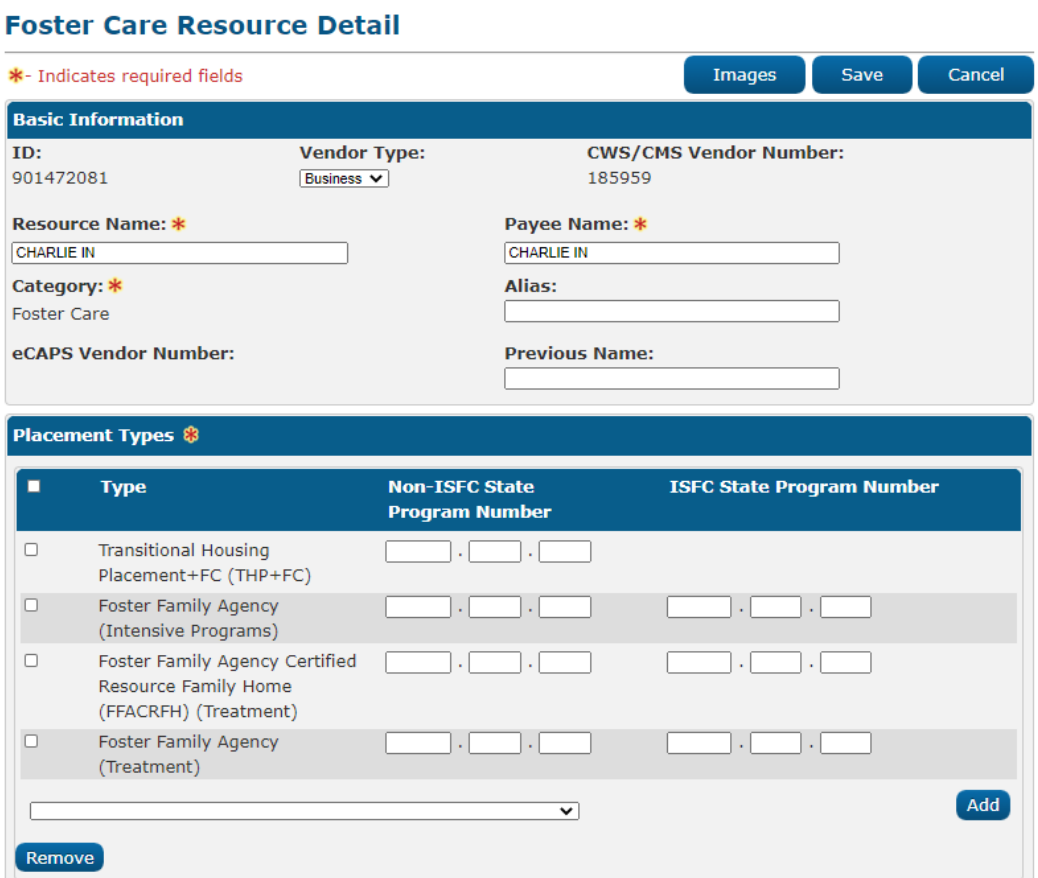


Figure 2.5.1 – Foster Care Resource Detail in Edit Mode


Foster Care Resource Detail

*- Indicates required fields

Images | Issuance Method | Edit | Close

Basic Information

ID: 901472081

Vendor Type: Business

CWS/CMS Vendor Number: 185959

Resource Name: * CHARLIE IN

Payee Name: * CHARLIE IN

Category: * Foster Care

Alias:

eCAPS Vendor Number:

Previous Name:

Placement Types *

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

Figure 2.5.2 – Foster Care Resource Detail in View Mode

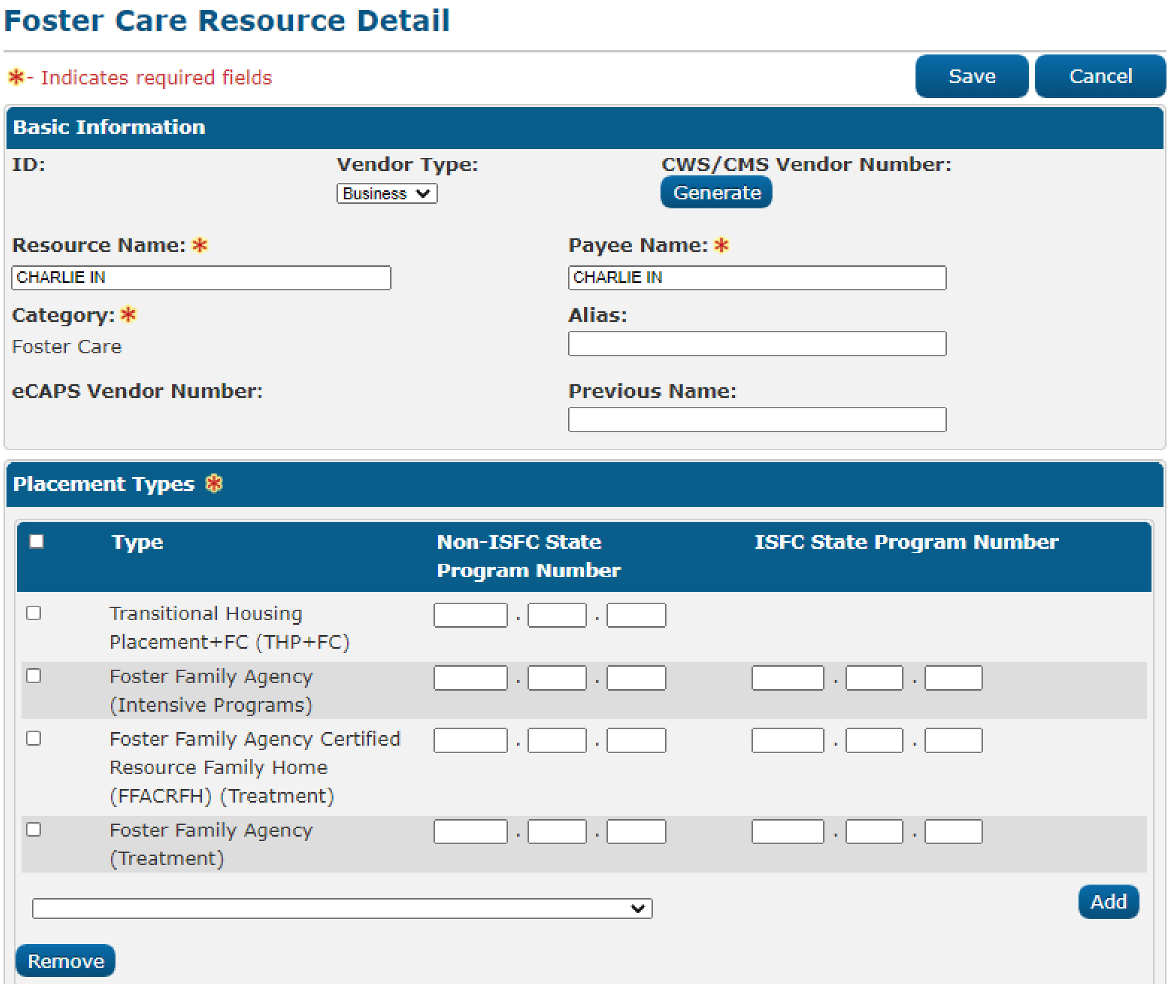
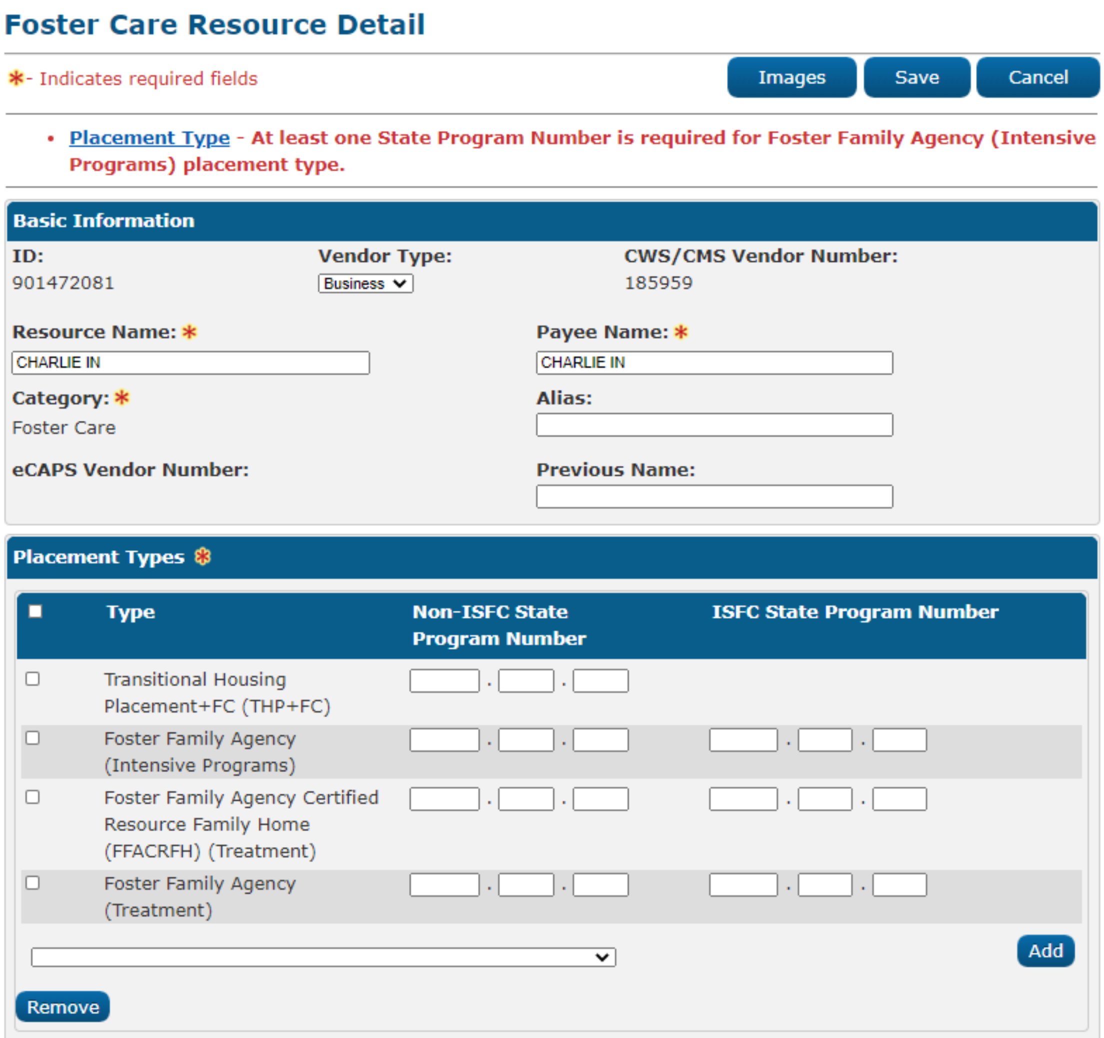


Figure 2.5.3 – Foster Care Resource Detail in Create Mode


Foster Care Resource Detail

*- Indicates required fields

Images | Save | Cancel

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

Basic Information

ID: 901472081

Vendor Type: Business

CWS/CMS Vendor Number: 185959

Resource Name: * CHARLIE IN

Payee Name: * CHARLIE IN

Category: * Foster Care

Alias:

eCAPS Vendor Number:

Previous Name:

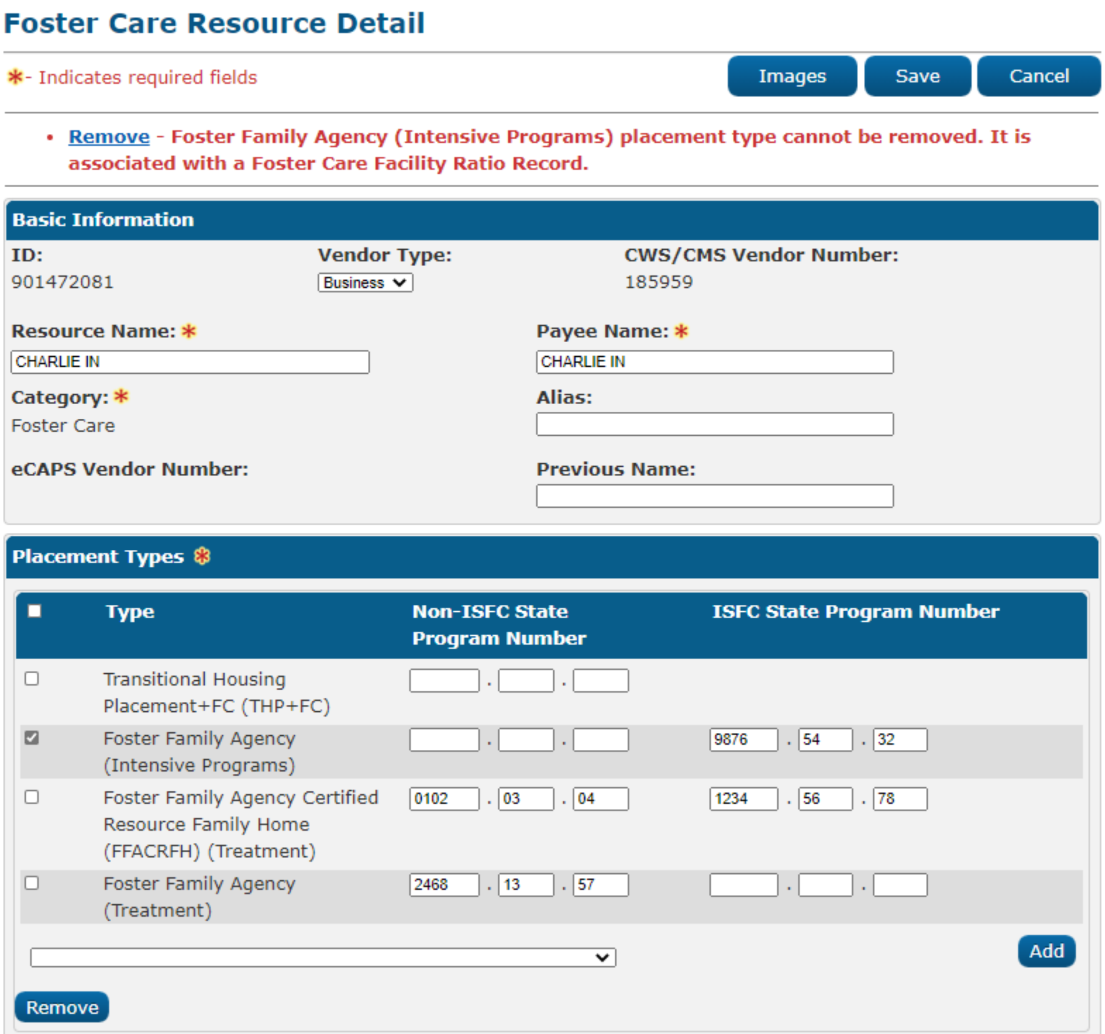
Placement Types *

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

Add

Remove

Figure 2.5.4 – Foster Care Resource Detail Placement Type Validation Message



Foster Care Resource Detail

*- Indicates required fields

Images | Save | Cancel

- Remove - Foster Family Agency (Intensive Programs) placement type cannot be removed. It is associated with a Foster Care Facility Ratio Record.

Basic Information

ID: 901472081

Vendor Type: Business

CWS/CMS Vendor Number: 185959

Resource Name: * CHARLIE IN

Payee Name: * CHARLIE IN

Category: * Foster Care

Alias:

eCAPS Vendor Number:

Previous Name:

Placement Types *

	Type	Non-ISFC State Program Number	ISFC State Program Number
☐	Transitional Housing Placement+FC (THP+FC)	. .	
☑	Foster Family Agency (Intensive Programs)	. .	9876 . 54 . 32
☐	Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)	0102 . 03 . 04	1234 . 56 . 78
☐	Foster Family Agency (Treatment)	2468 . 13 . 57	. .

Add

Remove

Figure 2.5.5 - Foster Care Resource Detail Remove Validation Message

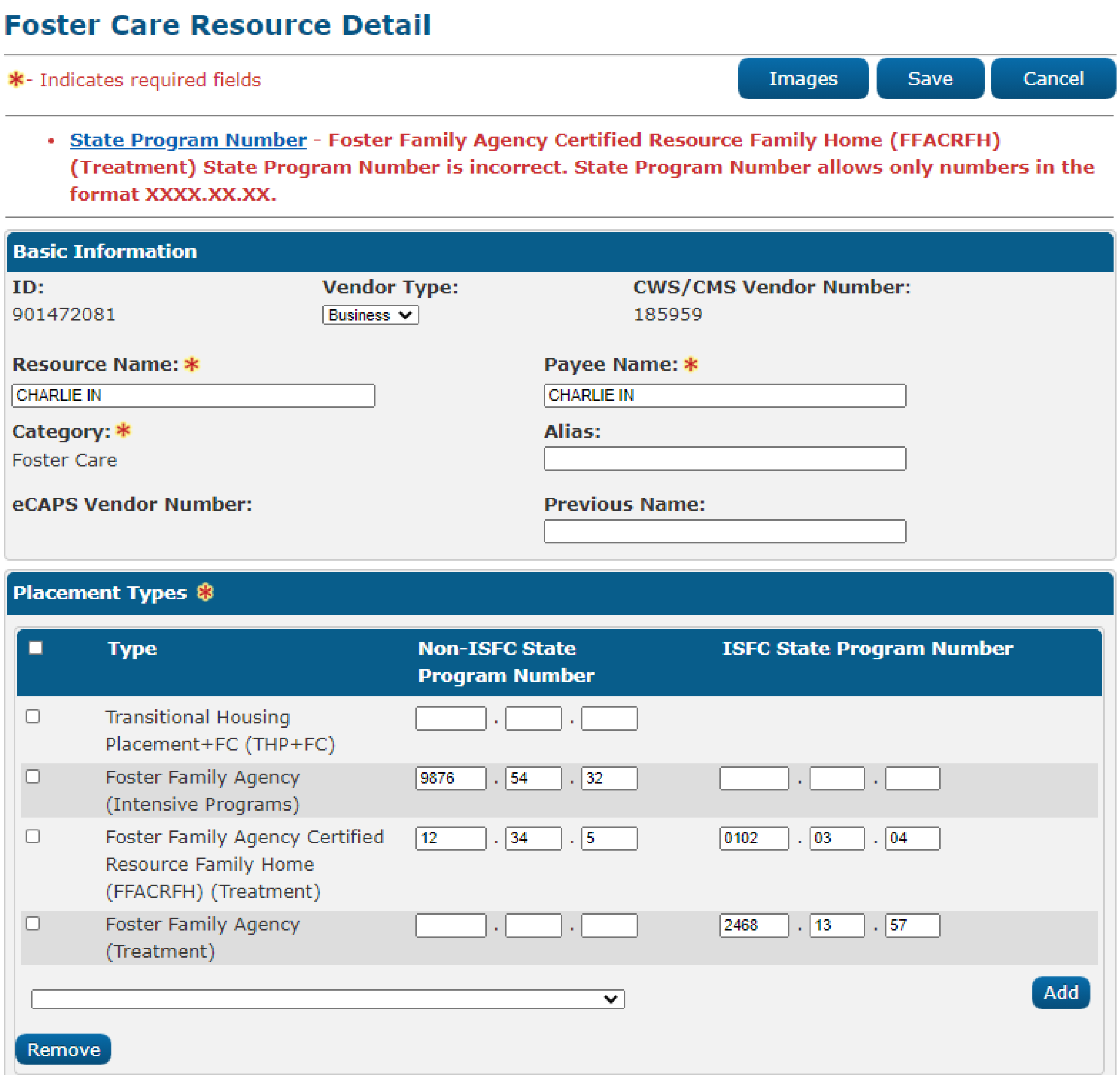


Figure 2.5.6 – Foster Care Resource Detail with State Program Number Format Validation Message

2.5.3 Description of Changes

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

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

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

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

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

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

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

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

2.5.4 Page Location

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

2.5.5 Security Updates

N/A

2.5.6 Page Usage/Data Volume Impacts

No impact to this section.

2.5.7 Page Mapping

Update page mapping to include State Program Numbers.

2.6 Foster Care License Detail Page

2.6.1 Overview

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

2.6.2 Foster Care License Detail Mockup

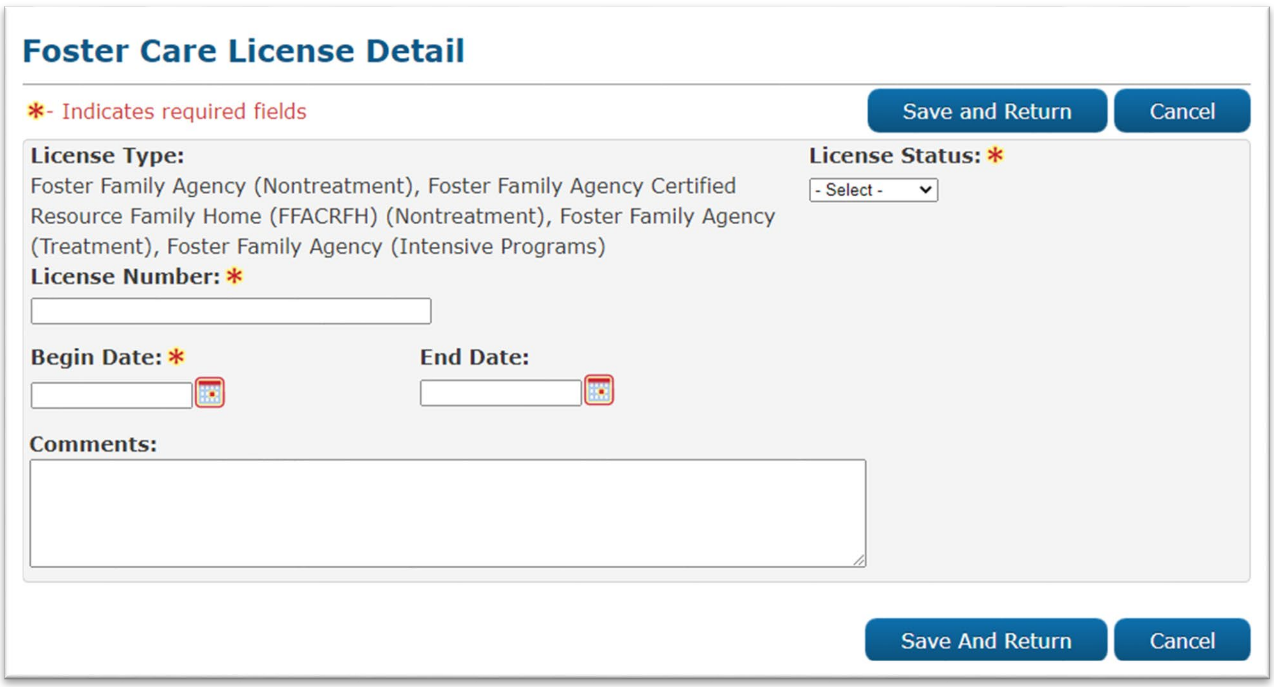


Figure 2.6.1 – Foster Care License Detail (Create Mode)

Foster Care License Detail

*- Indicates required fields

Save and Return | Cancel

License Type:
Foster Family Agency (Nontreatment), Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment), Foster Family Agency (Treatment), Foster Family Agency (Intensive Programs)

License Number: *

Begin Date: *
09/27/2016

End Date:

Comments:

License Status: *
Approved

Last Updated On 07/17/2020 12:14:42 AM By: 882208

Save and Return | Cancel

Figure 2.6.2 – Foster Care License Detail (Edit Mode)

Foster Care License Detail

*- Indicates required fields

Edit | Close

License Type:
Foster Family Agency (Nontreatment), Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment), Foster Family Agency (Treatment), Foster Family Agency (Intensive Programs)

License Number: *
1234567

Begin Date: *
08/01/2020

End Date:

Comments:

Test

License Status: *
Approved

Last Updated On 08/06/2020 2:18:37 PM By: 996660

Edit | Close

Figure 2.6.3 – Foster Care License Detail (View Mode)

2.6.3 Description of Changes

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

2.6.4 Page Location

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

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Update page mapping to remove the State Program Number field.

2.6.7 Page Usage/Data Volume Impacts

No impact.

2.7 Foster Care Rate Detail Page

2.7.1 Overview

1. Allow rates with Begin Dates and End Dates up to one month in the future.
2. For the new Placement Type ‘Foster Family Agency’, update the Rate Detail page for FC to display the same dropdowns and options as ‘Foster Family Agency (Nontreatment)’ with one exception: do not show Standard State Rate in the Type dropdown since it is only used for pre-CCR age-based rates.
3. Add additional selections to the Rate dropdown for the placement type ‘Out of State Basic’.

2.7.2 Foster Care Rate Detail Page Mockup

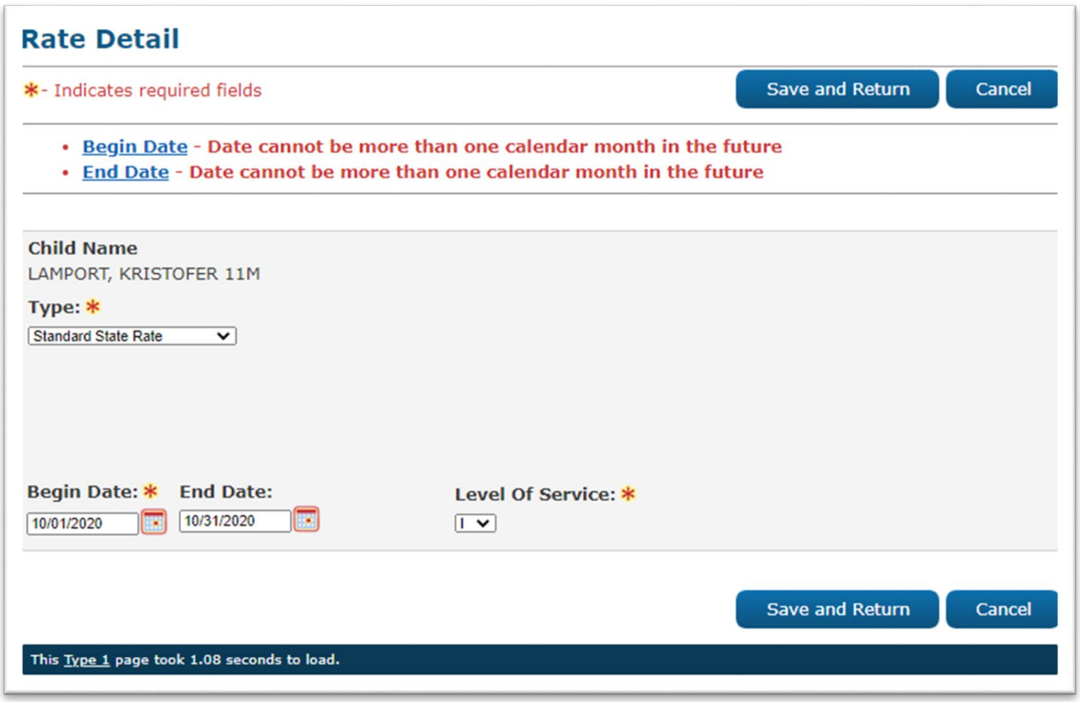


Figure 2.7.1 – FC Rate Detail Validation Message

2.7.3 Description of Changes

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

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

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

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

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

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

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

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

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

2. LRS/CalSAWS is adding the new Placement Type 'Foster Family Agency' that already exists in C-IV. Update the Type, Basic Rate, and Level of Care fields on the FC Rate Detail page to display the same options for the new placement type 'Foster Family Agency' that display for the existing type 'Foster Family Agency (Nontreatment)' (excluding Standard State Rate).
   a. Type field:
      i. – Select –
      ii. Non Standard Rate
      iii. Regional Center Vendorized
      ~~iv. Standard State Rate~~
      iv. RB-FFA
      v. ISTF - ISFC - TFC
      vi. ISFA - ISFC – FFA

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

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

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

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

3. When the placement type is 'Out of State Basic', the only selection that currently displays in the 'Type' field is 'Non Standard Rate'. Add the following additional values to the dropdown. No other dropdown options will display on the page when one of these values is selected:
    a. Standard State Rate
    b. Dual Agency RC-California Early Start Intervention (P1)
    c. Dual Agency RC-Lanterman Developmental Disability (P2)

2.7.4 Page Location

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

2.7.5 Page Usage/Data Volume Impacts

No impact to this section.

2.7.6 Page Mapping

No impact to this section.

2.8 Kin-GAP Rate Detail Page

2.8.1 Overview

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

2.8.2 Kin-GAP Rate Detail Mockup

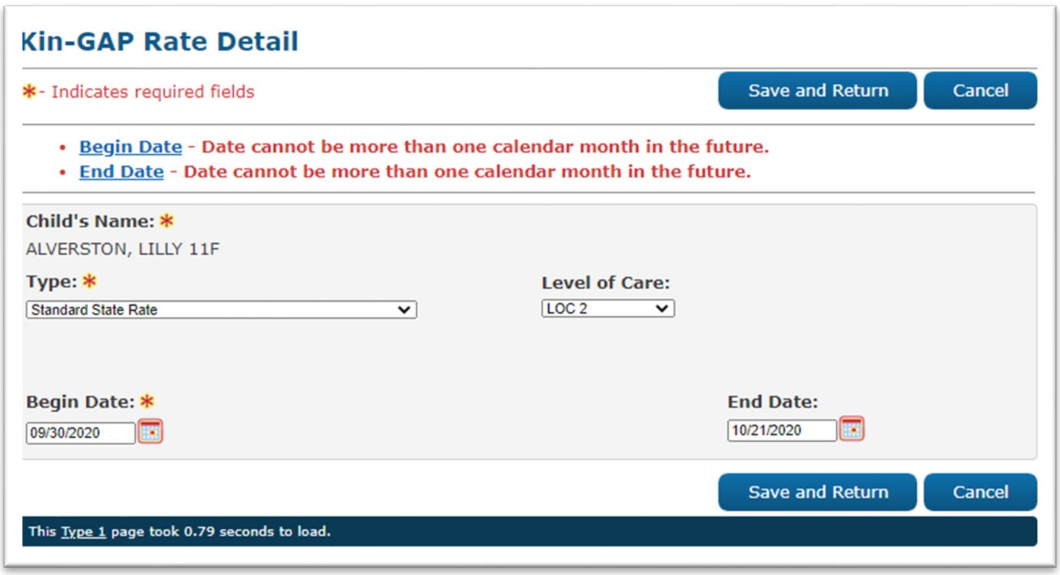


Figure 2.8.1 – Kin-GAP Rate Detail Validation Message

2.8.3 Description of Changes

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

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

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

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

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

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

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

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

2.8.4 Page Location

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

2.8.5 Page Usage/Data Volume Impacts

No impact to this section.

2.8.6 Page Mapping

No impact to this section.

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

2.9.1 Overview

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

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

2.9.2 Description of Changes

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

2.9.3 Programs Impacted

Foster Care

2.9.4 Performance Impacts

No impact.

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

2.10.1 Overview

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

2.10.2 Description of Changes

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

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

    display the following message:

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

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

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

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

display the following message:

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

2.10.3 Programs Impacted

Foster Care

2.10.4 Performance Impacts

Impact is negligible.

2.11 Eligibility – Run EDBC Validation for ISFC Rates

2.11.1 Overview

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

2.11.2 Description of Changes

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

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

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

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

   display the following message:

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

2.11.3 Programs Impacted

Foster Care

2.11.4 Performance Impacts

Impact is negligible.

2.12 Batch/Interface – DCFS FC Inbound Reader Interface

2.12.1 Overview

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

2.12.2 Description of Change

Modify Batch Job PI19C884 with the following changes:

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

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

2.12.3 Execution Frequency

No Change

2.12.4 Key Scheduling Dependencies

No Change

2.12.5 Counties Impacted

No Change

2.12.6 Data Volume/Performance

N/A

2.12.7 Failure Procedure/Operational Instructions

No Change

2.13 Fiscal - Auditor Controller Writer (POXXF108)

2.13.1 Overview

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

2.13.2 Description of Change

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

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

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

2.13.3 Execution Frequency

No Changes.

2.13.4 Key Scheduling Dependencies

No Changes.

2.13.5 Counties Impacted

CIV migration counties only.

2.13.6 Data Volume/Performance

N/A

2.13.7 Failure Procedure/Operational Instructions

No changes

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

2.14.1 Overview

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

2.14.2 Description of Change

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

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

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

2.14.3 Execution Frequency

No Changes.

2.14.4 Key Scheduling Dependencies

No Changes.

2.14.5 Counties Impacted

CIV migration counties only.

2.14.6 Data Volume/Performance

N/A

2.14.7 Failure Procedure/Operational Instructions

No changes

2.15 Fiscal - Foster Care Benefit Issuance Claiming (PBXXF202)

2.15.1 Overview

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

2.15.2 Description of Change

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

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

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

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

2.15.3 Execution Frequency

No changes

2.15.4 Key Scheduling Dependencies

No changes

2.15.5 Counties Impacted

All Counties.

2.15.6 Data Volume/Performance

N/A

2.15.7 Failure Procedure/Operational Instructions

No changes

2.16 Fiscal - Recovery Account Claiming (PBXXR203)

2.16.1 Overview

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

2.16.2 Description of Change

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

2.16.3 Execution Frequency

No changes

2.16.4 Key Scheduling Dependencies

No changes

2.16.5 Counties Impacted

All Counties

2.16.6 Data Volume/Performance

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

2.16.7 Failure Procedure/Operational Instructions

No changes

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

2.17.1 Overview

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

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

Existing Template Revision Date: 4/17

Current Program(s): FC, KG

Include NA Back 9: Y

Existing Languages:

English

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

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

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

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

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

2.18 Client Correspondence – Update FC/KG Approval Action Fragments

2.18.1 Overview

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

Action Fragment Name and ID:

FC_KG_AP_ACTION4

ID # = 4110

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

Current Program(s): FC, KG

Current Action Type: AP

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages:

English

2.18.2 Update Fragment XDP

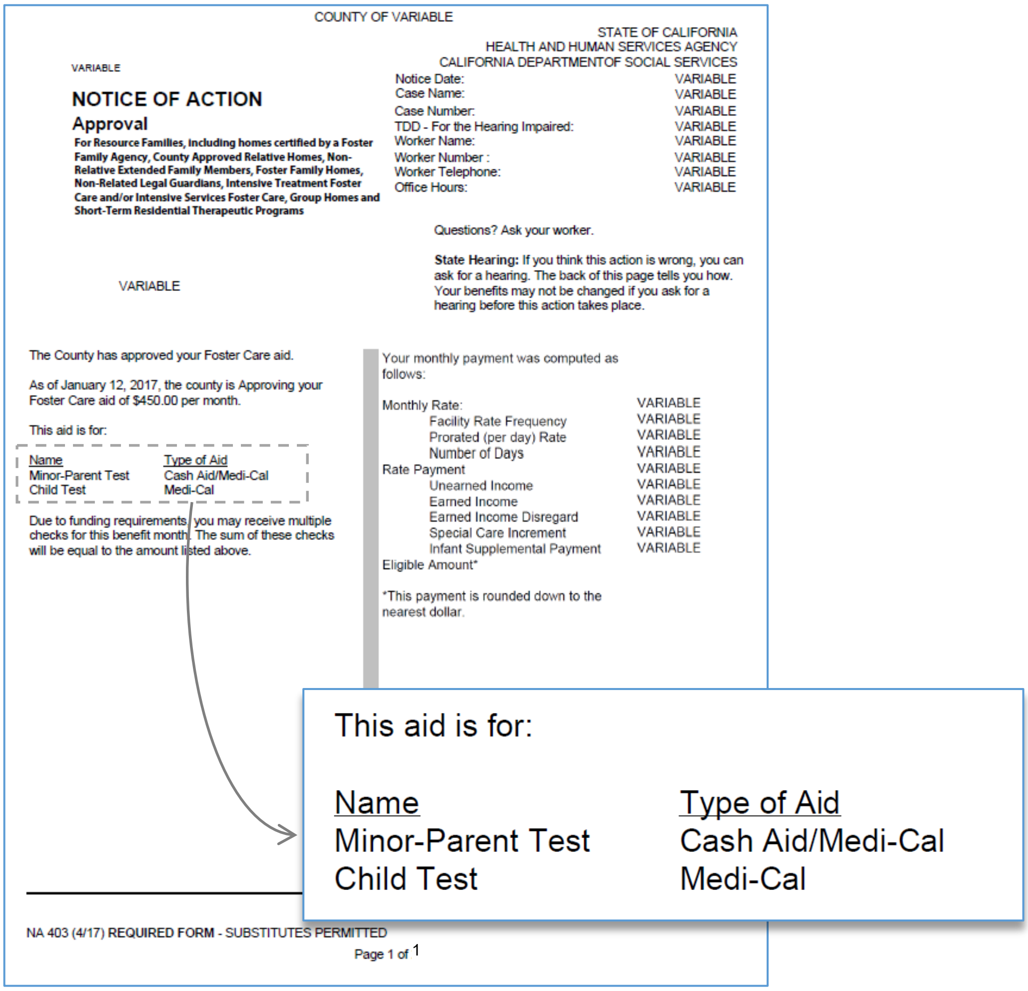
XDP will be updated with an additional column to the right of 'Person'(s) that will populate with the Aid Type – either Medi-Cal or Cash Aid/Medi-Cal

Updated Languages:

English

NOA Mockups/Examples: See Supporting Documents #1

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


COUNTY OF VARIABLE

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

VARIABLE

NOTICE OF ACTION

Approval

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

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

Questions? Ask your worker.

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

VARIABLE

The County has approved your Foster Care aid.

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

This aid is for:

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

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

Your monthly payment was computed as follows:

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

*This payment is rounded down to the nearest dollar.

This aid is for:

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

NA 403 (4/17) REQUIRED FORM - SUBSTITUTES PERMITTED

Page 1 of 1

2.18.3 Add/Update Fragment Variable Population

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

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

Variables Requiring Translations: N/A

2.19 Client Correspondence – Update FC/KG Change Action Fragment

2.19.1 Overview

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

Action Fragment Name and ID:

FC_KG_CH_ACTION3

ID # = 4111

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

Current Program(s): FC, KG

Current Action Type: AP

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages:

English

2.19.2 Update Fragment XDP

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

Updated Languages:

English

NOA Mockups/Examples: See Supporting Documents #1

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

2.19.3 Add/Update Fragment Variable Population

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

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

Variables Requiring Translations: N/A

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

2.20.1 Overview

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

Action Fragment Name and ID:

Foster Care

FC_CH_ SUPPLEMENTAL_CARE_INCREMENT_T311

ID # = 7487

Kin-GAP

KG_CH_SUPPLEMENTAL_CARE_INCREMENT_K020

ID # = 7492

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

Current Program(s): FC, KG

Current Action Type: Change, Supplement

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

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

Existing Languages:

English

2.20.2 Update Fragment XDP

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

Updated Languages: English

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

2.21 Client Correspondence – Turn off KG Age Rules Discontinuance Reason

2.21.1 Overview

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

Turn off NOA generation in LRS/CalSAWS for:

Reason Fragment Name and ID:

KG_TN_NO_LONGER_SUPPORT_K015

ID #: 7502

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

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

Current Program(s): KG

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

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

Existing Languages:

English

2.22 Client Correspondence – Update KG Legal Guardianship Terminated Discontinuance Reason

2.22.1 Overview

Currently in LRS/CalSAWS, the Legal Guardianship fragment is generated only when the Child is under 18 and the reason is _not_ 'Guardianship Ended', which is incorrect. This change will update the generation conditions for the Legal Guardianship Discontinuance NOA. It will now fire when the reason _is_ 'Guardianship Ended'.

Action Fragment Name and ID:

KG_TN_LEGAL_GUARD_TERM_K014

ID # = 7501

"The Legal Guardianship was Terminated"

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

Current Program(s): KG

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

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

Existing Languages:

English

2.22.2 Updates to Fragment Generation

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

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

New NOA Template: N

New Program Generation: N

New Action Type: N

Update to Fragment Level: N

Repeatable: N

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

Action Fragment: FC_KG_TN_ACTN4

Message Fragment: N/A

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

2.23 Data Change – Delete LRS FC Ratio data from Conversion

2.23.1 Overview

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

2.23.2 Description of Change

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

2.23.3 Estimated Number of Records Impacted/Performance

Approximately 6,000 records will be deleted.

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

2.24.1 Overview

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

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

2.24.2 Description of Change

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

2.24.3 Estimated Number of Records Impacted/Performance

Approximately 1,800 records will be updated.

2.25 Automated Regression Test

2.25.1 Overview

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

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

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

2.25.2 Description of Change

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

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

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

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

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

        Note: This validation message will be verified for both ISFC and Non-ISFC fields.
4. Create new, or update existing automated scripts to verify that new records can be created and saved through the Foster Care Rate Detail page, and to verify the following on this page:
    a. Records can be saved with Begin Date and End Date values one calendar month in the future.
    b. The following validation messages display in at least one applicable scenario:
        i. **"Begin Date - Date cannot be more than one calendar month in the future."**
        ii. **"End Date - Date cannot be more than one calendar month in the future."**
    c. When the Placement Type of 'Foster Family Agency' is selected, the following Type field values are available:
        i. Non Standard Rate
        ii. Regional Center Vendorized
        ~~iii. Standard State Rate~~
        iii. RB-FFA
        iv. ISTF - ISFC - TFC
        v. ISFA - ISFC - FFA
    d. When the Placement Type of 'Out of State Basic' is selected, the following Type field values are available:
        i. Dual Agency RC-California Early Start Intervention (P1)
        ii. Dual Agency RC-Lanterman Developmental Disability (P2)
        iii. Non Standard Rate
        iv. Standard State Rate

5. Create new, or update existing automated scripts to verify that new records can be created and saved through the Kin-GAP Rate Detail page, and to verify the following on this page:
    a. Records can be saved with Begin Date and End Date values one calendar month in the future.
    b. The following validation messages display in at least one applicable scenario:
        i. **"Begin Date - Date cannot be more than one calendar month in the future."**
        ii. **"End Date - Date cannot be more than one calendar month in the future."**

2.26 Client Correspondence - Regression Test SCI FFA NOAs

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

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

*Fragment with ID 6162 is currently turned off in LRS and cannot be tested.

**Fragments with ID 6156, 6168, and 6181 use rates that are not applicable to the FFA placement type and cannot be tested.

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

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

5 MIGRATION IMPACTS

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

6 APPENDIX

6.1 Placement Type to Ratio Detail Page Mode Mapping

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

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

6.2 Placement Types That Require a State Program Number

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

6.3 Technical Notes

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

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

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-207026 – Migrate C-IV Contact Center Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester
	Reviewed By	Raji Sanuvala, Michael T. Wright, Pandya P. Amitkumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/18/2021	0.1	Initial version	Jared Kuester
03/25/2021	0.2	Content Revision 1	Jared Kuester
4/27/2021	0.3	Content Revision 2	Jared Kuester

Contents

1 OVERVIEW

The C-IV County Amazon Connect contact centers will be migrated to communicate with the CalSAWS application. This contact center solution will only be used by the 39 C-IV Counties.

1.1 Current Design

The C-IV County contact centers authenticate callers, and provides self service to customers by communicating with the C-IV application. All data dips are pulled from the C-IV Application database.

1.2 Requests

As part of the migration from the C-IV Application to CalSAWS, the Amazon Connect contact center will be modified to interact with the CalSAWS database.

1.3 Overview of Recommendations

The recommendations migrating the Amazon Connect contact cetner solution are as follows –

1. Update the Self Service Lambdas from Java to Node.js to communicate directly with the CalSAWS application database.
    a. This includes updating the IVR PIN lambdas to accept 4 and 6 digit PINs.
    b. Update Custom_ResendFormWebserviceLambda to not allow reprinting of forms generated before 9/26/2021.
    c. Add new Phone Number lookup lambda, and Get Case List lambda
2. ~~Update the Custom CCP to validate user against Amazon Connect.~~
2. Update Custom CCP.
    a. Update the CCPAgent, CCPSupervisor, and CCPMessageSender to CalSAWS Identity Provider roles.
    b. Update the CCP Environemnt Variable to open CalSAWS rather than C-IV.
3. Update the Prompts to remove the "4 digit" IVR PIN reference, and update C4Yourself to BenefitsCal.
4. Modify the Authentication Method in the IVR to no longer require Case Number as CalSAWS case numbers contain letters.
    a. See attached Call Flows for details.

1.4 Assumptions

- This only applies to the 39 C-IV Counties.
- The only update to the Call Flows is the removal of the mention of a "4 digit" IVR PIN.
- Users can authenticate with either a 4 or 6 digit PIN after the migration.
- Existing IVR PINS will remain 4 digit, but any PIN generated after the migration to CalSAWS will be 6 digit.
- Voice Authentication is not impacted by the authentication method change

2 RECOMMENDATIONS

The Migration to CalSAWS will consist of the following actions

2.1 Update the Self Service Lambdas

The existing Self Service lambdas will be updated from Java to Node.js. They will also be updated to no longer interact with the IVR Web Service, but to gather the information from the CalSAWS database directly. This will require updating the Lambda to also include the business logic that resides in the IVR Web Service.

2.1.1 List of Lambdas to update.

The following list are all the Self Service Lambdas currently in use

Lamabda Name	Function
Custom_CaseLookupWebserviceLambda	Looks up case information after a successful Voice Authentication.
Custom_CaseValidationWebserviceLambda	Validates the case number entered exists in the county called.
Custom_ChangePINWebServiceLambda	Change existing IVR PIN
Custom_DeleteVoiceprintWebserviceLambda	Send request to Nuance Servers to delete the voice print, and updates BVP_CODE column to N.
Custom_GenerateFormWebServiceLambda	Generates Benefit history document (CFS 142).
Custom_GetSentFormsInfoWebserviceLambda	Retrieves information on SAR7 and TMC form.
Custom_ResendFormWebserviceLambda	Requests to resend either SAR7 or TMC.

Lamabda Name	Function
Custom_PersonLookupWebserviceLambda	Checks if a caller has a Voice Print or not based on caller ID.
Custom_RequestPINWebserviceLambda	Requests a new IVR PIN
Custom_UpdateBvpInfoWebServiceLambda	Updates BVP_CODE column to Y after successful voice enrollment.
Custom_ConfirmAppointmentWebserviceLambda	Updates CONFIRM_IND column to Y
Custom_GetAppointmentsWebserviceLambda	Retrieves past and future appointments information.
Custom_RescheduleAppointmentWebserviceLambda	Reschedules a future appointment within the same month.
Custom_LoginProcessorLambda	Invokes other lambdas for login in San Bernardino county only.
Custom_GetEBTOrderReplacementWebserviceLambda	Cancel existing EBT and submits request for a new one in San Bernardino county only.
Custom_GetEBTPersonIdCaseByDOBWebserviceLambda	Get person ID and Case Information for EBT replacement via DOB for San Bernardino county only.
Custom_PredictiveHandlingLookupLambda	Returns the PH_CODE for San Bernardino county callers.
Custom_UpdateCallerResponseWebserviceLambda	Updates CALLER_RESP to Y or N
Custom_GetDistrictOfficeWebServiceLambda	Get District Office ID for Riverside county only.

Lamabda Name	Function
Custom_LoginWebserviceLambda	Authenticates callers via Case Number and IVR PIN.
Custom_UpdateExitReasonForCallWebserviceLambda	Update IVR_EXIT_RSN column to match caller's reason for calling.
Custom_GetCalFreshProgramInfoWebServiceLambda	Invoked by LoginProcessor to retrieve CalFresh benefits information.
Custom_GetCalWORKsProgramInfoWebServiceLambda	Invoked by LoginProcessor to retrieve CalWORKs benefits information.
Custom_GetMedicalProgramInfoWebServiceLambda	Invoked by LoginProcessor to retrieve MediCal benefits information.
Custom_GetWTWProgramInfoWebServiceLambda	Invoked by LoginProcessor to retrieve Welfare to Work benefits information.
Custom_DoLoginWebServiceSBLambda	Authenticaes San Bernardino county callers with Case and PIN
Custom_DoLoginWithSSNAndDOBWebServiceLambda	Authenticaes San Bernardino county callers with SSN and DOB.
Custom_ValidateIVRESignatureWebServiceLambda	Marks a document as e-signed
Custom_CancelAppointmentWebServiceLambda	Cancels upcoming appointment.
Custom_OutboundResendFormWebServiceLambda	Resends SAR7 document.

Lamabda Name	Function
Custom_SetAppointmentReminderCompleteWebServiceLambda	Update the appointment reminder call as completed.
Custom_SetDocumentReminderCompleteWebServiceLambda	Updates the document reminder call as completed.

2.1.2 Prevent Reprint of Converted Forms.

When a customer invokes the Custom_OutboundResendFormWebServiceLambda, the IVR System needs to validate wether or not the requested form was converted or not. If the form has an original generation date before 9/26/2021, the system should proceed down the Failed path of the Lambda.

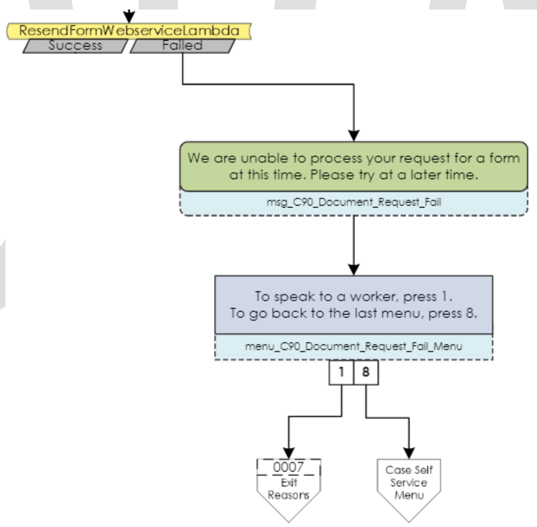


Figure 2.1.2 – Request Reprint call flow.

2.1.3 Add new Validate Caller and Get Case List Lambdas.

Create a new lambda that will validate a caller's identity when they enter their phone number, Social Security Number, Date of Birth, and/or IVR PIN. Once validated this lambda will return the customer's case number and IVR PIN. If the customer does not have an IVR PIN, the IVR will attempt to generate a new IVR PIN for the customer if they entered their Social Security number, otherwise they will be sent to a queue to speak to an eligibility worker.

If a customer is associated to more than one case, the get case list lambda will return a list of cases the customer is on where their person status is not "Out of Home". The customer will then be asked to choose from the list of cases which one they are calling about.

2.2 Update Custom CCP

When a contact center worker logs into the Custom CCP, the application checks what security permission the worker has. ~~This security check needs to be modified to interact with Amazon Connect rather than C-IV~~. This security check needs to be modified to no longer exist in C-IV but as a CalSAWS Identity Provider role.

2.2.1 Update CCP security rights to CalSAWS Identity Provider Roles.

The CCPAgent, CCPSurpervisor, and CCPMessageSender rights currently exist in C-IV. This functionality will be replicated as a CalSAWS Identity Provider role.

If an Amazon Connect agent exists in the CalSAWS Identiy Provider they will have the CCPAgent automatically. If a supervisor needs access to the Team Performance Panel they will need to have the CCPSupervisor role applied to their account in the CalSAWS Identity Provider. If a manager needs access to the Message of the Day Sender panel, they will need the CCPMessageSender role applied to their account.

2.2.2 Update CCP Environment Variables.

When an authenticated call is delivered to an agent, the Custom CCP will open the Case Summary page. If an unauthenticated caller arrives, the Custom CCP will open the Person Search page.

The CCP_Screen_Pop Environment Variable will be updated to the following.

```
https://web.calsaws.net/c-iv/
```

2.3 Update the ~~IVR PIN~~ Call Flow Prompts

CalSAWS currently uses a 6 digit IVR PIN, and C-IV Counties use a 4 digit PIN. Existing C-IV customers will still have an IVR PIN, but if they choose to change it, or a new PIN is requested, it will be a six digit PIN. The Call Flow needs to be updated to reflect this change. This change will impact all C-IV county call flows.

The IVR also mentions the C4Youself portal in multiple locations. These prompts will be updated to now direct the customer to BenefitsCal. For more information on the new prompts please see the attached Call Flows.

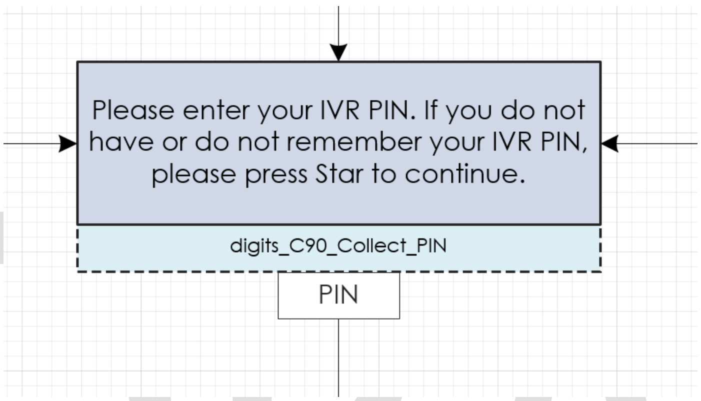


Figure 2.3.1 – Collect PIN prompt.

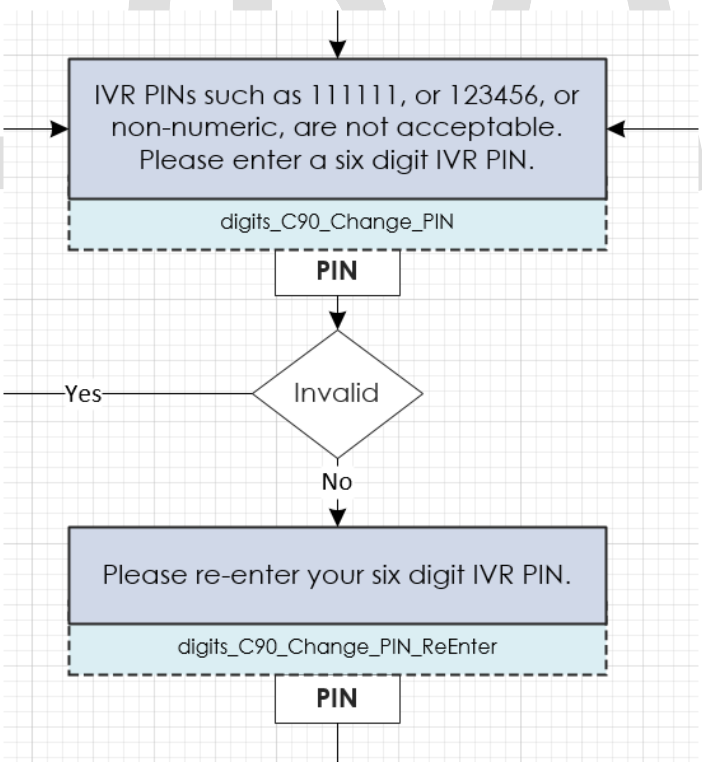


Figure 2.3.2 – Change PIN Prompts.

2.4 Modify IVR Authentication Method

New Cases generated in CalSAWS will contain letters as well as numbers. Customers will no longer be able to enter their case number if it contains letters, so the IVR will no longer prompt them to enter it.

The IVR will now prompt the customer to enter their phone number and their social security number. If the customer does not have, or doesn't know their social security number they will be prompted for their date of birth, and/or their IVR PIN. A customer will only be prompted for their date of birth or IVR PIN if the IVR is unable to narrow down the customer to a single person in the CalSAWS database.

For additional information please see the attached call flows.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Butte County Call Flow	
2	IVR	Humbold County Call Flow	
3	IVR	Kern County Call Flow	
4	IVR	Kings County Call Flow	
5	IVR	Marin County Call Flow	
6	IVR	Monterey County Call Flow	
7	IVR	Riverside County Call Flow	
8	IVR	San Bernardino County Call Flow	
9	IVR	Shasta County Call Flow	
10	IVR	Stanislaus County Call Flow	
11	IVR	Sutter County Call Flow	
12	IVR	Yuba County Call Flow	
13	IVR	Non-CSC Call Flow	

APPENDIX

Amazon Connect - https://aws.amazon.com/connect/features/

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207131

DDID 2208 Add Dashboard that Shows Appointment Availability

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Remi Lassiter
	Reviewed By	Ravneet Bhatia, Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/17/2021	1.0	Initial draft	Remi Lassiter
04/14/2021	1.1	Design Clarification made to remove all mention of 'Assigned/In Process' task status	Remi Lassiter
4/27/2021	1.2	Content Revision made to remove Language column from Appointments sheet	Remi Lassiter

Table of Contents

1 OVERVIEW

This SCR will implement a new Appointments/Tasks Assigned to Unavailable Workers Dashboard that will display appointments and tasks that are assigned to workers who are unavailable. This dashboard will be used by office supervisors to identify and redistribute or reschedule appointment and task conflicts due to worker unavailability.

Note: This dashboard is similar to the on request reports in the previous reporting tool, but in the new reporting Qlik platform, on request reports function more similarly to Qlik dashboards.

1.1 Current Design

There is currently no report or dashboard in CalSAWS which provides details on appointments or tasks assigned to unavailable workers.

1.2 Requests

1. Add a dashboard that shows any appointments and tasks that are assigned to users that are not available at that time.

1.3 Overview of Recommendations

1. Implement a new Appointments/Tasks Assigned to Unavailable Workers Dashboard.

1.4 Assumptions

1. The dashboard will be developed in Qlik.

2 RECOMMENDATIONS

2.1 Appointments/Tasks Assigned to Unavailable Workers Dashboard

2.1.1 Overview

Implement a new Appointments/Tasks Assigned to Unavailable Workers Dashboard that displays all appointments and tasks that are assigned to workers who are unavailable.

2.1.2 Appointments/Tasks Assigned to Unavailable Workers Dashboard Mockup

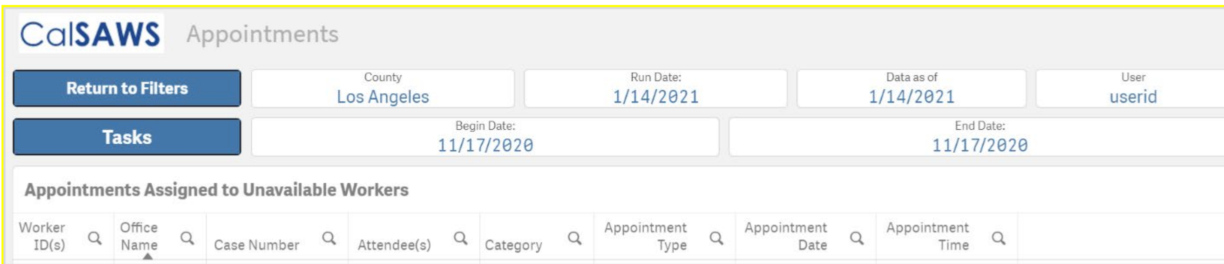


Figure 2.1.1 – Appointments/Tasks Assigned to Unavailable Workers Dashboard Mockup – Appointments Sheet

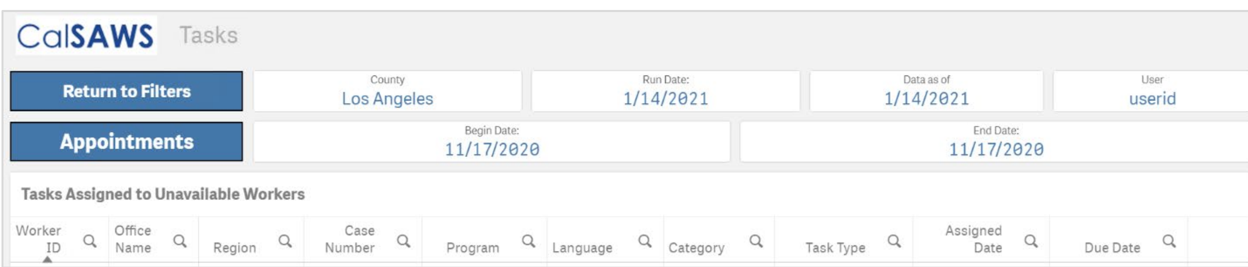


Figure 2.1.2 – Appointments/Tasks Assigned to Unavailable Workers Dashboard Mockup – Tasks Sheet

2.1.3 Description of Change

1. Create a new Appointments/Tasks Assigned to Unavailable Workers Dashboard.
    i. Generate this dashboard for any selected dates specified in the Report Filters page.
    ii. Refresh the data for this dashboard daily via a nightly sweep job.

2. The dashboard will contain two sheets – 'Appointments' and 'Tasks'.

i. **Base Population for Appointments Sheet:** all appointments with a status of 'Scheduled' or 'Rescheduled' that occur during the specified date range for which ALL assigned workers are unavailable during the time of the appointment.

   1. The full duration of the appointment will be examined for conflicts. For example, if an appointment is scheduled from 10:00 – 11:00 AM, and a worker is unavailable starting at 10:30 AM, the appointment will display on this dashboard.
   2. An appointment can have multiple assigned workers. The appointment will only be displayed on this dashboard if ALL assigned workers are unavailable.
   3. A worker is considered unavailable if their availability status is of type 'Leave', 'Unavailable' or 'Vacation Days' OR if the assigned worker is no longer valid (i.e., their Position or Staff record became inactive or their staff assignment to the position has an end date prior to the appointment date.)

   Technical Note: Select all appointment records where CUST_APPT.STAT_CODE = 'Scheduled' or 'Rescheduled' and CUST_APPT.APPT_DATE is within the date range

   AND

   The assigned worker has an availability status, INTAKE_SCH.AVAIL_TYPE_CODE, of 'Leave', 'Unavailable' or 'Vacation Days' (CATGRY_ID = 290) during the duration of the appointment (CUST_APPT.START_TIME and CUST_APPT.STOP_TIME)

   OR the assigned worker is now invalid – POS.STAT_CODE = 'Inactive', STAFF.STAT_CODE = 'Inactive' or STAFF_POS_ASSIGN.END_DATE < CUST_APPT.APPT_DATE

ii. **Base Population for Tasks Sheet:** All tasks with a status of 'Assigned' or 'In Process' whose due date falls in the specified date range and for which the assigned worker is unavailable to complete the task. For tasks, there are two ways a worker's availability may be evaluated:

   1. **If it is a task linked to an appointment** by the Automated Action created in SCR 214914, the task's corresponding appointment record will be examined using similar rules as described above for the Appointments sheet to determine if the task should be included in the dashboard. In this scenario, a worker is considered

unavailable to complete the task if ALL assigned workers on the corresponding appointment are unavailable during the scheduled appointment time.

   a. Per the design of SCR 214914, if an appointment has multiple assigned workers, a separate task record is created for each worker by the Automated Action. If any of the assigned workers are available, none of the corresponding task records will be included in this dashboard. Conversely, if all the assigned workers are unavailable, all of the corresponding task records will be included in this dashboard.
   b. If a task record or records are displayed on the Task sheet the corresponding appointment record will appear in Appointments sheet.

2. **If it is not a task linked to an appointment**, only the task record will be examined for availability. In this scenario, the worker is considered unavailable to complete the task if they are unavailable from the day the dashboard is generated through the due date of the task.
3. A task can be assigned to a worker or a bank or both. If a task has any assignment to a bank, it will not be considered for this dashboard.
4. A worker is unavailable if their availability status is of type 'Leave', 'Unavailable' or 'Vacation Days' OR if the assigned worker is no longer valid (i.e., their Position or Staff record became inactive or their staff assignment to the position has an end date prior to the task due date.)

Technical Note: Select all task records where TASK.STAT_CODE is 'Assigned or 'In Process' and the TASK.DUE_DATE is within the date range and TASK.BANK_ID is NULL

AND

The assigned worker has an availability status (INTAKE_SCH.AVAIL_TYPE_CODE) of 'Leave', 'Unavailable' or 'Vacation Days' from the day the dashboard is generated through the task's due date

OR TASK_ATTR.ATTR_NAME = 'taskAppointmentInfo' and ALL workers on the corresponding appointment record (TASK_ATTR.ATTR_VALUE) have an availability status (INTAKE_SCH.AVAIL_TYPE_CODE) of 'Leave', 'Unavailable' or 'Vacation Days' during the duration of the appointment (CUST_APPT.START_TIME and CUST_APPT.STOP_TIME)

OR the assigned worker is now invalid - POS.STAT_CODE = 'Inactive', STAFF.STAT_CODE = 'Inactive' OR STAFF_POS_ASSIGN.END_DATE < TASK.DUE_DATE

Please refer to the Appendix for a visual of the logic for these two sheets and examples of how appointments and tasks are expected to be included in this dashboard.

3. The dashboard will have the following columns defined in the tables below:

Appointments Sheet Column Definitions

Column Name	Column Description
Worker ID(s)	The worker ID(s) of the worker(s) assigned to the appointment. If multiple Workers, each worker ID will be displayed in numerical order separated by a comma. Format: WorkerID, WorkerID Note: multiple workers will only be displayed if ALL assigned workers are unavailable.
Appointment Office	The office name associated with the appointment. This is the office location of the appointment. Note: this field will be blank if an office is not specified for the appointment record. Technical Note: CUST_APPT.OFFICE_NAME
Region	The region associated with the office location of the appointment. Note: this field will be blank for counties that don't use region.
Case Number	The case number associated with the appointment.
Attendee(s)	The individual(s) with whom the appointment is scheduled. If multiple attendees, each name will be displayed alphabetically separated by a comma. Format: FirstName LastName, FirstName LastName Technical Note: CUST_APPT_ATTEND
Category	The category of the appointment (CATGRY_ID = 291). Possible Values: (Note: this list is as of when this design was written and subject to change in the future) • Counselor Meeting • Intake Interview • Re-Evaluation Interview

	• Home Visit • Meeting with Worker • Group Meeting • Telephone Interview • IEVS Interview • Preventative Fraud Interview • Re-Evaluation CW/CF Interview • Telephone CW/CF RE Interview • Cal-Learn • GROW • General Appointment • WTW/REP • Provider • QC Case Review • YBN Appointment
Appointment Type	The sub-category of the appointment (CATGRY_ID = 10113) Possible values include 'YBN Application Appointment', 'Screening Only', 'Client Requested', 'Direct Rent', 'Fingerprinting' (this is a non-exhaustive list)
Appointment Date	The scheduled date of the appointment. (CUST_APPT.APPT_DATE) Format: MM/DD/YYYY
Appointment Time	The scheduled begin and end time of the appointment. (CUST_APPT.START_TIME, CUST_APPT.STOP_TIME) Format: HH:MM PM/AM – HH:MM PM/AM

Tasks Sheet Column Definitions

Column Name	Column Description
Worker ID	The worker ID of the worker assigned to the task.
Office Name	The office name associated with the worker assigned to the task.
Region	The region of the worker assigned to the task. Note: this field will be blank for counties that don't use region.
Case Number	The case number associated with the task.
Program	The program associated with the task. Note: this field will be blank for tasks that aren't associated to a program. Technical Note: TASK > TASK_PGM > PGM
Language	The language associated with the task. Technical Note: TASK.LANG_CODE (CATGRY_ID = 145)

Category	The category of the task type (CATGRY_ID = 10350). Possible values include ‘Fraud’, ‘Case Update’, ‘Redetermination’ (this is a non-exhaustive list).
Task Type	The sub-category of the task (CATGRY_ID = ‘399’). Possible values include ‘ABAWD’, ‘Alternate Card Holder’, ‘Earned Income’, ‘Fleeing Felon’, ‘Immigration Status’ (this is a non-exhaustive list).
Assigned Date	The date the task was assigned (TASK.ASSIGN_DATE)
Due Date	If task is linked to an appointment, display the date and time of the linked appointment – Format: MM/DD/YYYY HH/MM AM/PM – HH/MM AM/PM Otherwise, display the due date of the task – Format: MM/DD/YYYY

4. Default the sort for both sheets to the Worker ID column.

2.1.4 Report Filters

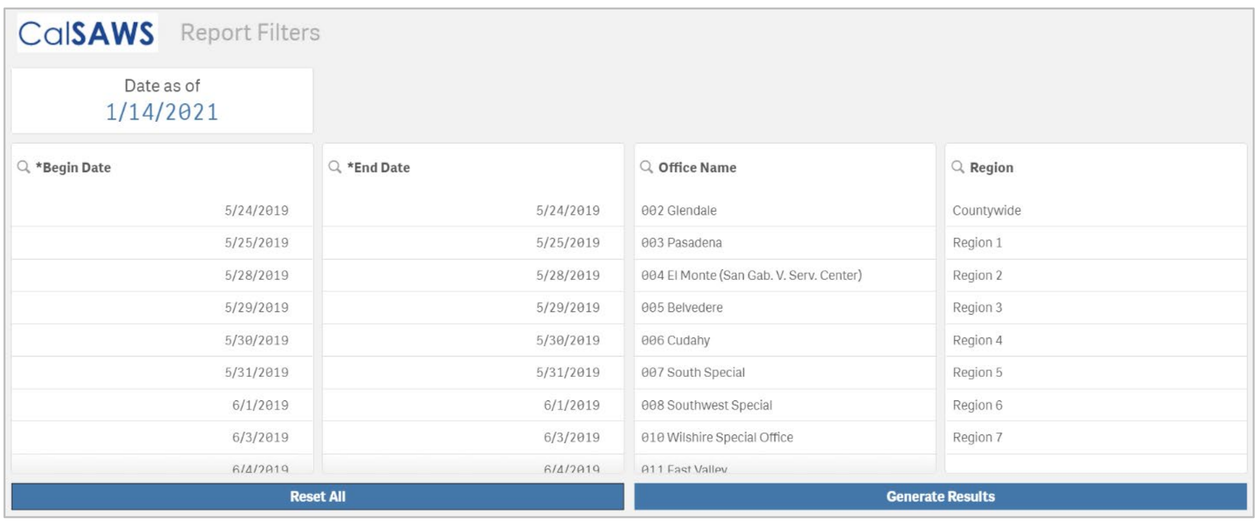


Figure 2.1.3 – Appointments/Tasks Assigned to Unavailable Workers Dashboard Filters

The Appointments/Tasks Assigned to Unavailable Workers Dashboard will have the following filter selections:

- **Begin Date:** restricts the base population of the dashboard to include appointments scheduled to be held on or after the Begin Date and tasks with due dates on or after the Begin Date. This is a required field.
- **End Date:** restricts the base population of the dashboard to include appointments scheduled to be held on or before the End Date and tasks with due dates on or before the End Date. This is a required field.

- **Office Name:** restricts the base population to appointments and tasks assigned to workers from the selected Office(s).
- **Region:** restricts the base population to appointments and tasks assigned to workers from Office(s) in the selected Region(s).

2.1.5 Report Location

- **Global:** Reports
- **Local:** On-Request
- **Task:** Administrative
- **Title:** Appointments/Tasks Assigned to Unavailable Workers Dashboard
  Description: Displays appointments and tasks that are assigned to workers who are unavailable.

2.1.6 Counties Impacted

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

2.1.7 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
Appointments/TasksAssignedToUnavailableWorkersDashboard	This right gives access to view the Appointments/Tasks Assigned to Unavailable Workers Dashboard.	Appointments / Tasks Assigned to Unavailable Workers Dashboard

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Appointments / Tasks Assigned to Unavailable Workers Dashboard	This group gives access to view the Appointments/Tasks Assigned to Unavailable Workers Dashboard.	Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor and Regional Call Center Supervisor

2.1.8 Report Usage/Performance

This dashboard is expected to be viewed, on average, once per week per office.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix for Appointments/Tasks Assigned to Unavailable Workers Dashboard	Security Matrix

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
n/a		

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2208	The CONTRACTOR shall add a dashboard that shows any appointments and tasks that are assigned to users that are not available at that time.	- It is assumed only one new dashboard will be created.	New Appointments/Tasks Assigned to Unavailable Workers Dashboard created.

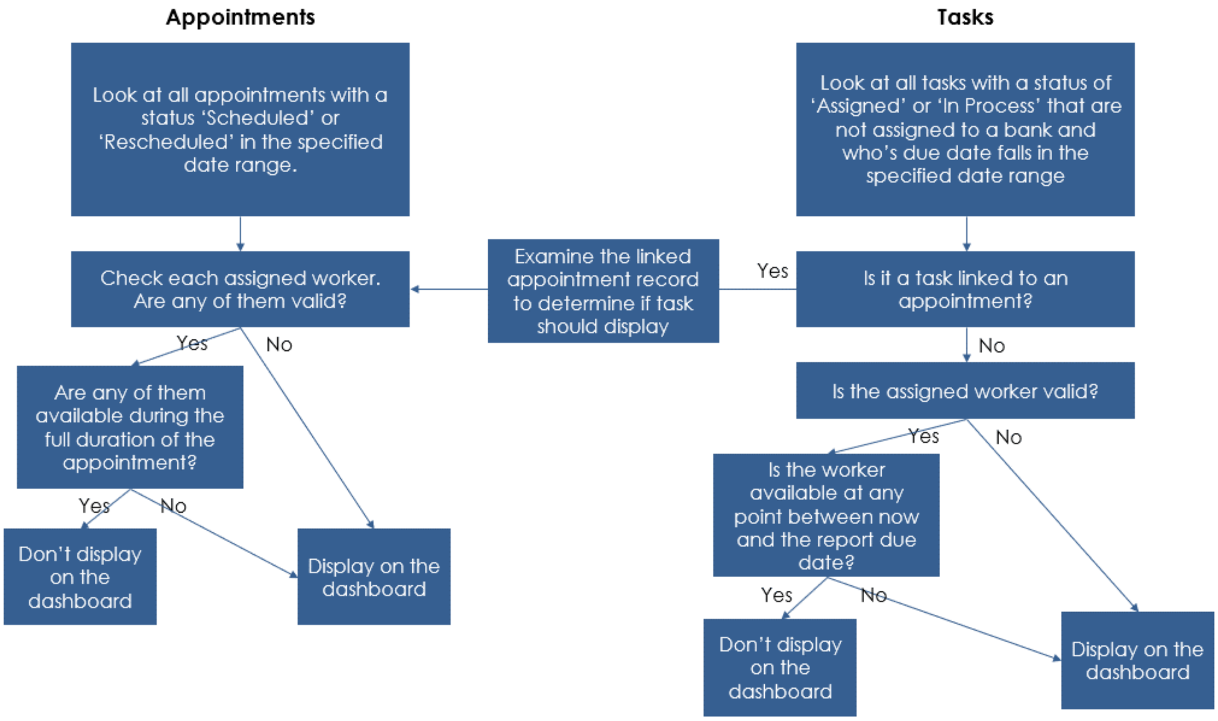
5 MIGRATION IMPACTS

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

6 APPENDIX

6.1 Base Population Logic

The following flow chart provides a visualization of the logic for populating the Appointments and Tasks sheets of the Appointments/Tasks Assigned to Unavailable Workers Dashboard.



6.2 Example Scenarios

The following examples look at how a variety of Appointment and Task records would show up in the Appointments/Tasks Assigned to Unavailable Workers Dashboard over the course of a week if generated each day for the remainder of the week:

- Scenario 1.1: Appointment with Unavailable Worker
- Scenario 1.2: Task Linked to an Appointment with Unavailable Worker
- Scenario 1.3: Task (not linked to an Appointment) with Unavailable Worker
- Scenario 2.1: Appointment with End-Dated Worker
- Scenario 2.2: Task Linked to an Appointment with End-Dated Worker
- Scenario 3.1: Appointment with Multiple Workers
- Scenario 3.2: Task Linked to Appointment with Multiple Workers

6.2.1 Scenario 1.1: Appointment with Unavailable Worker

On 1/25, An appointment is scheduled for 1/30 from 10-11am. On 1/27, the assigned worker's availability status is updated to 'Leave' from 10:30-2pm on 1/30. The supervisor re-assigns this appointment to an available worker on 1/29.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	An appointment is scheduled for 1/30 from 10-11am.	1/25 – 1/31		The appointment is not yet considered for the dashboard because the nightly sweep hasn't refreshed the data yet.
Tue 1/26		1/26 – 1/31		The appointment is considered for the dashboard but not included because there is no conflict in availability for the assigned worker.
Wed 1/27	The assigned worker updates their availability status to 'Leave' from 10:30-2pm on 1/30.	1/27 – 1/31		The appointment is considered for the dashboard but not included because the nightly sweep hasn't refreshed the data yet to reflect that the assigned worker is unavailable at the time of the appointment.
Thu 1/28		1/28 – 1/31	X	The data has been refreshed and the assigned worker is unavailable for the appointment.
Fri 1/29	The supervisor re-assigns this appointment to an available worker.	1/29 – 1/31	X	The appointment was reassigned today but the nightly sweep job hasn't refreshed the data yet.
Sat 1/30 **(Appt Date)**		1/30 – 1/31		The appointment is considered for the dashboard but not included because it was reassigned to an available worker.
Sun 1/31		1/31		The appointment is not considered for the dashboard because it is outside the date range.

6.2.2 Scenario 1.2: Task Linked to an Appointment with Unavailable Worker

The appointment in Scenario 1.1 is linked to a task by Automated Action. On 1/25, a task is created with a due date of 1/30 and linked to the Appointment record. On 1/27, the assigned worker's availability status is updated to 'Leave' from 10:30-2pm on 1/30. The supervisor re-assigns this appointment to an available worker on 1/29. The task record is automatically updated to reflect this change via a nightly sweep.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	A task is created with a due date of 1/30 and linked to the Appointment record.	1/25 – 1/31		The task is not yet considered for the dashboard because the nightly sweep hasn't refreshed the data yet.
Tue 1/26		1/26 – 1/31		The task is considered for the dashboard but not included because there is no conflict in availability for the assigned worker.
Wed 1/27	The assigned worker updates their availability status to 'Leave' from 10:30-2pm on 1/30.	1/27 – 1/31		The task is considered for the dashboard but not included because the nightly sweep hasn't refreshed the data yet to reflect that the assigned worker is unavailable at the time of the appointment.
Thu 1/28		1/28 – 1/31	X	The data has been refreshed, the linked appointment record is examined for conflicts, and the task record is included in the dashboard because the assigned worker is unavailable for the appointment.
Fri 1/29	The supervisor re-assigns this appointment to an available worker. The task record is updated to reflect this change via a nightly sweep.	1/29 – 1/31	X	The appointment was reassigned today but the nightly sweep job hasn't refreshed the data yet.
Sat 1/30 **(Due Date)**		1/30 – 1/31		The task is considered for the dashboard but not included because it was reassigned to an available worker.
Sun 1/31		1/31		The task is not considered for the dashboard because it is outside the date range.

6.2.3 Scenario 1.3: Task (not linked to an Appointment) with Unavailable Worker

A task (not linked to any appointment) is assigned to a worker with a due date of 1/29. On 1/26, The assigned worker's availability status is updated to 'Vacation Days' for 1/28-1/31. On 1/29, the task is still not complete, and the supervisor re-assigns the task to an available worker.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	A task is assigned to a worker with a due date of 1/29.	1/25 – 1/31		The task is not yet considered for the dashboard because the nightly sweep hasn't refreshed the data yet.
Tue 1/26	The assigned worker's availability status is updated to 'Vacation Days' for 1/28-1/31.	1/26 – 1/31		The task is considered for the dashboard but not included because the data hasn't been refreshed to reflect the worker's new availability.
Wed 1/27		1/27 – 1/31		The data has been refreshed to reflect the worker's new availability, but the task is not included in the dashboard because the worker is available for at least one day leading up to the task's due date.
Thu 1/28		1/28 – 1/31	X	The task is included in the dashboard because the worker is now unavailable through the due date for this task.
Fri 1/29	The task is still not complete, and the supervisor re-assigns the task to an available worker.	1/29 – 1/31	X	The task is included in the dashboard because the data hasn't been refreshed yet to reflect the updated worker assignment.
Sat 1/30 **(Due Date)**		1/30 – 1/31		The task is considered for the dashboard but not included because it was reassigned to an available worker.
Sun 1/31		1/31		The task is not considered for the dashboard because it is outside the date range.

6.2.4 Scenario 2.1: Appointment with End-Dated Worker

On 1/1, a worker was assigned to appointment that is scheduled for 1/30. On 1/25 they are promoted to a new position which they will start on 1/27 so the end date of their current staff position assignment is updated to 1/27. The supervisor re-assigns this appointment to a new worker on 1/27.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	Worker is promoted to a new position and the end date of	1/25 – 1/31		The appointment is considered for the dashboard but not included because the nightly sweep hasn't refreshed the data yet to reflect that the worker is unavailable.

	their staff position assignment is updated to 1/27.			
Tue 1/26		1/26 – 1/31	X	The data has been refreshed and the appointment is included in the dashboard because the staff position assignment of the assigned worker has an end date prior to the appointment date making them unavailable for the appointment.
Wed 1/27	The supervisor re-assigns this appointment to a new worker.	1/27 – 1/31	X	The appointment is included in the dashboard because the data hasn't been refreshed yet to reflect the updated worker assignment.
Thu 1/28		1/28 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Fri 1/29		1/29 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Sat 1/30 **(Appt Date)**		1/30 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Sun 1/31		1/31		The appointment is not considered for the dashboard because it is outside the date range.

6.2.5 Scenario 2.2: Task Linked to an Appointment with End-Dated Worker

The appointment in Scenario 2.1 is linked to a task by Automated Action. On 1/1, a task is created with a due date of 1/30 and linked to the Appointment record. On 1/27, the end date of their staff position assignment for the assigned worker of the appointment record is updated to 1/27. The supervisor re-assigns this appointment to a new worker on 1/27, and the task record is automatically updated to reflect this change via a nightly sweep.

Day of the Week	Action	Date Range Generated	Included in the Dashboard?	Explanation
Mon 1/25	Worker is promoted to a new position and the end date of their staff position assignment is updated to 1/27.	1/25 – 1/31		The task is considered for the dashboard but not included because the nightly sweep hasn't refreshed the data yet to reflect that the worker is unavailable.

Tue 1/26		1/26 – 1/31	X	The data has been refreshed and the task is included in the dashboard because the staff position assignment of the assigned worker for the corresponding appointment record has an end date prior to the appointment date making them unavailable for the appointment.
Wed 1/27	The supervisor re-assigns the appointment to a new worker. The task record is automatically updated to reflect this change via a nightly sweep.	1/27 – 1/31	X	The task is included in the dashboard because the data hasn't been refreshed yet to reflect the updated worker assignment.
Thu 1/28		1/28 – 1/31		The task is considered for the dashboard but not included because it is now assigned to an available worker.
Fri 1/29		1/29 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Sat 1/30 **(Due Date)**		1/30 – 1/31		The appointment is considered for the dashboard but not included because it is now assigned to an available worker.
Sun 1/31		1/31		The task is not considered for the dashboard because it is outside the date range.

6.2.6 Scenario 3.1: Appointment with Multiple Workers

On 1/25 an appointment is scheduled with two assigned workers for 1/30. On 1/28, Worker 1 is terminated, and their staff id is inactivated. Worker 2 remains active.

This appointment will never display on the dashboard because there is always at least one valid assigned worker.

6.2.7 Scenario 3.2: Task Linked to Appointment with Multiple Workers

The appointment in Scenario 3.1 is linked to two tasks by Automated Action. With the creation of the appointment on 1/25, one task was created for Worker1 and a second task was created for Worker 2.

Neither task will ever display on the dashboard because although the individual task assigned to Worker 1 is assigned to an unavailable worker, it is linked to an appointment record that has at least one valid assigned worker (Worker 2).

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207637

ABAWD – Phase III

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mark Keehn, Philip McGinty, Taylor Fitzhugh, Jennifer Muna
	Reviewed By	Jason Francis

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/18/2020	1	Initial version provided to the CW/CF Committee.	Mark Keehn, Philip McGinty, Taylor Fitzhugh, Jennifer Muna
12/8/2020	2	Updates based on Region 6 comments.	Mark Keehn, Philip McGinty, Taylor Fitzhugh
3/15/2021	3	Content Revision 1	Philip McGinty, Taylor Fitzhugh, Jason Francis Jennifer Muna
3/30/2021	4	Design Clarification added in Section 2.21 - Updated "Unfit for Employment"" to "Obviously Unfit for Employment"	Ritu Chinya
4/6/2021	5	Adding back Design Clarification from 2/23/2021 to update section 2.20.2.2 to reflect correct ABAWD status	Jennifer Muna
4/13/2021	6	Design Clarifications for Content Revision 1 prior to SCRB/CCB approval: Changed fig. 2.11.2.2 to match the description of changes. Reverted section 2.3.3.7 back to the previous approved "Total Completed Hours" based on Region feedback. Add clarification to assumption 11.	Philip McGinty
4/19/2021	7	Design Doc updated to reflect missing highlights per QA's review	Philip McGinty
4/22/2021	8	Design Clarification to fig 2.11.2.2	Philip McGinty
4/27/2021	9	Content Revision 2	Philip McGinty

Table of Contents

1 OVERVIEW

This SCR provides additional system functionality for Able-Bodied Adult Without Dependents (ABAWD) cases extending the functionality provided with SCR **CA-57971/CIV-7215 – ABAWD Phase II**. These changes will only be implemented in CalSAWS and are based on policy in ACL 19-93, CalFresh AWAWD Time Limit Handbook II. In addition, the following Consortium Request for Policy Clarifications (CRPC) are applicable to this change: 2191, 2200, 2204, 2214, and 2189.

High level changes for this SCR include:

- New functionality to determine whether an ABAWD has met work requirements. The work requirement can be met in two ways:
  1. as an individual, meeting the 80 hours per month work requirement through employment or qualified activities
  2. as a household, meeting the calculated household workfare requirement

  This work requirement change will include page updates to:
  - Display the results of the work requirement determination.
  - Calculate a household's *anticipated workfare* requirement hours.
  - Track the household Local Minimum Wage.
  - Enter non-scheduled (non-CFET) activities.
  - Track actual hours needed to determine work requirement hours.
  - Enter effective-dated manual ABAWD exemptions.
- Updates to the batch ABAWD Determination sweep job to detect data changes which impact the new work requirement determination (e.g., employment and activity hours). These changes will initiate the ABAWD Determination batch job which will update a person's ABAWD Status and determine whether an ABAWD has met the work requirement.
- Update to the ABAWD Work Registration Exemption logic to prevent more than one person from being considered exempt for 'Cares for Dependent Child Under 6'.
- Updates to the ABAWD Status logic to handle the following scenarios:
  1. Treat a person receiving Transitional CalFresh (TCF) as a Non ABAWD with a reason of TCF.
  2. Treat a person manually identified by the user as 'Applied for Disability Benefits' as an Exempt ABAWD with a reason of 'Applied for Disability Benefits'.
  3. Treat a person manually identified by the user as 'Participating in an ORR Training Program at Least Half Time' as an Exempt ABAWD with a reason of 'Participating in an ORR Training Program at Least Half Time'.

The new functionality that determines an ABAWD Status of Non-ABAWD TCF person (see CRPC 2191) will have the following functional downstream impacts:

1. The TCF person will receive an ABAWD Time Limit status of 'TCF' with no status reason if a time clock has been started. If no time clock has been started, one will not be created for a TCF person.

2. The TCF person ABAWD time limit month will be transmitted to MEDS as exempt (E) if a time clock exists.

The new functionality that determines whether the work requirement was met relies on actual hours being entered into the system. In the absence of actual hours being entered, the system will find that the work requirement has not been met. The user will be able to override the system determined work requirement by updating the ABAWD Time Limit Detail page.

When processing a CalFresh (CF) EDBC, the system will determine whether the work requirement has been met. Before authorizing the CF EDBC, the user will be able to view how the work requirement was determined from the CF EDBC Detail page, specifically under the ABAWD Status section. Once an EDBC is authorized, the work requirement determination can also be viewed from the ABAWD Requirement Summary page, which is being added with this SCR.

Determining Work Requirement

New functionality will calculate whether an ABAWD who is subject to the Work Requirement has or has not met the Work Requirement. Options to satisfy the Work Requirement include, but are not limited to:

1. Employment
    a. Paid Employment
    b. Self-Employment
    c. In-Kind Work
2. Participating in qualifying work activities such as
    a. CalFresh Employment and Training
    b. Workforce Innovation and Opportunity Act (WIOA) programs
    c. Programs under section 236 of the Trade Act of 1974
    d. Community Service or Volunteer Work
3. Workfare (if available in your county)

Once the user has entered the hours associated with the above activities, the system will determine whether collectively these activities meet either

- the *individual* work requirement threshold of 20 hours per week/80 hours per month or
- the calculated *household* workfare requirement level.

For the Work Requirement, someone who meets the 20 hours per week criteria is going to meet the 80 hours monthly criteria. Conversely, someone who meets the 80 hours monthly may not meet the 20 hours weekly criteria. Given this, the system will only calculate and display monthly work hours.

For the system to determine monthly hours, actual hours will need to be entered by a user to indicate verified hours. Once actual hours are entered for a specific month for a customer activity or employment, the system will use those monthly actual hours into the future until a user makes a change. Take the following example.

Activity	December		January		February	
	Actual Hours (A)	Countable Hours (C)	Actual Hours (A)	Countable Hours (C)	Actual Hours (A)	Countable Hours (C)
1	**20**	20	-	20	-	20

In this example, the user has entered actual hours for the customer activity of 20 hours in the month of Dec. The user makes no further data entry; however, the system will still assume the client has 20 countable hours for future months until a change is made.

Here is another example with two customer activities.

Activity	Dec		Jan		Feb		Mar		April		May		June	
	A	C	A	C	A	C	A	C	A	C	A	C	A	C
1	**20**	20	-	20	-	20	-	20	-	20	-	20	-	20
2	**62**	62	-	62	-	62	**30**	30	-	30	-	30	**60**	60
Total Hours	82		82		82		**50**		50		50		**80**	
Work Req	Met		Met		Met		Not Met		Not Met		Not Met		Met	
Time Limit	Met		Met		Met		Not Met		Not Met		Not Met		Met	

In this example, the user has entered actual hours for the month of Dec. These hours carry into the future until March when the user enters new hours for customer activity 2. Beginning in March, the ABAWD is no longer meeting the work requirement. This continues to be true until June when the actual hours for customer activity 2 increases to 60 giving the ABAWD 80 total hours and thus again meeting the work requirement in June.

When a user determines that an ABAWD had good cause for not working at least 80 hours, the user will enter 'Good Cause' using the ABAWD Time Limit Month Detail page. Defining 'Good Cause' for an ABAWD will cause the system to skip over a given benefit month when determining whether to carry actual hours forward.

As an example of good cause, take the above example, but now assume that the decrease in actual hours entered in March was due to good cause. The user therefore overrides the ABAWD Time Limit page to indicate 'Good Cause' for March and then reprocess the April and May benefit months.

Activity	**Dec**		**Jan**		**Feb**		**Mar**		**April**		**May**		**June**	
	A	**C**	**A**	**C**	**A**	**C**	**A**	**C**	**A**	**C**	**A**	**C**	**A**	**C**
1	20	20	-	20	-	20	-	20	-	20	-	20	-	20
2	62	62	-	62	-	62	30	30	-	**62**	-	**62**	60	60
Total Hours	82		82		82		50		**82**		**82**		80	
Work Req	Met		Met		Met		Not Met		**Met**		**Met**		Met	
Time Limit	Met		Met		Met		**Good Cause**		**Met**		**Met**		Met	

When the system processes for April and May, no actual hours have been entered for either of those months. The system will no longer carry forward the 30 hours from March since 'Good Cause' was defined. Instead the system will use the Dec hours for both customer activity 1 and 2 for future months since this is the most recent month with actual hours that does not have Good Cause. Note that March will continue to use 30 hours for customer activity 2, but those 30 hours are not used in any month other than March because of the 'Good Cause'.

The system will use the actual hours entered for a self-employment, however, per policy, the system must also be able to calculate countable hours from self-employment income ***but only*** if actual hours are not available.

Per ACL 19-93, page 23, self-employment income is calculated as follows:

1. Subtract any applicable deductions from the gross self-employment income.
2. Divide the adjusted income amount by the higher of the state or local minimum wage associated with the individual's residence address.

1.1 Current Design

Currently a user is required to define whether a non-exempt ABAWD is meeting or not meeting the work requirement. This is accomplished by updating the ABAWD Time Limit Month Detail page, or, in some scenarios, by defining the work requirement from the CF EDBC page.

1.2 Requests

Automate the ABAWD work requirement determination.

Make updates to the Work Registration Exemption logic and ABAWD Status logic.

1.3 Overview of Recommendations

<u>Online</u>

1. Update Left Navigation - All stand-alone ABAWD pages will be gathered under a single collapsible task navigation section.
2. Add a new ABAWD Requirement Summary page. The ABAWD Requirement Summary page displays a list of ABAWD records for the household within a given month. This list will be displayed at the case level with the appropriate ABAWD information.
3. Add a new ABAWD Requirement Person Summary page. This page provides details related to a person's ABAWD Status, including work registration exemptions and how their work requirement status was determined.
4. Add a new Local Minimum Wage List page. The Local Minimum Wage List page displays a list of records that have been created through the Local Minimum Wage Detail page and provides access to that page.
5. Add a new Local Minimum Wage Detail page. The Local Minimum Wage Detail page captures, displays, and manages the fields for Local Minimum Wage.
6. Add a new ABAWD Exemption List page. The ABAWD Exemption List page allows users to view and manage manual ABAWD exemptions.
7. Add a new ABAWD Exemption Detail page. The ABAWD Exemption Detail page captures and manages manual exemptions for the participant.
8. Add a new Workfare Requirement Calculator page. The Workfare Requirement Calculator page will be used to allow the user to run and display the Workfare Requirement.
9. Add a new Non-Scheduled Activities List page. The Non-Scheduled Activities List page is used to track non-CFET activities of participants which are not scheduled by a CalFresh Employment and Training (E&T) worker.
10. Add a new Non-Scheduled Activity Detail page. The Non-Scheduled Activity Detail page captures, displays, and manages the fields for Non-Scheduled Activities.
11. Add a new Non-Scheduled Activity Hours Detail page. The Non-Scheduled Activity Hours Detail page captures, displays, and manages monthly hours for Non-Scheduled Activities.
12. Update the Employment Hours page to allow the capture of zero hours and an indicator for when to 'Use Self-Employment Calculation for ABAWD'.
13. Update the Activity Hours page to allow the capture of zero hours.

<u>Eligibility</u>

14. Update the ABAWD Status section of the CF EDBC Summary page to account for the work requirement being determined by the system.

15. Add a new ABAWD Requirement Person Summary page. This page provides details related to a person's ABAWD Status, including work registration exemptions and how their work requirement result was determined. This page is only viewable from the CF EDBC Summary page.
16. Add new logic to determine whether a non-exempt ABAWD who is not geographically waived has met the Work Requirement.
17. Update the Work Registration exemption logic to prevent more than one person from being identified as exempt for 'Cares for Dependent Child Under 6'. Existing logic will allow anyone who has care and control of a qualifying child to receive this exemption.
18. Update the ABAWD Status logic to include the following changes:
    a. Treat a person receiving TCF as a Non ABAWD with a reason of TCF.
    b. Treat a person manually identified by the user as 'Applied for Disability Benefits' as an Exempt ABAWD with a reason of 'Applied for Disability Benefits'.
    c. Treat a person manually identified by the user as 'Participating in an ORR Training Program at Least Half Time' as an Exempt ABAWD with a reason of 'Participating in an ORR Training Program at Least Half Time'.

Batch

19. Update the Super Trigger process and subsequent data collection changes required to identify cases for ABAWD Determination reevaluation.
20. Update the ABAWD Determination Sweep logic to account for new ABAWD data triggers.
21. Update the ABAWD Time Limit Sync Job to account for new ABAWD Status and ABAWD Status Reasons.

Fiscal

22. Update the ABAWD Time Limit Status from '15% ABAWD Exemption' to 'Discretionary Exemption'.

1.4 Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
2. SCR **CA-215950/CIV-107142: ACL 18-94 Automate 377.11C ABAWD Reminder Notice** will track additional ABAWD correspondence related changes. This allows maximum flexibility for scheduling delivery of this functionality given the volume of COVID-19 related changes.
3. Users will only enter qualifying work hours for customer activities and employment. The system will make no determinations as to whether hours entered are qualifying versus non-qualifying. When determining whether an ABAWD has met the work requirement, the system will only count actual hours

entered by the user. The system will make no assumptions based on scheduled hours.

4. The changes for the activity hours are only valid for the activities not related to GROW.
5. Additional changes to CFET service types will be implemented as a future enhancement through CA-205009. Additional updates will also be applied to the Stat 47.
6. The user is responsible for providing historical time limit records during an inter county or interstate transfer. This same assumption was in SCR **CA-57971/CIV-7215 – ABAWD Phase II** and is still functional for this SCR.
7. ABAWD Time Tracks do not differentiate between federally funded Supplemental Nutrition Assistance Program (SNAP) recipients and state funded California Food Assistance Program (CFAP) recipients. When a person moves from state to federally funded, an ABAWD's eligibility for CalFresh will need to be "reset" and they will be subject to the time limit as a recipient of federal CalFresh benefits. This functionality will be introduced at a later point with SCR **CA-216420 – ABAWD Tracking for CFAP**.
8. New reporting functionality will track the discretionary exemptions granted to CF recipients. This functionality will be introduced with SCR **CA-51987 – Track Workfare and 15% Exemptions on Stat 47 Quarterly Report**.
9. Persons receiving CF who also qualify for services under the Trafficking and Crime Victims Assistance Program (TCVAP) are not required to participate in work registration and should be considered Non ABAWDS. System automation to include this functionality will added with SCR **CA-221024 - No Work Registration Record for T-Visa and U-Visa Holders**. Currently this population can be considered mandatory work registrants.
10. The system will count all workfare hours entered in the system. Because CFET and non-CFET **workfare** hours would **never be applicable at the same time**, the user is expected to enter workfare hours as either CFET (via the Customer Activity Page) or non-CFET (via the Non-Scheduled Activities Page). The system will not prevent the user from entering hours as both CFET and non-CFET.
11. Hours entered for a component other than Supervised Job Search / Job Club will be qualifying hours for that component. When entering hrs., if Job Club/Job Search is part of the CFET activity, the worker will have to make sure the Job Club/Job Search hrs. should not be more than 50% of the total hours of the component, as per CRPC #2233.
12. The system will not display ABAWD Work Requirement Detail information for a Partial Month.
13. The system will only calculate ABAWD work requirement hours based on a self-employment income when the user has explicitly indicated that the self-employment income should be used. This requires that
    a. the user has linked an employment record to the self-employment income and
    b. the user has indicated zero hours on the Employment Hours page and checked the 'Use Self-Employment Calculation for ABAWD' checkbox (see section 2.12, Employment Hours Page).

14. **Multiple Self-Employment Earned Incomes with Actual Expenses** – In some scenarios the system will determine countable work requirement hours based on self-employment (SE) income. This could be either income of type 'Self-Employment' or 'Rental Income – Manages Property at Least 20 Hours per Week'.
   Currently when determining earned income from either 'Self-Employment' (CT186_27) or 'Rental Income – Manages Property at Least 20 Hours per Week' (CT186_53) during a CF EDBC, the system will either use either a Standard Deduction or Actual Expenses for the expense when determining countable earned income (Income – Expense = Countable Earned Income). The user is responsible for either entering an expense record of either Standard Deduction or the Actual Expense amount based on what is appropriate for a given client. If a single individual has more than one source of 'Self-Employment' income or more than one source of 'Rental Income' and they provide Actual Expenses, the user would enter a single expense record with the actual expenses. The system, when determining countable income, will first use the actual expense against one of the SE incomes. If there is any expense left over, the system would then use the remainder of the expense on the additional SE income. The example below shows a person with two monthly SE incomes (SE1 = $500, SE2 = $400) with actual expenses of $300 that are only deducted from one of the SE incomes ($400 – $300 = $100).

EDBC Person Line Item Detail - Earned Income

Close

Name	Type	Description	Amount
SMITH, JOHN 49M	Self Employment	(09/01/2020) $500.00	$ 500.00
SMITH, JOHN 49M	Self Employment	(09/01/2020) $400.00 - $300.00(Actual Self-Employment Expense)	$ 100.00
		Total	**$ 600.00**

The functionality described above will not change with this SCR. In the case of multiple SE income (or multiple rental income), if the allocation of the actual expenses against the multiple SE incomes does not match the users expectations as related to countable work requirement hours, the user will need to manually calculate the countable earned income (Income – Actual Expense = Countable Earned Income). The Countable Earned Income would then be divided by the applicable Minimum Wage (i.e., the greater of the State or Local Minimum Wage) to determine countable work requirement hours. These hours would then be entered as qualifying work hours for the employment record associated with the self-employment income. The system would then only use the hours associated with the employment record rather than calculating them automatically.

Cases with multiple SE income using actual expenses are rare. The two tables below show the frequency of various types of SE and rental income cases. These tables are based on queries of July 2020 data in Los Angeles county.

Self-Employment Income

Type of Case	# of Cases	% of Cases
All active CF cases	791,914	100.0000%
All active CF cases with at least one SE income	32,313	4.0804%
All active CF cases with 2 SE incomes	1,284	0.1621%
All active CF cases with 2 or more SE incomes - Standard Deduction	1,270	0.1604%
All active CF cases with 2 or more SE incomes - Actual Expenses	14	0.0018%

Rental Income – Manages Property at Least 20 Hours per Week

Type of Case	# of Cases	% of Cases
All active CF cases	791,914	100.0000%
All active CF cases with at least one rental income	477	0.0602%
All active CF cases with 2 rental incomes	25	0.0032%
All active CF cases with 2 or more rental incomes - Standard Deduction	25	0.0032%
All active CF cases with 2 or more rental incomes - Actual Expenses	0	0.0000%

There are currently no LA cases that would be impacted by this scenario since all 14 cases with multiple SE incomes and actual expenses were exempted ABAWD. If there is eventually a case that meets these criteria, it would still only matter for a non-exempt ABAWD who does not (or cannot) provide verifiable work hours.

2 RECOMMENDATIONS

2.1 Update ABAWD Task Navigation Options

2.1.1 Overview

All stand-alone ABAWD pages will be gathered under a single collapsible task navigation section.

2.1.2 ABAWD Task Navigation Mockup

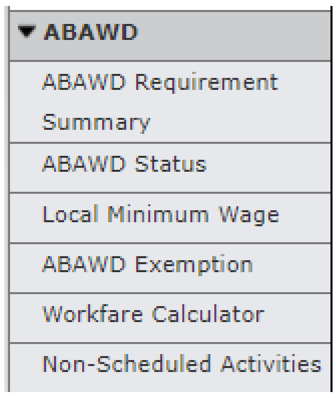


Figure 2.1.1 – ABAWD Task Navigation Mockup

2.1.3 Description of Changes

1. Add a collapsible section labeled ABAWD. This will collapse by default. The following pages will display in this section, in this order:
    a. ABAWD Requirement Summary
    b. ABAWD Status
    c. Local Minimum Wage
    d. ABAWD Exemption
    e. Workfare Calculator
    f. Non-Scheduled Activities

2. This will be located below the ‘Service Arrangements’ section.

3. Move the existing ‘ABAWD Status ‘option within the collapsible ABAWD section.

2.1.4 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LocalMinimumWageListView	Local Minimum Wage List Page	Local Minimum Wage List View
ABAWDRequirementSummaryView	Allows the user to view the ABAWD Requirement Summary page	ABAWD Requirement Summary View
WorkfareRequirementCalculatorView	Ability to view the Workfare Requirement Calculator Page	Workfare Requirement Calculator View

2. Security Groups

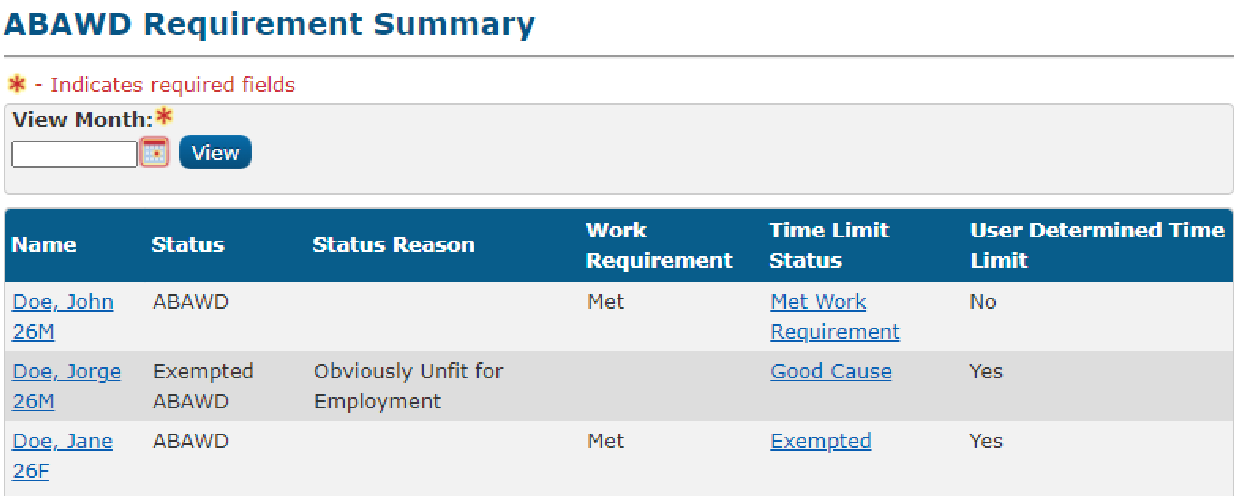
Security Group	Group Description	Group to Role Mapping
Local Minimum Wage List View	Access to the Local Minimum Wage List Page to view existing records	Local Minimum Wage List View
ABAWD Requirement Summary View	Gives access to view the ABAWD Requirement Summary information	
WorkfareRequirementCalculatorView	Ability to view the Workfare Requirement Calculator Page	Workfare Requirement Calculator View

2.2 ABAWD Requirement Summary

2.2.1 Overview

The ABAWD Requirement Summary page displays a list of ABAWD records for the household within a given month. This list will be displayed at the case level with the appropriate ABAWD information.

2.2.2 ABAWD Requirement Summary Mockup



ABAWD Requirement Summary

* - Indicates required fields

View Month:*

View

Name	Status	Status Reason	Work Requirement	Time Limit Status	User Determined Time Limit
Doe, John 26M	ABAWD		Met	Met Work Requirement	No
Doe, Jorge 26M	Exempted ABAWD	Obviously Unfit for Employment		Good Cause	Yes
Doe, Jane 26F	ABAWD		Met	Exempted	Yes

Figure 2.2.2.1 – ABAWD Requirement Summary

2.2.3 Description of Changes

1. View Month – Accepts date inputs based on the mm/yyyy format. The calendar icon will also populate dates based on this format. The default date for this field will be the current month. This is a required field.

2. View Button – Executes a search for ABAWD records matching the specified filter criteria (‘View Month’). The default search for the page will be based on the current month.

3. Add a results table with the following fields:

    a. Name – The name(s) of the participant. This will be displayed in alphabetical order for the record by Last Name and then First name in ascending order. Name Format should be as follows:

[Last], [First] [Age][Gender Initial]. This will be linked to the ABAWD Requirement Person Summary.

b. Status – The ABAWD status of the participant.

c. Status Reason – The participants ABAWD status reason.

d. Work Requirement – The 'Work Requirement' status of the ABAWD participant.

e. Time Limit Status – The ABAWD Time Limit Status of the participant. This will link to the 'ABAWD Time Limit Month Detail' page of the participant during the 'View Month', when the user has the security right of ABAWDTimeLimitDetailView.

f. User Determined Time Limit – This will display an indicator of whether the Time Limit Status was determined by the system or by the user.
   i. Yes – Time limit is determined by the user
   ii. No – Time limit is determined by the system

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** ABAWD->ABAWD Requirement Summary

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
ABAWDRequirementSummaryView	Allows the user to view the ABAWD Requirement Summary page	ABAWD Requirement Summary View
ABAWDRequirementPersonSummaryView	Allows the user to view the ABAWD Requirement Person	ABAWD Requirement Person Summary View

Security Right	Right Description	Right to Group Mapping
	Summary page	

4. Security Groups

Security Group	Group Description	Group to Role Mapping
ABAWD Requirement Summary View	Gives access to view the ABAWD Requirement Summary information	See Security Matrix
ABAWD Requirement Person Summary View	Gives access to view the ABAWD Requirement Person Summary information	See Security Matrix

2.2.6 Page Mapping

Add page mapping for the ABAWD Requirement Summary page

2.2.7 Page Usage/Data Volume Impacts

This is a new page. No data usage is currently available. The expectation is that the usage will mirror that of the ABAWD population.

2.3 ABAWD Requirement Person Summary

2.3.1 Overview

This page provides details related to a person's ABAWD Status, including work registration exemptions and how their work requirement status was determined. Data includes employment Hours, Activity Hours, Work Registration Exemptions, Workfare Activities and Workfare Hours.

Per the Page Mapping description below (section 2.2.6), this page displays in the new ABAWD section being added to the left navigation bar (see section 2.1). This page is separate from, although almost identical to, the page displayed from the CF EDBC Summary page (see sections 2.14 and 2.15). When a user processes a CF EDBC, the following steps would occur:

1. The user would view the ABAWD Status and Work Requirement results on the main CF EDBC Summary in the ABAWD Status section of the CF EDBC Summary (see section 2.14).
2. If the user wants to view how the Work Requirement was determined, they would select the hyperlinked person's name (see section 2.14) to be navigated to the ABAWD Work Requirement Detail page (see section 2.15) which displays the work requirement determination made by the EDBC determination the user is currently viewing. This allows the user to verify that they agree with the work requirement determination prior to authorizing the EDBC (i.e., Save and Continue). Note that the work requirement determination is performed during the EDBC processing and is described in section 2.16, Eligibility – Calculate Whether Work Requirement Has Been Met.
3. Once the EDBC is authorized, the ABAWD Status and Work Requirement results along with the work requirement determination are saved to the database and can be viewed from this page (i.e., section 2.3) accessed from the new ABAWD section in the left navigation bar. This page allows the user to see the latest ABAWD Status and Work Determination results for a given benefit month.

2.3.2 ABAWD Requirement Person Summary Mockups

ABAWD Requirement Person Summary

Close

View Month: 09/2020	**Name:** Doe, John 26M	
Work Requirement Hours: 80	**Total Hours Completed:** 41.5	**Work Requirement Status:** Not Met
Household Workfare Requirement Hours: 17	**Total Household Workfare Hours:** 22	**Household Workfare Requirement Status:** Met

Employment Hours

Total Monthly Hours:19

Name	Type	Monthly Hours
Employer #1	Self-Employment	8
Employer #2	Unsubsidized	11

Non-Limited Activity Hours

Total Monthly Hours:15

Name	Monthly Hours
Activity #1	10
Activity #2	5

Limited Activity Hours

Total Monthly Hours: 7.5 **Allowable Monthly Hours:** 7.5 **Actual Monthly Hours:** 8

Name	Monthly Hours
Job Club	3
Job Search	5

Work Registration Exemptions

Type
No Data Found

Workfare Activities

Name	Actual Hours
Workfare #1	9
Workfare #2	13

Close

Figure 2.3.2.1 – ABAWD Requirement Person Summary

Calculation Description
$255 / $15 (Local Minimum Wage) = 17

Figure 2.3.2.2 – Household Workfare Requirement Hours Hover

Calculation Details
(($200-$80(Standard Deduction)/$15.00 (Local Minimum Wage) = 8

Figure 2.3.2.3 – Self-Employment Hover

Calculation Description
15 (Total Monthly Non-Limited Activity Hours)/2=7.5

Figure 2.3.2.4 – Allowable Monthly Hours Hover

2.3.3 Description of Changes

1. View Month – Displays the selected month in mm/yyyy format.

2. Name – The name of the participant of the ABAWD record. Name Format should be as follows: [Last], [First] [Age][Gender Initial].

3. Household Workfare Requirement Hours – Displays the Workfare Requirement Hours required for the ABAWD's household. The Workfare Calculation will display when the user hovers over the field. (fig. 2.3.2.2)

4. Total Household Workfare Hours – Displays the total amount of reported Workfare Hours for all household ABAWD participants.

5. Household Workfare Requirement Status – Displays the following based on whether the ABAWD Household met the Workfare Requirement or not:
    i. 'Met'
    ii. 'Not Met'
    iii. 'N/A'
    Note: N/A will only display if there is no 'Met' or 'Not Met' determination. This would only be applicable for a 'Non-ABAWD' or 'Exempted ABAWD'.

6. Work Requirement Hours – Displays the Work Requirement Hours.

7. Total Hours Completed – Displays the total amount of countable eligible employment and activity hours for the ABAWD participant.

8. Work Requirement Status – Displays the following based on whether the ABAWD participant met the Work Requirement or not:
   a. ‘Met’
   b. ‘Not Met’
   c. ‘N/A’
      Note: N/A will only display if there is no ‘Met’ or ‘Not Met’ determination. This would only be applicable for a ‘Non-ABAWD’ or ‘Exempted ABAWD’.

9. Add a results table named ‘Employment Hours’ with the following fields:

   a. Total Monthly Hours – Displays the total amount of reported eligible employment hours for the given month.

   b. Name – Displays the name of the employer

   c. Type – Displays the type of employment

   d. Monthly Hours – Displays the amount of employment hours for the specific employer in the given month. If the employment type is ‘Self-Employment’, then the Self-Employment hour calculation will display when the user hovers over the field, if the value is calculated from the income. (fig. 2.3.2.3)

10. Add a section named ‘Non-Limited Activity Hours’ with the following fields:

   a. Total Monthly Hours – Displays the total amount of eligible Non-Limited Activity hours for the given month.

   b. Add a results table with the following fields:

      i. Name – Displays the type of Activity.

      ii. Monthly Hours – Displays the amount of hours for the applicable Activity in the given month.

11. Add a section named ‘Limited Activity Hours’ with the following fields:

   a. Total Monthly Hours – Displays the total amount of eligible Limited Activity hours for the given month.

   b. Allowable Monthly Hours – Displays the total amount of eligible Activity hours for the given month that can be counted. The calculation for the Allowable Monthly hours field will display in a hover window (fig.2.3.2.4)

c. Actual Monthly Hours – Displays the actual countable hours for the applicable activity in the given month.

d. Add a results table with the following fields:
    i. Name – Displays the type of Activity.

    ii. Monthly Hours – Displays the amount of hours for the applicable Activity in the given month.

12. Add a results table named 'Work Registration Exemptions' with the following fields:

    a. Type – Displays the Work Registration Exemption

13. Add a results table named 'Workfare Activities' with the following fields:

    a. Name – Displays the type of Workfare Activity.

    b. Monthly Hours – Displays the amount of reported eligible Workfare Activity hours for the applicable Activity in the given month.

2.3.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** ABAWD->ABAWD Requirement Summary

2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ABAWDRequirementSummaryView	ABAWD Requirement Summary	ABAWD Requirement Summary View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
ABAWD Requirement Summary View	Gives access to view the ABAWD Requirement Summary information	See Security Matrix

2.3.6 Page Mapping

Add page mapping to ABAWD Requirement Person Summary page

2.3.7 Page Usage/Data Volume Impacts

None, this page only renders existing data.

2.4 Local Minimum Wage List

2.4.1 Overview

The Local Minimum Wage List page displays a list of records that have been created through the Local Minimum Wage Detail page and provides access to that page.

2.4.2 Local Minimum Wage List Mockup

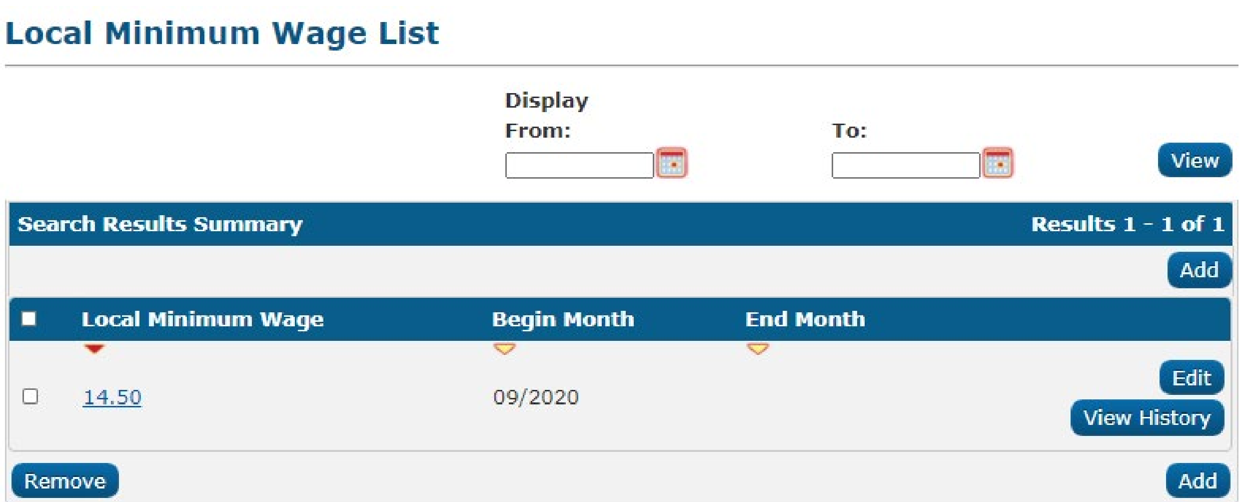


Figure 2.4.2.1 – Local Minimum Wage List

2.4.3 Description of Changes

1. Display From – Local Minimum Wage records with a Date Created equal to or after this date will be returned in the search results. Accepts date inputs based on the mm/yyyy format. The calendar icon will also populate dates based on this format.

2. To – Local Minimum Wage records with a Date Created equal to or before this date are returned in the search results. Accepts date inputs based on the mm/yyyy format. The calendar icon will also populate dates based on this format. Add a validation stating that the "To date must be after the From date."

3. View Button – Executes a search for Local Minimum Wage records matching the specified filter criteria for the case. If no filters are specified, it will pull back all case specific Local Minimum Wage records. If a filter is blank, the filter will be ignored when returning the results.

4. Add a results table with the following fields:

    a. Checkbox – This Checkbox will be used to mark records to be removed. The Checkbox will only be visible when the user has the 'LocalMinimumWageListRemove' security right.

    b. Local Minimum Wage – The Local Minimum Wage. This will be sortable by value and will be in 'XX.XX' format. This will be hyperlinked to the Local Minimum Wage Detail page when the user has the 'LocalMinimumWageDetailView' security right.

    c. Begin Month – The Begin Month for the Local Minimum Wage record. This will be sortable in chronological order and will be in 'mm/yyyy' format. This table will be ordered by this column and the default order upon load will be descending.

    d. End Month – The End Month for the Local Minimum Wage record. This will be sortable in chronological order and will be in 'mm/yyyy' format.

    e. Edit Button – This button will lead the user to the Local Minimum Wage Detail page in Edit Mode. This button will only be viewable by users with the security right of 'LocalMinimumWageDetailEdit'.

    f. View History Button – This button will open the Transaction History detail page in a separate pop-up. This button will only be viewable by users with the security right of

'LocalMinimumWageDetailEdit'. The Transaction History Detail page will display the old and new values for each field that is added or modified for the associated record. The collapsible results table will have a title of 'Local Minimum Wage Detail'.

5. Add a Remove Button. This button will delete all the records that have marked checkboxes, the button will only display if there are existing Local Minimum Wage records. The security right of 'LocalMinimumWageListRemove' is required to view this button.

6. Add an Add Button. This button will lead the user to the Local Minimum Wage Detail page in Create Mode. This button will only be viewable by users with the security right of 'LocalMinimumWageDetailEdit'.

2.4.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** ABAWD->Local Minimum Wage

2.4.5 Page Mapping

Add Page Mapping to Local Minimum Wage List page

2.4.6 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
LocalMinimumWageListView	Ability to view the Local Minimum Wage List Page	Local Minimum Wage List View
LocalMinimumWageListRemove	Remove ability on the Local Minimum Wage List page	Local Minimum Wage List Remove
LocalMinimumWageDetailView	Ability to view the Local Minimum Wage Detail Page	Local Minimum Wage Detail View, Local Minimum

Security Right	Right Description	Right to Group Mapping
		Wage Detail Edit
LocalMinimumWageDetailEdit	Ability to Edit the Local Minimum Wage Detail Page	Local Minimum Wage Detail Edit

4. Security Groups

Security Group	Group Description	Group to Role Mapping
Local Minimum Wage List View	Access to the Local Minimum Wage List Page to view existing Local Minimum Wage records.	See Security Matrix
Local Minimum Wage List Remove	Gives the user the ability to remove a Local Minimum Wage record from the Local Minimum Wage List Page.	See Security Matrix
Local Minimum Wage Detail Edit	Access to view and edit detailed information for existing Local Minimum Wage records.	See Security Matrix
Local Minimum Wage Detail View	Access to view detailed information for existing Local Minimum Wage records.	See Security Matrix

2.4.7 Page Usage/Data Volume Impacts

None, this page only renders existing data.

2.5 Local Minimum Wage Detail

2.5.1 Overview

The Local Minimum Wage Detail page captures, displays, and manages the fields for Local Minimum Wage.

2.5.2 Local Minimum Wage Detail Mockup

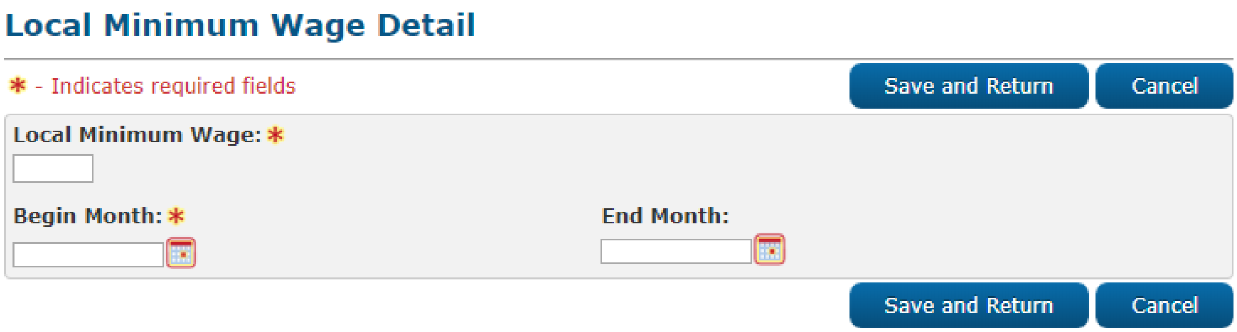


Figure 2.5.2.1 – Local Minimum Wage Detail (Create/Edit Mode)

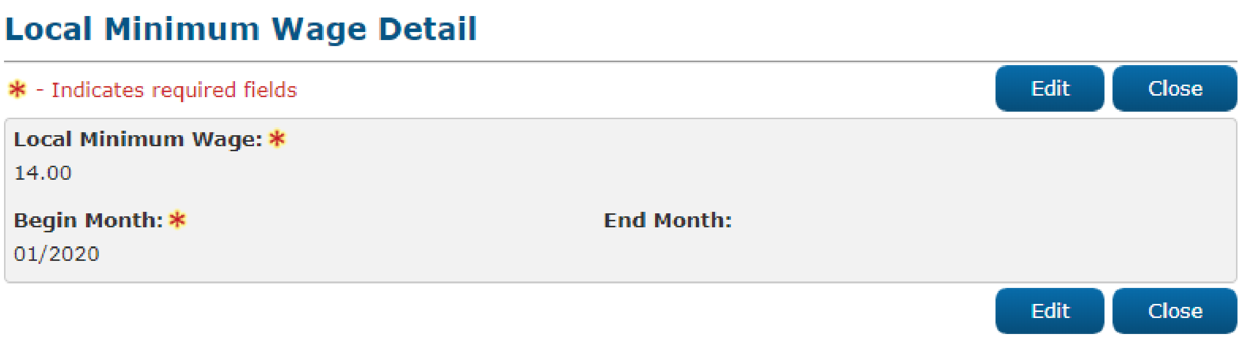


Figure 2.5.2.2 – Local Minimum Wage Detail (View Mode)

2.5.3 Description of Changes

1. Local Minimum Wage – The Local Minimum Wage for the case. This will follow the system standard money constraint of 'XX.XX', negative values will not be accepted. This is a required field.

2. Begin Month – Accepts date inputs based on the mm/yyyy format. The calendar icon will also populate dates based on this format. This is a required field.

3. End Month – Accepts date inputs based on the mm/yyyy format. The calendar icon will also populate dates based on this format. Add a

validation stating that the "End Month must be on or after the Begin Month."

4. Save and Return Button – This Button will save the record to the database and navigate the user back to the Local Minimum Wage List page. Effective dating logic (non-continuous) will apply to this data so that there are no overlapping records, but we will not require a high-dated record. This button will only appear in Create and Edit modes.

5. Cancel Button – This Button will navigate the user back to the Local Minimum Wage List page. This button will only appear in Create and Edit modes.

6. Edit Button – This Button will open the Local Minimum Wage Detail page in Edit mode. This button will only appear in View mode. This button will only be viewable by users with the security right of 'LocalMinimumWageDetailEdit'.

7. Close Button – This Button will navigate the user back to the Local Minimum Wage List page. This button will only appear in View mode.

2.5.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** ABAWD->Local Minimum Wage

2.5.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LocalMinimumWageDetailView	Gives the user the ability to view the Local Minimum Wage Detail Page	Local Minimum Wage Detail View, Local Minimum Wage Detail Edit
LocalMinimumWageDetailEdit	Gives the user the ability to edit the Local Minimum Wage Detail Page	Local Minimum Wage Detail Edit

Security Right	Right Description	Right to Group Mapping
LocalMinimumWageListView	Gives the user the ability to view the Local Minimum Wage List Page	Local Minimum Wage List View Local Minimum Wage Detail View Local Minimum Wage Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Local Minimum Wage Detail Edit	Access to view and edit detailed information for existing Local Minimum Wage records.	See Security Matrix
Local Minimum Wage Detail View	Access to view detailed information for existing Local Minimum Wage records.	See Security Matrix

2.5.6 Page Mapping

Add page mapping for Local Minimum Wage Detail page.

2.5.7 Page Usage/Data Volume Impacts

None, this page only renders existing data.

2.6 ABAWD Exemption List

2.6.1 Overview

The ABAWD Exemption List page allows users to view and manage manual ABAWD exemptions.

2.6.2 ABAWD Exemption List Page Mockup

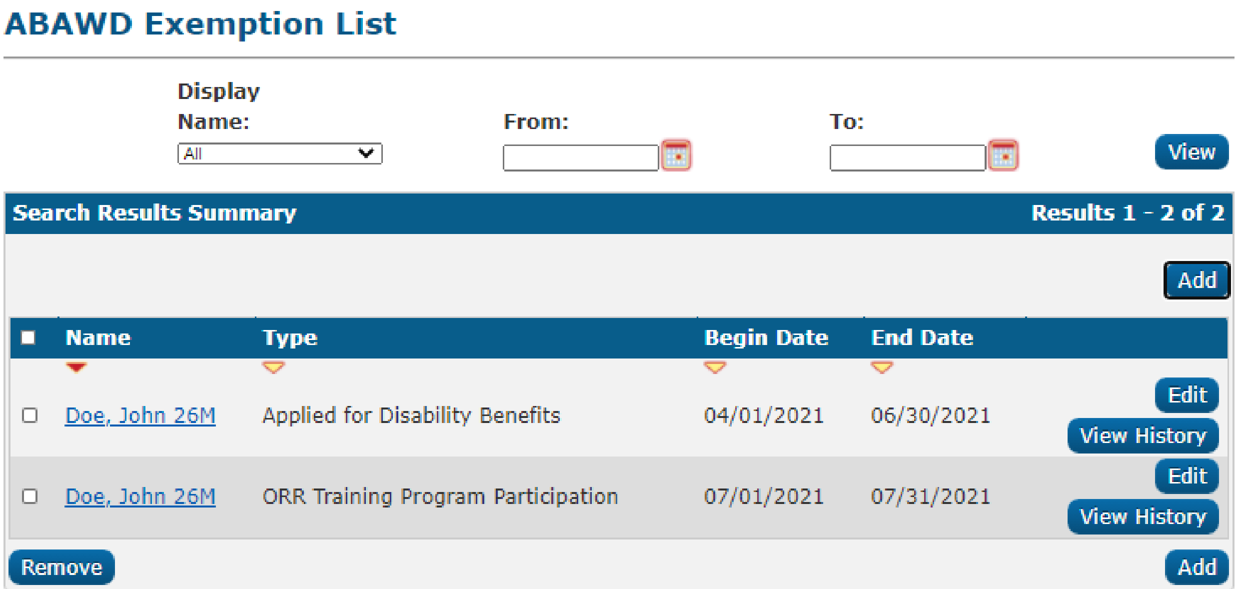


Figure 2.6.2.1 – ABAWD Exemption List Page

2.6.3 Description of Changes

1. Display by Name – Drop down selection of all CalFresh program participants and an option to select 'All', which will provide manual exemption records for all CalFresh program participants. Name Format should be as follows: [Last], [First] [Age][Gender Initial]. The selection will default to 'All'. Hidden/duplicate persons will not be included

2. From – ABAWD manual exemption records with a Start Date equal to or after this date will be returned in the search results. Accepts date inputs based on the mm/dd/yyyy format. The calendar icon will also populate dates based on this format.

3. To – ABAWD manual exemption records with a Date Created equal to or before this date are returned in the search results. Accepts date inputs based on the mm/dd/yyyy format. The calendar icon will also populate dates based on this format. Add a validation stating that the "To date must be after From date."

4. View Button – Executes a search for ABAWD manual exemption records matching the specified filter criteria for the case. If no filters are specified, it will pull back all manual ABAWD exemption records. If a filter is blank, the filter will be ignored when returning the results

5. Add a results table named 'Search Results Summary' with the following fields:

a. Checkbox – This Check box will be used to mark records to be removed. The Check box will only be visible when the user has the 'ABAWDExemptionListRemove' security right.

b. Name – The name of the participant. This will be sortable in alphabetical order for the record by Last Name and then First name. Name Format should be as follows: [Last], [First] [Age][Gender Initial]. This will be hyperlinked to the ABAWD Exemption Detail page. This will only be hyperlinked for users with the security right of 'ABAWDExemptionDetailView'.

c. Type – The manual ABAWD exemption type of the participant. This will be sortable by alphabetical order.

d. Begin Date – The Begin Date for the ABAWD manual exemption record. This will be sortable in chronological order and will be in 'mm/dd/yyyy' format. This column will be the table's default sort order by descending.

e. End Date – The End Date for the ABAWD manual exemption record. This will be sortable in chronological order and will be in 'mm/dd/yyyy' format.

f. Edit Button – This button will lead the user to the ABAWD Exemption Detail page in Edit Mode for the record. This button will only be viewable by users with the security right of 'ABAWDExemptionDetailEdit'.

g. View History Button – This button will open the Transaction History Detail page in a separate pop-up. This button will only be viewable by users with the security right of 'ABAWDExemptionDetailEdit'. The Transaction History Detail page will display the old and new values for each field that is added or modified for the associated record. The collapsible results table will have a title of 'ABAWD Exemption Detail'

6. Add a 'Remove' Button. This button will delete all the records that have marked checkboxes, the button will only display if there are existing ABAWD Exemption records. The security right of 'ABAWDExemptionListRemove' is required to view this button.

7. Add an 'Add' Button above and below the results table. These buttons will lead the user to the ABAWD Exemption Detail page in Create Mode. These buttons will only be viewable by users with the security right of 'ABAWDExemptionDetailEdit'.

2.6.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** ABAWD->ABAWD Exemptions

2.6.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
ABAWDExemptionListView	Gives the user the ability to view the ABAWD Exemption List page	ABAWD Exemption List View, ABAWD Exemption Detail View, ABAWD Exemption Detail Edit
ABAWDExemptionListRemove	Gives the user the ability to remove exemptions from the ABAWD Exemption List page	ABAWD Exemption List Remove
ABAWDExemptionDetailView	Gives the user the ability to view the ABAWD Exemption Detail page	ABAWD Exemption List View, ABAWD Exemption Detail View, ABAWD Exemption Detail Edit
ABAWDExemptionDetailEdit	Gives the user the ability to create and modify ABAWD Exemption Detail records on the ABAWD Exemption Detail page	ABAWD Exemption Detail Edit

Security Groups

Security Group	Group Description	Group to Role Mapping
ABAWD Exemption List View	Gives the user the ability to view the ABAWD Exemption List page	See Security Matrix
ABAWD Exemption List Remove	Gives the user the ability to remove exemptions from the ABAWD Exemption List page	See Security Matrix

Security Group	Group Description	Group to Role Mapping
ABAWD Exemption Detail View	Gives the user the ability to view the ABAWD Exemption Detail page	See Security Matrix
ABAWD Exemption Detail Edit	Gives the user the ability to create and modify ABAWD Exemption Detail records on the ABAWD Exemption Detail page	See Security Matrix

2.6.6 Page Mapping

Add page mapping for ABAWD Exemption List page

2.6.7 Page Usage/Data Volume Impacts

None, this page only renders existing data.

2.7 ABAWD Exemption Detail

2.7.1 Overview

The ABAWD Exemption Detail page captures and manages manual exemptions for the participant.

2.7.2 ABAWD Exemption Detail Page Mockup

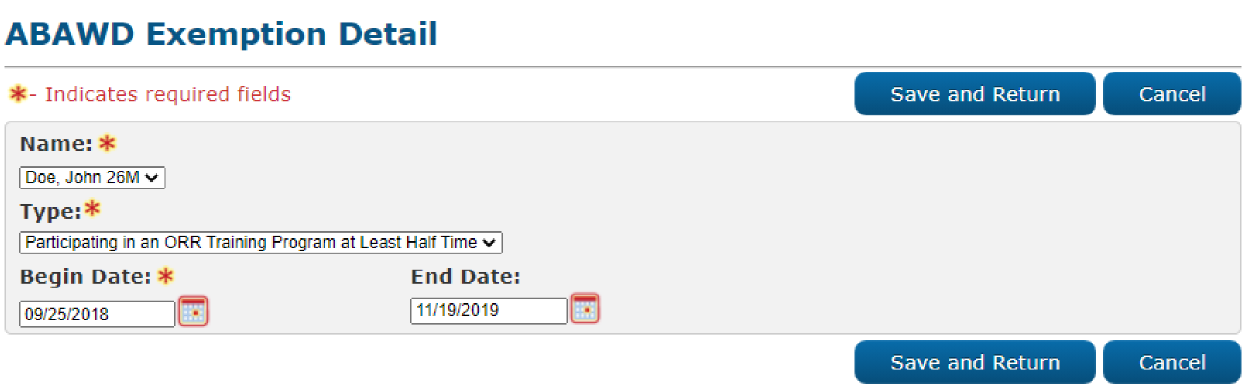


Figure 2.7.2.1 – ABAWD Exemption Detail Page (Create Mode)

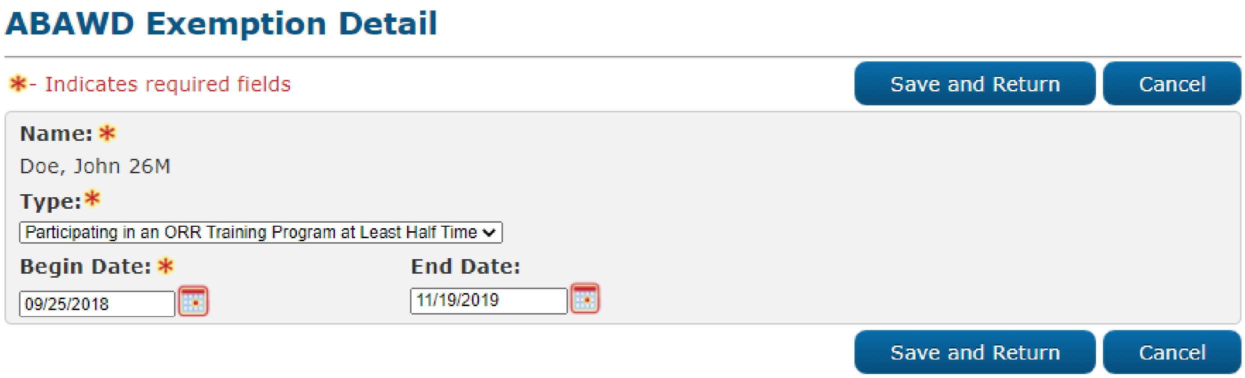


Figure 2.7.2.2 – ABAWD Exemption Detail Page (Edit Mode)

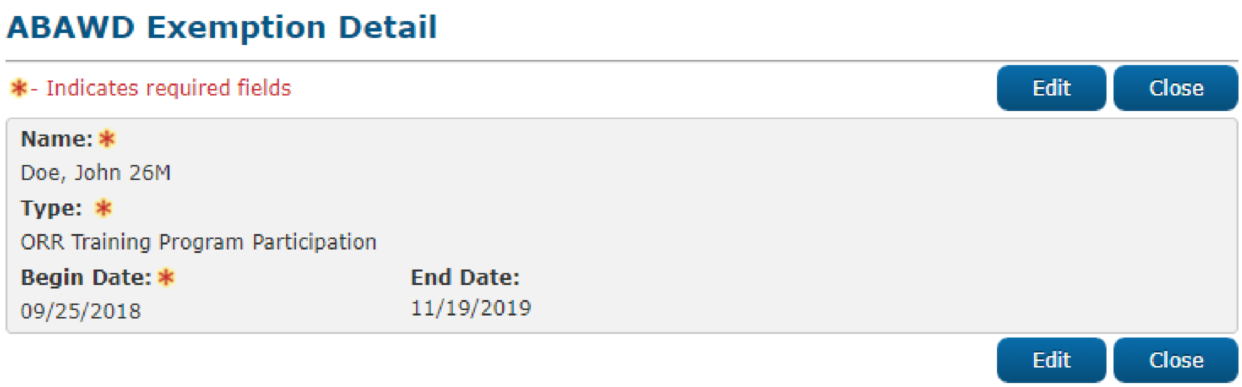


Figure 2.7.2.3 – ABAWD Exemption Detail Page (View Mode)

2.7.3 Description of Changes

1. Name – The name of the participant. This will be displayed in alphabetical order for the record by Last Name and then First name in ascending order. Name Format should be as follows: [Last], [First] [Age][Gender Initial]. This will only be editable when creating a record. This is a required field.

2. Type – The ABAWD manual exemption type of the participant. This will be a drop-down selection with a default value of a '-Select-'selection. This is a required field. The options for this dropdown will be in the specific order as follows:

    a. 'Applied for Disability Benefits'
    b. 'Participating in an ORR Training Program at Least Half Time'

3. Begin Date – The Begin Date for the ABAWD manual exemption record. This will be in 'mm/dd/yyyy' format. The calendar icon will also populate dates based on this format. This is a required field.

4. End Date – The End Date for the ABAWD manual exemption record. This will be in 'mm/dd/yyyy' format. The calendar icon will also populate dates based on this format. Add a validation stating that the "End Date must be after the Begin Date."

5. Add a 'Save and Return' button – This Button will save the record to the database on a person level and navigate the user back to the ABAWD Exemption List page. This button will only appear in Create and Edit modes.

6. Add a 'Cancel' button – This Button will navigate the user back to the ABAWD Exemption List page. This button will only appear in Create and Edit modes.

7. Add a 'Close Button' – This Button will navigate the user back to the ABAWD Exemption List page. This button will only appear in View mode.

8. Add an Edit Button – This button will load this page in Edit mode. It will only appear in View mode. This button will only be viewable by users with the security right of 'ABAWDExemptionDetailEdit'.

2.7.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** ABAWD->ABAWD Exemptions

2.7.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
ABAWDExemptionDetailView	Gives the user the ability to view the ABAWD Exemption Detail page	ABAWD Exemption List View, ABAWD Exemption Detail View, ABAWD Exemption Detail Edit
ABAWDExemptionDetailEdit	Gives the user the ability to create and modify ABAWD Exemption Detail	ABAWD Exemption Detail Edit

Security Right	Right Description	Right to Group Mapping
	records on the ABAWD Exemption Detail page	

Security Groups

Security Group	Group Description	Group to Role Mapping
ABAWD Exemption Detail View	Gives the user the ability to view the ABAWD Exemption Detail page	See Security Matrix
ABAWD Exemption Detail Edit	Gives the user the ability to create and modify ABAWD Exemption Detail records on the ABAWD Exemption Detail page	See Security Matrix

2.7.6 Page Mapping

Add page mapping for ABAWD Exemption Detail page

2.7.7 Page Usage/Data Volume Impacts

This is a new page. No data usage is currently available. The expectation is that the usage will mirror that of the ABAWD population.

2.8 Workfare Requirement Calculator

2.8.1 Overview

The Workfare Requirement Calculator page will be used to allow the user to calculate the hours needed to meet the Workfare Requirement. The hours calculated are based on the current CF Allotment for the benefit month. Whenever the ABAWD Work Requirement logic is processed (via

EDBC or batch) the CF Allotment is redetermined, which could cause a change in hours needed to meet the Workfare Requirement, if the CF Allotment changes.

2.8.2 Workfare Requirement Calculator Mockup

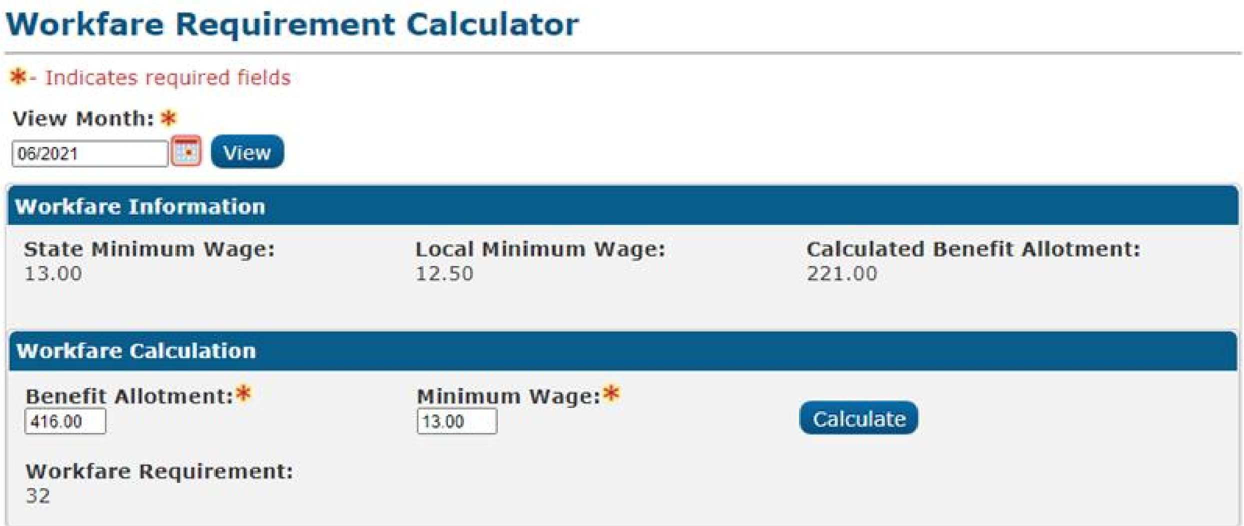


Figure 2.8.2.1 – Workfare Requirement Calculator

2.8.3 Description of Changes

1. View Month – Displays the selected month in mm/yyyy format. This is a required field. The calendar icon will also populate dates based on this format. This is a required field. The default date for this month will be the current month.

2. View Button – Executes a search for Workfare minimum wage records matching the specified filter criteria ('View Month'). The default search for the page will be based on the current month.

3. Add a results table named 'Workfare Information' with the following fields:

    a. State Minimum Wage – Displays the State Minimum Wage for the given month.

    b. Local Minimum Wage – Displays the case-specific Local Minimum Wage for the given month. This will be blank if no Local Minimum Wage was entered for the given month on the Local Minimum Wage Detail page.

c. Calculated Benefit Allotment – Displays the cases CalFresh Benefit Allotment for the given month.

4. Add a results table named 'Workfare Calculation' with the following fields:

   a. Benefit Allotment – The CalFresh benefit allotment. The default amount will be the Benefit Allotment for the given View Month. This will follow the system standard money constraint of 'XX.XX', negative values will not be accepted. Add a validation that states, "Value must be greater than 0.". The trigger for this validation is when the Calculate Button is selected and the value of the 'Benefit Allotment' is less than or equal to 0. This is a required field.

   b. Minimum Wage – The Minimum wage used to calculate the Workfare Requirement. The default amount will be the higher of the State Minimum Wage or the Local Minimum Wage for the given View Month. If no Local Minimum Wage has been defined for View Month, the State Minimum Wage will be used. This will follow the system standard money constraint of 'XX.XX', negative values will not be accepted. Add a validation that states "Value must be greater than 0.". The trigger for this validation is when the Calculate Button is selected and the value of the 'Minimum Wage' is less than or equal to 0. This is a required field.

   c. Calculate Button – This button will populate the Workfare Requirement field based on the following calculation:

      i. (Benefit Allotment/Minimum Wage)
         1. These hours will be rounded down to the whole number (e.g., 4.55 will be rounded down to 4).

   d. Workfare Requirement – Displays the Workfare Requirement that is calculated using the values from the Benefit Allotment and Minimum Wage field. The default value will be the Workfare Requirement based on the default values for the Benefit Allotment and Minimum Wage fields. If the minimum wage or the benefit allotment is not valid, then the default value will be blank.

2.8.4 Page Location

- **Global:** Eligibility

- **Local:** Customer Information
- **Task:** ABAWD->Workfare Calculator

2.8.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
WorkfareRequirementCalculatorView	Ability to view the Workfare Requirement Calculator Page	Workfare Requirement Calculator View

Security Groups

Security Group	Group Description	Group to Role Mapping
WorkfareRequirementCalculatorView	Ability to view the Workfare Requirement Calculator Page	Workfare Requirement Calculator View

2.8.6 Page Mapping

Add page mapping for Workfare Requirement Calculator page

2.8.7 Page Usage/Data Volume Impacts

None, this is a calculation page and has no data impacts.

2.9 Non-Scheduled Activities List

2.9.1 Overview

The Non-Scheduled Activities List page is used to maintain activities of participants, in which the activities are not stored in the system in relation to a provider.

2.9.2 Non-Scheduled Activities List Mockup

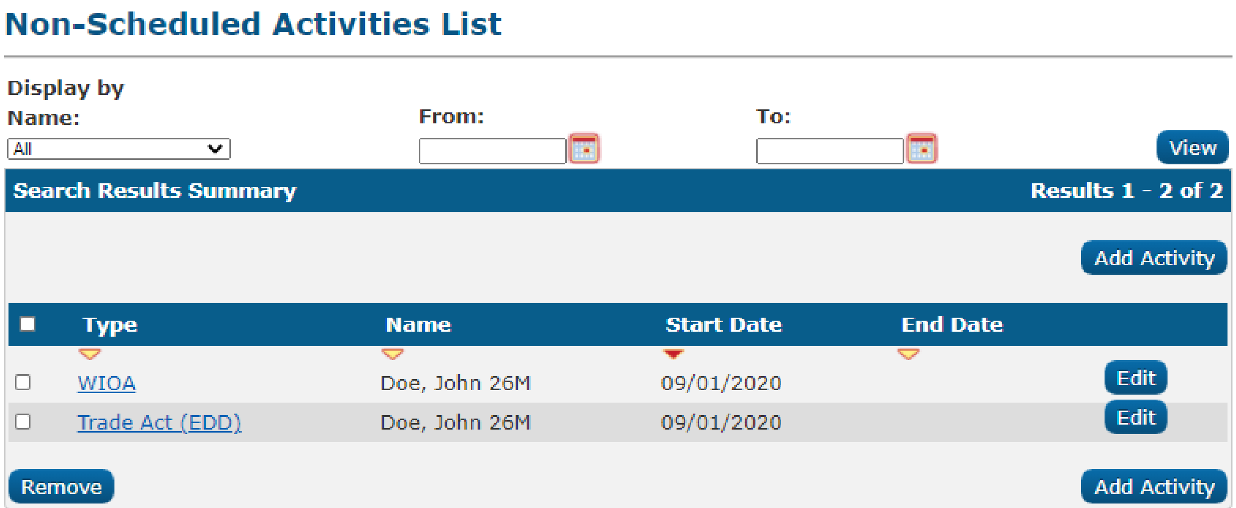


Figure 2.9.2.1 – Non-Scheduled Activities List

2.9.3 Description of Changes

1. Display by Name – Drop down selection of all CalFresh program participants and an option to select 'All', which will provide records for all household participants. Name Format should be as follows: [Last], [First] [Age][Gender Initial]. The selection will default to 'All'. Hidden/duplicate persons will not be included.

2. From – Non-Scheduled Activity records with a Start Date equal to or after this date will be returned in the search results. The default search results for this table will be all 'Non-Scheduled Activity' records in the last 90 days. Accepts date inputs based on the mm/dd/yyyy format. The calendar icon will also populate dates based on this format.

3. To – Non-Scheduled Activity records with a Date Created equal to or before this date are returned in the search results. Accepts date inputs based on the mm/dd/yyyy format. The calendar icon will also populate dates based on this format. Add a validation stating that the "To date must be after From date."

4. View Button – Executes a search for Non-Scheduled Activity records matching the specified filter criteria for the case. If no filters are specified, it will pull back all Non-Scheduled Activity records. If a filter is blank, the filter will be ignored when returning the results

5. Add a results table named ‘Search Results Summary’ with the following fields:

    a. Checkbox – This Check box will be used to mark records to be removed. The Check box will only be visible when the user has the ‘NonScheduledActivitiesListRemove’ security right.

    b. Type – The Non-Scheduled Activity of the participant. This will be sortable in alphabetical order. This will be hyperlinked to the Non-Scheduled Activity Detail page for the record. This will only be hyperlinked for users with the security right of ‘NonScheduledActivityDetailView’.

    c. Name – The name of the participant. This will be sortable in alphabetical order for the record by Last Name and then First name. Name Format should be as follows: [Last], [First] [Age][Gender Initial].

    d. Start Date – The Start Date for the Non-Scheduled Activity record. This will be sortable in chronological order and will be in ‘mm/dd/yyyy’ format. This column will be the table’s default sort order by descending.

    e. End Date – The End Date for the Non-Scheduled Activity record. This will be sortable in chronological order and will be in ‘mm/dd/yyyy’ format.
    f. Edit Button – This button will lead the user to the Non-Scheduled Activity Detail page in Edit Mode for the record. This button will only be viewable by users with the security right of ‘NonScheduledActivityDetailEdit’.

6. Add a ‘Remove’ Button. This button will delete all the records that have marked checkboxes, the button will only display if there are existing Non-Scheduled Activity records. The security right of ‘NonScheduledActivitiesListRemove’ is required to view this button.

7. Add an ‘Add Activity’ Button. This button will lead the user to the Non-Scheduled Activity page in Create Mode. This button will only be viewable by users with the security right of ‘NonScheduledActivityDetailEdit’.

2.9.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** ABAWD → Non-Scheduled Activities

2.9.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
NonScheduledActivitiesListView	Gives the user the ability to view the Non-Scheduled Activities List Page	Non Scheduled Activities List View, Non Scheduled Activity Detail View, Non Scheduled Activity Detail Edit
NonScheduledActivitiesListRemove	Gives the user the ability to remove non-scheduled activities on the Non-Scheduled Activities List page	Non Scheduled Activity List Remove
NonScheduledActivityDetailView	Gives the user the ability to view the Non Scheduled Activity Detail Page	Non Scheduled Activity Detail View, Non Scheduled Activity Detail Edit
NonScheduledActivityDetailEdit	Gives the user the ability to manage Non-Scheduled Activities on the Non Scheduled Activity Detail Page	Non Scheduled Activity Detail Edit

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping
Non Scheduled Activities List View	Gives the user the ability to view the Non-Scheduled Activities List Page	See Security Matrix
Non Scheduled Activities List Remove	Gives the user the ability to remove a Non-Scheduled Activity record from the Non-Scheduled Activities List Page.	See Security Matrix
Non Scheduled Activity Detail View	Gives the user the ability to view the Non Scheduled Activity Detail Page	See Security Matrix
Non Scheduled Activity Detail Edit	Gives the user access to view and edit the Non-Scheduled Activity Detail page.	See Security Matrix

2.9.6 Page Mapping

Add page mapping for Non-Scheduled Activities List page

2.9.7 Page Usage/Data Volume Impacts

None, this page only renders existing data.

2.10 Non-Scheduled Activity Detail

2.10.1 Overview

The Non-Scheduled Activity Detail page captures, displays, and manages the fields for Non-Scheduled Activities. Only non-CFET activities would be added to the Non-Scheduled Activity page.

2.10.2 Non-Scheduled Activity Detail Mockup

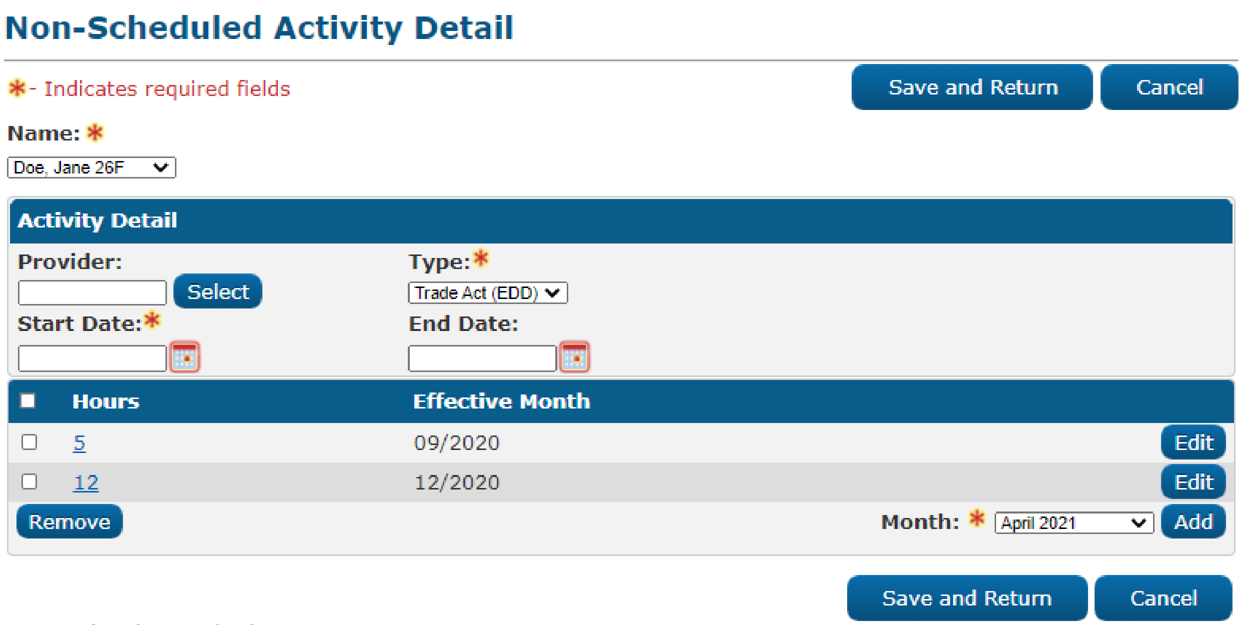


Figure 2.10.2.1 – Non-Scheduled Activity Detail (Create Mode)

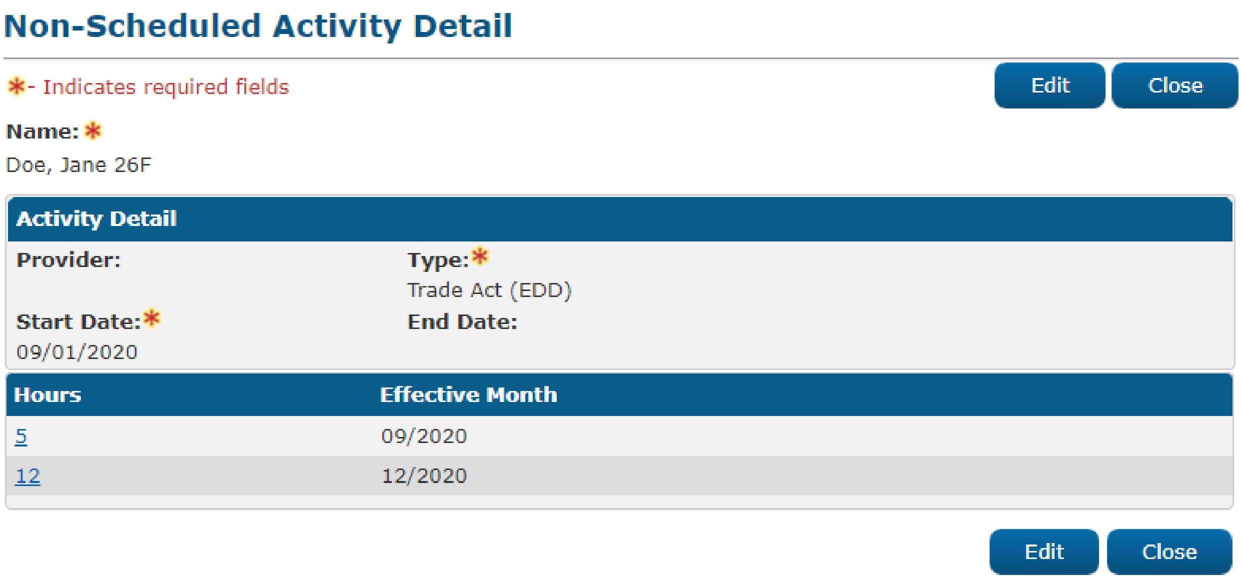


Figure 2.10.2.2 – Non-Scheduled Activity Detail (View Mode)

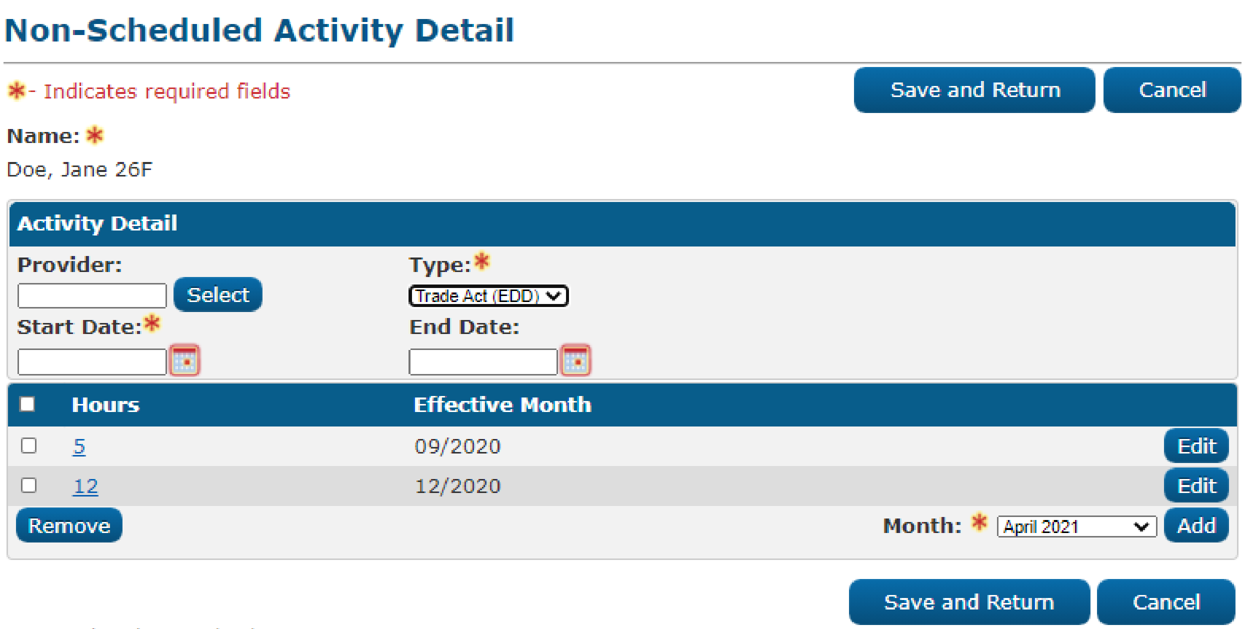


Figure 2.10.2.3 – Non-Scheduled Activity Detail (Edit Mode)

2.10.3 Description of Changes

1. Name – A dropdown selection of all CalFresh program participants. The default value will be the ‘Select’ option if no value is selected for the field. This is a required field. This will only be editable in ‘Create’ mode. Hidden/duplicate persons will not be included.

2. Add a table named ‘Activity Detail’

a. Provider – This will be an input field that will accept the name of the ‘Provider’, up to 60 characters. This will only be editable in ‘Create’ and ‘Edit’ mode.

b. Select Button – This will take the user to the ‘Select Provider Resource’ page, where they can select the Provider. When the user selects a ‘Provider’, the ‘Provider’ field will be populated with the selected organization’s name. This will only be visible in ‘Create’ and ‘Edit’ mode.

c. Type – A dropdown selection of the type of Non-Scheduled Activities. This will only be editable in ‘Create’ and ‘Edit’ mode. This is a required field. The following are the selection options:

    i. Community Service/Volunteer Work
    ii. Trade Act (EDD)
    iii. Workfare
    iv. WIOA

d. Start Date – The Start Date for the Non-Scheduled Activity record. This will be in ‘mm/dd/yyyy’ format. The calendar icon will also populate dates based on this format. This is a required field. Add the following validations:
    i. Add the validation “Remove the reported hours that occur before this Start Date.”, for the following scenarios This validation will focus on the ‘Start Date’ and will trigger upon the user selecting the ‘Save and Return’ button):
        1. When a user edits a ‘Start Date’ that will cause existing hours to fall out of a month within the new date range.
        2. When daily hours are reported prior to the ‘Start Date’.
        3. When an applicable weekly total field has reported hours and all the days in that week are prior to the ‘Start Date’.
    ii. Add the following validation if the user selects a start date that is 2 months more in the future of the current system date month: “Start Date is more than two months in the future.”. In this instance, the months will be counted based on the actual month of the date and the specific day will not be taking into account (e.g. if the date is 3/15/2021, then there can be a start date past 3/15/2021 up through 4/30/2021).

e. End Date – The End Date for the Non-Scheduled Activity record. This will be in ‘mm/dd/yyyy’ format. The calendar icon will also populate dates based on this format. Add the following validations:

    i. Add the validation stating that the "End Date must be on or after the Start Date.".
    ii. Add the validation "Remove the reported hours that occur after this End Date.", for the below scenarios (This validation will focus on the 'End Date' and will trigger upon the user selecting the 'save and return' button):
        1. When a user edits an 'End Date' and causes existing hours to fall out of a month within the new date range.
        2. When daily hours are reported after the 'End Date'.
        3. When an applicable weekly total field has reported hours-and all the days in that week are after the 'End Date'.

3. Add a results table with the following fields:
    a. Checkbox – This Check box will be used to mark records to be removed. The Check box will only be visible when the user has the 'NonScheduledActivitiesListRemove' security right. The check box will only be available in Create and Edit modes.

    b. Hours – Displays the monthly number of hours for the Non-Scheduled Activity. This will be linked to the 'Non-Scheduled Activity Hours Detail' page in view mode for the given record. Add the following validation when a user edits the 'Start Date', End Date, 'Provider' or 'Type' and they select the 'Hours' hyperlink while changes are unsaved: "Changes need to be saved before being able to view the selected hours.". This validation will only trigger in Edit Mode. This validation message will focus on the 'Save and Return' button.

    c. Effective Month – Displays the Effective Month for which the correlated hours apply to. This will display in a 'mm/yyyy' format.

    d. Edit Button – This button will lead the user to the Non-Scheduled Activity Hours Detail page in Edit mode, for the applicable month. This button will only be available in Create and Edit mode. Add the following validation when a user edits the 'Start Date', End Date, 'Provider' or 'Type' and they select the 'Edit' button while changes are unsaved: "Changes need to be saved before being able to edit hours.". This validation will only trigger in Edit Mode. This validation message will focus on the 'Save and Return' button.

e. Add Button – This button will lead the user to the Non-Scheduled Activity Hours Detail page in Edit Mode for the selected month. This button will not be available in View Mode. Add the following validation when a user edits the 'Start Date', End Date, 'Provider' or 'Type' and they select the 'Add' button while changes are unsaved hitting: "Changes need to be saved before being able to add hours.". This validation will only trigger in Edit Mode. This validation message will focus on the 'Save and Return' button.

   i. Note:
      1. The Non-Scheduled Activity Hours Detail page will allow users to add hours for the selected month.
      2. Months are not individually created records, but the hours are recorded for the months.

f. Month: – This will be a dropdown selection of months the user can add hours for. Months will display in 'Month YYYY' format. These will be listed in ascending order. Upon page load in Create mode, it will default to be blank. This is a required field.
   i. The following scenarios describe what month the selection will default to upon page load in Edit mode:
      1. 'Start Date's' month is in the future of the current system date month: It will default to the month of the 'Start Date'.
      2. 'Start Date's month is in the past or is the same month as the current system date's month and there is no 'End Date': It will default to the current system date's month.
      3. 'Start Date's month is in the past or is the same month as the current system date's month and there is an 'End Date': It will default to the current system date's month, not to surpass the end date's month.
   ii. The following scenarios describe what should display in the dropdown selections:
      1. 'Start Date's' month is in the future of the current system date's month and there is no 'End Date': The month selection will display the start date's month and one month past the start date's month.
      2. 'Start Date's' month is in the future of the current system date's month and there is an 'End Date': The month selection will display the start date's month and one month past the start date's month, not to surpass the end date's month.
      3. 'Start Date's month is in the past or is the same month as the current system date's month and

there is no ‘End Date’: The month selection will display the start date’s month all the way up to one month past the current system date’s month.

4. ‘Start Date’s month is in the past or is the same month as the current system date’s month and there is an ‘End Date’: The month selection will display the start date’s month all the way up to one month past the current system date’s month, not to surpass the end date’s month.
5. ‘Start Date’ is blank: The month selection will be blank.
6. For any scenario where the user inputs an ‘End Date’ where the end date’s month is prior to the ‘Start Date’s’ month, the end date’s month will not display as an option.

iii. Add the following validation for when the user selects a month that already has hours added to it and clicks on the ‘Add’ button: “The month selected already has hours added.”. This validation will focus on the month field. Add the following validation when a user selects the ‘Add’ button but did not select a month in the dropdown: “A month needs to be selected to add hours to.”. This validation will focus on the month field.

4. Edit Button – This Button will open the Non-Scheduled Activity Detail page in Edit mode. This button will only appear in View mode. This button will only be viewable by users with the security right of ‘NonScheduledActivityDetailEdit’.

5. Save and Return Button – This Button will save the record to the database and navigate the user back to the Non-Scheduled Activities List page.

6. Cancel Button – This Button will navigate the user back to the Non-Scheduled Activities List page.

7. Close Button – This Button will navigate the user back to the Non-Scheduled Activities List page.

8. Remove Button – This button will delete all the records that have marked checkboxes, this includes all hours associated in the month. This action will save to the database when the user selects the ‘Save and Return’ button. Selecting the ‘Cancel’ button will void the removal of the records. The button will only display if there are existing Non-Scheduled Activity Hours records. The security right of ‘NonScheduledActivitiesListRemove’ is required to view this button. This button will only be available in Create and Edit modes.

Note:

- If a ‘Provider’, ‘Type’, ‘Start Date’ or ‘End Date’ is selected or populated while the user is in ‘Create’ mode and they navigate to the Non-Scheduled Activity Hours page without saving, the selected ‘Provider’, ‘Type’, ‘Start Date’ or ‘End Date’ will display on the Non-Scheduled Activity Hours page.

2.10.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** ABAWD → Non-Scheduled Activities

2.10.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
NonScheduledActivityDetailView	Non-Scheduled Activity Detail Page, Non-Scheduled Activity Hours Detail Page	Non-Scheduled Activity Detail View, Non-Scheduled Activity Detail Edit, Non-Scheduled Activity Hours Detail View, Non-Scheduled Activity Hours Detail Edit
NonScheduledActivityDetailEdit	Non-Scheduled Activity Detail Page, Non-Scheduled Activity Hours Detail Page	Non-Scheduled Activity Detail Edit, Non-Scheduled Activity Hours Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Non-Scheduled Activity Detail Edit	Gives the user access to view and edit the Non-Scheduled Activity Detail page.	See Security Matrix
Non-Scheduled Activity Detail View	Gives the user view access to the Non-Scheduled Activity Detail page.	See Security Matrix

2.10.6 Page Mapping

Add page mapping for Non-Scheduled Activity Detail page.

2.10.7 Page Usage/Data Volume Impacts

This is a new page. No data usage is currently available. The expectation is that the usage will mirror a subset of the ABAWD population.

2.11 Non-Scheduled Activity Hours Detail

2.11.1 Overview

The Non-Scheduled Activity Hours Detail page captures, displays, and manages monthly hours for Non-Scheduled Activities.

2.11.2 Non-Scheduled Activity Detail Mockup

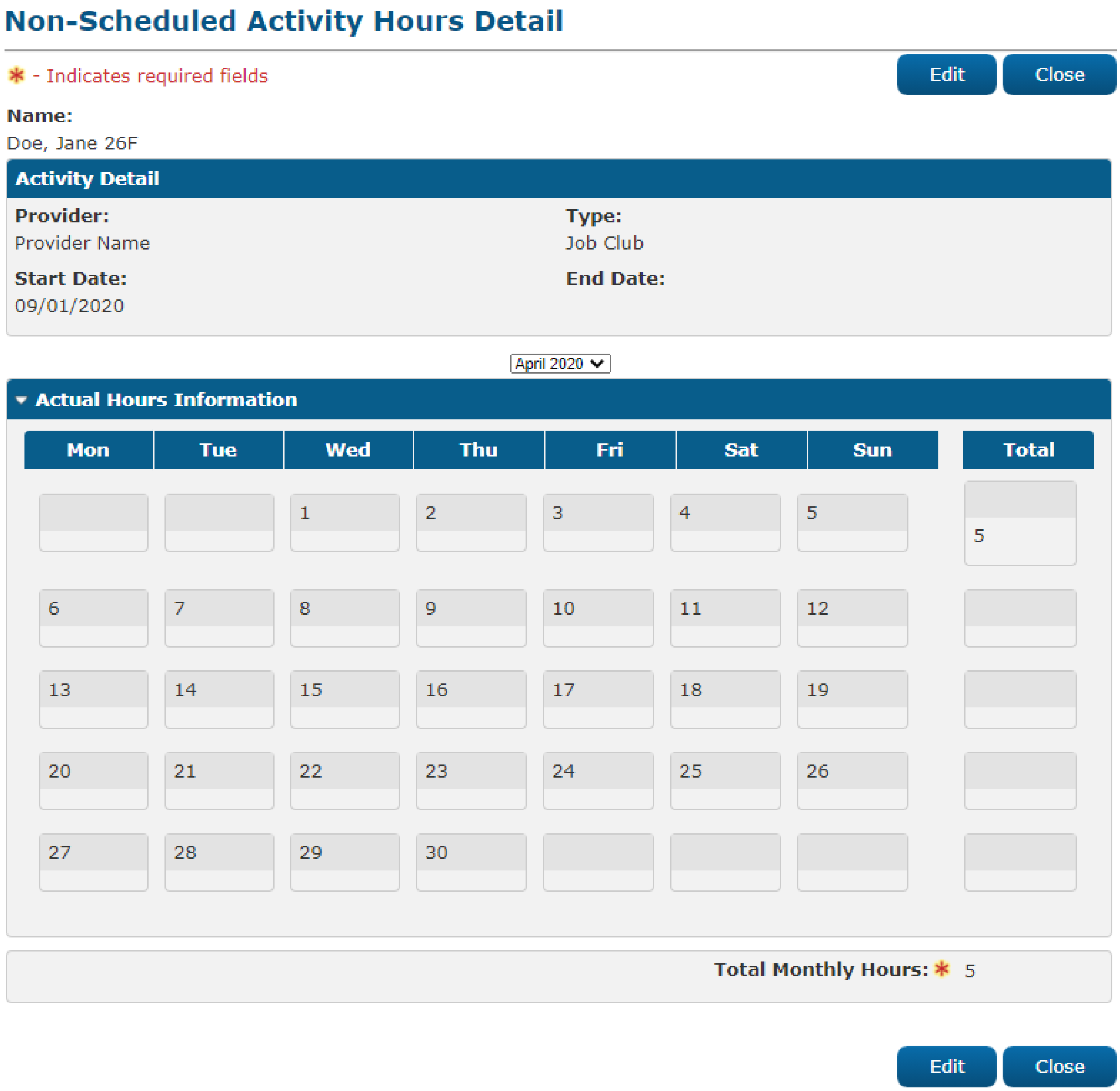


Figure 2.11.2.1 – Non-Scheduled Activity Hours Detail (View Mode)

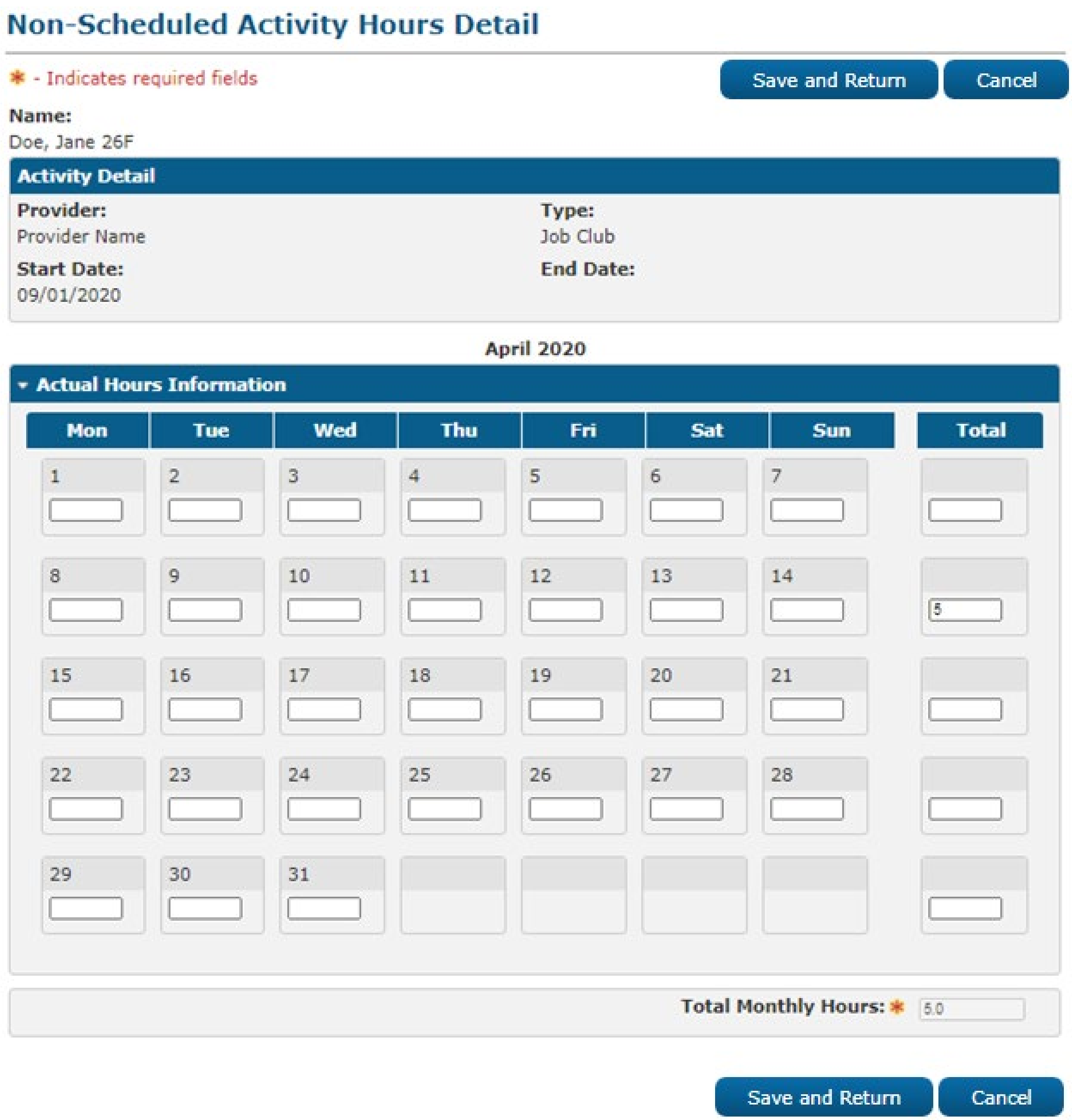


Figure 2.11.2.2 – Non-Scheduled Activity Hours Detail (~~Create and~~ Edit Mode)

2.11.3 Description of Changes

1. Name – Displays the name of the participant. Name Format should be as follows: [Last], [First] [Age][Gender Initial].

2. Add a table named 'Activity Detail'

a. Provider – Displays the Non-Scheduled Activity Provider Name from the associated record.

b. Type – Displays the Type of Non-Scheduled Activity

c. Start Date – Displays the Start Date for the Non-Scheduled Activity record. This will be in 'mm/dd/yyyy' format.

d. End Date – Displays the End Date for the Non-Scheduled Activity record. This will be in will be in 'mm/dd/yyyy' format

3. Add a dropdown for the month selection for the Activity in View mode only. Months will display in "Month YYYY" format. This will be view only in Edit mode.
   a. View Mode – The page will load to the applicable month that the user selected the hyperlink for on the Non-Scheduled Activity Detail page. These will be listed in ascending order. The following scenarios describe what should display in the dropdown selections:
      i. 'Start Date's' month is in the future of the current system date's month and there is no 'End Date': The month selection will display the start date's month and one month past the start date's month.
      ii. 'Start Date's' month is in the future of the current system date's month and there is an 'End Date': The month selection will display the start date's month and one month past the start date's month, not to surpass the end date's month.
      iii. 'Start Date's month is in the past or is the same month as the current system date's month and there is no 'End Date': The month selection will display the start date's month all the way up to one month past the current system date's month.
      iv. 'Start Date's month is in the past or is the same month as the current system date's month and there is an 'End Date': The month selection will display the start date's month all the way up to one month past the current system date's month, not to surpass the end date's month.
      v. The 'Start Date' or 'End Date' is changed, while existing hours have not been saved to the DB, and the updated 'Start Date' or 'End Date' will cause these hours to fall out of the month of the new date range: The previously mentioned scenarios and logic will apply to updated 'Start Date' or 'End Date', but the months for the hours

that exist outside of the new date range will still display, with gaps if applicable.

   b. Edit Mode – The page will load to the applicable month that the user selected the 'Edit' or 'Add' button for on the Non-Scheduled Activity Detail page.

4. View Button – This button will update the calendar to match the selected month. This will only be visible in 'View' mode.

5. When navigating to the Non-Scheduled Activity Hours Detail page the Actual Hours Information will be collapsed when in 'View' mode and the total monthly hours field is equal to 0. The page will default to be expanded when the total monthly hours field is greater than 0 or anytime the page is in 'Edit' mode.

6. The calendar will only be editable in Edit mode. The logic listed below applies for Edit' mode. Entries for hours must be equal to or greater than 0 and can be up to 2 decimals (XX.XX). The Calendar for the Actual Hours Information section will allow the following:
   a. Day entries:
      i. When daily hours exist for that week the User can no longer enter the Total for the week or the Total Monthly Hours.
      ii. The Total for the week will total and display in the Total column for that week and not be editable.
      iii. The Total Monthly Hours field will total the hours and not be editable.
      iv. When deleting all the daily input fields for a specific week, that correlated week's weekly total field will become editable. When deleting all the months daily input fields, then all the daily, weekly, and monthly fields will become editable.
      v. Add the validation message "Daily values must range between 0.00 to 24.00.", this will trigger when a value is greater than 24.00 in a 'Daily Value field' and the user selects the 'Save and Return' button. This validation will trigger when hours are manually entered in the daily values. The validation message will focus on each applicable daily value field.
   b. Weekly entries:
      i. When hours exist for the weekly total, while the weekly total field is editable, the User can no longer enter the daily hours that week or the Total Monthly hours.
      ii. The Total Monthly Hours field will total the hours and not be editable.

        i. When deleting the weekly total, the daily input fields will become editable. When all weekly totals are deleted, the Total Monthly Hours field will be editable.
        iii. Add the validation message "Weekly values must range between 0.00 to 99.99.", this will trigger when a value is greater than 99.99 in a 'Weekly Value field and the user selects the 'Save and Return' button. This validation can be triggered by either manually entered daily values or weekly total values. The validation message will focus on each applicable weekly total Value field.
    c. Monthly entries:
        i. When hours exist for the Total Monthly Hours field, while the Total Monthly Hours field is editable, then the date and week fields will no longer be editable.
        ii. When deleting the monthly total, the daily and weekly input fields will become editable.
        iii. The Total Monthly Hours field will be required.
        iv. Add the Validation message "Month value must range between 0.00 to 400.00.", this will trigger when a value is greater than 400 in the Total Monthly Hours field and the user selects the 'Save and Return' button. The validation message should focus on the total monthly hours field. This validation can be triggered by entering daily, weekly total or monthly total value fields.

7. Edit Button – This Button will open the Non-Scheduled Activity Hours Detail page in Edit mode. This button will only appear in View mode. Hours will be able to be added for a month with no existing hours, if the user selects the 'Edit' button for a month that has no hours.

8. Close Button – This Button will navigate the user back to the Non-Scheduled Activity Detail page. This button will only appear in View mode.

9. Save and Return Button – This Button will save the record to the database and navigate the user back to the Non-Scheduled Activity Detail page. This button will only appear in Edit modes. If the user selects 'Save and Return' and there are 0 hours recorded for the month, then the record for the month will not be recorded or will be removed if it is being edited. Add the following validations:
    a. Add the following validation when hours are entered in daily value fields or in an applicable weekly total field that has reported hours and all of the days in that week are prior to the 'Start Date': "Hours entered need to be on or after the Start Date.". This validation message will focus on the applicable daily value field or the applicable weekly total field.
    b. If an 'End Date' is recorded, add the following validation when hours are entered in daily value fields after the 'End Date' or in

an applicable weekly total field that has reported hours and all of the days in that week are after the 'End Date': "Hours entered need to be on or before the End Date.". These validations will focus on each applicable daily value field or the applicable weekly total field.

10. Cancel Button – This Button will navigate the user back to the Non-Scheduled Activity Detail page. This button will only appear in mode~~.~~

2.11.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** ABAWD → Non-Scheduled Activities

2.11.5 Security Updates

No security updates.

2.11.6 Page Mapping

Add page mapping for Non-Scheduled Activity Hours Detail page.

2.11.7 Page Usage/Data Volume Impacts

This is a new page. No data usage is currently available. The expectation is that the usage will mirror a subset of the ABAWD population.

2.12 Employment Hours Page

2.12.1 Overview

Update the Employment Hours page to allow the capture of zero hours and an indicator for when to 'Use Self-Employment Calculation for ABAWD'. Per ACL 19-93, page 23, "Self-employment income should only be used as a means of calculating ABAWD work hours when no other verification source is available".

This page captures, displays, and manages monthly hours for Employment.

2.12.2 Employment Hours Page Mockup

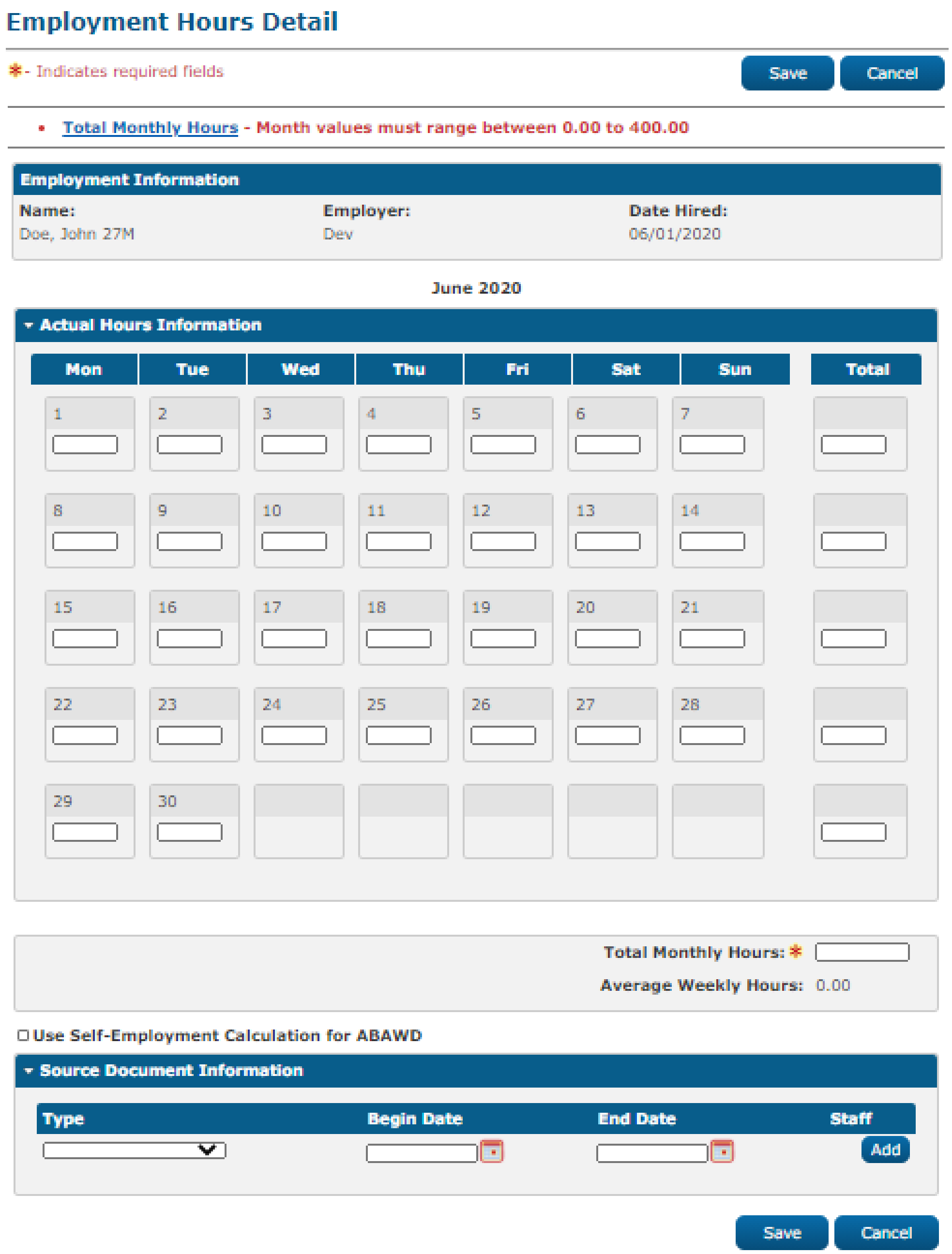


Figure 2.12.2.1 – Employment Hours Page (Create and Edit Mode)

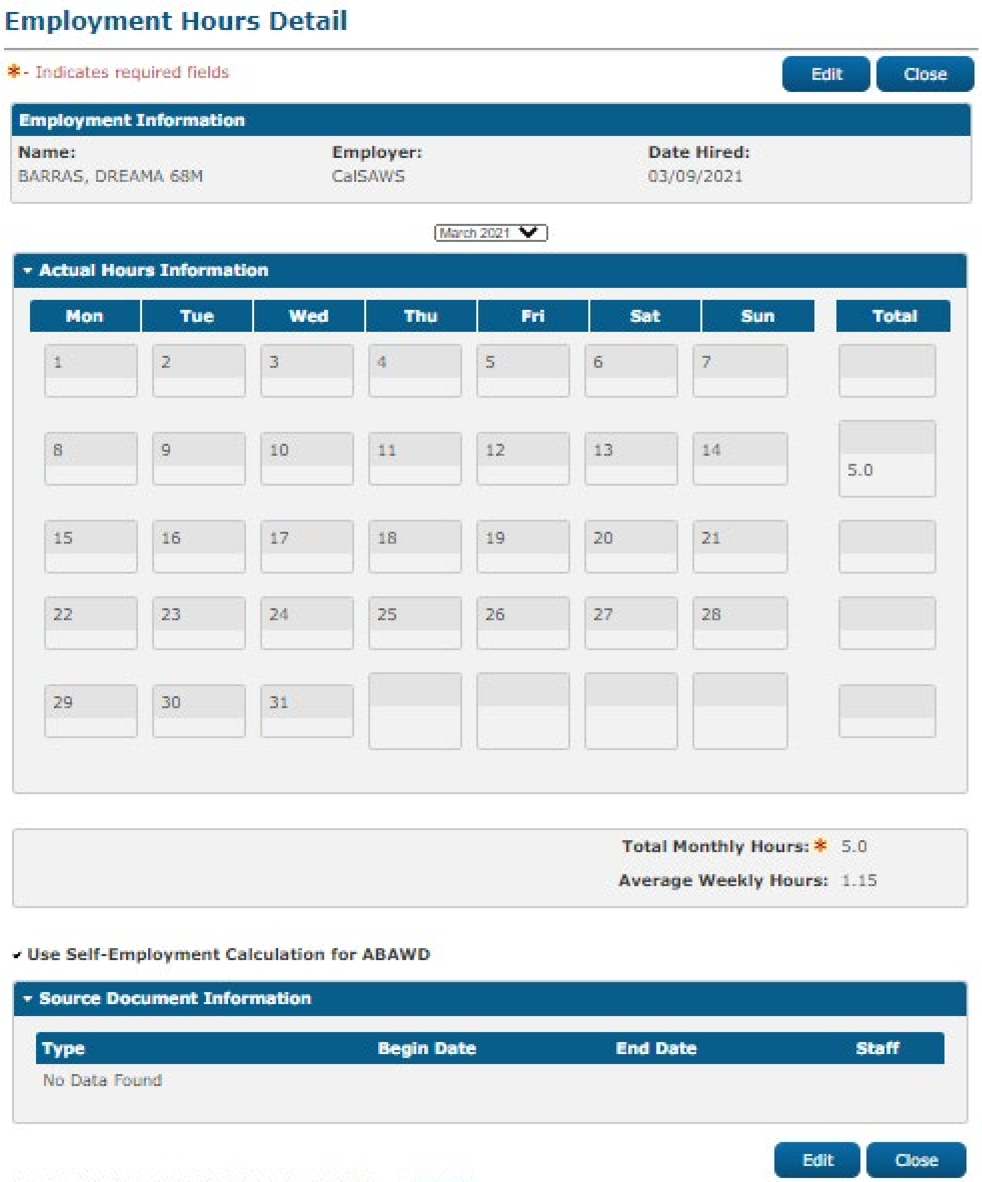


Figure 2.12.2.2 – Employment Hours Page (View Mode)

2.12.3 Description of Changes

1. Update the Validation message that triggers when a value is less than 0.1 to allow for 0 hours, up to 2 decimal places.
    a. Change the Month validation to "Month values must range between 0.00 to 400.00."

    b. Change the validation message for weekly values to "Weekly values must range between 0.00 to 99.99."

2. Use Self-Employment Calculation for ABAWD – Checkbox will only display if the Type of the employment is self-employment and the total monthly hours is 0.
3. Update the Month Dropdown – Update the month dropdown to display all months from the employment's 'Date Hired' month to one month after the current system date's month if there is no 'Termination Date'.

2.12.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Financial->Employment

2.12.5 Security Updates

No security updates

2.12.6 Page Mapping

Add page mapping for the Self-Employment Calculation for ABAWD field

2.12.7 Page Usage/Data Volume Impacts

No performance impacts.

2.13 Activity Progress Summary Page

2.13.1 Overview

Update the Activity Progress Summary page to add a validation message for when the Total Monthly Hours field is greater than 400.

2.13.2 Activity Progress Summary Mockup

Figure 2.13.2.1 – Activity Progress Summary Page

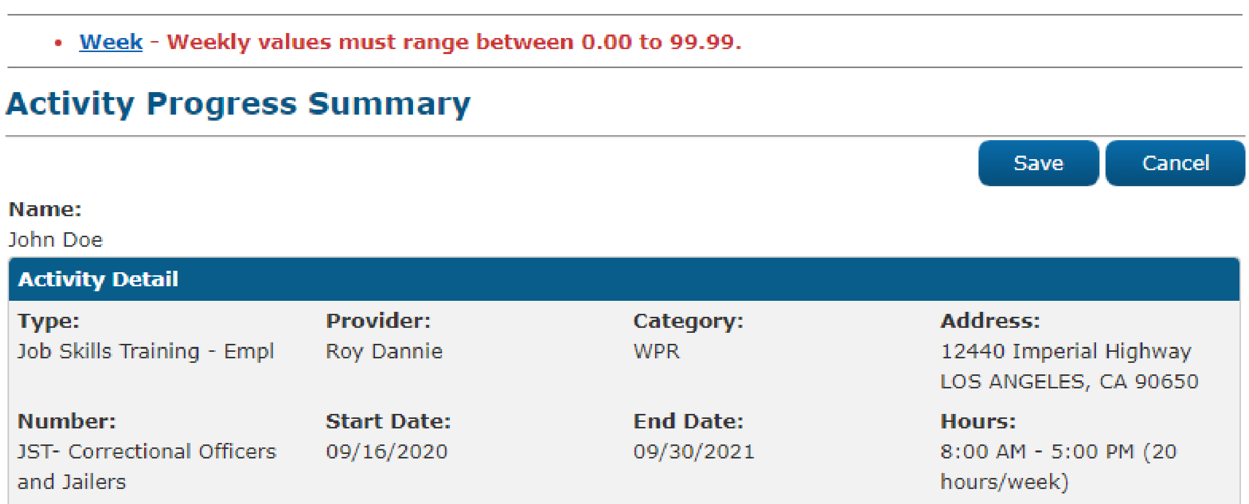


Figure 2.13.2.2 – Activity Progress Summary Page

2.13.3 Description of Changes

1. Add the Validation message "Month values must range between 0.00 to 400.00.", this will trigger when a value is greater than 400 in the Total Monthly Hours field.
2. Add the validation message "Weekly values must range between 0.00 to 99.99.", this will trigger when a value is greater than 99.99 in a 'Weekly Value field'.

2.13.4 Page Location

- **Global:** Empl. Services
- **Local:** Activities
- **Task:** Customer Activities

2.13.5 Security Updates

No Security Updates

2.13.6 Page Mapping

N/A

2.13.7 Page Usage/Data Volume Impacts

No performance impacts.

2.14 Eligibility – CF EDBC Summary

2.14.1 Overview

Update the ABAWD Status section of the CF EDBC Summary page to account for the work requirement being determined by the system.

Currently, the ABAWD Status section of the CF EDBC Summary page displays the Work Requirement result based on user data entry either from:

d. CF EDBC Summary page if no calendar exists, or
e. the ABAWD Time Limit Detail page.

The current process is described in section 2.9 of SCR **CA-57971/CIV-7215 – ABAWD Phase II**.

This current behavior for defining the work requirement will be removed from the system.

As of this SCR, the Work Requirement value (Met vs. Not Met) will be determined by the system. The details of this Work Requirement determination will be described in the following section, 'Eligibility – ABAWD Work Requirement Detail'.

This SCR does not change the logic for determining whether someone is Geographically Waived.

A user can override the EDBC determination for the work requirement by using the ABAWD Time Limit Detail page. While EDBC will prioritize user entered data from the ABAWD Time Limit Detail page when determining whether a person loses CF eligibility, the CF EDBC Summary will only show the Work Requirement result determined by EDBC (i.e., Met or Not Met).

2.14.2 ABAWD Status Mockup

▾ ABAWD Status

Name	Status	Status Reason	Work Requirement	Source
Smith, John 49M	ABAWD		Met	User

Figure 2.14.2.1 – ABAWD Status

2.14.3 Description of Changes

1. Update the ABAWD Status display to hyperlink the Name column. This hyperlink will lead to the ABAWD Work Requirement Detail page. For instances where no Work Requirement calculation was made, including historical EDBCs run prior to this SCR, the name will be static text with no hyperlink.
2. Update the ABAWD Status display to include an additional column to track the Source of the ABAWD Status record. This column will display either 'System', if determined by the EDBC, or 'User' if specified by a user-determined ABAWD Time Limit record. Update Page Mapping to include this new column. Historical EDBCs will have no Source, as functionality was not present prior to this change.
3. Remove previous logic which allowed the user to select the Work Requirement from the CF EDBC Summary page. See section 2.9 of SCR **CA-57971/CIV-7215 – ABAWD Phase II**.

2.14.4 Page Location

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

2.14.5 Security Updates

No changes

2.14.6 Page Mapping

Update Page Mapping for added fields.

2.14.7 Page Usage/Data Volume Impacts

The page usage/data volume will match the existing CF EDBC Summary page.

2.15 Eligibility – ABAWD Work Requirement Detail

2.15.1 Overview

Add a new ABAWD Requirement Person Summary page. This page provides details related to a person's ABAWD Status, including work registration exemptions and how their work requirement status was determined. This page is only viewable by clicking a hyperlink in the ABAWD Status section of the CF EDBC Summary page (see section 2.14.2).

This page shows how the Work Requirement result (i.e., 'Met' vs 'Not Met') was determined during the CF EDBC.

The layout of this page will mirror the ABAWD Requirement Person Summary page in section 2.3 with one exception: the first row of data will only include the Name rather than the View Month and Name.

2.15.2 ABAWD Work Requirement Detail Mockup

ABAWD Requirement Person Summary

Close

Name:
Smith, John 26M

Work Requirement Hours: 80	**Total Work Requirement Hours:** 41.5	**Work Requirement Status:** Not Met
Household Workfare Requirement Hours: 17	**Total Household Workfare Hours:** 22	**Household Workfare Requirement Status:** Met

Employment Hours

Total Monthly Hours:19

Name	Type	Monthly Hours
Employer #1	Self-Employment	8
Employer #2	Unsubsidized	11

Non-Limited Activity Hours

Total Monthly Hours:15

Name	Monthly Hours
Activity #1	10
Activity #2	5

Limited Activity Hours

Total Monthly Hours:7.5 **Allowable Monthly Hours:** 7.5 **Actual Monthly Hours:**8

Name	Monthly Hours
Job Club	3
Job Search	5

Work Registration Exemptions

Type
No Data Found

Workfare Activities

Name	Actual Hours
Workfare #1	9
Workfare #2	13

Close

Figure 2.15.2.1 – ABAWD Requirement Person Summary

2.15.3 Description of Changes

1. See section 2.3, ABAWD Requirement Person Summary page. The page layout description for that page will mirror this page with one exception: the first row of data will only include the Name rather than the View Month and Name.
   This page will show the results determined by EDBC when processing the benefit month. These results will not be made permanent unless the EDBC is authorized. Once the EDBC results are authorized, the ABAWD Requirement Person Summary page (under ABAWD Task section in the Left Navigation pane), will show the same results for a given benefit month.

2.15.4 Page Location

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

2.15.5 Security Updates

This page will have the same security as the existing CalFresh EDBC Summary page.

2.16 Eligibility – Calculate Whether Work Requirement Has Been Met

2.16.1 Overview

Add new logic to determine whether a non-exempt ABAWD who is not geographically waived has met the Work Requirement.

The system logic which determines whether the Work Requirement has been met can be triggered from two different parts of the system:

- CF EDBC
- Batch ABAWD Status Job

This section of the document describes how the system determines whether the Work Requirement has been met.

The Work Requirement can be met for a benefit month in two ways using either Work Requirement Hours or Workfare Hours. If the ABAWD is eligible for a Geographical Waiver, the system will not calculate whether the ABAWD has met the Work Requirement.

a. Work Requirement Hours: An individual ABAWD person has been employed or involved in a qualifying work activity for at least 80 hours during the benefit month. The 80 hours can be met by a) using only employment hours, b) using only work activity hours or c) using a combination of employment hours and work activity hours. The sources for work requirement hours can be the following:

   i. Employment
      1. Employment (paid employment, self-employment, and in-kind work) with qualifying hours
      2. Self-Employment with no qualifying hours
   ii. Work Activities
      1. CalFresh Employment and Training (CFET)
         a. Work Activities counted hour for hour
         b. Work Activities with limited hours
      2. Non-Scheduled (Non-CFET)
         a. Workforce Innovation and Opportunity Act (WIOA) programs
         b. Programs under section 236 of the Trade Act of 1974
         c. Community Service or Volunteer Work
      3. GROW Activities

b. WorkFare Hours
   Note: Workfare may not be available in every county.

Hours for Work Requirement and Workfare can come from four sources: Customer Activity page, Employment page, Non-Scheduled Activity page, and Income page.

2.16.2 Description of Changes

1. Add new logic to calculate whether an ABAWD has met the Work Requirement. This logic will supersede the previous logic for determining whether the work requirement was met described in the ABAWD Phase II SCR. See the following sections that have been superseded:
   a. 2.9.3.2 (display dropdown in ABAWD Status for user to select 'Met' vs 'Not Met')
   b. 2.9.3.3.2 (sets work requirement to 'Met' base on ABAWD Time Limit record)
   c. 2.9.3.3.3, 2.9.3.3.4, 2.9.3.4.2 (sets work requirement to 'Not Met')

2. **Prioritize User Defined ABAWD Time Limit for Met/Not Met** – Add new logic to prioritize a manually entered (i.e., user entered) ABAWD Time Limit record of 'Met Work Requirement' (CT842_WW) and 'Did not meet work requirement' (CT842_NN) for the benefit month being processed over the system determination for the work requirement. CF EDBC Detail page will still display the system results of the work requirement in the ABAWD Status section. However, when determining whether an ABAWD remains eligible (assuming the

ABAWD has used all countable and consecutive months), the system will prioritize the user entered data. This impacts whether the 'Did Not Meet ABAWD Work Rules after Regaining Elig' Status Reason (CT73_AI) will be set.
User entered data will be a Time Limit record entered by a user as opposed to being updated by Batch via the ABAWD Time Limit Sync Job. Data entered through Batch is identified by checking that the Staff ID that entered the record has a Last Name of 'Batch', 'Data Change', or 'Conversion'.
When saving the ABAWD Status, include the source so it can be displayed in the EDBC ABAWD Status display:
 a. System – when the EDBC determined the work requirement
 b. User – when the work requirement was set due to a user entered Time Limit record

3. **Define Minimum Wage** – Add new logic to define the Minimum Wage for Work Requirement and Workfare calculations. All references to 'Minimum Wage' unless stated otherwise will refer to the following definition. The 'Minimum Wage' will be the higher of the State Minimum Wage or the Local Minimum Wage. If the Local Minimum Wage has not been defined for the benefit month being processed, the State Minimum Wage will be used by default. The State Minimum Wage (CT335-MW) is defined in code table 335. The Local Minimum Wage is defined by the user using the new Local Minimum Wage page.
4. **Identify Source of Hours** – Add new logic to identify the source of Work Requirement and Workfare hours for each ABAWD. The sections below identify sources of hours, classify how they will be counted, and define where they display on the ABAWD Work Requirement Detail page.
   Hours for Work Requirement and Workfare can come from four sources: Customer Activity page, Non-Scheduled Activity page, Employment page, and Income page. These hours will be classified and then totaled separately for each ABAWD.
   a. **Customer Activity** – The customer activities displayed in the table below will be used to determine whether the Work Requirement was met. These activities will be displayed on the ABAWD Work Requirement Detail page. The table columns describe the following information:
      i. **#**: This is the sequential row number and is used for referencing the columns during reviews.
      ii. **Name – Page Display**: This defines the verbiage that will be used display the name of the customer activity on the ABAWD Work Requirement Detail page.
      iii. **Page Category**: This defines the category of the ABAWD Work Requirement Detail page in which the activity will be listed. Some of the rules for counting hours is also based on this category. These rules will be defined later

in this section. The categories valid for customer activities are:

1. Non-Limited Activity Hours
2. Limited Activity Hours
3. Workfare Activities

iv. The next three columns identify the criteria used to identify countable Customer Activities. Only the customer service activities listed are countable and only if they are associated with the program defined in the **Program Association** column.

Countable Customer Activities

#	Name - Page Display	Page Category	Customer Service Type	Service Type Code – CT56	Program Association
1	Education - Empl	Non-Limited	Education - Empl	15	WPR
2	Job Skills Training - Empl	Non-Limited	Job Skills Training - Empl	32	WPR
3	Satisfactory School Attendance (REM)	Non-Limited	Satisfactory School Attendance (REM)	50	WPR
4	Voc/Ed Training	Non-Limited	Voc/Ed Training	69	WPR
5	WEX	Non-Limited	WEX	72	WPR
6	CFET Retention Services	Non-Limited	CFET Retention Services	FR	CFET
7	Self Initiated Workfare	Workfare	Self Initiated Workfare	SI	CFET
8	Workfare	Workfare	Workfare	WF	CFET
9	Job Readiness Training	Limited	Job Readiness Training	G04	GROW
10	Job Readiness Training for Youth	Limited	Job Readiness Training for Youth	G05	GROW
11	Pathways to Success	Limited	Pathways to Success	G06	GROW
12	Career Opportunities Resources & Employment	Limited	Career Opportunities Resources & Employment	G07	GROW
13	Education & Training	Non-Limited	Education & Training	G08	GROW
14	Security Officer Training	Non-Limited	Security Officer Training	G30	GROW
15	Office Occupations	Non-Limited	Office Occupations	G32	GROW
16	Computer Application Class	Non-Limited	Computer Application Class	G33	GROW
17	Short-Term Training	Non-Limited	Short-Term Training	ST	GROW
18	GED	Non-Limited	GED	G09	GROW

19	Literacy	Non-Limited	Literacy	G10	GROW
20	Self-Initiated Program	Non-Limited	Self-Initiated Program	SP	GROW
21	Post Employment Services	Non-Limited	Post Employment Services	G17	GROW

b. **Non-Scheduled Activity** – The non-scheduled activities displayed in the table below will be used to determine whether the Work Requirement was met. These activities will be displayed on the ABAWD Work Requirement Detail page. The table columns describe the following information:

  i. **#**: This is the sequential row number and is used for referencing the columns during reviews.

  ii. **Name – Page Display**: This defines the verbiage that will be used display the name of the customer activity on the ABAWD Work Requirement Detail page.

  iii. **Page Category**: This defines the category of the ABAWD Work Requirement Detail page in which the activity will be listed. Some of the rules for counting hours is also based on this category. These rules will be defined later in this section. The categories valid for non-scheduled activities are:

    1. Non-Limited Activity Hours
    2. Workfare Activities

  iv. The next three columns identify the criteria used to identify countable Non-Scheduled Activities. Only the activities listed are countable. Because all the Non-Scheduled Activities are new, no type code has been defined yet. Non-scheduled activities have no program association. Therefore, all rows are marked Not Applicable (N/A) in the **Program Association** column.

Countable Non-Scheduled Activities

#	Name - Page Display	Page Category	Service Type	Service Type Code	Program Association
1	WIOA	Non-Limited	WIOA (Non-CFET)	TBD	Not Applicable
2	Trade Act	Non-Limited	Trade Act (Non-CFET)	TBD	Not Applicable
3	Community Service/Volunteer Work	Non-Limited	Community Service/Volunteer Work (Non-CFET)	TBD	Not Applicable

4	Workfare	Workfare	Workfare (Non-CFET)	TBD	Not Applicable

c. **Employment** – All employment types will be used to determine whether the Work Requirement was met and are listed in the table below which defines how these employments will be displayed on the ABAWD Work Requirement Detail page. The table columns describe the following information:
   i. **#**: This is the sequential row number and is used for referencing the columns during reviews.
   ii. **Name – Page Display**: This defines the verbiage that will be used display the name of the customer activity on the ABAWD Work Requirement Detail page.
   iii. **Page Category**: This defines the category of the ABAWD Work Requirement Detail page in which the activity will be listed. Some of the rules for counting hours is also based on this category. These rules will be defined later in this section. The only category valid for employment records is 'Employment Hours'.
   iv. The next two columns identify the criteria used to identify countable Employments. Currently all employment types are countable.

Employment records of type Self-employment that are associated to either an income record of Self-Employment (CT186_27) or Rental Income – Manages Property at least 20 Hours/Week (CT186_53) may use the income record to calculate the number of countable hours if the countable hours for the employment record have been set to zero and the 'Use Self-Employment Calculation for ABAWD' checkbox has been selected. This determination is described in the sections below.

Countable Employments

#	Name - Page Display	Page Category	Service Type	Service Type Code (CT2359)
1	Grant-based on-the-job training (OJT)	Employment Hours	Grant-based on-the-job training (OJT)	GB
2	OJT - On the Job Training	Employment Hours	OJT - On the Job Training	OJ
3	Paid Work Experience - Private	Employment Hours	Paid Work Experience - Private	PW
4	Self-employment	Employment Hours	Self-employment	SE
5	Subsidized	Employment Hours	Subsidized	SU

6	Supported work or transitional employment	Employment Hours	Supported work or transitional employment	SW
7	Unsubsidized	Employment Hours	Unsubsidized	US
8	Work Study	Employment Hours	Work Study	WS

d. **Income** – Earned income from the self-employment income types displayed in the table below will be used to determine whether the Work Requirement was met. These two sources of self-employment may be used to calculate countable hours when the following conditions are met:
   i. The income has a linked employment record.
   ii. The user has explicitly stated that the self-employment calculation may be used. This will be true if the countable hours for the employment record have been set to zero and the 'Use Self-Employment Calculation for ABAWD' checkbox has been selected.

When calculating the work requirement hours based on self-employment income, only the income amount for the benefit month being processed will be used. Therefore, if the income amount changes over time, the work requirement hours calculated will also potentially change.

If used, the hours calculated based on these incomes will be displayed on the ABAWD Work Requirement Detail page. The table columns describe the following information:
   i. **#**: This is the sequential row number and is used for referencing the columns during reviews.
   ii. **Name – Page Display**: This defines the verbiage that will be used display the name of the customer activity on the ABAWD Work Requirement Detail page.
   iii. **Page Category**: This defines the category of the ABAWD Work Requirement Detail page in which the activity will be listed. Some of the rules for counting hours is also based on this category. These rules will be defined later in this section. The only category valid for self-employment income records is 'Employment Hours'.
   iv. The next two columns identify the criteria used to identify countable self-employment income.

Countable Income

#	Name - Page Display	Page Category	Income Type	Income Type Code (CT186)

1	Self-employment	Employment Hours	Self-Employment	27
2	Self-employment	Employment Hours	Rental Income – Manages Property at Least 20 Hours/Week	53

5. **Determine Monthly Countable Hours** - Add new logic to determine the number of countable actual hours for each ABAWD for the month that should be associated with an employment, customer activity, non-scheduled activity, or income for the benefit month being processed. The process for determining countable hours is described in the steps below.
   Work Requirement hours are displayed and totaled at the individual ABAWD level. Workfare Activity hours are displayed at the individual level, but the Total Household Workfare Hours are based on all active ABAWDs in the CF program.
   a. **Countable Hours based on Benefit Month** – For each ABAWD, determine whether any countable hours have been defined for the benefit month based on the following criteria:
      i. If the Status for the associated record is 'Closed' for the entire month, the countable hours for the benefit month will be zero. This will be true regardless of whether actual hours have been defined for the benefit month or not. Note: This only applies to employment and customer activity records. Non-scheduled activities do not track Status.
      ii. If the Status for the associated record is not 'Closed' for the entire month (this includes when no Status has been defined or a Status other than 'Closed' was defined) and actual hours have been defined for the benefit month, the countable hours for the benefit month will be the Total Monthly Hours. The Total Monthly Hours could be zero or greater than zero.
      If the record being tested is an Employment record with a type of 'Self-Employment' and the Total Monthly Hours are defined as zero, the system will additionally look at the 'Use Self-Employment Calculation for ABAWD' indicator.
         1. If the indicator is No, the benefit month will be treated as having zero actual hours.
         2. If the indicator is Yes, the benefit month will be treated as having actual hours as defined by the self-employment income calculation (see point 6 below, **Countable Hours Based on Self-Employment Income**).
      iii. If the Status for the associated record is not 'Closed' for the entire month and no actual hours have been

defined for the benefit month, the countable hours will be undefined.

b. **Countable Hours based on Prior Month** - If the countable hours for the benefit month are undefined based on point a above, determine whether countable hours from a prior month can be carried forward to the benefit month being processed. The carry forward hours could be zero or greater than zero. Countable hours will be carried forward from the most recent month prior to the benefit month that meets all the criteria listed below. If no prior month meets the criteria, no countable hours can be carried forward and the countable hours for the benefit month remain undefined.
    i. The Time Limit Status for the prior month being evaluated is not 'Good Cause'.
    ii. The prior month being evaluated has countable hours which are not undefined based on the same criteria for defining Countable Hours in the Benefit Month.
    iii. The prior month is not before the earliest allowable month.
        1. For a non-ICT application, the earliest allowable month will a person's Beginning Date of Aid (BDA). Note: For a new application the user is required to recertify the hours being used by an ABAWD to meet the work requirement. For a mid-month BDA, hours for the entire month will be counted.
        2. For an ICT application, the earliest allowable month will be two months prior to the person's Beginning Date of Aid (BDA). ICT applications are identified through an indicator rather than the application source.
        Note: For an ICT application, the user may begin entering data associated with an ongoing recipient prior to actual BDA. For example, the participant may still have the same employment and associated work hours even though the participant has moved to a new county. For convenience the user can enter these existing hours up to two months prior to the BDA.

c. If the countable hours for the benefit month remain undefined based on the points above, zero countable hours will be used for the associated record for the benefit month

6. **Determine Countable Hours based on Self-Employment Income** - Add new logic to calculate the number of hours coming from self-employment income. As defined in the sections above, employment hours from self-employment will be based on actual hours worked unless the user has explicitly indicated that the self-employment

calculation should be used, in which case, the hours will be calculated based on the formulas below.

a. Calculated Self-Employment Hours
    i. Hours = Adjusted Self-Employment Income Amount / Minimum Wage
        1. These hours will be rounded to the nearest tenth of an hour (e.g., 4.35 will be rounded to 4.4).
    ii. Adjusted Self-Employment Income Amount = Gross Self-Employment Income – Expenses
        1. This definition will follow the same rules as existing CF rules for determining monthly earned income from self-employment income sources. This includes:
            a. Rules for determining monthly income based on income frequency
            b. Rules for determining whether expenses will be based on either standard deduction or actual expenses.
            c. Rules that allocate actual expenses between multiple incomes when there is more than one SE income or more than one rental income for a single individual. See the related assumption in section 1.4
        2. The self-employment calculation for countable hours will not use Change Reason logic for determining whether income can be used based on an Apply Date. All income valid for a benefit month will be used in the calculation.

b. Add new logic to define the hover string on the ABAWD Requirement Person Summary page used to display how the countable hours were calculated for self-employment income. The format will be ($[Monthly SE Income 1] – $[Expense]([Expense Type]) + $[Monthly SE Income 2] – $[Expenses]([Expense Type])) / $[Minimum Wage]([Minimum Wage Type]) = [Result]
The Expense Type will be either 'Standard Deduction' or 'Actual Expense'.
The Minimum Wage Type will be either 'Local Minimum Wage' or 'State Minimum Wage'.
    i. Examples:
        1. ($300 - $120 (Standard Deduction)) / $15 (Local Minimum Wage) = 12
        2. (($300 - $120 (Standard Deduction)) + ($600 - $240 (Standard Deduction))) / $15 (State Minimum Wage) = 36

7. **Determine Total Monthly Employment Hours** – Add new logic to calculate the 'Total Monthly Hours' in the 'Monthly Employment Hours'

section by totaling all countable hours for the month defined as 'Employment Hours'.

8. **Determine Total Monthly Non-Limited Activity Hours** – Add new logic to calculate the 'Total Monthly Hours' in the 'Non-Limited Activity Hours' section by totaling all countable hours for the month defined as 'Non-Limited Hours'.
9. **Determine Total Monthly Limited Activity Hours** – Add new logic to determine the maximum number of hours allowed for any countable hours defined as 'Limited Activity Hours'. The 'Limited Activity Hours' section of the ABAWD Work Requirement Detail page defines the following three types of hours:
    a. **Total Monthly Hours:** The 'Total Monthly Hours' is the lesser of the 'Allowable Monthly Hours' and the 'Actual Monthly Hours'.
    b. **Allowable Monthly Hours**: The 'Allowable Monthly Hours' is calculated by taking the 'Total Monthly Hours' from the 'Non-Limited Activity Hours' section and dividing that amount by two. These hours will be rounded to the nearest tenth of an hour (e.g., 15.9/2 = 7.95 which rounds to 8.0).
    Add new logic to define the hover string on the ABAWD Requirement Person Summary page used to display how the hours were calculated for the 'Allowable Monthly Hours'. The format will be [Total Monthly Non-Limited Activity Hours] (Total Monthly Non-Limited Activity Hours / 2 = [Result]
        i. Examples:
            1. $15 (Total Monthly Non-Limited Activity Hours) / 2 = 7.5
    c. **Actual Monthly Hours**: Total all countable hours for limited activities.
10. **Determine Total Hours Completed** – Add new logic to calculate 'Total Hours Completed' by totaling the 'Total Monthly Hours' from the following sections:
    a. Employment Hours
    b. Self-Employment Hours
    c. Non-Limited Activity Hours
    d. Limited Activity Hours
11. **Determine whether Work Requirement has been Met Based on Work Requirement Hours** – Add new logic to determine whether the Work Requirement has been met based on the Total Hours Completed. This will be true if the 'Total Hours Completed' equals or exceeds the 'Work Requirement Hours'. The 'Work Requirement Hours' defines the minimum number of monthly hours needed and is currently set at 80 hours by the State and needs to be added to the code tables.
12. **Determine Household Workfare Requirement Hours** –
    a. Add new logic to determine the 'Household Workfare Requirement Hours'. This value is determined by dividing the EDBC calculated CF Final Allotment amount by the Minimum Wage (as defined above). This result will be rounded down to the nearest hour (see page 25 of ACL 19-93).

If a user has overridden the allotment, the system will still use the system determined Final Allotment to calculate the 'Household Workfare Requirement Hours'. If the overridden allotment would have altered the results of whether the Work Requirement was or was not met, the user may also need to override the Time Limit page.

Note: If this logic is processed by the Batch ABAWD Determination job, a new CF EDBC is processed but is not saved/authorized. The new batch CF EDBC grant benefit amount used by the 'Household Workfare Requirement Hours' calculation may not match the last authorized EDBC allotment amount for the benefit month. These CF allotment amounts will remain out of sync until the CF EDBC is reprocessed for the benefit month.

b. Add new logic to define the hover string on the ABAWD Requirement Person Summary page used to display how the 'Household Workfare Requirement Hours' were calculated. The format will be ($[CF Final Allotment] / $[Minimum Wage] ([Minimum Wage Type]) = [Result]
   The Minimum Wage Type will be either 'Local Minimum Wage' or 'State Minimum Wage'.
   i. Examples:
      1. $255 / $15 (Local Minimum Wage) = 17

13. **Determine Total Household Workfare Hours** – Add new logic to determine the 'Total Household Workfare Hours'. This value will be calculated by adding all countable hours labeled as workfare that are associated with an active Member in the CF program who is an ABAWD.
    The 'Actual Hours' listed in the 'Workfare Activities' section of the ABAWD Work Requirement Detail page are specific to a single ABAWD. However, the 'Total Household Workfare Hours' may be for a single ABAWD or for multiple ABAWDs in the CF program. If there are multiple ABAWDS, the 'Actual Hours' listed in the 'Workfare Activities' section may not equal the 'Total Household Workfare Hours'.
14. **Determine whether Household Workfare Requirement Hours has been Met Based on Workfare Hours** – Add new logic to determine whether the Work Requirement has been met based on the Total Household Workfare Hours. This will be true if the 'Total Household Workfare Hours' equals or exceeds the 'Household Workfare Requirement Hours'.
15. **Determine whether Work Requirement has been Met** – Add new logic to determine whether the Work Requirement has been met for CF. The Work Requirement will be considered met if either the 'Work Requirement Status' is Met or the 'Household Workfare Requirement Status' is Met.
16. Add new logic to write out ABAWD Work Requirement results. These results will be permanently saved as part of the EDBC and as part of the ABAWD Work Requirement Summary page.

a. Effective dating logic will need to create a new record even if the Work Requirement result (i.e., Met vs. Not Met) has not changed. This is to ensure that the results of the ABAWD Work Requirement details are saved off.

2.16.3 Programs Impacted

CF

2.16.4 Performance Impacts

New logic which should have no discernible impact on performance.

2.17 Eligibility – Update Work Registration Exemption Logic

2.17.1 Overview

Update the Work Registration exemption logic to prevent more than one person from being identified as exempt for 'Cares for Dependent Child Under 6'.

Existing logic will allow anyone who has care and control of a qualifying child to receive this exemption.

2.17.2 Description of Changes

1. Update the Work Registration exemption logic which allows a person with care and control of a child under 6 to receive an exemption of 'Cares for Dependent Child Under 6' as follows:
   a. New system logic will differentiate between a record generated manually by a worker versus a record generated after an EDBC has been authorized.
   b. If the user has manually defined a CF Work Registration exemption of 'Cares for Dependent Child Under 6' that is valid for the benefit month, the system will not automatically determine the exemption. The user created exemption will take priority.
   c. If there is no manually defined CF Work Registration exemption of 'Cares for Dependent Child Under 6' that is valid for the benefit month, the system will only automatically generate an exemption of 'Cares for Dependent Child Under 6' if there is only one person who meets the existing requirements. If multiple people meet the existing qualifications, the system will not generate any exemption. Instead, it will be the user's responsibility to manually assign the exemption, thus, making it

explicit which person should receive the 'Cares for Dependent Child Under 6' exemption.

2.17.3 Programs Impacted

CF

2.17.4 Performance Impacts

New logic which should have no discernible impact on performance.

2.18 Eligibility – Update ABAWD Status Logic

2.18.1 Overview

Update the ABAWD Status logic to include the following changes:

a. Treat a person receiving TCF as a Non ABAWD with a reason of 'TCF'.
b. Treat a person manually identified by the user as 'Applied for Disability Benefits' as an Exempt ABAWD with a reason of 'Applied for Disability Benefits'.
c. Treat a person manually identified by the user as 'Participating in an ORR Training Program at Least Half Time' as an Exempt ABAWD with a reason of 'Participating in an ORR Training Program at Least Half Time'.

The table below shows how this new logic will be prioritized when determining a person's ABAWD Status/Status Reason. The rows in bold indicate new logic.

Priority	ABAWD Status	ABAWD Status Reason
1	Non ABAWD	Non-Aided
2	**Non ABAWD**	**TCF**
3	Exempt ABAWD	Work Registration Exemption
4	Exempt ABAWD	Under Age 18
5	Exempt ABAWD	Adult 50 or Older
6	Exempt ABAWD	Child Under 18 in the household
7	Exempt ABAWD	Pregnancy
8	Exempt ABAWD	Obviously Unfit for Employment
9	**Exempt ABAWD**	**Applied for Disability Benefits**
10	**Exempt ABAWD**	**Participating in an ORR Training Program at Least Half Time**
11	ABAWD	Partial Benefit Month

Prioritization of ABAWD Status Logic

2.18.2 Description of Changes

1. Add a new rule to the ABAWD Status logic to give a person an ABAWD Status of 'Non-ABAWD' and an ABAWD Status Reason of 'TCF' when the person meets the following criteria:

    a. The person has a 'Member' role in a TCF program.
    b. The person has a status of 'Pending', 'Active', or 'Ineligible' during the EDBC determination.
2. Add new rule to the ABAWD Status logic to logic to give a person an ABAWD Status of 'Exempt ABAWD' (CT2622_EA) and an ABAWD Status Reason of 'Applied for Disability Benefits' (new code for code table 2623) when the person meets the following criteria:
    a. The person has a 'Member' role in a CF program.
    b. The person has a status of 'Pending', 'Active', or 'Ineligible' during the EDBC determination.
    c. The person has a record of 'Applied for Disability Benefits' from the new ABAWD exemption data collection page that is valid for the benefit month being processed.
3. Add new rule to the ABAWD Status logic to logic to give a person an ABAWD Status of 'Exempt ABAWD' (CT2622_EA) and an ABAWD Status Reason of 'Participating in an ORR Training Program at Least Half Time' (new code for code table 2623) when the person meets the following criteria:
    a. The person has a 'Member' role in a CF program.
    b. The person has a status of 'Pending', 'Active', or 'Ineligible' during the EDBC determination.
    c. The person has a record of 'Participating in an ORR Training Program at Least Half Time' from the new ABAWD exemption data collection page that is valid for the benefit month being processed.

Note: The above three rules will be prioritized with existing ABAWD Status logic based on the table shown in the overview section above.

2.18.3 Programs Impacted

CF

2.18.4 Performance Impacts

New logic which should have no discernible impact on performance.

2.19 Batch – New Materialized Views and Super Trigger jobs

2.19.1 Overview

The purpose of the Super Trigger jobs is to identify data changes in the data collection tables, which is used to trigger downstream automation. The ABAWD Determination Sweep job detects potentially meaningful data collection updates for ABAWD determination and triggers cases through the Batch ABAWD Determination process.

This section outlines the updates to the Super Trigger process and subsequent data collection changes required to identify cases for the ABAWD Determination reevaluation.

2.19.2 Description of Change

1. Create new materialized views for the following tables:
    a. EMP_MONTH_ACTUAL (Total Actual hours of the month for the employment)
    b. CUST_ACTIV_ATTEND (Actual hours the customer attended the activity)
    c. EXPN_SELF_DEDUCT (Expense Self Deduction – Deduction Type)
    d. EXPN_AMT_DETL (Expense Amount Detail – Amount)
    e. EXPN_CONTRIB_PERS (Expense Contributor – Contributor to an Expense)
    f. Non-Scheduled Activity Hours Detail* (Monthly Total of Non-Scheduled Activity hours)
    g. Local Minimum Wage* (Local Minimum Wage Amount)
    h. Manual ABAWD Exemption* (Type of Manual ABAWD Exemption)

    Note: (*) indicates new database tables.
2. Create new Super Trigger jobs to detect the data changes based on the new materialized views above.

2.19.3 Execution Frequency

The new Super Trigger jobs will run daily during CalSAWS business days (Monday – Saturday) excluding Sundays and holidays.

2.19.4 Key Scheduling Dependencies

Successor: Batch ABAWD Determination Sweep job

2.19.5 Counties Impacted

All CalSAWS counties

2.19.6 Data Volume/Performance

N/A

2.19.7 Failure Procedure/Operational Instructions

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

2.20 Batch – Update ABAWD Determination Sweep

2.20.1 Overview

The Batch ABAWD Determination Sweep job (PB00T200) identifies all CalFresh cases that should be reevaluated for ABAWD due to data changes that may result in a change to the recipient's current ABAWD status.

This section outlines the modifications necessary to update the ABAWD Determination sweep logic.

2.20.2 Description of Change

1. Update the Batch ABAWD Determination Sweep job to insert a record into the SYS_TRANSACT table for all CalFresh cases in which there is a new or updated data record for one of the following data elements and that is effective during any point within the current 36-month ABAWD calendar, since the last successful run of this job:
    a. The addition or update to the Actual Monthly Hours from the following data sources. These monthly hours should trigger only the benefit month in which a monthly hour change occurred.
        i. Employment Hours for all Employment Types
        ii. Customer Activity associated to a WPR, CFET or GROW program (See table in Section 2.16.2, '*Countable Customer Activities*')
        iii. Non-Scheduled (Non-CFET) Activities (See table in Section 2.16.2, '*Countable Non-Scheduled Activities*')
    b. The addition or update to the Income Amount associated to the following Income Category:
        i. Self-Employment
        ii. Rental – Manages Property At Least 20 Hours/Week

        Any benefit month that falls within the income amount begin and end date (up to the come-up month) should be triggered.

        Note: Income of type Rental – Manages Property Less Than 20 Hours/Week (CT186) has not been included as a trigger since it is not considered earned income.
    c. The addition or update to the following data elements for an Expense Category of Self-Employment:
        i. The Deduction Type (CT2524) for a Self-Employment Deduction Type record for a CalFresh program. Any

benefit month that falls within the begin and end date (up to the come-up month) should be triggered.

   ii. The Amount for a Self-Employment Amount Detail record. Any benefit month that falls within the begin and end date (up to the come-up month) should be triggered.
   iii. The Contributors for an Expense Contributor Detail record. Any benefit month that falls within the begin and end date (up to the come-up month) should be triggered.

d. The addition or update to the Local Minimum Wage Amount. Any benefit month that falls within the begin and end date (up to the come-up month) should be triggered.
e. The addition or update of an ABAWD Time Limit Month with a Status of 'Good Cause' (CT842). This change will trigger the benefit month **following** the month of the 'Good Cause' change and all the benefit months thereafter (up to the come-up month) for months for which the CalFresh program is Active or Ineligible.
f. The addition or update to a Manual ABAWD exemption Type. Any benefit month that falls within the begin and end date (up to the come-up month) should be triggered.

2. The above Person-level data changes (points a through f) will trigger the ABAWD Status batch job for a Case if the data is associated to a person who has a Status of Active, or Ineligible in the CalFresh program. This will be regardless of the person's ABAWD Status (i.e., exempt ABAWD vs ABAWD) since a person's ABAWD Status could change during the ABAWD determination.

2.20.3 Execution Frequency

No change. The ABAWD Batch Sweep runs daily during business days (Monday – Saturday) excluding Sundays and holidays.

2.20.4 Key Scheduling Dependencies

N/A

2.20.5 Counties Impacted

All CalSAWS counties

2.20.6 Data Volume/Performance

N/A

2.20.7 Failure Procedure/Operational Instructions

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

2.21 Batch - Update ABAWD Time Limit Sync Job

2.21.1 Overview

The ABAWD Time Limit Sync job (CalSAWS: PB00E307) runs daily to align individual ABAWD time limit months with the latest ABAWD Status determination data from the ABAWD_STAT table. The Sync job maintains individual month statuses to reflect updates made to any individual's ABAWD status throughout the current 36-month ABAWD calendar.

Additionally, the Sync job identifies any CalFresh recipients for which an ABAWD Time Clock does not already exist, but the person has been determined to be a non-exempt ABAWD via EDBC. For this population, the Sync job will establish the ABAWD Time Clock appropriately.

The Sync job maintains Time Limit Month records up to and including the current system month.

2.21.2 Description of Change

1. Create CTCR to add new Time Limit Status Reasons (CT863) for the following elements:
    a. Participating in an ORR Training Program at Least Half Time
    b. Applied for Disability Benefits
2. Create a CTCR to add new Time Limit Status Code (CT842) for 'Transitional CalFresh' with a MEDS ABAWD Code mapping of 'E' - Exempted.
3. Modify the ABAWD Time limit Status Sync batch job to determine the appropriate time limit month status for each month within the current 36-month period through the come-up month. Any Time Limit Status not mentioned will retain their current functionality. The Sync job will read from the ABAWD_STAT table and retrieve the appropriate record for each time limit month being evaluated. The job will determine the appropriate status and status reason (if applicable) using the following rules:
    a. Set the Time Limit Month Status to 'Transitional CalFresh' and Status Reason to 'blank' when the following are true:
        i. The tracked ABAWD's applicable ABAWD Status entry for the month being evaluated has a Status of 'NA' (Non-ABAWD) with a Status Reason of 'TCF' (Transitional CalFresh).

b. Set the Time Limit Month Status to 'EE' (Exempted) and Status Reason to 'Participating in an ORR Training Program at Least Half Time' when the following are true:
    i. The tracked ABAWD's applicable ABAWD Status entry for the month being evaluated has a Status of 'EA' (Exempted ABAWD) with a Status Reason of 'Participating in an ORR Training Program at Least Half Time'.
c. Set the Time Limit Month Status to 'EE' (Exempted) and Status Reason to 'Applied for Disability Benefits' when the following are true:
    i. The tracked ABAWD's applicable ABAWD Status entry for the month being evaluated has a Status of 'EA' (Exempted ABAWD) with a Status Reason of 'UN' (Obviously Unfit for Employment).
d. Modify the logic for 'WW' (Met work requirement) and 'NN' (Did not meet work requirement) status determination to no longer carry forward the previous month's status.
    i. Set the Time Limit month status to 'WW' (Met work requirement) and the status reason to Blank when the following conditions are true:
        1. The tracked ABAWD's applicable ABAWD_STAT entry for the month being evaluated has a status of 'AB' (ABAWD).
        2. The tracked ABAWD's case associated to the ABAWD_STAT record for the month DOES NOT belong to a waived County.
        3. The ABAWD status record applicable for the month has a 'Met' value for the work requirement indicator AND the previous month is NOT the first or second month of the 3-consecutive month period.
    ii. Set the Time Limit month status to 'NN' (Did not meet work requirement) and the status reason to Blank when the following conditions are true:
        1. The tracked ABAWD's applicable ABAWD_STAT entry for the month being evaluated has a status of 'AB' (ABAWD).
        2. The tracked ABAWD's case associated to the ABAWD_STAT record for the month DOES NOT belong to a waived County.
        3. The ABAWD status record applicable for the month has a 'Not Met' value for the work requirement indicator AND the previous month is NOT the first or second month of the 3-consecutive month period.

2.21.3 Execution Frequency

No change.

2.21.4 Key Scheduling Dependencies

N/A

2.21.5 Counties Impacted

All CalSAWS counties

2.21.6 Data Volume/Performance

N/A

2.21.7 Failure Procedure/Operational Instructions

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

2.22 Update ABAWD Time Limit Discretionary Exemption Status

2.22.1 Overview

A user can add or update an ABAWD time limit record and set a status of '15% ABAWD Exemption'. Effective FFY 2020, the Agriculture Improvement Act of 2018 reduces the number of percentage exemptions from 15 percent of covered individuals to 12 percent of covered individuals.

2.22.2 Description of Change

1. Update the ABAWD Time Limit Status from '15% ABAWD Exemption' to 'Discretionary Exemption'. All historical Time Limit records will reflect this naming change.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

2.8.1.21	The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes.	New logic will automate the work registration determination for ABAWDs.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214740 | DDID 2297

FDS: API - Case API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/18/20	1.0	Initial Draft	Avi Bandaranayake
2/22/21	1.1	Updating section 2.1.4, removing worker object from response.	Avi Bandaranayake
3/4/2021	1.2	Updated person object to include a phone number object. Updated return objects. Added Header details.	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

There is no Application Programming Interface (API) available to external partners which allows access to read case data from the CalSAWS system.

1.2 Requests

Create a service that will allow the 58 Counties to search for cases by case number, EBT card/account number, individual demographic information, or participant phone number.

1.3 Overview of Recommendations

Create a new endpoint that will retrieve case information.

1.4 Assumptions

1. Results are limited to county level data.
2. Results returned will be paginated to 20 values by default.
3. Limit parameter will allow a maximum of 250 values returned by default. Requesting a larger value will result in a 400 error response.
4. Code table values for this API can be found in the Appendix.
5. Code table values are limited to those available as of the API release date.
6. Requests and Responses will use Code Table values as described in the Appendix.
7. Offset and limits will apply only if paginated results are available.
8. Offset beyond the max available will return a 404 error.
9. Offset and limits will only apply to the root element
10. Sorting and ordering only applies to the root element.
11. Null or empty values will not be returned in the response objects.
12. Requests sent with improper data types will result in 400 error with a stack trace.

2 RECOMMENDATIONS

2.1 Case API

2.1.1 Overview

This API will expose case data from the CalSAWS system.

2.1.2 Description of Changes

The Case API will include the following filters, data elements, and error handling. Please refer to the **cases.html** document for the technical specifications and data element definitions.
Additional examples and specific error messages may be added during build for the developer portal.

2.1.3 Request

The API will include the following request parameters for case:

1. EBT card number
2. Case number
3. SSN
4. CIN
5. First name
6. Last name
7. DOB
8. Phone number

2.1.4 Response

The Case API will return the following objects and elements.


```
[
  {
    "person": {
      "ssn": "string",
      "lastName": "string",
      "midName": "string",
      "firstName": "string",
      "nameSuffix": "string",
      "dob": "2021-03-04",
      "age": "string",
      "emailAddr": "string",
      "spokenLang": "string",
      "writtenLang": "string",
      "ethnicity": "string",
      "phNumbers": [
        {
          "type": "string",
          "phNum": "string"
        }
```

```
    ],
    "addr": [
      {
        "type": "string",
        "cityName": "string",
        "line1Addr": "string",
        "line2Addr": "string",
        "stateCode": "string",
        "county": "string",
        "regn": "string",
        "zipCodeSuffix": "string",
        "zipCodeNum": "string",
        "country": "string"
      }
    ]
  },
  "cases": [
    {
      "caseNum": "string",
      "confidentialFlags": [
        {
          "comnt": "string",
          "rmvdDate": "2021-03-04",
          "confidentialFlagTypes": [
            {
              "confidFlagType": "string"
            }
          ]
        }
      ],
      "caseFlags": [
        {
          "caseFlagType": "string",
          "begDate": "2021-03-04",
          "endDate": "2021-03-04",
          "dueDate": "2021-03-04",
          "expireDate": "2021-03-04"
        }
      ]
    }
  ]
 }
]
```

2.1.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

2.1.6 Error Messages

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	cases.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2297	The CONTRACTOR shall create a service allowing 58 Counties to retrieve case information utilizing a CalSAWS API. The service will allow the 58 Counties to search for cases by case number, EBT card/account number, individual demographic information, or participant phone number. The service will return a list of cases and a list of people on the case including individual demographic information and contact information.	The API complexity accounts for the ability to search for cases utilizing multiple filters and variety of individual level data that will be returned.	Create case API

	The case level information will return any confidentiality indicators associated to the case and case flags.		

5 APPENDIX

The API complexity accounts for the ability to search for cases utilizing multiple filters and variety of individual level data that will be returned.

CT 225 Ethnic Code
White, Non-Hispanic
Hispanic
Other Asian/Pacific Islander
American Indian/Alaska Native
Filipino
Black
Chinese
Cambodian
Japanese
Korean
Samoan
Asian Indian
Hawaiian
Guamanian
Laotian
Vietnamese

CT 51 Confidentiality Type
Adoptions Assistance
CWS AAP Mask Address
Domestic Violence
Employee/Employee Relative
Foster Care
High Profile
Human Trafficking
CWS Foster Care/KinGap Mask Address
Minor Consent
CWS Sealed Mask Address

CWS Sensitive Mask Address

CT 1082 Flag Type
Federal
State
County
Court Case
Study
Civil Rights
Error Prone and High Risk

CT 967 Name Suffix
I
II
III
IV
V
VI
VII
VIII
IX
X
Jr.
Sr.

CT 241: State
AK
AL
AR
AZ
CA
CO
CT
DE
FL
GA
HI
IA
ID
IL

CT 241: State
IN
KS
KY
LA
MA
MD
ME
MI
MN
MO
MS
MT
NC
ND
NE
NH
NJ
NM
NV
NY
OH
OK
OR
PA
RI
SC
SD
TN
TX
UT
VA
VT
WA
WI
WV
WY

CT 15: County
Alameda
Alpine

CT 15: County
Amador
Butte
Calaveras
Colusa
Contra Costa
Del Norte
El Dorado
Fresno
Glenn
Humboldt
Imperial
Inyo
Kern
Kings
Lake
Lassen
Los Angeles
Madera
Marin
Mariposa
Mendocino
Merced
Modoc
Mono
Monterey
Napa
Nevada
Orange
Placer
Plumas
Riverside
Sacramento
San Benito
San Bernardino
San Diego
San Francisco
San Joaquin
San Luis Obispo
San Mateo
Santa Barbara

CT 15: County
Santa Clara
Santa Cruz
Shasta
Sierra
Siskiyou
Solano
Sonoma
Stanislaus
Sutter
Tehama
Trinity
Tulare
Tuolumne
Ventura
Yolo
Yuba
Out of State

CT 244 Region
Countywide
Mountains
Nationwide
Statewide
Valley
West End
Bakersfield
Chowchilla
Corcoran
Districts
Eastern County
Eastern Slope
Fort Bragg
Lower Desert
Madera
Mountain
Region 10
Region 1
Region 11
Region 12
Region 13

CT 244 Region
Region 14
Region 15
Region 16
Region 17
Region 18
Region 19
Region 2
Region 20
Region 21
Region 22
Region 23
Region 24
Region 25
Region 26
Region 27
Region 28
Region 29
Region 3
Region 30
Region 31
Region 32
Region 33
Region 34
Region 35
Region 36
Region 37
Region 38
Region 39
Region 4
Region 40
Region 5
Region 6
Region 7
Region 8
Region 9
Rest of County
Upper Desert
Ukiah
Western County
Willits

CT 244 Region
Western Slope

CT 228: Country
Aruba
Antigua
United Arab Emirates
Afghanistan
Algeria
Azerbaijan
Albania
Armenia
Andorra
Angola
American Samoa
Argentina
Australia
Ashmore & Cartier Islands
Austria
Anguilla
Antarctica
Bahrain
Barbados
Botswana
Bermuda
Belgium
Bahamas
Bangladesh
Belize
Bosnia & Herzegovina
Bolivia
Burma
Benin
Belarus
Soloman Islands
Navassa Island
Brazil
Bassas Da India
Bhutan
Bulgaria
Bouvet Island

CT 228: Country
Brunei
Burundi
Canada
Cambodia
Chad
Sri Lanka
Congo, Republic of
Congo, Democratic Republic of
China
Chile
Cayman Islands
Cocos (Keeling) Islands
Cameroon
Comoros
Colombia
No Mariana Islands
Coral Sea Islands
Costa Rica
Central African Republic
Cuba
Cape Verde
Cook Islands
Cyprus
Canal Zone
Denmark
Djibouti
Dominica
Jarvis Island
Dominican Republic
Ecuador
Egypt
Ireland
Equatorial Guinea
Estonia
Eritrea
El Salvador
Ethiopia
Europa Island
Czech Republic
Antarctic Lands

CT 228: Country
French Guiana
Finland
Fiji
Falkand Islands
Federated States of Micronesia
Faroe Islands
French Polynesia
Baker Island
France
French Southern & Antarctic Lands
Gambia
Gabon
Georgia
Ghana
Gibraltar
Grenada
Guernsey
Greenland
Germany
Glorioso Islands
Guadeloupe
Guam
Greece
Guatemala
Guinea
Guyana
Gaza Strip
Haiti
McDonald Island
Hong Kong
Heard Island & McDonald Islands
Honduras
Howland Island
Croatia
Hungary
Iceland
Indonesia
Man, Isle of
India
British Indian Ocean

CT 228: Country
Clipperton Island
Iran
Israel
Italy
Cote d'Ivoire (Ivory Coast)
Iraq
Japan
Jersey
Jamaica
Jan Mayen
Jordan
Johnston Atoll
Juan De Nova Island
Kenya
Kyrgyzstan
Korea (North)
Kingman Reef
Kiribati
Republic of Korea (South)
Christmas Island
Kuwait
Kazakhstan
Laos
Lebanon
Latvia
Lithuania
Liberia
Slovakia
Palmyra Atoll
Liechtenstein
Lesotho
Luxembourg
Libya
Madagascar
Martinique
Macau
Moldova
Mayotte
Mongolia
Montserrat

CT 228: Country
Malawi
Montenegro
Macedonia
Mali
Monaco
Morocco
Mauritius
Midway Islands
Mauritania
Malta
Oman
Maldives
Mexico
Malaysia
Mozambique
New Caledonia
Niue
Norfolk Island
Niger
Vanuatu
Nigeria
Netherlands
Norway
Nepal
Nauru
Surinam
Netherlands Antilles
Nicaragua
New Zealand
South Sandwich Island
Grenadines, The
Paraguay
Pitcairn Islands
Peru
Paracel Islands
Spratley Islands
Pakistan
Poland
Panama
Portugal

CT 228: Country
Papua New Guinea
Republic of Palau
Guinea-Bissau
Qatar
Serbia
Reunion
Marshall Islands
Romania
Philippines
Puerto Rico
Russia
Rwanda
Saudi Arabia
St Pierre & Miquelon
St Kitts & Nevis (St Christopher & Nevis)
Seychelles
South Africa
Senegal
St Helena
Slovenia
Sierra Leone
San Marino
Singapore
Somalia
Spain
St Lucia
Sudan
Svalbard
Sweden
South Georgia & the South Sandwich Islands
Syria
Switzerland
Trinidad & Tobago
Tromelin Island
Thailand
Tajikistan
Turks & Caicos Islands
Tokelau
Tonga
Togo

CT 228: Country
Sao Tome & Principe
Tunisia
East Timor
Turkey
Tuvalu
Taiwan
Turkmenistan
Tanzania
Undeclared
Uganda
United Kingdom (England)
Ukraine
United States
Burkina Faso
Uruguay
Uzbekistan
St Vincent & the Grenadines
Venezuela
Virgin Islands (UK)
Vietnam
Virgin Islands (US)
Vatican City
Namibia
West Bank
Wallis & Futuna
Western Sahara
Wake Island
Western Samoa
Swaziland
Yugoslavia
Yemen
Zambia
Lybia
Zimbabwe
Unknown

CT 254 Phone Number types
Cell
Fax

Home
IVR
Message
Main
TDD
Toll Free
Work

CT 275 Address
1099 Mailing
Absent Parent
ATTORNEY
Billing
CLAIMEE
Contact
DEFENDANT
Employer
Health Insurance
LIABLE INSURANCE
Mailing
Physical
Union

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214745 | DDID 2342

FDS: API - Appointment API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/28/2020	1.0	Initial Draft	Avi Bandaranayake
3/2/2021	1.1	Updated field names to be camel case.	Avi Bandaranayake
3/2/2021	1.1	Updated field names to remove references to 'code' in the names	Avi Bandaranayake
3/2/2021	1.1	Updated /appointments/appointment from put to post	Avi Bandaranayake
3/2/2021	1.1	Added additional error messages and headers	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

This is a new API made available to expose the customer appointment data from the CalSAWS system. An API service to expose customer appointment data does not exist in the CalSAWS System.

1.2 Requests

Create a service that can retrieve, update, and create appointments.

1.3 Overview of Recommendations

1. Create a new endpoint to retrieve, update and create appointments.
2. Add filter criteria based on scheduled appointments by EBT card number, case number, Document ID, person information and appointment type, worker number, date, and status to limit the results returned.

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. Offset and limits will apply only if paginated results are available.
7. Offset beyond the max available will return a 404 error.
8. Offset and limits will only apply to the root element
9. Sorting and ordering only applies to the root element.
10. Null or empty values will not be returned in the response objects.
11. Requests sent with improper data types will result in 400 error with a stack trace.

2 RECOMMENDATIONS

2.1 Appointments API

2.1.1 Overview

This API will expose the customer appointment data from the CalSAWS system.

2.1.2 Description of Changes

The Appointments API will include the following filters, data elements, and error handling. Please refer to the **appointments.html** document for the technical specifications and data element definitions.

Additional examples and specific error messages may be added during build for the developer portal.

2.1.3 Request

The API will include the following query parameters for appointments:

1. EBT card number
2. Case number
3. Person Id
4. Document Id
5. Worker Number
6. Start Date
7. End Date
8. Status (CT 22)
9. Type Code (CT 291)

2.1.4 Request Body

The appointments API can be used to create an appointment in CalSAWS. The request must contain the following fields:

```
{
  "caseNum": "string",
  "personId": "string",
  "workerNum": "string",
  "type": "string",
  "subType": "string",
  "stat": "string",
  "statRsn": "string",
  "startTime": "string",
  "apptDate": "2021-03-03",
  "duration": "string",
  "attendance": "pending"
}
```

2.1.5 Response

The appointment API will return the following data elements:

Structure of the return object may differ based on the endpoint. See detail design for more detail.

```
[
  {
    "persId": "string",
    "caseNum": "string",
    "startTime": "string",
```

```
    "stopTime": "string",
    "apptDate": "2021-03-23",
    "confirmInd": true,
    "ivrComplInd": true,
    "origStartTime": "string",
    "origStopTime": "string",
    "origApptDate": "2021-03-23",
    "statRsn": "string",
    "type": "string",
    "stat": "string",
    "locDescr": "string",
    "apptDescr": "string",
    "id": 0,
    "officeName": "string",
    "apptCmnt": "string",
    "subType": "string",
    "workerNum": [
      "string"
    ]
  }
]
```

2.1.6 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

2.1.7 Error Messages

The Appointment 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	appointments.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
DDID 2342	The CONTRACTOR shall create a service allowing 58 Counties to retrieve, update, and create appointments utilizing a CalSAWS API. The service will allow the 58 Counties to do the following: 1) Search for scheduled appointments by EBT card number, case number, Document ID, person information and appointment type, worker number, date and status. The service will return a list of appointments based on the search parameters provided by the user. When searching by date or status a worker number, case number, or person information will be required. 2) Allow users to update the status of an appointment and create new appointments based on identified worker availability from a separate worker schedule API. This API will update and create appointments when called utilizing required data elements as specified by the CalSAWS Software.	Create appointments 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 22: status/stat_code
Canceled
Completed
No Show
Rescheduled

CT 22: status/stat_code
Scheduled
Showed

CT 291: type
Cal-Learn
Counselor Meeting
General Appointment
Group Meeting
GROW
Home Visit
IEVS Interview
Intake Interview
Meeting with Worker
Preventative Fraud Interview
Provider
QC Case Review
Re-Evaluation CW/CF Interview
Re-Evaluation Interview
Telephone CW/CF RE Interview
Telephone Interview
WTW/REP
YBN Appointment

CT 10113: subType
2nd Telephone Interview Recertification
Appraisal Appointment
Assign Next Activity Appointment
Cal-Learn Non-Compliance Cause Determination
Cal-Learn Orientation
Case Management Appointment
Client Requested
Cure Sanction
DCFS Referral
Direct Rent
Exemption Expired Appointment
Fingerprinting
General Appointment
GR B&C Appointment
GR Case Manager

CT 10113: subType
GR Denial Complaint
GR Employment Specialist
GR Hearings
GR JSTP Appointment
GR Medical
Group
GROW Hearing
Home Call
IFDS Appointment
Intake-follow-up Appointment
Issuance see Cashier
Issuance see Worker
Meeting
Mental Health Worker
MSUDRP Assessment
NHR Appointment
Non-Compliance Cause Determination
Non-Compliance Home Visit
Other
Other Non-client
Out of County EBT Transaction
Out of State EBT Transaction
Post Time Limit
PVS Appointment
Reaffirmation Group
Reaffirmation Non-Group
Reaffirmation Second Appt.
Return GROW 85
Return Job Development
Sanction Home Visit
Screening & Intake Appointment
Screening Only
Second Parent
SSI 2nd Advocacy Mandatory
SSI Advocacy Follow-Up
SSI Advocacy Mandatory
SSI Advocacy Voluntary
SSIAP NSA with Worker
Telephone Interview Intake
Telephone Interview Recertification

CT 10113: subType
Testing
Time Limit Review
Training
Verification Return
VIP Appointment
YBN Application Appointment

CT 23 : statRsn
Batch Initiated
Client Initiated
Interrupted
Rescheduled
Worker Initiated

Type Code : Sub Type Code mapping

Type Code	Sub Type Code
Cal-Learn	Cal-Learn Non-Compliance Cause Determination
Cal-Learn	Cal-Learn Orientation
GROW	Case Management Appointment
GROW	GROW Hearing
GROW	Return GROW 85
GROW	Return Job Development
General Appointment	2nd Telephone Interview Recertification
General Appointment	Client Requested
General Appointment	Direct Rent
General Appointment	Fingerprinting
General Appointment	GR B&C Appointment
General Appointment	GR Case Manager
General Appointment	GR Denial Complaint
General Appointment	GR Employment Specialist
General Appointment	GR Hearings
General Appointment	GR JSTP Appointment
General Appointment	Group
General Appointment	Home Call
General Appointment	IFDS Appointment
General Appointment	Intake-follow-up Appointment
General Appointment	Issuance see Cashier
General Appointment	Issuance see Worker
General Appointment	Meeting

Type Code	Sub Type Code
General Appointment	Mental Health Worker
General Appointment	NHR Appointment
General Appointment	Other
General Appointment	Other Non-client
General Appointment	Out of County EBT Transaction
General Appointment	Out of State EBT Transaction
General Appointment	PVS Appointment
General Appointment	Reaffirmation Group
General Appointment	Reaffirmation Non-Group
General Appointment	Reaffirmation Second Appt.
General Appointment	SSI 2nd Advocacy Mandatory
General Appointment	SSI Advocacy Follow-Up
General Appointment	SSI Advocacy Mandatory
General Appointment	SSI Advocacy Voluntary
General Appointment	SSIAP NSA with Worker
General Appointment	Screening & Intake Appointment
General Appointment	Screening Only
General Appointment	Telephone Interview Intake
General Appointment	Telephone Interview Recertification
General Appointment	Testing
General Appointment	Training
General Appointment	VIP Appointment
General Appointment	Verification Return
General Appointment	YBN Application Appointment
Provider	GR Medical
Provider	MSUDRP Assessment
WTW/REP	Appraisal Appointment
WTW/REP	Cure Sanction
WTW/REP	General Appointment
WTW/REP	Non-Compliance Cause Determination
WTW/REP	Non-Compliance Home Visit
WTW/REP	Sanction Home Visit
WTW/REP	Time Limit Review

Stat: statRsn Mapping

Appointment Status Code	Appointment Status Reason Code
Canceled	Client Initiated
Canceled	Worker Initiated
Rescheduled	Client Initiated

Rescheduled	Interrupted
Rescheduled	Rescheduled
Rescheduled	Worker Initiated
Scheduled	Batch Initiated
Scheduled	Client Initiated
Scheduled	Worker Initiated

CT 285: Attendance
Canceled
No Showed
Pending
Rescheduled
Showed

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214748 | DDID 2345

FDS: API - Document API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/14/2021	1.0	Initial Draft	Avi Bandaranayake
3/23/2021	1.1	Updated response objects. Updated Assumptions. Added Header details.	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

There is no Application Programming Interface (API) available to external partners which allows access to read document data from the CalSAWS system.

1.2 Requests

Create a service that will allow the 58 Counties to search for documents by barcode or case number and to update documents to be marked as received.

1.3 Overview of Recommendations

Create a new endpoint that will retrieve and update document information.

1.4 Assumptions

1. Results are limited to county level data.
2. Results returned will be paginated to 20 values by default.
3. Limit parameter will allow a maximum of 250 values returned by default. Requesting a larger value will result in a 400 error response.
4. Code table values for this API can be found in the Appendix.
5. Code table values are limited to those available as of the API release date.
6. Requests and Responses will use Code Table values as described in the Appendix.
7. Offset and limits will apply only if paginated results are available.
8. Offset and limits will only apply to the root element.
9. Sorting only applies to the root element.

2 RECOMMENDATIONS

2.1 Document API

2.1.1 Overview

This API will expose document data from the CalSAWS system.

2.1.2 Description of Changes

The Document API will include the following filters, data elements, and error handling. Please refer to the **documents.html** document for the technical specifications and data element definitions.
Additional examples and specific error messages may be added during build for the developer portal.

2.1.3 Request

The API will include the following request parameters for case:

1. Barcode
2. Case number
3. Received date

2.1.4 Response

The API will return the following objects and elements.


```
[
      {
        "id": "string",
        "caseNum": "string",
        "imagingBarcodeIdentifier": "string",
        "docBarcodeIdentifier": "string",
        "docTemplFormNumber": "string",
        "docTemplImagingFormNumber": "string",
        "docTemplFormName": "string",
        "docTemplImagingFormName": "string",
        "docTemplDocumentType": "string",
        "docTemplImagingDocumentType": "string",
        "alfFmsNum": "string"
      }
]

{
  "docId": "string",
  "custRptPgmTypeId": "string",
  "status": "string",
  "statDate": "2021-03-24",
  "createdBy": "string",
  "updatedBy": "string",
  "createdOn": "2021-03-24T02:42:54.407Z",
  "updatedOn": "2021-03-24T02:42:54.407Z",
```

```
  "statDetl": "string",
  "scanSrc": "string"
}
```


2.1.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

2.1.6 Error Messages

1. Bad request. body/parameter {parameter name} is invalid. {Reason}
   a. Bad request. Document StatCode is either {Complete, Ready To Run or Not Applicable} and cannot be updated to Received.
   b. Bad request. Document {barcode} is already marked Received for the {receivedDate}
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	documents.html

4 REQUIREMENTS

4.1 Migration Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2345	The CONTRACTOR shall create a service allowing 58 Counties to update documents to be received utilizing a CalSAWS API. This service will update the status of documents to received when called utilizing required information as specified by the CalSAWS Software.		Create Documents API

5 APPENDIX

The API complexity accounts for the ability to search for cases utilizing multiple filters and variety of individual level data that will be returned.

CT 10397 Customer Report Status Detail Code
CW is AR/CO
Action Required
No Change
No SAR Due
Pending Incomplete

CT 258 Customer Report Status Code
Completed
Complete- EDBC Accepted
Denied
Error
Generated
Incomplete
Not Applicable
Reviewed
Received
Reviewed- Ready to Run EDBC
Sent

CT 51 Confidentiality Type
Adoptions Assistance
CWS AAP Mask Address
Domestic Violence
Employee/Employee Relative
Foster Care
High Profile
Human Trafficking
CWS Foster Care/KinGap Mask Address
Minor Consent
CWS Sealed Mask Address
CWS Sensitive Mask Address

CT 1082 Flag Type
Federal
State
County
Court Case
Study
Civil Rights
Error Prone and High Risk

CT 10602 Imaging Type Codes
Lobby/Kiosk - Other
Self-Service - Other
Address/Residency
Adoption Assistance Program (AAP)
Application, Intake, or Screening
Appointment Letter
Authorized Rep and Release of Info
CalFresh (CF)
Cal-Learn
CalWORKs (CW)
CAPI
CFET
Child Care
County Medical Services Program (CMSP)
Court/Hearings Document
Customer Reporting
Customer Verification Forms
Customer/Worker Contact
DDSD
Domestic Violence
Education
Electronic Benefit Transfer (EBT)
E-Notification
Family Stabilization
Fiscal
Foster Care (FC)
GA/GR Work and Activities
Gen. Assistance/Gen. Relief (GA/GR)
Homeless Assistance (HA)
Housing Support Program (HSP)
IEVS

CT 10602 Imaging Type Codes
IHSS
Income
Inter-County Transfer (ICT)
Interoffice Correspondence
Jail/Inmate
Kin-GAP
Language
Learning Disability Documents
Medi-Cal (MC)
Medical Reports/Records
MEDS Related
Notification/NOA
Overpayment/Overissuance (OP/OI)
Person Verification
Sworn Statements
Personal Expenses
Property
Quality Assurance/Quality Control
Referrals
Rights and Responsibilities
Welfare to Work (WTW)
Sponsor Related
Tax Documents
Time Limit Documents
TNB/SNB
Transportation
Vendors and Providers
Verification Requests
Veterans
Voter Registration
Welfare to Work (WTW)
Child Support
Returned Mail

CT 61 Document Template Type
Brochure/Flyer
Application
NOA
State Hearings

Appointment Letter
Forms
Referrals
Miscellaneous

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214751 | DDID 2348

FDS: API - Journal API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/28/2020	1.0	Initial Draft	Avi Bandaranayake
3/2/2021	1.1	Updated return object to include journal entry append.	Avi Bandaranayake
3/2/2021	1.1	Added additional CT values.	Avi Bandaranayake
3/2/2021	1.1	Added header details	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

This is a new API made available to expose the Journal_Entry data object from the CalSAWS system. An API service to expose journal data does not exist in the CalSAWS System.

1.2 Requests

Create a service that returns all journal entries for a specific case.

1.3 Overview of Recommendations

1. Create a new endpoint to retrieve journal details.
2. Add filter criteria based on caseId, date, journal category and journal type to limit the results returned.

1.4 Assumptions

1. Results returned will be paginated to 20 values by default.
2. Limit parameter will allow a maximum of 250 values returned by default. 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. Offset and limits will apply only if paginated results are available.
7. Offset beyond the max available will return a 404 error.
8. Offset and limits will only apply to the root element
9. Sorting and ordering only applies to the root element.
10. Null or empty values will not be returned in the response objects.
11. Requests sent with improper data types will result in 400 error with a stack trace.

2 RECOMMENDATIONS

2.1 Journal API

2.1.1 Overview

This API will expose the Journal_Entry data object from the CalSAWS system.

2.1.2 Description of Changes

The Journal API will include the following filters, data elements, and error handling. Please refer to the **journals.html** document for the technical specifications and data element definitions.

Additional examples and specific error messages may be added during build for the developer portal.

2.1.3 Request fields

The API will include the following query parameters for Journal:

1. Case number (required)
2. Start Date
3. End Date
4. Journal Category Code (CT 278)
5. Journal Type (CT 141)

2.1.4 Response

The Journal API will return the following data elements:


```
[
  {
    "shortDescr": "string",
    "id": 0,
    "orgId": 0,
    "caseId": 0,
    "typeCode": "string",
    "longDescr": "string",
    "workerNum": "string",
    "classCode": "string",
    "contactTypeCode": "string",
    "filterCode": "string",
    "entryAppend": [
      {
        "entry": {
          "appendDescr": "string",
          "updatedOn": "2021-03-02T23:01:08.165Z",
          "supprInd": "string",
          "workerNum": "string",
          "class": "string"
        }
      }
    ]
  }
]
```


2.1.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

2.1.6 Error Messages

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

1. Bad request. {parameter name} is invalid. {Reason}
2. Authorization information is missing or invalid.
3. A Journal with the specified {param name(s)} was not found.
4. Request Timeout.
5. Internal Server Error.

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2348	The CONTRACTOR shall create a service for the 58 Counties that returns all journal entries for a specific case. The service will allow users to filter by case number, date, journal category and journal type. A list of all journal entries that meet the search criteria will be returned.	Create journal 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 141: journalType
Activity
Application Date/BDA
Appointment
Assessment
Assignment
Authorized Representative
Batch EDBC
Change Reported
Closure
Conversion
CWS General Ledger
CWS Interest Allocation
Data Removed
Deregister
Discontinuance
Document
File Location
Fiscal
ICT
IEVS
Intake

CT 141: journalType
Interfaces
MCE Determination
MV Property Determination
Narrative
Notice of Action
Program Status Update
Recovery Account
Registration
RRR
Sanction Update
SB 87
Self Service
Special Circumstance
Work Registration Update
WTW

CT 278: category
All
Child Care
CWS SSAAP
CWS SSIAP
Eligibility
Employment Services
Fiscal
Fraud
Hearing
Interfaces
Quality Review

CT 286 Classification		
Account Clerk	Supervising Automated Systems Analyst I	Auditor
Information Technology Analyst III	Supervising Automated Systems Analyst II	Automated Call Distribution Coordinator
Information Technology Analyst IV	Supervising Employment Services Analyst II	Benefits / FS issuance
Information Technology Principal	Supervising Employment Services Specialist II	Benefits Analyst
Information Technology Specialist	Supervising Fiscal Clerk IV	Benefits Analyst III

CT 286 Classification		
Information Technology Technician	Supervising Office Assistant I	Benefits Representative
Intake	Supervising Office Assistant II	Benefits Representative Supervisor
Intake Worker	Supervising Social Worker	Business Leader
Intern	Supervising Social Worker Practitioner	Business Relationship Manager
Intern/Work Study	Supervising Veterans Claim Representative	Business Systems Analyst
Internal Auditor	Supervising Welfare Fraud Investigator II	Business Systems Application Manager
Account Clerk I	Support Services Assistant Lead	Cal-Learn Worker
Investigator Assistant	System Administration	CalWIN Aid Claim Specialist
IS Administrator II	System Administration Supervisor	CalWIN Aid Claim Supervisor
IS Administrator III	System Support Analyst	Career Development Spec I
IS Administrator - Supervisor	TAD District Manager	Career Development Spec II
IS Business Analyst	Telecom Operators	Career Employment Specialist
IS Business Analyst - Principal	Training & Development Specialist Supervisor	Career Employment Specialist II
IS Business Analyst - Senior	User Technical Support	Career Employment Specialist Sr
IS Manager	Program Specialist Technician	Career Employment Specialist Supervisor
IS Operator - Journey	Program Staff Services	Carrying Worker
Account Clerk II	Programmer/Analyst I	Case Management
IS Operator - Senior	Programmer/Analyst II	Case Manager - Contracted
IS Operator - Supervisor	Programmer/Analyst III	Case Manager - County
IS Programmer Analyst	Programmer/Analyst IV	Case Manager - DASU
IS Programmer Analyst - Principal	Property Clerk	Caseworker Aide II - CWS
IS Programmer Analyst - Senior	Psychologist	Caseworker Aide II - CWS - BL
IS Technician - Journey	Public Health Nurse	Cashier
IT Analyst	Admissions Clerk	Cashier II
IT Business Analyst	Account Assistant	Cashier III
IT Business Systems Analyst	Accountant Technician	Chief
IT Customer Support Specialist	Accounting Technician	Chief Criminal Investigator
Account Clerk III	Admin Secretary	Chief Departmental Admin Svcs
IT Manager	Administrative Buyer	Chief Dept HR Administrator
IT Project Manager	Administrative Clerk I	Chief Deputy PA/PG/PC
IT Specialist	Administrative Clerk II	Chief Payroll and Personnel Clerk
IT Supervisor	Administrative Clerk III	Chief Storekeeper

CT 286 Classification		
IT Technician	Administrative Compliance Officer	Chief Telephone Operator
Job Developer	Adult Protective Services Specialist	Chief Welfare Fraud Investigator
Job Development Specialist	Administrative Manager	Child Care Case Manager
Job Specialist	Administrative Secretary	Child Care Case Supervisor
Junior Administrative Analyst	Administrative Supervisor	Community Liaison Worker, PSS
Junior Clerk	Application Developer	Child Care Resource Coordinator
Account Supervisor	Application Developer MRU	Child Case Specialist
Junior Clerk Typist	Application Developer Supervisor	Child Development Specialist
Lead Office Assistant	Assistant to the Director	Child Protective Services Social Work Supervisor
Legal Clerk	Automated Systems Analyst II	Master Assignment Queue
Legal Office Assistant	Building & Services Manager	Administrative Services Manager II
Legal Support Manager	Business Analyst	Administrative Services Manager III
Legal Support Supervisor	Business System Analyst	Child Protective Services Social Worker
Licensed Mental Health Clinician	Business System Analyst Supervisor	Child Services Supervisor
Licensing Evaluator	Business Systems Analyst I	Child Support Assistant
LVN	Business Systems Analyst II	Child Support Manager
Account Technician	Business Systems Analyst III	Child Support Officer
Management Assistant I - IV	Chief Archivist	Child Support Program Attorney
Management Specialist P	QR - IEVS	Management Analyst
Manager, Budget and Performance Monitoring	QR - PFI	Child Support Staff
Masterfile	QR - Quality Assurance	Child Welfare Supervisor
Materials Handler	QR - Quality Control	Child Welfare Supervisor P
Medi-Cal Program Assistant	Quality Review Specialist	Child Welfare Worker II
MEDS	Quality Review Supervisor I	Child Welfare Worker II P
Mgmt Aide	Quality Review Supervisor III	Children Services Worker
Micrographic Technician	Quality Review Supervisor II	Children's Services Clerical Specialist
Accountant I	Records and Support Assistant	Claims Aide
Non-EHSD Emp. - Auditor	Regional Manager	Clerical Operations Manager
Non-EHSD Emp. - CBO	Child Care Contractor	Clerical Operations Supervisor
Non-EHSD Emp. - Contract/Temp	Clerical	Clerical Supervisor I - III
Non-EHSD Emp. - DCSS	Clerical Supervisor	Clerk - Beginning Level
Non-EHSD Emp. - Intern	Clerk IV	Clerk - Beginning Level (Typing)
Non-EHSD Emp. - Other	Collector II	Clerk - Experience Level

CT 286 Classification		
Non-EHSD Emp. - State	Communication Analyst	Clerk - Senior Level
Non-EHSD Emp. - Title V	Communication Analyst Supervisor	Clerk - Specialist Lead Level
Non-EHSD Emp. - WEX	Community Government Relations Manager	Clerk I/II
OA I/II	Computer Based Training Officer	Management Secretary IV
Accountant II	Adult Protective Services Supervisor	Clerk I/II - BL
OA I/II - BL	Computer Based Training Supervisor	Clerk II/III
OA III	Contract and Services Officer	Clerk Typist
OA III - BL	Data Entry Operator	Client Advocate
OA IV	Data Entry Operator II	Client Services Technician
OA IV - BL	Data Processor I	Clinic Services Coordinator
Office Assistant	Data Processor II	Collection Officer II
Office Assistant I - IV	Data Processor Supervisor	Collections Officer
Office Assistant I - IV (ES Clerk w/ Embossing Access)	Database Administration	Collections Officer II - III
Office Assistant I - IV (ES Clerk w/o Embossing Access)	Department Information Service Manager	Network Systems Administrator II
Office Assistant I - IV (GR w/o Embossing Access & Deny Case)	Division Chief	Collections Supervisor
Accountant III	DPSS Program Specialists Services - Assistant Policy Developer	Community Based Organization
Office Assistant I - IV (w/ Embossing Access)	DPSS Program Specialists Services CalWORKs	Community Health Technician
Office Assistant I - IV (w/o Embossing Access)	DPSS Research Specialist	Community Services Worker I - III
Office Assistant II/III	Eligibility & Training Worker II	Community Worker
Office Manager	Eligibility Services Clerk	Computer Lab Support Specialist
Office Mgmt Coord	Eligibility Worker I	Computer Specialist Technician
Office Specialist I	Registration Information Assistant	Computer Support Liaison
Office Specialist II	Revenue and Recovery Technician I	Computer Systems Specialist
Office Specialist III	Revenue and Recovery Technician II	Computer Systems Specialist II
Office Supervisor B	Secretary I	Computer Systems Specialist Supervisor
Account Clerk - BL	Secretary II	Consultant
Office Supervisor C	Secretary III	Consultant Social Svcs Agcy N

CT 286 Classification		
Office Supervisor D	Senior Accountant	Continuing Worker
Office Support Specialist	Senior Accounting Assistant	Correctional Counselor
Office Systems Coordinator I - IV	Senior Administrations Analyst	Cost Analyst
Office Technician	Eligibility Worker II	County Department
Orientation Leader	Eligibility Worker III	Criminal Investigator
Patient Services Specialist	Eligibility Worker Supervisor I	CSET Youth
Payroll Clerk	Employment & Training Account Technician	CWS Screener
Payroll Records Clerk	Employment & Training MIS Technician	CWS Team Leader
Personnel Analyst	ERA	CWS/CMS Support Assistant
Account Clerk Specialist	Executive Staff	DA - Investigator
Department Analyst II	Family Services Specialist IV	Data Analyst
Account Executive I - III	Family Support Lead Worker	Data Applications Manager
Accountant Assistant	Family Support Worker	Sr Network Systems Administrator
Accountant/Auditor I	Foster Parent Trainer	Data Applications Specialist
Accountant/Auditor II	IHSS Management Information Technician	Data Applications Supervisor
Accountant/Auditor II - District Accounting	Information Assistant	Data Engineer
Accountant/Auditor II - Employment Services	Information Technology Officer III	Data Entry Technician
Accountant/Auditor II - Program Integrity	JESD Regional Manager	Data Entry Technician - SST
Accounting Clerical Supervisor	Legal Analyst	Data Input Clerk
Accounting Clerk II	Management Analysis Supervisor	Data Office Specialist
Accounting Clerk III	Office Assistant III	DCSS Staff
Accounting Office Supervisor II	Office Assistant Supervisor	Accounting Officer I
Accounting Officer I - IV	Office Support Supervisor	Accounting Officer II
Accounting Specialist	Organization & Employee Development Manager	Accounting Officer III
Accounting Specialist I	Appeals Officer	Department Facilities Manager
Accounting Specialist II	Program Analysts IV - Business Systems Analyst	Department Accounting Manager
Accounts Payable Supervisor	Program Coordinator	Department Administrative Services Director
Admin Analyst I	Program Specialist Services	Department Administrator
Admin Analyst II	Public Service Employee	Department Analyst
Admin Analyst III	Senior Systems Engineer	Department Automation Specialist
Admin Intern SAN	Senior Human Resources Clerk	Department Business Specialist
Admin Specialist I	Senior Internal Auditor	Department Information Specialist

CT 286 Classification		
Admin Specialist II	Senior Program Specialist Children Social Services	Department Information Systems Manager
Admin Support Officer	Senior Program Specialist Services	Department Information Systems Specialist
Administrative Aide	Senior Program Specialist TAMD	Department Information Systems Technician
Accounting Assistant I	Senior Services Program Manager	Department Personnel Officer
Personnel Specialist	Senior Services Program Specialist	Departmental Administrative Analyst
Personnel Technician	Senior Services Program Worker	Departmental Systems Analyst
Personnel Technician Trainee	Senior Software Developer Analyst	Departmental HR Manager
Placement Coordinator	Quality Control Family Assistance Representative III	Departmental HR Officer
Planning Analyst	Quality Control/ Fair Hearings Supervisor	Dept Fiscal Officer
Policy Director	Revenue & Reimbursement	Deputy Director HSA
Prevention Services Coordinator	Revenue Recovery Technician	Deputy Director, Department of Human Services
Principal Account Clerk	Senior Accounting Technician	Deputy PA/PG/PC
Principal Administrative Analyst	Appeals Supervisor	Deputy Public Guard - Cons/Inves
Principal Clerk	Senior Data Processor	Director of Employment & Benefits Srv
Accounting Assistant II	Senior Employment Services Counselor	Director of Social Services
Principal Personnel Analyst	Senior Investigative Technician	Director of Social Services Agency
Program Analyst	Senior Investigator	Director of Human Services
Program Assistant	Senior Program Specialist	Other
Program Development Manager	Senior Program Specialist Supervisor	Director, Budget and Planning
Program Integrity Div Dir	Social Service Planner	Director, Information Technology
Program Integrity Specialist	APS	Director, Human Services Agency
Program Manager I	Social Services Program Administrator	Division Director
Program Manager II	Social Services Program Specialist	Division Director, SSA
Program Manager III	Social Services Program Worker	Division Manager
Accounting Supervisor	Social Services Receptionist	E & T Counselor I
Program Planner	Social Worker Aide	Procurement Aide
Program Planning Analyst	Social Worker Practitioner	Procurement Assistant I

CT 286 Classification		
Program Review Specialist	Social Worker Supervisor I	Procurement Assistant II
Program Services Coordinator	Social Worker Supervisor II	E & T Program Coordinator
Program Specialist Supervisor	Special Investigations Supervisor	E & T Specialist
Program Support Analyst	Special Investigator I	Economic Development
Program Systems Coordinator	Special Investigator II	Electronic Data Processing Analyst
Program Technician	Special Investigator III	Electronic Data Processing Analyst II
Program/Financial Specialist	Accounting Systems Technician	Electronic Data Processing Analyst Sr
Project Manager	Senior Accounting Systems Technician	Project Administrator, ICSC
Accounting Technician III	Supervising Appeals Hearing Specialist	Eligibility
Protective Services Supervisor	Administrative Assistant III	Eligibility Benefits Specialist I
Protective Services Worker	Application Developer I	Eligibility Benefits Specialist II
Public Assistance Investigator	Assistant Director of Public Social Services	Eligibility Benefits Specialist III
Public Assistance Investigator Manager	GROW Services Supervisor	Eligibility Benefits Specialist Supervisor
Public Assistance Investigator Supervisor	GROW Services Worker	Eligibility Continuing
Public Assistance Specialist III - IEVS	HEAD,ADMINISTRATIVE INVESTIGATIONS	Eligibility Examiner
Public Assistance System Technician	Contractor	Eligibility Fraud
Accounting Technician I	Senior Training Officer	Eligibility Section Manager
Public Assistance Systems Manager	Social Service Assistant	Eligibility Services Tech I
Public Assistance Systems Specialist	System Support Specialist	Eligibility Services Tech II
Public Service Aide - Administration	Social Service Supervisor I	Eligibility Services Tech III
Public Service Trainee	Social Service Supervisor II	Principal Network Systems Administrator
Public Services Specialist	Social Service Worker I	Eligibility Services Tech IV
Quality Assurance	Social Service Worker II	Eligibility Specialist - African American C
Quality Assurance Monitor	Appeals Hearing Specialist	Eligibility Specialist - Arabic/Middle Eastern LC
Quality Assurance Specialist	Social Service Worker III	Eligibility Specialist - Armenian LC
Quality Assurance Technician	Social Service Worker IV	Eligibility Specialist - Cambodian LC
Reception	Social Service Worker V	Eligibility Specialist - Chinese LC

CT 286 Classification		
Department Specialist I	Welfare Fraud Investigator Assistant	Eligibility Specialist - Farsi LG Persian CL
Receptionist	Social Worker I	Eligibility Specialist - Filipino LC
Records Center Assistant	Social Worker II	Eligibility Specialist - Korean LC
Records Center Supervisor	Social Worker III	Eligibility Specialist - Laotian LC
Records Clerk	Social Worker IV	Eligibility Specialist - Mien LC
Registered Nurse II	Software Applications Assistant	Eligibility Specialist - Russian LC
Registered Nurse III	Assessor	Compliance Management Officer
Rehabilitation Production Manager - Exempt	Software Developer I	Eligibility Specialist - Spanish L/Latin C
Rehabilitation Production Supervisor	Software Developer II	Staff Resources Manager
Research & Eval	Software Developer III	Eligibility Specialist - Vietnamese LC
Retention Specialist	Assistant Caseworker I/II	Eligibility Supervisor - OCPC
Administrative Clerk	Staff Analyst I	Vocational Assistant
Retired Annuitant I	Staff Analyst II	Volunteer Services Coordinator
Retired Annuitant ll	Staff Development Manager	Volunteer Services Manager
Revenue and Recovery Officer	Staff Development Officer	Welfare Fraud Investigator
Revenue Collections Clerk	Cal-Learn Contractor	Eligibility Support Clerk
Revenue Collections Officer	REP Clerk	Eligibility System Liaison
Screening	REP Case Worker	Eligibility Technician
Secretary - Confidential	REP Supervisor	Eligibility Technician - Foster Care
Self Sufficiency Resource Specialist	REP Administrator	Eligibility Technician - GR
Self Sufficiency Resource Specialist - BL	GCM Clerk	Eligibility Technician - Program Integrity
Administrative Hearings Officer	GCM Case Worker	Eligibility Technician - Quality Control Unit
Self Sufficiency Supervisor I	GCM Supervisor	Eligibility Trainer
Self Sufficiency Supervisor II	GCM Administrator	Eligibility Unit Clerk
Self Sufficiency Support Assistant	AAP Adoptions	Eligibility Work Specialist
Self Sufficiency Support Supervisor	Staff Resources Manager	Eligibility Work Supervisor
Senior Accountant/Auditor I	Assistant Child Support Officer	Eligibility Worker
Senior Administrative Services Analyst	Staff Services Analysts II	Eligibility Worker Lead
Senior Analyst	Staff Services Manager Automation Support	Eligibility Worker Supervisor
Senior Auditor	Stock Clerk	Employment & Eligibility Administrator
Administrative Manager I	Stock Delivery Clerk	Employment & Eligibility Manager

CT 286 Classification		
Senior Case Data Clerk	Storekeeper	Employment & Social Services Program Supervisor
Senior Clerk Typist	Supervising Accountant	Employment & Training Coordinator
Senior Collections Officer	Supervising Accountant I	Employment & Training Counselor
Senior Department Information Systems Manager	Supervising Accountant II	Employment & Training Specialist
Senior Departmental Personnel	Supervising Accountant III	Employment and Training Specialist I
Senior Deputy PA/PG/PC	Supervising Accounting Assistant	Employment and Training Specialist II
Senior E & T Specialist	Supervising Accounting Technician	Employment and Training Specialist III
Senior Eligibility Specialist	Supervising Automated System Analyst	Employment and Training Specialist IV
Senior Eligibility Specialist - Filipino CL	Assistant Director of Human Services	Employment Case Manager
Senior Eligibility Specialist - Laotian CL	Supervising Data Entry Officer	Employment Case Manager Supervisor
Administration Supervisor II	Assistant Public Administrator / Public Guardian	Employment Counselor
Senior Eligibility Specialist - Russian CL	Supervising Employment Services Analyst I	Employment Counselor II
Senior Eligibility Specialist - Spanish/Latin LC	Supervising Employment Service Counselor	Research Specialist I
Senior Eligibility Worker	Supervising Employment Services Specialist I	Research Specialist II
Senior Employment & Training Specialist	Assoc Bus Intelligence Analyst	Employment Eligibility Specialist
Senior Employment Training Specialist	Family Services Supervisor	Employment Placement Counselor
Senior Financial Svcs Spec	Supervising Fiscal Clerk I	Employment Program Manager
Senior IT Analyst	Assoc Mgmt Analyst	Employment Program Supv
Senior IT Project Manager	Supervising Fiscal Clerk II	Employment Resources Specialist I
Senior IT Specialist	Supervising Fiscal Clerk III	Employment Resources Specialist II
Senior Management Analyst	Assoc Trng & Staff Dev Spec	Employment Resources Specialist III
Administration Supervisor I	Children's Services Administrator I	Regional Administrator, CFS
Administrative Analyst	Children's Services Administrator II	Employment Resources Specialist Supervisor
Administrative Assistant I	Children's Services Administrator III	Employment Services
Administrative Assistant II	Eligibility Computation Clerk I	Employment Services Director
Administrative Manager II	Eligibility Computation Clerk II	Employment Services Partner

CT 286 Classification		
Administrative Programs Supervisor	Adoptions Assistant	Employment Services Specialist I
Administrative Technician I	Asst Regional Administrator	Employment Services Specialist II
Administrative Technician II	Children Services Administrator	Employment Services Specialist III
Analyst I	Children's Social Worker I	Employment Specialist
Analyst II	Supervising Investigations Technician	Employment Training Advisor
Analyst III	Associate Accountant	Employment Training Specialist
Appeals Specialist	Supervising Mail Clerk	Employment/Resource Spec I
Appeals Supervisor I	Supervising Office Support Assistant I	Employment/Resource Spec II
Appeals Supervisor II	Supervising Office Support Assistant II	Employment/Resource Spec III
Appeals Supervisor III	Supervising Program Specialist	Employment/Resource Spec IV
Application Specialist I	Supervising Program Specialist I	Employment/Services Supervisor
Application Specialist II	Supervising Program Specialist II	Enrollment Coordinator
Applications Specialist III	INTERMEDIATE CASHIER	ES Supervisor
Assistant Auditing Manager	Supervising Social Worker II	Executive Assistant
Assistant Deputy Director	Supervising Social Worker II	Exec Programs Coordinator
Assistant Director	Supervising Storekeeper	Executive Director, Department of Human Services
Associate Administration Officer	Supervising Welfare Fraud Investigator	Executive Secretary I
Auditing Manager	Supervisor Clerk	Executive Secretary III
Automated Systems Analyst I	Supply Services Supervisor	Extra Help
Automated Systems Technician	Support Services Assistant	Facilities Analyst
Behavior Health Specialist I	Systems Accountant I	Staff Assistant I
Behavior Health Specialist II	Systems Accountant II	Senior Departmental Personnel Tech
Senior Management Assistant	Associate Administrative Services Analyst	Senior Info Systems Support Analyst
Senior Nutritionist	Associate Analyst	Senior Information Systems Analyst
Senior Office Supervisor (C/D)	Associate Data Analyst	Senior Information Technology Aide
Senior Office Systems Coord	Associate Employment Counselor	Senior Inventory Control Assistant
Senior Payroll and Personnel Clerk	Systems Engineer I	Senior IT Technical Support Analyst
Senior Personnel Analyst	Systems Engineer II	Senior Management Secretary III
Senior Personnel Clerk	Systems Operation Manager	Senior Management Secretary IV

CT 286 Classification		
Senior Program Systems Coord	Technical Support Manager	Principal Information Systems Analyst
Senior Protective Services Worker	Associate IT Business Analyst	Senior Application Developer
Behavior Health Specialist III	Assistant Division Chief, Child & Family Services	Supervising Clerk
Senior Revenue and Recovery Officer	Dep Dir Children & Family Servs(UC)	Senior Clerk
Senior Social Services Supervisor - DASU	Administrative Deputy III	Social Worker Trainee
Senior Social Worker	Director of Children & Family Servs	Staff Development Spec/SOC Work
Senior Social Worker - DASU	Div Chief, Children & Family Services	Staff Development Spec/Welfare
Senior Telephone Operator	Division Chief, PSS	Student Worker
Senior Training & Staff Development	Departmental Personnel Assistant	INTERMEDIATE STENOGRAPHER
Senior Welfare Fraud Investigator	Children's Social Worker II	Family Intervention Coordinator
Service Centers Administrative Specialist	Clerical Administrator	Family Intervention Supervisor
Service Support Specialist	Telephone Systems Operator	Family Service Worker
SFIS	Training Officer	Section Manager, ISD
Budget Analyst	Typist Clerk I	Financial Aid Advisor
Site Coordinator	Typist Clerk II	Financial Aid Counselor
Social Casework Assistant	Typist Clerk III	Student Professional Worker
Social Service Supervisor	Departmental Finance Manager III	Financial Analyst
Social Service Technician	User Technical Support Supervisor	Financial Analyst, SSA
Social Service Worker	Veteran's Claim Representative	Social Services Supervisor
Social Services Fiscal Officer	Deptl Info Security Officer II	Financial Office Professional
Social Services Ombudsperson	Veteran's Claim Representative Supervisor	Financial Office Professional II
Social Services Prg Cntrl Supv	Administrative Clerk (Trainee)	SSIAP Advocate
Social Services Program Mgr	Clerical/Community Aide II	Social Worker
Social Services Program Mgr I	Personal Service Contact	Financial Office Professional Sr
Business Applications Manager	Staff Service Technician	Financial Services Manager
Social Services Program Mgr II	System Support Analyst II	Financial Services Officer
Social Services Program Mgr III	Asst Dir of Public Social Servs(UC)	Financial Srv Deputy Dir, SSA

CT 286 Classification		
Social Services Program Supervisor	Student Intern	IT Technical Support Analyst I
Social Services Supervisor I	Paralegal	IT Technical Support Analyst II
Social Services Supervisor I - Program Integrity	Legal Filing Clerk	IT Technical Support Supervisor
Social Services Supervisor I - SST Analyst	Senior Child Support Attorney	Supervising Typist-Clerk
Social Services Supervisor II	Child Support Attorney	Typist-Clerk
Social Svc Wrkr I	Supervising Legal Transcriber	Staff Assistant, PSS
Social Svc Wrkr I - BL	Legal Transcriber II	Staff Assistant II
Buyer	Child Support Interviewer	Senior Departmental Personnel Asst
Social Svcs Appeals Officer	Child Support Specialist	Information Technology Supervisor
Social Svs Worker II	Child Support Services Program Manager	Senior Typist-Clerk
Social Svs Worker II - BL	Department Director	Information Technology Specialist II
Social Svs Worker III	Dependency Investigation Assistant	Int Supervising Typist-Clerk
Social Svs Worker III - BL	Div Chief	Senior Secretary IV
Social Work Specialist	Human Services Aide	Information Technology Specialist I
Social Work Supervisor	Intermediate Supervising Typist Clerk	Senior Secretary III
Social Work Training Speclst	Regional Administrator	Information Technology Manager, ES
Social Worker - African American C	Supv Children's Social Worker	Senior Secretary II
Social Worker - Chinese LC	Word Processor I	Information Technology Manager III
CHDP Nurse	Eligibility Worker TA	Senior Secretary I
Social Worker - Hmong LC	Accountant Technician I	Information Technology Manager II
Social Worker - Laotian LC	Child Support Services Regional Manager	Senior Network Systems Administrator
Social Worker - MSW	Child Support Services Supervisor	Application Developer II
Social Worker - Russian LC	NMU - Dept Community Services	Administrative Investigator, PSS
Social Worker - Spanish LC	NMU - Probation	Administrative Services Division Manager
Social Worker Assistant	NMU - Central Collections	Principal Application Developer
Social Worker Supervisor	NMU - Pre School Services	Prin Accounting Systems Technician
Software Engineer	NMU - Dept of Community Services	Budget & Fiscal Services Manager
Special Assistant IV	Accenture/Subcontractor	Clerical Administrator, Children's Services

CT 286 Classification		
Special Assistant IX	Central Help Desk/EDS Operations	Transcriber Typist
Administrative Manager III	Associate Program Specialist	Chief Clerk
Special Assistant VII	Account Clerk Supervisor	Chief Research Analyst, Behavior SCI
Special Assistant X	Account Tech	Clerk
Special Assistant XI	Accountant	Contract Program Monitor
Special Assistant XII	Accounting Assistant	Chf Dep Dir of Pub Social Servs(UC)
Special Assistant XIII	Administrative Analyst II	Financial Srvs Director, SSA
Special Assistant XIV	Administrative Assistant	Financial Svcs Specialist II
Special Assistant XV	Administrative Services Analyst	Fiscal Accounting
Special Assistant XVI	Administrative Services Assistant	Fiscal Assistant I - IV
Special Assistant XVII	Executive Secretary IV	Fiscal Manager I - IV
Special Programs Supervisor	Administrative Services Manager	Fiscal Office Specialist
Case Worker I	Administrative Services Officer	Fiscal Specialist I - II
Specialist Clerk I	Administrative Services Associate	Fiscal Technician I - II
Specialist Clerk II	Administrative Services Supervisor	Fraud Prevention Supervisor
Specialist Clerk II P	Agency Director	Fund Deve and Grant Specialt
SSA Applcation DEC Sup Spec II	Agency Partner	Gain Emp Counselor Suprvsr
SSA Applctn DEC Supp Mgr	Assistant Director HHS-Social Services	GEPS Trainer
SSA Application DEC Sup Spec I	Accountant Trainee	Health Worker III
SSA Partner	Accounting Manager	Hearings
SSC I	Accounting Technician II	Hearings Specialist
SSC II	Case Manager	Hearings Supervisor
SSC III	Case Review Specialist	HHSA Program Coordinator
Case Worker II	Chief Learning Officer	Housing Aide
Staff Accountant	C-IV Technical Analyst	Housing Program Analyst
Staff Analyst	DPSS Contracts and SVCS Officer	Housing Specialist
Staff Development Coordinator	DPSS Internal Security Officer	Housing Specialist II
Staff Development Specialist	DPSS Office Support Supervisor	Housing Specialist III
Staff Development Trainer	Eligibility Specialist	HS Administrative Spec I - II
Staff Service Analyst	Eligibility Specialist Supervisor	HS Administrative Spec I - II (CalWIN Interfaces Lead)

CT 286 Classification		
Staff Specialist	Employment Services Analyst	HS Administrative Spec I - II (CalWIN Non-Interfaces Lead)
State Agency	Employment Services Analyst Trainee	HS Administrative Spec I - II (Program/Training)
Statistician	Fiscal Analyst	HS Adult Prot Svcs Soc Supvsr
Case Worker III	Fiscal Assistant	HS Adult Prot Svcs Soc Wkr I - IV
Store Clerk	Fiscal Specialist	HS Case Aide I - II
Student Aide	HSS Program Integrity Div Chief	HS Case Aide I - II (ES Clerk)
Student Worker I - III	Interviewer I	HS Case Aide I - II (GR w/ Embossing Access & Deny Case)
Sup E & T Counselor	Interviewer II	HS Case Aide I - II (w/ Embossing Access)
Sup E & T Specialist	Office Assistant IV	HS Case Aide I - II (w/o Embossing Access)
Supervising Account Clerk	Office Specialist	HS Child Welfare Supervisor
Supervising Accounting Officer II	Regional Manager Children's Social Services	HS Client Benefit Spec III - IV (CalWIN Help Desk)
Supervising Auditor	Research Analyst	HS Client Benefit Spec IV (CAPI Worker)
Supervising Child Support Officer	Revenue and Recovery Supervisor	HS Client Benefit Spec IV (Foster Care Lead Worker)
Supervising Collection Officer	Senior Child Support Specialist	HS Client Benefit Spec IV (General Relief Lead)
Chief Fiscal Clerk	Social Service Aide	SupVG Administrative Assistant I
Clerical Assistant	Social Service Practitioner	SupVG Appeals Hearing Specialist
Clerk I	Staff Analyst Trainee	SupVG Elig Computation Clerk I
Clerk II	Staff Services Analyst I	SupVG Elig Computation Clerk II
Clerk III	Statistical Analyst	SupVG Welfare Fraud Investigator
Collector	Statistical Analyst Trainee	HS Client Benefit Spec IV (Generic)
Confidential Assistant I	Supervising Appeals Specialist I	HS Client Benefit Spec IV (IEVS Worker)
Confidential Assistant II	Supervising Appeals Specialist II	HS Client Benefit Spec IV (MEDS Worker)
Confidential Assistant III	Supervising Case Review Specialist	HS Client Benefit Spec IV (VCCCA Phone Worker)
DPSS Chief of Investigations	Supervising Fiscal Specialist	HS Client Benefit Spec IV (WTW)
Administrative Office Professional	Supervising Fraud Investigator I	HS Client Benefit Spec IV w/ Access to Confidential Cases
Data Processor	Supervising Fraud Investigator II	HS Client Benefit Spec IV w/ Confidential Access (FC Lead Worker)
Deputy District Attorney	Supervising Office Assistant	HS Client Benefit Spec IV w/ Access to Confidential Cases (Generic)

CT 286 Classification		
Deputy Director	Supervising Office Specialist	HS Client Benefit Spec Trainee, I - III
Director	Supervising Social Service Practitioner	HS Client Benefit Spec Trainee, I - III (CAPI Worker)
Driver Clerk	Systems Technician I	HS Client Benefit Spec Trainee, I - III (Foster Care Worker)
Eligibility Supervisor	Systems Technician II	HS Client Benefit Spec Trainee, I - III (General Relief Worker)
Eligibility Technician I	Training and Development Manager	HS Client Benefit Spec Trainee, I - III (IEVS Worker)
Eligibility Technician II	Training and Development Supervisor	HS Client Benefit Spec Trainee, I - III (MEDS Worker)
Eligibility Technician III	Welfare Fraud INV Manager	HS Client Benefit Spec Trainee, I - III (VCCCA Phone Worker)
Eligibility Technician - Trainee	Assistant Regional Manager	HS Client Benefit Supervisor or Spvsr - TC
Employment & Training Worker I	Banked Caseload	HS Client Benefit Supervisor or Spvsr - TC (CalWIN Help Desk Supervisor)
Employment & Training Worker II	CHIEF,GOVERNMENTAL RELATIONS,PSS	HS Client Benefit Supervisor or Spvsr - TC (Foster Care Supervisor)
Employment & Training Worker III	Behavior Health Specialist	HS Client Benefit Supervisor or Spvsr - TC (MEDS Supervisor)
Employment Services Analyst I	Branch Director	HS Client Benefit Supervisor or Spvsr - TC (VCCCA Supervisor)
Employment Services Analyst II	Business Process Analyst	HS Client Benefit Supervisor w/ Confidential Access (FC Supervisor)
Employment Services Counselor I	Automation Services Manager	HS Employment Specialist I - III
Supervising Criminal Investigator	Business Technology Analyst II	HS Employment Specialist I - III (General Relief)
Supervising Employment & Training Counselor	Business Technology Analyst III	HS Employment Specialist I - IV
Supervising Employment & Training Specialist	Business Technology Analyst IV	HS Employment Specialist IV
Supervising Human Services Specialist	Case Review Officer	HS Employment Specialist IV (General Relief)
Supervising Investigator	Case Review Supervisor	HS Employment Specialist IV w/ Access to Confidential Cases
Supervising Public Assistance System Technician	Chief Account Tech	HS Employment Svcs Spvsr or Spvsr - TC
Supervising Vocational Assessment	Chief Fiscal Officer	HS Employment Svcs Spvsr or Spvsr - TC w/ Access to Confidential Cases
Supervising Welfare Fraud Inve	Chief Investigator SIU	HS Homeless Svcs Soc Wkr I - IV

CT 286 Classification		
Supervisor Fraud Investigation Unit	Business Systems Information Analyst	HS Homeless Svcs Spvsr
Supply Clerk I	Child Support Services Manager	Welfare Fiscal Analyst
Employment Services Counselor II	Clinical Therapist	Welfare Fraud Investigator Trainee
Supply Clerk II	Collection Agent I	Welfare Recipient Employment Coord
Supportive Services	Collection Agent II	Children's Social Worker III
Supervising Admin Specialist	Collection Agent III	Database Administrator
Supervising Appeals Officer	Collections Officer I	Sr Dep Dir, Child & Family Servs(UC)
Supervising Child Care Worker	Generic Worker	Departmental Employee Relations Rep
Supervising Clerk I	Behavior Health Services Supervisor	Deptl Human Resources Manager III
Supervising Clerk II	Fiscal & Technical Services Assistant III	Fiscal Officer I
Supervising Clerk III	Fiscal & Technical Specialist	Financial Specialist III
Supervising Eligibility Tech	Asst Agcy Dir, Social Svs Agcy	GAIN Services Coordinator
Supervising Financial Svcs Spec	Human Services Administrator I	GAIN Services Supervisor
Employment Services Specialist	Human Services Administrator II	GAIN Services Worker
Supervising Welfare Investigator	Human Services Administrator III	Administrative Services Manager I
Supv Accounting Tech	Human Services Liaison, PSS	Asst Regional Administrator, CFS
Supv Admin Clerk	Community Program Specialist	HS IHSS Social Worker I - IV, Z
Supv Legal Clerk	Contracts & Grants Analyst	HS IHSS Social Worker I - IV, Z (HCA Partner)
Systems Administrator	Courier	HS IHSS Supervisor
Systems and Procedures Analyst	Courier and Supervising Warehouse Worker	HS Program Analyst I - II
Systems Programmer	Customer Support Representative	HS Program Analyst I - II (CalWIN Interfaces Lead)
Telephone Operator	Head Administrative Investigations	HS Program Analyst I - II (CalWIN Non-Interfaces Lead)
Testing Technician	Department Analyst I	HS Program Analyst I - II (OSM Staff)
Training Assistance	Head Clerk	HS Program Assist I - III
Employment Services Technician	Head Departmental Personnel Technician	HS Program Coord I - III
Training Coordinator	Department Specialist II	Information Technology Analyst II
Training Manager	Department Specialist III	HS Program Manager I - II (VCCCA Manager)

CT 286 Classification		
Training Officer I	Eligibility Assistant	HS Senior Program Coordinator
Training Supervisor	Eligibility Program Specialist	HSA Administrative Manager (CalWIN Manager)
Transcriptionist	Eligibility Specialist I	HSA Administrative Spec III
Translator	Eligibility Specialist II	HSA Sr Administrative Spec
Transportation Coordinator	Eligibility Specialist III	Coord Welfare Recipient Vendor Prog
Transportation Worker	Eligibility Specialist Trainee	HSA Sr Program Manager
Transportation Worker SAN	Eligibility Worker II Bilingual	Human Resources Manager
TulareWORKs Family Advocate	Eligibility Worker III Bilingual	Human Resources Technician
Employment Services Technician Trainee	Employment & Training Worker Supervisor	Human Services Aide I
Unit Manager - CalWORKs	Employment and Training Supervisor	Human Services Analyst
User Support Analyst II	Employment and Training Worker III	Employment Services Manager
User Support Specialist	Employment and Training Worker Supervisor	Deputy Administrative Officer
Utility Clerk	Employment Development Counselor	Executive Secretary II
Veterans Claims Worker	Employment Development Counselor Bilingual	Executive Secretary III
Veterans Service Specialist	Employment Services Supervisor	Statistical Methods Analyst
Veterans Services Representative	Executive Secretary	Chief Govermental Relations, PSS
Vocational Assessment Counselor	Fair Hearings Officer	Program Assistant, PSS
Vocational Assessor	Financial Systems Analyst	Human Services Control Specialist
Administrative Office Professional II	Fiscal & Technical Services Assistant I	Human Services Department Network Analyst
Volunteer Program Coordinator	Fiscal & Technical Services Assistant II	Human Services Division Director
Welfare Fraud Field Investigator	Asst Dir, Area Agency on Aging	Human Services Hearings Officer
Welfare Fraud Investigations Supervisor	INFORMATION SYSTEMS ANALYST AID	Human Services Manager
Welfare Fraud Investigator Supervisor	Information Systems Analyst I	Human Services Manager, Investigations
Welfare Fraud Technician	Information Systems Analyst II	Human Services Operations Manager
Welfare Investigator II	Information Systems Manager I	Human Services Program Manager

CT 286 Classification		
WEX Intern	Information Systems Supervisor I	Human Services Program Policy Analyst
Workforce Board Systems Admin	Information Systems Supervisor II	Human Services Section Manager
Workforce Career Assmnt Supervisor	Information Systems Supervisor III	Human Services Spec - African American C
Workforce Coord - African American Culture	Information Systems Support Analyst II	Human Services Spec - Arabic/Middle Eastern
Executive Assistant I	Information Technology Aide	Human Services Spec - Armenian LC
Workforce Coordinator	Fiscal Specialist I	Human Services Spec - Cambodian LC
Workforce Investmt Bd Director	Fiscal Specialist II	Human Services Spec - Chinese LC
Workforce Services Director	Intermediate Clerk	Human Services Spec - Filipino LC
Workforce Services Specialist	Fiscal Specialist III	Human Services Spec - Hmong LC
Workforce Services Tech	Fiscal Staff	Human Services Spec - Laotian LC
WTW Trainer	Fiscal Supervisor	Human Services Spec - Mien LC
Information Systems Technician	HS Office Supervisor	Human Services Spec - Native American LC
Information Technology Analyst	Human Services Specialist I	Human Services Spec - Russian LC
Information Technology Analyst (Prin)	Human Services Specialist II	Human Services Spec - Spanish L/Latin C
HS Program Manager I - II	Human Services Specialist III	Human Services Spec - Vietnamese LC
Executive Assistant II	Human Services Specialist IV	Human Services Specialist
Admin Assistant	Information Systems Analyst	Human Services Specialist Supervisor
Administrative Office Professional Sr	Information Systems Specialist	Human Services Supervisor
Administrative Secretary II	Information Systems Supervisor	Human Services Systems and Programming Analyst
Administrative Secretary III	Information Technology	Human Svcs Assistant
Family Services Representative I	Integrated Case Work Supervisor	Human Svcs Asst - Arabic/Middle Eastern
Family Services Representative II	Integrated Case Worker	Human Svcs Asst - Armenian LC
Family Services Representative III	Investigative Assistant	Human Svcs Asst - Chinese LC
Family Services Specialist I	Intermediate Supervising Clerk	Human Svcs Asst - Farsi LG Persian CL
Family Services Specialist II	Intermediate Typist-Clerk	Human Svcs Asst - Hispanic/Spanish LC
Family Services Specialist III	Investigative Technician	Human Svcs Asst - Laotian LC

CT 286 Classification		
Family Services Specialist Supervisor	Secretary IV	Human Svcs Asst - Russian LC
Fiscal Clerk I	Legal Process Specialist	Human Svcs Asst - Vietnamese LC
Fiscal Clerk II	Legal Support Assistant	IEVS
Fiscal Clerk III	Licensed Clinical Social Worker	Imaging Technician
Fiscal Manager	Media Specialist	NMU - DA
Fiscal Services Supervisor	Asst Dir, Employment & Benefit	NMU - Dept Child Support Services
Fraud Enforcement Assistant	Mental Health Practitioner	NMU - Dept Behavioral Health
Fraud Investigator	Mental Health Services Supervisor	NMU - Dept Children's Services
Fraud Investigator Supervisor I	Navigator	NMU - Dept Adult Aging Services
Fraud Investigator Supervisor II	Office Assistant III Bilingual	NMU - JESD WIA
Fraud Technician	Office Services Supervisor	NMU - Dept Public Health
Human Resource Payroll Analyst	Office Supervisor	NMU - Department of Workforce Industry
Help Desk Technician	Procurement Specialist	NMU - Auditor
Human Resources Analyst I	Public Assistance Specialist I	NMU - Family Support
Human Resources Analyst II	Public Assistance Specialist II	NMU - Health
Human Resources Clerk	Public Assistance Specialist III	NMU - Public Health
Human Resources Officer I	Public Assistance Specialist Supervisor	NMU - Schools
Human Resources Officer II	Research Specialist	NMU - Hospitals
Information Technology III	Revenue & Recovery Technician	NMU - Clinics
Information Technology Officer I	Secretary	NMU - Behavioral Health and Recovery Services
Information Technology Officer II	Security Officer	NMU - Building Successful Tomorrows
Intake Specialist	Senior Account Clerk	NMU - Child Welfare
Investigations Supervisor	Senior Administrative Analyst	NMU - Department of Employment Services
Investigative Technician I	Senior Office Assistant	NMU - Modesto Junior College
Investigative Technician II	Senior Program Coordinator	NMU - Department of Child Support Services
Investigator	Senior Secretary	NMU - District Attorney
Investigator II	Senior Staff Services Manager	Dept Child Support Services
Investigator III	Social Service Aide I	Child Protective Services
Kelly Temp	Social Service Aide II	Adult Protective Services
Legal Clerk I	Social Service Practitioner CPS	EDA - WIA
Legal Clerk II	Social Service Program Manager	Info Systems Manager

CT 286 Classification		
Legal Clerk III	Social Service Supervisor CPS	Chief of Investigations
Legal Transcriber I	Social Service Worker I CPS	Family Services Supervisor
MSW Intern	Social Service Worker II CPS	Recovery Supervisor II
Mail Clerk	Social Service Worker III CPS	Ethics Resource Officer
Manager I	Social Services Aide	Training and Development Specialist
Manager II	Social Services Division Director	Organizational Measurement Specialist
Manager III	Social Services Screener	Communications and Career Services Manager
Manager IV	Social Services Worker	Assistant Communications Specialist
Mental Health Clinician I	Asst Dir, Wrkfrce Invst Board	Programmer III
Mental Health Clinician II	Staff Development Supervisor	Administrative Clerk IV
Mental Health Clinician III	Asst. Chief Criminal Investigator	Clerical/Community Aide I
Network Administrator	Staff Services Analyst II	Temporary Employee
Network Systems Support Analyst	Attorney	Family Services Specialist III - Intern
Office Assistant I	Staff Support Assistant II	Family Services Specialist IV - Intern
Office Assistant II	Staff Support Assistant III	Family Services Supervisor - Intern
Office Assistant III	Staff Support Manager	Homecare Assistant
Supervising Research Specialist	Staff Trainer I	Legal Clerk IV
Community Service Assistant	Staff Trainer II	Social Worker IV-Trainee
Child Care Development Specialist	Supervising Analyst	Software Developer/Analyst III
Mental Health Counselor	Supervising Employment Development Counselor	Senior Software Developer/Analyst
Ombudsman Program Manager	Supervising Staff Services Analyst	Stock/Delivery Clerk I
Personnel Assistant	Supervising User Support Technician	Stock/Delivery Clerk II
Principal Accountant	Supervising Warehouse Worker	Storekeeper I
Administrative Trainee	Systems Accountant	Storekeeper II
Program Evaluation Supervisor	User Support Technician	Supervising Account/Administrative Clerk I
Program Manager	Veterans Service Officer	Supervising Account/Administrative Clerk II
Program Operations Supervisor	Vocational Trainee	Supervising Legal Clerk I
Program Specialist	Volunteer	Supervising Legal Clerk II
Program Specialist I	Welfare Collections Officer	Confidential Assistant IV

CT 286 Classification		
Program Specialist II	Welfare Fraud Investigator I	Confidential Assistant V
Staff Analyst III	Welfare Fraud Investigator II	Social Worker V
Staff Development Officer Children's Services	Welfare Investigator	Information Systems Program Analyst
Staff Training Instructor	Work Crew Supervisor	Director of CSA
Staff Training Instructor Trainee	Workforce Development & Eligibility Specialist	General Accounting Manager
Statistical Analyst I	Welfare Fraud Investigator III	
Statistical Analyst II	Support Service Worker I	
Statistical Analyst III	Staff Support Assistant I	

CT 983 Contact Type Code
Verbal
Written
Contact Center

CT 321 Classifications	
1931(b) Sneede Property Detail	Income Allocation to Family Members - Countable Income
FC Special Care Increment	Total Net Nonexempt Income of Spouse/Non-Excluded Children
Regular Sneede Property Detail	Total Countable Income of Person in LTC/B&C
Program Person	Health Insurance for Person in LTC/B&C
Overridden Program Person	Community Spouse Gross Income (Include Public Assistance)
Benefit Month Property Detail	Total Gross Income
CF Gross Earned Income	Actual Income of Family Members
CF Gross Unearned Income	Excluded Child(ren) Allocation
Earned Income	SSI/SSP Allocation Detail
CF Net Unearned Income	SSI Methodology Allocation Detail
CF Deductions	Income Allocation to Family Member(s)
CF Excess Shelter Costs	Allocation to Family Members LTC/B&C
CF Adjustments	Budgeting Methodology Type
Applicant Unearned Income	Data Month Property Detail
Applicant Unearned Income Disregards	CalWORKs Family Unit Size
Applicant Earned Income	CalWORKs Assistance Unit Size
Applicant Earned Income Disregards	CalFresh Household Size
Family Special Needs	MC Property Test Person Total
Unearned Income	MC Sneede FPL Individual Nonexempt Income
Unearned Income Disregards	IN Previous Potential Benefit Amount
Earned Income	Self Employment Expense Deduction

Earned Income Disregards	Non-Verified Expense
AU Special Needs	Legal Guardianship
Adjustments	Person''s Age
Gross Income	Overpayment For a Prior Case Person
Property	Pregnancy Termination Date
Expense	Average Income Calculation Self Employment
Miscellaneous	Average Income Calculation Disability
MC Unearned Income	Average Income Calculation Earned Income
MC Unearned Income Deductions	Average Income Calculation Unearned Income
MC Earned Income	Qualifies for Exempt MAP
MC Earned Income Deductions	Net Sequential - Monthly Amount
Combined Income Deductions	Net Sequential - Excluded Income
Income Adjustments	Net Sequential - Deduction
Allocation and Other Deductions	Net Sequential - Dependent Care Under 2
Maintenance Need	Net Sequential - Calculated Average
Sneede FPL Countable Income	Average Income Calculation All Other Income
Monthly Gross Earnings Month 1	FC Aid Code
Monthly Gross Earnings Month 2	FC Earned Income
Monthly Gross Earnings Month 3	FC Unearned Income
Monthly Dependent Care Expense Month 1	FC Earned Income Disregard
Monthly Dependent Care Expense Month 2	Infant Supplemental Payment
Monthly Dependent Care Expense Month 3	Program Person Fail Budget
Special Treatment - Home Value	Related Case
Special Treatment - Other Real Property Value	InKind Income
Special Treatment - Liquid Property Value	Additional Payment
Special Treatment - Gross Earned Income	Educational Travel Reimbursement
Special Treatment - Gross Unearned Income	Earned Income Deductions
	EDBC Homeless Past Due Rent
	Accessible Liquid Resources
	Disaster Related Expenses
	Parenting Support Plan

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214753 | DDID 2350

FDS: API – Program

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sridhar Mullapudi
	Reviewed By	Avi Bandaranayake

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/10/2020	1.0	Initial Draft	Sridhar Mullapudi
2/22/2021	1.1	Section 2.1.3 request parameter, added new input field.	Avi Bandaranayake
3/23/2021	1.2	Updated Responses Updated Assumptions Added Header section	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

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

1.2 Requests

Create a service that can retrieve program information for a given case ID or persons SSN or CIN.

1.3 Overview of Recommendations

1. Create a new endpoint to retrieve program information.

1.4 Assumptions

1. Results are limited to county level data.
2. Results returned will be paginated to 20 values by default.
3. Limit parameter will allow a maximum of 250 values returned by default. Requesting a larger value will result in a 400 error response.
4. Code table values for this API can be found in the Appendix.
5. Code table values are limited to those available as of the API release date.
6. Requests and Responses will use Code Table values as described in the Appendix.
7. Offset and limits will apply only if paginated results are available.
8. Offset beyond the max available will return a 404 error.
9. Offset and limits will only apply to the root element
10. Sorting and ordering only applies to the root element.
11. Null or empty values will not be returned in the response objects.

2 RECOMMENDATIONS

2.1 Program API

2.2 Overview

This API will expose the program data from the CalSAWS system.

2.3 Description of Changes

1. The Program API will include the following data elements, and error handling. Please refer to the **Program.html** document for the technical specifications and data element definitions.
2. Additional examples and specific error messages may be added during build for the developer portal.

2.4 Request Parameter

The Program API can be used to retrieve program information form CalSAWS. The request must contain one of the following fields:

1. case number
2. view date
3. SSN
4. CIN
5. program code
6. program status

2.5 Response

The program API will return the following data elements:


```
[
  {
    "program": [
      {
        "caseNum": "string",
        "caseName": "string",
        "pgm": "string",
        "aidCode": "string",
        "programDetail": [
          {
            "statCode": "string",
            "begDate": "2021-03-24",
            "statRsnCode": "string",
            "reportingTypeCode": "string"
          }
        ],
        "programRedeter": [
          {
            "reDueDate": "2021-03-24",
            "reBegDate": "2021-03-24",
            "reStatRsnCode": "string"
```

```
          }
        ],
        "programPerson": [
          {
            "persId": "string",
            "persName": "string",
            "persStatCode": "string",
            "persStatRsnCode": "string",
            "persBegDate": "2021-03-24",
            "persContact": [
              {
                "phTypeCode": "string",
                "phNum": "string"
              }
            ]
          }
        ],
        "staffWorker": [
          {
            "worker": "string",
            "workerNum": "string",
            "unitName": "string",
            "unitNumIdentif": "string",
            "officeName": "string",
            "officeNumIdentif": "string",
            "secondPgmAssignInd": "string"
          }
        ]
      }
    ]
  }
]
```


2.6 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

2.7 Error Message

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

1. Bad request. {parameter name} is invalid. {Reason}

2. Authorization information is missing or invalid.
3. Not found. Request {parameter name} - {value} was not found.
4. Request Timeout.
5. Internal Server Error.

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2350	The CONTRACTOR shall create a service for the 58 Counties that returns program information utilizing a CalSAWS API. The service will allow the 58 Counties to do the following: 1) Search for programs associated to a case by providing a case number 2) Search for all programs associated to an individual with a provided social security number The service will return a list of programs that meet the provided criteria including the case, program type, program status, program	The API complexity accounts for the ability to search for programs utilizing multiple filters and variety of individual level data that will be returned.	Create program API

	status reason, the individuals on the program, the individual program person status and status reason, the phone numbers for the individuals, and the worker associated to the programs.		

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 72: Program Status Code
Active
Discontinued
Denied
Pending
Ineligible
Exempt
Deferred
Deregistered
Non-Comp
Good Cause
Waiting to Transfer
Sanction

CT 18: Program Code
AAP
CalFresh
Cal-Learn
CalWORKs
CAPI
CFET
Child Care
Disaster CalFresh
Diversion
Foster Care
General Assistance (Managed)

CT 18: Program Code
General Assistance/General Relief (GR)
GROW
Homeless - Perm
Homeless - Temp
Immediate Need
Kin-GAP
Medi-Cal
Nutrition Benefit
RCA
REP
Welfare to Work

CT 254: Phone Type Code
Cell
Fax
Home
Main
Message
TDD
Toll Free
Work

CT 542: Reporting Type Code
Annual Reporting
Change Reporting
Non Reporting
Quarterly Reporting
Semi-Annual Reporting

Semi-Annual Reporting Annually
TMC Reporting
TNB Non Reporting

CT 51: Confidentiality Type Code
Adoptions Assistance
Employee/Employee Relative
Foster Care
Minor Consent
Domestic Violence
High Profile
Human Trafficking
CWS AAP Mask Address
CWS Foster Care/KinGap Mask Address
CWS Sealed Mask Address
CWS Sensitive Mask Address

CT 1082: Flag Type Codes
Federal
State
County
Court Case
Study
Civil Rights
Error Prone and High Risk

CT 1892: Completion Reason
CalFresh Restored
Conversion

Data Change
Deemed Eligible Child
Eligible to TCF
No Longer Valid
Processed
TMC Eligibility

CT 184: Aid Codes		
01 - RCA	58 - OBRA-ESO/Pregnancy	D7 - OBRA-LTC-Disabled-SOC
02 - RMA/EMA	59 - Continuing TMC-Full	D8 - OBRA-MI-Pregnancy-No SOC
03 - AAP-Fed	5C - PE HF to MC NP	D9 - OBRA-MI-Pregnancy-SOC
04 - AAP-State	5D - PE HF to MC PPY	E1 - Bridging-Unverified Citizen-1 Month Limited
05 - SED-Non EA	5F - OBRA-Pregnancy	E2 - Infant-19 ACA CHIP Lawful Citizen
06 - Fed AAP Cash Subsidy Out-of-State	5J - Pending SP-DDSD - No SOC-Restrict.	E3 - New Adult Group LTC
07 - AAP-Extended-Fed	5K - FC-EA	E4 - Infant-19 ACA CHIP Undocumented
08 - Foster Care - Cuban/Haitian-Entrants	5R - Pending SP-DDSD - SOC	E5 - Child 1-19 ACA CHIP Premium
09 - CalFresh	5T - Continuing TMC-ESO/Pregnancy	E7 - Infant - Above 267-322%
0C - Access for Infants and Mothers	5V - Trafficking/Crime Victim no SOC	F0 - HCCI - LIHP
0D - MCAP Pregnant Woman-213-322% FPL	5W - 4 Month Cont.-ESO/Pregnancy	F1 - MC No SOC State Inmates
0E Pregnant Women 213 - 322%	5X - Extended TMC, terminated 10/1/2003	F2 - No SOC MC for Undoc State Inmates
0F - TCF	5Y - Extended TMC, terminated 10/1/2003	F3 - MC County Inmate Inpatient Hospital Only
0G MCAP Pregnant Woman - 213 - 322% FPL	60 - Disabled - SSI/SSP	F4 - MC Undoc County Inmates
0H - Transitional Nutrition Benefit	63 - LTC-Disabled	F5 - MCE ST Inmates
10 - Aid to the Aged - SSI/SSP	64 - MN-Disabled-No SOC	F6 - MCE CO Inmates
13 - LTC-Aged	65 - Hurricane Katrina Evacuees	F7 - MCE Existing
14 - MN-Aged-No SOC	66 - Pickle-Disabled	F8 - LIHP - MCE
16 - Pickle-Aged	67 - MN-Disabled-SOC	F9 - HCCI LIHP - CI

17 - MN-Aged-SOC	68 - Disabled-IHSS-SOC	G1 - MC SOC State Inmates
18 - Aged-IHSS	69 - 200% OBRA Infant	G2 - SOC MC for Undoc State Inmates
1A - CAPI-Qualified-Aged	6A - DAC-Blind	G3 - Medi-Cal County Inmate SOC Inpatient Hospital Only
1E - CCE for the Aged	6C - DAC-Disabled	G4 - Medi-Cal County Inmate Undoc SOC Inpatient Hospital Pregnancy+ ESO
1H - FPL-Aged-Full-No SOC	6E - CCE for the Disabled	G5 - County Juvenile Inmate Inpatient Hospital+ Inpatient MH
1U - FPL-Aged-ESO-No SOC	6G - 250% Working Disabled-Full	G6 - County Juvenile Inmate Undoc, ESO Inpatient Hospital, MH & Pregnancy
1V - RCA - TCVAP (State)	6H - FPL Disabled-Full	G7 - County Juvenile Inmate, SOC Inpatient Hospital & Inpatient MH
1X - MSSP without a SOC	6J - SB87 Pending SP-DDSD - No SOC	G8 - County Juvenile IM Undoc, SOC, ESO Inpatient Hospital, MH & Pregnancy
1Y - MSSP with a SOC	6K - CAPI-Non Qualified	G9 - Compassionate Release No SOC State
20 - Blind - SSI/SSP	6M - CAPI-Sponsored	H0 - Child 6-19 133-266%
23 - LTC-Blind	6R - SB87 Pending SP-DDSD - SOC	H1 - Infant 200-250%
24 - MN-Blind-No SOC	6T - CAPI-Limited Term	H2 - Child 1-6 133-150%
26 - Pickle-Blind	6U - FPL-Disabled-ESO/Pregnancy	H3 - Child 1-6 150-250% P
27 - MN-Blind-SOC	6V - DDS Waiver-No SOC	H4 - Child 6-19 100-150%
2A - Abandoned Baby	6W - DDS Waiver-SOC	H5 - Child 6-19 150-250% P
2E - CCE for the Blind	6X - IHO Waiver - No SOC	H6 - Infant 209-266%
2H - FPL-Blind-Full-No SOC	6Y - IHO Waiver - SOC	H7 - Child 1-6 -142%
2K - IHSS Community First Choice Option	71 - Dialysis/Dialysis Supplement	H8 - Child 6-19 - 0-133%
2L - IHSS Plus Waiver	72 - 133% Child-Full	H9 - Child 1-6 143-266%
2M - Personal Care Services	73 - TPN/TPN Suppl.	IE - IE MC Member-Non Sneede MFBU
2N - IHSS Residual	74 - 133% Child-ESO	Indigent Burial
2P - ARC only	76 - 60-Day Postpartum	J1 - Compassionate Release No SOC County
2R - ARC only for NMD	77 - Anti-Rejection Medicine	J2 - Compassionate Release SOC County
2S - ARC - Fed CW	7A - 100% Child-Full	J3 - County Medical Probation No SOC
2T - ARC - State CW	7C - 100% Child-OBRA-ESO	J4 - County Medical Probation SOC
2U - ARC - State CW for NMD	7H - TB	J5 - Compassionate Release LTC Aged County

2V - Trafficking/Crime Victim no SOC	7J - CEC-Full	J6 - Compassionate Release LTC Aged County Restricted
30 - CW-All Other Families (Fed)	7K - CEC-ESO	J7 - Compassionate Release LTC Disabled County
32 - CW-TANF-Timed Out (Fed)	7M - Minor Consent-Family Planning	J8 - Compassionate Release LTC Disabled County Restricted
32 - CW-TANF-Timed Out (State)	7N - Minor Consent-Pregnancy	K1 - CW-Felon-Safety Net-Non-Two Parent
33 - CW-Zero Parent (Fed)	7P - Minor Consent-Outpatient Mental Health	K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
34 - AFDC-MN-No SOC	7R - Minor Consent-Sexual Assault	K6 - MAGI ACA N/E Adult (19 - 64) County Comp Release/ <138% FPL, Citizen
35 - CW-Two Parent (Fed)	7S - Title XIX, parents 19-64, not blind or disabled, no SOC	K7 - MAGI ACA N/E Adult (19 - 64) County Comp Release/ <138% FPL, Undoc
35 - CW-Two Parent (State)	7U - Title XIX, CalFresh adults from 19 through 64, no SOC	K8 - MAGI ACA NNE Adult (19 - 64) County Comp Release/ <128% FPL, Citizen
36 - Disabled-COBRA-Widow/ers	7V - Trafficking/Crime Victim with a SOC	K9 - MAGI ACA NNE Adult (19 - 64) County Comp Release/ <128% FPL, Undoc
37 - AFDC-MN-SOC	7W - Title XIX, children under age 19 not blind or disabled, no SOC	L1 - LIHP Transitional Aid Code
38 - Edwards v. Kizer	7X - Bridging-Child-1 Month Limited	L6 - Citizen/Lawfully Present 19-64 Years Old 128% Full
39 - Initial TMC-Full	7Y - Bridging-Adult-1 Month Limited	L7 - Undocumented 19-64 Years Old 128% Restricted
3A - (Prior to 12/2013)	80 - QMB	L9 - 21-64 Year Old 138% Full 5 Year Bar
3A - CW-Timed Out-Safety Net-All Other Fam.	82 - MI-Child-No SOC	M0 - Pregnant Women - 60-213% - Undocumented
3C - (Prior to 12/2013)	83 - MI-Child-SOC	M1 - 19-64 Year Old 138% Full
3C - CW-Timed Out-Safety Net-Two Parent	84 - CMSP - Full - No SOC	M2 - 19-64 Year Old 138% Restricted
3D - Cash Based MC	85 - CMSP - Full - SOC	M3 - Parent Caretaker Relative - at or below 109% - Full
3E - CW-All Other Families (Mixed)	86 - MI-Pregnancy-No SOC	M4 - Parent Caretaker Relative - at or below 109% - Restricted
3F - CW-Felon-Safety Net-Two Parent	87 - MI-Pregnancy-SOC	M5 - Child 6-19 - 108-133% - Citizen
3F - CW-Safety Net/Felon/WTW Sanct-Two Parent	88 - CMSP - Non-Fed - Full - No SOC	M6 - Child 6-19 - 108-133% - Undocumented
3G - CW-Zero Parent (State)	88 - CMSP - Pending DDSD - Full - No SOC	M7 - Pregnant Women - 60% - Citizen

3H - CW-Zero Parent (Mixed)	89 - CMSP - Non-Fed - Full - SOC	M8 - Pregnant Women - 60% - Undocumented
3J - Diversion-All Other Families (Fed)	89 - CMSP - Pending DDSD - Full - SOC	M9 - Pregnant Women - 60-213% - Citizen
3K - Diversion-Two Parent (Fed)	8A - QWDI	N0 - Co. Inmate LIHP/MCE Transition to MC
3L - CW-All Other Families (State)	8C - SLMB	N5 - 19-64 Year Old State Inmate - 0-138% - Limited
3M - CW-Two Parent (State)	8D - Qualified Individual 1-135%	N6 - 19-64 Year Old State Inmate - 0-138% - Restricted
3N - AFDC-1931(B) Full	8E - Accelerated Enrollment of Children	N7 - 19-64 Year Old County Inmate - 0-138% - Limited
3P - CW-All Other Families-Exempt MAP (Fed)	8F - CMSP - LTC	N8 - 19-64 Year Old County Inmate - 0-138% - Restricted
3R - CW-Zero Parent-Exempt MAP (Fed)	8K - Qualified Individual 2-175%	P0 - Infant - 0-208% - Undocumented
3T - Initial TMC-ESO/Pregnancy	8N - 133% Excess Property Child-ESO	P1 - Hospital PE Infant - 0-208%
3U - CW-Two Parent (State)	8P - 133% Excess Property Child-Full	P2 - Hospital PE Parent Caretaker Relatives - 0-109%
3V - AFDC-1931(B)-ESO/Pregancy	8R - 100% Excess Property Child-Full	P3 - Hospital PE Adults - 0-138%
3W - CW-TANF-Timed Out (Fed)	8T - 100% Excess Property Child-ESO	P4 - Hospital PE Pregnant Women - 0-213%
3W - CW-TANF-Timed Out (State)	8U - CHDP Gateway Deemed Infant - NO SOC	P5 - Child 6-19 - 0-133% - Citizen
3X - Diversion-All Other Families (State)	8V - CHDP Gateway Deemed Infant - SOC	P6 - Child 6-19 - 0-133% - Undocumented
3Y - Diversion-Two Parent (State)	8W - CHDP Gateway Medi-Cal	P7 - Child 1-6 - 0-142% - Citizen
40 - AFDC-FC (State)	8X - CHDP Gateway HF	P8 - Child 1-6 - 0-142% - Undocumented
42 - AFDC-FC (Fed)	8Y - CHDP	P9 - Infant - 0-208% - Citizen
43 - FC Extended (State)	90 - GA General Relief Independent Living-CNTY	R1 - CW - TCVAP (State)
44 - 200%-Pregnancy Citizen	91 - GA General Relief-B/C Non Independent Living-CNTY	R2 - CF - TCVAP (State)
45 - FC (County)	92 - GA General Relief-R/B Non Independent Living-CNTY	R4-WINS Non-Two-Parent
46 - Fed Funded FC Benefits Out-of-State	93 - GA General Relief-MFG Child-CNTY	R5-WINS Two-Parent
47 - 200%-Infant-Full	94 - GRI Emergency Assistance	R6-WINS CFAP
48 - 200%-Pregnancy-OBRA	95 - Unemployable, Independent Living, Single	R7-WINS Non-Two Parent TCF
49 - FC Extended (Federal)	96 - Unemployable, Facility, Family Group	R8-WINS Two-Parent TCF

4A - Out of State AAP	97 - Unemployable, Facility, Single	R9-WINS TCFAP
4C - Voluntary Placement	98 - Aid In Kind	RE - SF Retention
4E - Presumptive Eligibility for Former Foster Care Children	99 - Electronic Theft Replacement Cash Benefit	RR - RR MC Member-Sneede MBU
4F - Kin-GAP (Fed)	9A - SF AGEX	T0 - Infant - 208-266% - Undocumented
4F - Kin-GAP (State)	9G - Return to Residence	T1 - Child 6-19 - 160-266% - Citizen
4G - Kin-GAP (State)	9H - Healthy Families Child	T2 - Child 6-19 - 133-160% - Citizen
4G - Kin-GAP (State) beyond age 18 due to a disability	9I - SF CALM	T3 - Child 1-6 - 160-266% - Citizen
4H - Foster Care Child in CalWORKs	9J - SF PAES	T4 - Child 1-6 - 142-160% - Citizen
4K - Probation Emergency Assistance	C1 - OBRA-MN-Aged-No SOC	T5 - Infant - 208-266% - Citizen
4L - 1931(b) Foster Care	C2 - OBRA-MN-Aged-SOC	T6 - Child 6-19 - 160-266% - Undocumented
4M - FC Continuing Medi-Cal	C3 - OBRA-MN-Blind-No SOC	T7 - Child 6-19 - 133-160% - Undocumented
4N - Extended CalWORKS for NMDs	C4 - OBRA-MN-Blind-SOC	T8 - Child 1-6 - 160-266% - Undocumented
4P - CW Family Reunification-All Families	C5 - OBRA-MN-AFDC-No SOC	T9 - Child 1-6 - 142-160% - Undocumented
4R - CW Family Reunification-Two Parent	C6 - OBRA-MN-AFDC-SOC	X1 - Covered CA Subsidized (APTC and/or State Subsidy) 250-400%
4S - Kin-GAP Extended (Fed)	C7 - OBRA-MN-Disabled-No SOC	X2 - Covered CA Subsidized 100-150%
4T - Kin-GAP (Fed)	C8 - OBRA-MN-Disabled-SOC	X3 - Covered CA Subsidized 151-200%
4V - Trafficking/Crime Victim with a SOC	C9 - OBRA-MI-Child-No SOC	X4 - Covered CA Subsidized 201-250%
4W - Kin-GAP Extended (State)	D1 - OBRA-MI-Child-SOC	X5 - Covered CA Cost Sharing Waiver 100-300%
50 - CMSP - Restricted	D2 - OBRA-LTC-Aged-No SOC	X6 - Covered CA AI/AN CSR Only No Income Test
53 - MI-LTC	D3 - OBRA-LTC-Aged-SOC	X7 - Covered CA Unsub Coverage or Ineligible for Subsidies Above 600%
54 - MC Four Month Continuing	D4 - OBRA-LTC-Blind-No SOC	X8 - Covered CA Lawful Present/MC Ineligible Under 100%
55 - OBRA-LTC	D5 - OBRA-LTC-Blind-SOC	X9 - Covered CA State Subsidy Eligible 400-600%
55 - OBRA-LTC-MI	D6 - OBRA-LTC-Disabled-No SOC	

CT 73: Status Reason Codes		
15% Criteria	Failed to make satisfactory progress in EDU Activity #2	No Child Care during Non-Traditional Hours
16/17 and in School Half Time	Failed to make satisfactory progress in EDU Activity #3	No Child Care Transportation Available
1st Instance	Failed to make satisfactory progress in GED Activity	No Dep Mut Child
1st instance sanction	Failed to make satisfactory progress in GED Activity #2	No Deprivation
2nd Instance	Failed to make satisfactory progress in GED Activity #3	No Elig. Child
2nd instance sanction	Failed to make satisfactory progress in GTEP Activity	No Eligible Mem
3 Countable ABAWD Months Used	Failed to make satisfactory progress in GTEP Activity #3	No Eligible Provider
3-Month time limit	Failed to make satisfactory progress in GYEP Activity	No Eviction Notice
3rd Instance	Failed to make satisfactory progress in GYEP Activity #2	No Intent to stay in County
3rd instance sanction	Failed to make satisfactory progress in GYEP Activity #3	No Legal Guardianship
48 Months Time Limit Reached	Failed to make satisfactory progress in LIT Activity	No Linkage - MPPP
60 years of age or older	Failed to make satisfactory progress in LIT Activity #2	No Linkage - No Property Verif
AAP Deferred Payments Accepted	Failed to make satisfactory progress in LIT Activity #3	No Linkage - Over Resources
AAP Denied	Failed to make satisfactory progress in MHS Activity	No Linkage - Property Waiver
AAP Discontinued	Failed to make satisfactory progress in MHS Activity #2	No Linkage SP-DDSD Denied
AAP Suspended	Failed to make satisfactory progress in MHS Activity #3	No Linkage to MC
ABP101 Form Not Received	Failed to make satisfactory progress in NCP Activity	No longer in Care
ABP898 Form Not Received	Failed to make satisfactory progress in NCP Activity #2	No longer preg or cust parent
ACA Requirement (CMSP)	Failed to make satisfactory progress in NCP Activity #3	No longer receiving aid
Accepted Diversion	Failed to make satisfactory progress in OST Activity	No NB Eligibility
Actively seeking employment	Failed to make satisfactory progress in OST Activity #2	No Need for Child Care
Acts beyond teen's control	Failed to make satisfactory progress in OST Activity #3	No Open Application

ADD Pers Refused Finger PRNT	Failed to make satisfactory progress in SIP Activity	No QR7 for Prior Month
Added to CW AU	Failed to make satisfactory progress in SIP Activity #2	No Reference CF EDBC
Adopted	Failed to make satisfactory progress in SIP Activity #3	No Remaining Benefits
Adult in home to provide care	Failed to make satisfactory progress in STEP Activity #2	No SAR7 for Prior Month
Age	Failed to make satisfactory progress in SYE Activity	No Show QC/QA
Age 18 Requirements	Failed to make satisfactory progress in SYE Activity #2	No Show/FTP # 2
Age 19, chose not to continue	Failed to make satisfactory progress in SYE Activity #3	No Show/FTP #1
Age 19, inelig. to part.	Failed to make satisfactory progress in WIA Activity	No Show/FTP #3
Age Requirement	Failed to make satisfactory progress in WIA Activity #2	No SOC 162 On File (NRLG Only)
Agency(s) staffing issues	Failed to make satisfactory progress in WIA Activity #3	No SSI/SSP
Aided Non-parent Relative caring for at risk child	Failed to make satisfactory progress in YTH Activity	No Stage 1 Available for Other Reasons
Already Got Exception	Failed to make satisfactory progress in YTH Activity #2	No Stage 1 Funding Available
Already received HA in another AU	Failed to make satisfactory progress in YTH Activity #3	No Stage 1 Provider for Children
Already received Once-in-a-Lifetime	Failed to meet work req.	No Trans-Pgm Barriers-Not Fund
Any subst. and compelling reason	Failed to provide progress report for DRC Activity	No transportation
Appear in court or incarcerated	Failed to provide progress report for DRC Activity #2	No Utility Shut-Off
Application denied	Failed to provide progress report for DRC Activity #3	No Valid CF Determination
Application Opened in Error	Failed to provide progress report for DVS Activity	No Valid Emergency
Applied for or Receiving Unemployment	Failed to provide progress report for DVS Activity #2	Non Co-Op Chld/Med Supp
Approved for CW	Failed to provide progress report for DVS Activity #3	Non Fed Caretaker
ARC child jurisdiction has been changed	Failed to provide progress report for EDU Activity	Non Government
ARC program not Available for County	Failed to provide progress report for EDU Activity #2	Non-Coop: AFIRMSFIS
Attained age 20	Failed to provide progress report for EDU Activity #3	Non-Parent Caretaker

Auto-test	Failed to provide progress report for GED Activity	Non-Parent Caring for Disabled HH Member
Back Rent and Rent Exceeds TMHI	Failed to provide progress report for GED Activity #2	Non-Payment of Premium
Back Rent Exceeds Assistance	Failed to provide progress report for GED Activity #3	Non-Payment of Premium - Low Income FPL
BDA After the Month	Failed to provide progress report for GTEP Activity	Not a Permanent Place
Biological Parent Right Reversed	Failed to provide progress report for GTEP Activity #2	Not accepting a job
Boarder	Failed to provide progress report for GTEP Activity #3	Not Affected by Disaster
Break in child care arrangements	Failed to provide progress report for GYEP Activity	Not Attending School
Break in transportation arrangements	Failed to provide progress report for GYEP Activity #2	Not Caring for Child
CA - Failed to keep Case Manager Appointment	Failed to provide progress report for GYEP Activity #3	Not Currently WPR
Calif. Residence	Failed to provide progress report for LIT Activity	Not Eligible for Cash Aid
CalWORKs	Failed to provide progress report for LIT Activity #2	Not Financially Elig.
CalWORKs and/or CalFresh Approved/Restored	Failed to provide progress report for LIT Activity #3	Not funded
CalWORKS Eligible	Failed to provide progress report for MHS Activity	Not Homeless
CalWORKs Family Reunification	Failed to provide progress report for MHS Activity #2	Not in Disaster Area
CalWORKs Restored	Failed to provide progress report for MHS Activity #3	Not in LA County
CalWORKs-FC	Failed to provide progress report for NCP Activity	Not Part of NB HH
CAPI Missed Interview (New Application/Recertification)	Failed to provide progress report for NCP Activity #2	Not part. in apprvd activity
CAPI RE Not Complete	Failed to provide progress report for NCP Activity #3	Not participating in activity
Care of 2 or More Children Under Age 6	Failed to provide progress report for OST Activity	Not providing proof of satisfactory progress in assigned activity
Care of a child 23 months or younger	Failed to provide progress report for OST Activity #2	Not Seeking Housing
Care of Child Age 12-23 Months	Failed to provide progress report for OST Activity #3	Not signing the WtW Plan
Care of Child Age 24-35 Months	Failed to provide progress report for SIP Activity	Off aid - other reason
Care of Child Under 12 Weeks (additional children)	Failed to provide progress report for SIP Activity #2	Off Aid - Receiving SSI

Care of Child Under 6/12 Months (1st child)	Failed to provide progress report for SIP Activity #3	Off aid due to employment
Care of Dependent Child Under 6	Failed to provide progress report for SYE Activity	Off Cash Aid
Care of First Child	Failed to provide progress report for SYE Activity #2	Offered and not accepted workfare
Care of Subsequent Child(ren)	Failed to provide progress report for SYE Activity #3	Offrd/Not accptd ed.& train.
Caregiver not a California Resident	Failed to provide progress report for WIA Activity	On Aid Another Case
Cares for HH Member Mentally/Physically Impaired	Failed to provide progress report for WIA Activity #2	One Month Diversion
Case Man. services unavail.	Failed to provide progress report for WIA Activity #3	One Month Immediate Need
CF IPV #1	Failed to provide progress report for YTH Activity	OP - Failed to keep Computer Application Class Activity
CF IPV #2	Failed to provide progress report for YTH Activity #2	OP - Failed to keep Office Occupations Activity
CF IPV #3	Failed to provide progress report for YTH Activity #3	OP - Failed to keep Security Officer Assessment
CF Job Quit #1	Failed to provide Proof of Sponsor Disability	OP - Failed to keep Security Officer Training
CF Job Quit #2	Failed to Provide U-Visa Status	Opt Out
CF Job Quit #3	Failed to ProvideT-Visa Status	Optional Child - Receives Child Support
CF Missed Interview (New Application/Recertification)	Failed to Reapply for SSI Reconsideration	Optional Spouse
CF Recert Expired	Failed to show to CAC Appointment	ORR Certified Trafficking Victim
CF Reduced Work #1	Failed to show to CAC Appointment #2	OS - Failed to keep One-Stop Activity
CF Reduced Work #2	Failed to show to CAC Appointment #3	OS - Failed to keep Workforce Investment Act Activity
CF Reduced Work #3	Failed to show to CLA Appointment	Other
CFET Non Part. # 1	Failed to show to CLA Appointment #2	Other CAPI Denial
CFET Non Part. # 2	Failed to show to CLA Appointment #3	Other CAPI Disc.
CFET Non Part. # 3	Failed to show to CORE Appointment	Other Federal
Change to Unemployable	Failed to show to CORE Appointment #2	Other parent participating 35 hours
Child	Failed to show to CORE Appointment #3	Other Program Assistance Data Sweep
Child Applicant Minor Consent	Failed to show to DRC Appointment	Other Property

Child Applicant Minor Consent Over 21	Failed to show to DRC Appointment #2	Other State/Local
Child Applied for Self	Failed to show to DRC Appointment #3	Other Substantial & Compelling Reasons
Child Attends State Preschool	Failed to show to EVA Appointment	Other Unearned
Child Care Request is Denied	Failed to show to EVA Appointment #2	Out of the Home
Child Eligible to Kin-GAP	Failed to show to EVA Appointment #3	Out of the Home - Incarcerated
Child exceeded age	Failed to show to GTEP Appointment	Out of the Home - Primary Applicant
Child not a California Resident	Failed to show to GTEP Appointment #2	Over $100 Limit
Child Not In Placement	Failed to show to GTEP Appointment #3	Over 130% FPL
Child of Foster Care Recipient	Failed to show to GYEP Appointment	Over Income
Child of FRI	Failed to show to GYEP Appointment #2	Over Income & CW Timed Out
Child of FTP Income	Failed to show to GYEP Appointment #3	Over Income-$0 Allotment
Child of FTP Property	Failed to show to ICM Appointment	Over IRT
Child of Kin-GAP Recipient	Failed to show to ICM Appointment #2	Over IRT & CW Timed Out
Child of Member	Failed to show to ICM Appointment #3	Over Program Age
Child Protective Services	Failed to show to JDM Appointment	Over Resources
Child Returned to FC	Failed to show to JDM Appointment #2	Overpayment Recoupment
Child Returns to Home of Removal	Failed to show to JDM Appointment #3	PA 1049 Form Not Received
Child Returns to Parent	Failed to show to JRT Appointment	PA1615 Form Not Received
Child under 16	Failed to show to JRT Appointment #2	PA2418A Form Not Received
Chose Expedited CW	Failed to show to JRT Appointment #3	PA2418B Form Not Received
Chronic Truant	Failed to show to JRY Appointment	PA2418C Form Not Received
CMSP Applicant Only	Failed to show to JRY Appointment #2	PA2492 Form Not Received
Conversion	Failed to show to JRY Appointment #3	Parent

Correct Status for Existing Application	Failed to show to LIT Appointment	Parent Caring for Disabled HH Mem
Cost More Than Limit	Failed to show to LIT Appointment #2	Parent Caring for Disabled HH Member
County opts out of ARC	Failed to show to LIT Appointment #3	Parent Not Absent
County Residence	Failed to show to MHS Appointment	Parent Not Deceased
Court Conviction for Employment 1st Offense	Failed to show to MHS Appointment #2	Parent Not Incap.
Court Conviction for Employment 2nd Offense	Failed to show to MHS Appointment #3	Parent of Married Minor
Court Conviction for Employment 3rd Offense	Failed to show to NCP Appointment	Parent resides in Foster Home
Court Conviction for Housing 1st Offense	Failed to show to NCP Appointment #2	Participating
Court Conviction for Housing 2nd Offense	Failed to show to NCP Appointment #3	Participating in a Program that Exceeds CFET Requirements
Court Conviction for Housing 3rd Offense	Failed to show to Orientation Appointment	Participating in ed. or training
Court Conviction for Income 1st Offense	Failed to show to Orientation Appointment #2	Participating in other activity
Court Conviction for Income 2nd Offense	Failed to show to Orientation Appointment #3	Passed Alt A Test
Court Conviction for Income 3rd Offense	Failed to show to OST Appointment	Passed Regular MPPP
Cure Sanction	Failed to show to OST Appointment #2	Passed SSI MPPP
Current IPV Disqualification 1	Failed to show to OST Appointment #3	Pending Appraisal
Current IPV Disqualification 2	Failed to show to PTS Appointment	Pending Foster Care Case
Current IPV Disqualification 3	Failed to show to PTS Appointment #2	Perm Placement language not est
Customer requested	Failed to show to PTS Appointment #3	Petition Not Filed
CW >$5K	Failed to show to SIP Appointment	Physically/Mentally Incapacitated
CW - No Elig Child	Failed to show to SIP Appointment #2	Post Emp/Job Retention
CW $2K to 5K	Failed to show to SIP Appointment #3	Post Employment
CW <$2K	Failed to show to SOA Appointment	Post Time Limit
CW Denial from outbound ICT	Failed to show to SOA Appointment #2	Post WTW 24 MTC CW Fed Requirements Not Met

CW Duplicate Aid	Failed to show to SOA Appointment #3	Post WTW 24 MTC Failed to Sign Subsequent Fed Plan
CW Duplicate Appl. #1	Failed to show to SOT Appointment	Post WTW 24 MTC Fed Standards Not Met - Participation
CW Duplicate Appl. #2	Failed to show to SOT Appointment #2	Post WTW 24 MTC Fed Standards Not Met - Progress
CW Duplicate Appl. #3	Failed to show to SOT Appointment #3	Postpartum recovery
CW Fraud >$10K	Failed to show to STT Appointment	Potential Non-MAGI Eligibility
CW Ineligible Due to Participant Not in the Home/SSI	Failed to show to STT Appointment #2	Potentially CAPI Eligible
CW IPV - #1	Failed to show to STT Appointment #3	Potentially RCA Eligible
CW IPV - #2	Failed to show to SYE Appointment	Pregnancy Unverified
CW IPV - #3	Failed to show to SYE Appointment #2	Pregnant and Doctor states unable to work
CW Non Part.	Failed to show to SYE Appointment #3	Probation/Parole Violator
CW Non Part. # 2	Failed to show to VOC Appointment	Program App Clean-up
CW Non Part. # 3	Failed to show to VOC Appointment #2	Property/Resource Exceed the Limit
CW RE Incomplete	Failed to show to VOC Appointment #3	Provider TrustLine Denied/Revoked/Closed
CW RE Not Received	Failed to show to WIA Appointment	Public Inst. entire cal. Mnth
CW Time Limit	Failed to show to WIA Appointment #2	QC Did not Cooperate (MC)
CW Timed Out	Failed to show to WIA Appointment #3	QC Failed to Keep 2 Appointments (CF)
Deceased	Failed to show to YTH Appointment	QC Failed to Keep 2 Appointments (CW)
Declined Elig	Failed to show to YTH Appointment #2	QC Failed to Keep Appointment (CF)
Declining WD	Failed to show to YTH Appointment #3	QC Failed to Keep Appointment (CW)
Deemed Child - Fam ReApp	Failed to sign post 24 MTC Fed plan	QC Failed to Respond in 30 Days (CF)
Deemed Eligible	Failed to verify LTC	QC Failed to Respond in 30 Days (CW)
Deprivation Not Established	Failed/Refused Assessment Appt	QC Failed to Return Signed Release (CF)
Did Not Apply for T-Visa	Failed/Refused Assessment Appt #2	QC Failed to Return Signed Release (CW)

Did Not Apply for U-Visa	Failed/Refused Assessment Appt #3	QC Failed to Sign Release (CF)
Did Not Meet ABAWD Work Rules after Regaining Elig	Failed/Refused Job Training	QC Failed to Sign Release (CW)
Did not Reapply after LTC	Failed/Refused Job Training #2	QC Refused to Cooperate (CF)
Did not Request Full Medi-Cal Hierarchy	Failed/Refused Job Training #3	QC Refused to Cooperate (CW)
Did Not Reside in U.S. for 30 days	Failed/Refused Urinalysis Appt	QR
Did not SFIS	Failed/Refused Urinalysis Appt #2	QR 7 Incomplete
Didn't Add Newborn	Failed/Refused Urinalysis Appt #3	QR 7 Not Received
Didn't Apply for SSI	Failed/Refused/Drop out Treatment Program	QR7 Form Not Received
Didn't Apply Medicare	Failed/Refused/Drop out Treatment Program #2	Quit Job
Didn't Apply OHC	Failed/Refused/Drop out Treatment Program #3	Quit Job #1
Didn't Complete/Qualify Health and Safety Certification	Failure to Enroll/Pay APTC Premiums	Quit Job #2 (CF)
Didn't Co-Op JS #1	Failure to Provide	Quit Job #2 (CW)
Didn't Co-Op JS #2	False Residence/ID	Quit Job #3
Didn't Co-Op JS #3	Family Reunification	Quitting a job
Didn't Coop w. MC Linkage	Family Stabilization	RCA Time Expired
Didn't Co-op with SP-DDSD	Father Not Unemployed	RCA Time Limit
Didn't Cooperate	Father of Unborn-PWO	Real Property
Didn't Go to Job # 1	FC Court Dependency Not Dismissed	Received Permanent Residency Card
Didn't Go to Job # 2	Federal Soc Sec Disability Ins (SSDI)	Recertification Withdrawal
Didn't Go to Job # 3	Finger Match found Recvg CW	Recertified to CalFresh
Didn't Meet CW Req	Fleeing Felon	Reduced Earnings
Didn't Meet WTW # 1	FO - Failed to keep Orientation	Reduced Earnings #2
Didn't Meet WTW # 2	Found on SFIS	Reduced Earnings #3
Didn't Meet WTW # 3	Four Month Continuing	Reduced Hours #1
Didn't Recert License	FT - Failed Pathways to Success	Reduced Hours #2
Didn't Register EDD	FT - Failed to keep Career Opportunities Resources & Employment	Reduced Hours #3
Didn't Register EDD #2	FT - Failed to keep Life Skill Activity	Reduced Work Effort
Didn't Register EDD #3	FT - Failed to keep Pathway To Success Activity	Reducing their earnings
Didn't Request Retro	FTP ABAWD Work #1	Referral to sanction

Didn't Sign MC 13	FTP ABAWD Work #2	Refuse to Comply Sponsorship
Didn't Sign SOF	FTP Age Verification	Refused Assign Supp Rights
Didn't Sign WTW	FTP California Residency	Refused DIB
Didn't Sign WTW # 2	FTP County Residence	Refused Inc-Collect Debt
Didn't Sign WTW # 3	FTP County Residence (Negative Action)	Refused Inc-Life Ins
Difficult pregnancy	FTP Eligibility Forms	Refused Job
Disaster CF Missed Interview	FTP Eligibility Forms (CMSP)	Refused Job # 3
Disrupted Adoption	FTP Graduate by 19	Refused Job #2
Diversion	FTP HIC #	Refused job offer/Voluntarily quit job
DM - Failed to keep Domestic Violence Services	FTP Immunization	Refused job offer/Voluntarily quit job
Does Not Live in County (CMSP)	FTP Immunizations	Refused Job Offer/Voluntray Quit job no show
Does Not Meet Minor Consent Requirements	FTP Immunizations Close Program	Refused Job Offer/Voluntray Quit job no show #2
Does Not Meet POEM Determination	FTP Income	Refused Job Offer/Voluntray Quit job no show #3
Does not meet the criteria for GR benefits	FTP Income for NOA	Refused Military Ben
Doesn't Meet Program Req.	FTP INS Document	Refused Retirement
Domestic violence	FTP Multiple Vehicles	Refused SDI
Drug Felon (CW & CF)	FTP Name/Identity	Refused Survivor Benefits
Drug Felon (CW only)	FTP One Vehicle	Refused UIB
Drug/Alcohol program Participant	FTP Other Health Care	Refused VA
Due to employment	FTP Pregnancy	Refused Wkr Cmp
Duplicate Application	FTP Proof Burial Property	Refusing to be fingerprinted
Duplicate Filing #1	FTP Proof Child Support Income	Registered in Error
Duplicate Filing #2	FTP Proof Citizenship	Regular EDBC
Duplicate Filing #3	FTP Proof Dependent Care Expense	Relative declined FC (Youakim)
Earned HS diploma or equivalent	FTP Proof Earned Income	Relative elects SSI/SSP
Earnings - Child	FTP Proof Liquid Property	Relative receiving SSI/SSP
Earnings - Father	FTP Proof Lotto/Gambling Income	Remained on Transitional CalFresh
Earnings - Mother	FTP Proof Marital Status	Rent Amount Exceeds TMHI Limit
Earnings - Other Person	FTP Proof Medical Care Expense	Rent Arrearages exceeds TMHI Limit
Earnings - Stepparent	FTP Proof Medical Condition	REP Non Compliance
EBT Form not received	FTP Proof of Costs	REP Non Compliance #2

EBT Whereabouts Unknown	FTP Proof Personal Property	REP Non Compliance #3
EDBC Changes Not Affecting Eligibility	FTP Proof Real Property	Req Pers Didn't Request Disc
EDBC Income Changes Not Affecting Eligibility	FTP Proof Relationship	Requested Disc. - Verbal
EDBC Property Changes Not Affecting Eligibility	FTP Proof Shelter Expense	Requested Disc. - Written
Edwards v. Kizer (38) - Determined Ineligible for Medi-Cal Only	FTP Proof Student Income	Requested Disc. - Written inc. MC
Edwards v. Kizer (38) - Failure to Cooperate, Medi-Cal Only	FTP Proof Third Party Liability	Requested Disc. (CMSP) - Add Person
Elected MAGI	FTP Proof Unearned Income	Requested Disc. (CMSP) - Reapply with Budget Change
Elected Non-MAGI	FTP Proof Utility Expense	Requested Disc. (CMSP) - Verbal
Eligible to MAGI	FTP Proof Vehicle Property	Requested Exclusion
Eligible to MC	FTP Property	Required Forms Not Received
Eligible to TCF	FTP Property for NOA	Requisite Court Language
End of 3 Consecutive ABAWD Months	FTP QC/QA	Residence Address is CMRA
End of Cert Period	FTP Required Info	Resident for less than 15 days
End of Disaster Period	FTP School Verif	Resident of Waiver County
End of Edwards MC	FTP Sponsor Dependents	Resides in a Federally Approved Geographically Excluded Area
End of HA Episode	FTP Sponsor Income	Resides Out of State/County
End of Temp Shelter	FTP Sponsor Property	Responsible Adult
Ended and/or CalWORKs Case term.	FTP Sponsor SOF	Return to Residence
Enrolled	FTP Third Party Liability	RFTHI Form Not Received
Enrolled - Cured Sanction	FTP Vendor Information	RP - Failed to keep Rapid Employment & Promotion
Enrolled/Waiting	FTP Verification	Sanction Cured
Erroneously referred to Cal-Learn	FTP Verification (CMSP)	Sanction Denied
Essential Person did not apply for GR	FTP-Married Filing Jointly Spouse Information	Sanctioned Individual
Exceeded income	Funding related problems	SAPID; Working Toward High School Diploma
Excess Earned Income	GA Employment Hours over 100	SAR
Excess Inkind Income	GA Time Limit	SAR 22 Form Not Received
Excess Liquid Property	General Assistance Program not Available for County	SAR 7 Incomplete
Excess Unearned Income	Gets AAP	SAR 7 Not Received
Excl Child - MC Linkage	Gets APTC	SB 1569 Recipient Test Fail

Excluded CW Indv with a child < 18 yrs	Gets ARC	Second Parent
Excluded Person	Gets CalWORKs	Seeking permanent housing
Excluded Sanction CW Indv	Gets CalWORKs	Senior Parent
Excluded Time Limited CW Indv	Gets CAPI	Separate CF HH
Exempt	Gets CF Inside HH	Separate P&P
Exempted from the Program	Gets CF Outside HH	Severe Family Crisis
Exhausted Expanded Temp-HA	Gets Duplicate Aid	SFIS Match Fraud 1st Instance
Expelled	Gets FC	SFIS Match Fraud 2nd Instance
Extreme weather, acts of nature	Gets Food Distribution	SFIS Match Fraud 3rd Instance
Fail for POI	Gets IHSS	Shelter Not Valid
Fail for PVS	Gets Kin-GAP	Sold CF for $$
Fail to Comply with NHR	Gets RCA	Sold CF for Drugs #1
Failed Job Search	Gets SSI	Sold CF for Drugs #2
Failed MAGI	Gets SSI/SSP	Sold CF for Weapons
Failed OPS Appointment	Gets Tribal TANF	SP - Failed to keep Self-Initiated Program
Failed OPS Appointment #2	Gets Waiver	Special needs
Failed OPS Appointment #3	GR IPV #1	Special needs child care not avail
Failed Property	GR IPV #2	Sponsor and family resources over limit
Failed to Apply for SSI	GR IPV #3	Sponsor Meeting Needs
Failed to Apply/Accept Rail Road Retirement Income	GROW Non Cooperation #2	Sponsor Met AU's Needs
Failed to attend CMA Appointment	GROW Non Cooperation #3	Sponsor Met Mem's Needs
Failed to attend CMA Appointment #2	Guardianship Ended	Sponsor Status
Failed to attend CMA Appointment #3	Guardianship Not Established	Spouse
Failed to attend JFR	Has $100 in LR	Spouse of Excl Stppnt
Failed to attend JFR #2	Has Dependency	Spouse of FRI
Failed to attend JFR #3	Has No Exception	Spouse of FTP Income
Failed to attend the DVS Appointment	Has No Housing Costs	Spouse of FTP Property
Failed to attend the DVS Appointment #2	Have more than one vehicle	Spouse of Married Minor
Failed to attend the DVS Appointment #3	HH Not Receiving CF	SSA
Failed to complete CLA Activity	Home/facility not Eligible	SSA/SSI Denied within 12 Months
Failed to complete CLA Activity #2	Homeless Participant	SSDI

Failed to complete CLA Activity #3	Household Emergency	SSI
Failed to complete CORE Activity	Illness	SSN Enumeration
Failed to complete CORE Activity #2	Illness of Another Household Member Requiring Their Presence	SSP14 Form Not Received
Failed to complete CORE Activity #3	In appeal	SSS Participant Refusing Services due to Exemption
Failed to Complete Determination	In conciliation	ST - Failed to keep Short-Term Training Activity
Failed to complete DRC Activity	In Conciliation	Stage 2 funding issues
Failed to complete DRC Activity #2	In process of curing sanction	Stepparent
Failed to complete DRC Activity #3	Incapacitated	Stop Aid for Optional Member
Failed to complete DVS Activity	Incarcerated	Striker
Failed to complete DVS Activity #2	Incarcerated Juvenile (MediCal)	Student Half Time or More
Failed to complete DVS Activity #3	Incomplete application	Substance abuse
Failed to complete EDU Activity	Incomplete MAGI Application	Support from Absent Parent
Failed to complete EDU Activity #2	Incomplete re-certification	Support from Other Person
Failed to complete EDU Activity #3	Independent CAPI Living Arrangement	Support from Spouse of Parent
Failed to Complete ES Requirements	Indv Left TFS Household	Support serv temp unavail
Failed to complete EVA Activity	Inelig due to CW determination	Support serv unavailable
Failed to complete EVA Activity #2	Inelig for FPL Pgm	TA - Failed to keep Education Training
Failed to complete EVA Activity #3	Ineligible CF Student	TA - Failed to keep GED Activity
Failed to complete GED Activity	Ineligible Non Citizen	TA - Failed to keep Literacy
Failed to complete GED Activity #2	Institutionalized	TCF Received
Failed to complete GED Activity #3	Insufficient Information For Linkage	Teen experiencing a family crisis
Failed to complete GTEP Activity	Inter-County Transfer	Teen meets Cal-Learn exemption
Failed to complete GTEP Activity #2	Invalid TCF Applicant	Teen Parent Transfer
Failed to complete GTEP Activity #3	Involved in Legal Difficulties	Teen refuses major medical serv.
Failed to complete GYEP Activity	IPV Court Decision Sanction 1	Temporarily ill or incapacitated

Failed to complete GYEP Activity #2	IPV Court Decision Sanction 2	Temporarily Laid Off - Expected to Return Within 60 Days
Failed to complete GYEP Activity #3	IPV Court Decision Sanction 3	Temporary Illness or Disability
Failed to complete ICM Activity	IPV Disqualify Agreed Sanction 1	Terminated due to 0-day sanction
Failed to complete ICM Activity #2	IPV Disqualify Agreed Sanction 2	Terminated due to 30-day sanction
Failed to complete ICM Activity #3	IPV Disqualify Agreed Sanction 3	Terminated due to 60-day sanction
Failed to complete JDM Activity	IPV Disqualify Hearing Waiver 1	Terminated due to other GR reasons
Failed to complete JDM Activity #2	IPV Disqualify Hearing Waiver 2	Terminated due to time limit
Failed to complete JDM Activity #3	IPV Disqualify Hearing Waiver 3	Time Limit Reached
Failed to complete JRT Activity	IPV STATE Hearing Sanction 1	Timed out of Stage 2
Failed to complete JRT Activity #2	IPV STATE Hearing Sanction 2	TMC
Failed to complete JRT Activity #3	IPV STATE Hearing Sanction 3	TMC Report Incomplete
Failed to complete JRY Activity	IPV-Drug	TMC Report Not Recvd
Failed to complete JRY Activity #2	Irregular School Attend.	TNB Recert Expired
Failed to complete JRY Activity #3	JC - Failed to keep Job Readiness Training	Transferred
Failed to complete LIT Activity	JC - Failed to keep Job Readiness Training for Youth	Transferred Income
Failed to complete LIT Activity #2	JD - Failed to keep Job Development Activity	Transferred Property
Failed to complete LIT Activity #3	JS - Failed to keep Intensive Case Management Activity	Transferred to Non-FC Program
Failed to complete MHS Activity	Jurisdiction Terminated (Not Youakim Elig.)	Transferred to Stage 2
Failed to complete MHS Activity #2	Jurisdiction Transfer	Transferred to Stage 3
Failed to complete MHS Activity #3	Lack of Dependent Care	Travel Time Exceeds two hours round trip or two miles walking
Failed to complete NCP Activity	Lack of English Proficiency	Tribal TANF
Failed to complete NCP Activity #2	Lack of supportive services	Turned Down a Job #1
Failed to complete NCP Activity #3	Lack of Transportation	Turned Down a Job #2
Failed to complete OPS Activity	Late Periodic Report SAR 72	Turned Down a Job #3
Failed to complete OPS Activity #2	Late Periodic Report SAR 73	T-Visa Denied

Failed to complete OPS Activity #3	Legal Difficulties	UIB
Failed to complete Orientation Activity	Legal Guardian	UIB Requirement not met
Failed to complete Orientation Activity #2	Less Grant Income	Unaided Sibling
Failed to complete Orientation Activity #3	Lic. or exempt child care not avail	Unallow. Wthdrwl
Failed to complete OST Activity	Linkage to Medi-Cal	Under 18 years old or over 50 years old
Failed to complete OST Activity #2	Liq Res Over Cost of Transp	Undoc Alien
Failed to complete OST Activity #3	Liq Res Plus Inc Meets Eviction Need	Unrelated Person
Failed to complete PTS Activity	Lived w/ Leg.Guard. < 12 Mo.	Unrelated Prim Appl
Failed to complete PTS Activity #2	Lived w/ Leg.Guard. < 6 Mo.	Unrequested Medi-Cal
Failed to complete PTS Activity #3	Lives an Unreasonable Distance from the Program Site	Unrequested Retro Medi-Cal
Failed to Complete Redetermination	Living in a federally determined work surplus area	Unverif: Budget MTH ERN Inc
Failed to Complete SAWS2	Living in a household with a child under 18 years old	Unverif: Restricted Acct. Withd
Failed to complete SIP Activity	MAGI Determination Pending	Unverified T-Visa
Failed to complete SIP Activity #2	Mandatory	Unverified U-Visa
Failed to complete SIP Activity #3	Mandatory/Optional Rules	US Citizen
Failed to complete SIT Activity	Married Minor	USCIS Approved T Visa
Failed to complete SIT Activity #2	MC 176 S Incomplete	USCIS Approved U Visa
Failed to complete SIT Activity #3	MC 176 S Not Received	U-Visa Denied
Failed to complete SOA Activity	MC 194 Form Not Received	VA - Failed to keep Vocational Assessment Appointment
Failed to complete SOA Activity #2	MC Verbal Withdrawal (CMSP snippet)	Veh CNTBL Value Exceeded Limit
Failed to complete SOA Activity #3	Medical Reason	Verbal Withdrawal
Failed to complete SOT Activity	MEDs Respon. Rel	Verified illness < 30 days
Failed to complete SOT Activity #2	Meets age requirements	Veteran's Benefits
Failed to complete SOT Activity #3	Mental health	VISTA volunteer

Failed to complete SYE Activity	Mental health/Physical Disabilities	Vital Statistics citizenship verified Data Sweep for restricted benefits
Failed to complete SYE Activity #2	MFG Child	Vital Statistics Unverified
Failed to complete SYE Activity #3	MH - Failed to keep Clinical Assessment	Voluntary (19 years old)
Failed to complete the CAC Activity	MH - Failed to keep Mental Health Services	Voluntary Placement Expired
Failed to complete the CAC Activity #2	Mid-Period Addition	Waiting for Approval
Failed to complete the CAC Activity #3	Minor Cannot Apply for GR	Waiting for CalWORKs
Failed to complete VOC Activity	Minor Consent	Weekly Earnings = Fed Minimum Wage x 30hrs
Failed to complete VOC Activity #2	Minor Parent	Welfare to Work / Alternative Employment Program
Failed to complete VOC Activity #3	Minor Parent Linkage Only	Whereabouts Unknown
Failed to complete WIA Activity	Minor Pnt Liv Arrng	Withdrawal - Written
Failed to complete WIA Activity #2	Minor Pnt Payee Agrmnt	Withdrew (plan to adopt)
Failed to complete WIA Activity #3	Missed EBT Out of ST/CNTY appt	Worker Initiated-Skip CalHEERS
Failed to complete YTH Activity	Mother Not Unemployed	Working
Failed to complete YTH Activity #2	Moved out of county	Working 30 hrs or more weekly
Failed to complete YTH Activity #3	Moved Out of County (CMSP)	Working and Refuses to Verify Employment
Failed to Comply with IFDS	MPPP Declined Eligible	Works Pending and/or Failed Residency Requirements
Failed to Comply with SSI	NC - Failed to keep Non-Custodial Parent Activity	WPR
Failed to enroll in EDU Appointment	Need Met by CF	WR - Failed to keep Day Reporting Center Activity
Failed to enroll in EDU Appointment #2	Need Met by Community Resource	WR - Failed to keep Employment Needs Evaluation Activity
Failed to enroll in EDU Appointment #3	Need Met by HA	WR - Failed to keep Job Fair Activity
Failed to enroll in GED Appointment	Need Met by MC	Written Withdrawal
Failed to enroll in GED Appointment #2	New Application	Written Withdrawal inc. MC
Failed to enroll in GED Appointment #3	NMD Does Not Meet Five Requirements	WT - Failed Family Reunification

Failed to File SSI Hearing	NMD Moved out of Calif.	WT - Failed Job/Training Offered
Failed to keep SSIAP appointment	NMD Non-coop w/6-month Review	YT - Failed to keep CSBG Activity
Failed to make satisfactory progress in DRC Activity	NMD Not Juvenile Court supervised	YT - Failed to keep CSE Activity
Failed to make satisfactory progress in DRC Activity #2	NMD Not living w/Relative	YT - Failed to keep GROW Transition-Age Youth Employment Program (GTEP)
Failed to make satisfactory progress in DRC Activity #3	No Activity	YT - Failed to keep GROW Youth Employment Program (GYEP)
Failed to make satisfactory progress in DVS Activity	No Apparent CW Elig.	YT - Failed to keep Summer Youth Employment Activity
Failed to make satisfactory progress in DVS Activity #2	No Appl - Req Person	YT - Failed to keep Youth Activity
Failed to make satisfactory progress in DVS Activity #3	No CF	
Failed to make satisfactory progress in EDU Activity	No Child Care Available	

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
3/3/2021	0.3	Renamed all fields to be camelCase.	Avi Bandaranayake
3/3/2021	0.3	Added section for headers	Avi Bandaranayake

Table of Contents

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.
7. Offset and limits will apply only if paginated results are available.
8. Offset beyond the max available will return a 404 error.
9. Offset and limits will only apply to the root element
10. Sorting and ordering only applies to the root element.
11. Null or empty values will not be returned in the response objects.
12. Requests sent with improper data types will result in 400 error with a stack trace.

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:


```
[
  {
    "taskId": 0,
    "caseNum": "string",
    "workerNum": "string",
    "bankNumIdentif": "string",
    "pgm": "string",
    "taskCatCode": "string",
    "taskTypeName": "string",
    "taskSubType": "string",
    "statCode": "string",
    "createDate": "2021-03-04",
    "assignDate": "2021-03-04",
    "dueDate": "2021-03-04",
    "closeDate": "2021-03-04",
    "longDescr": "string",
    "langCode": "string"
  }
]
```


2.1.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

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:


```
[
  {
    "taskTypeId": "string",
    "taskCatCode": "string",
    "taskTypeName": "string",
    "taskInstruction": "string",
    "priority": "string",
    "expirationType": "string",
    "expirationDays": "string",
    "availAutoInd": "string",
    "availOnlineInd": "string",
    "newAssignIndDays": 0,
    "subType": [
      {
        "subTypeId": "string",
        "taskSubType": "string",
        "subTypePriority": "string",
        "subTypeExpType": "string",
```

```
        "subTypeExpDays": "string"
      }
    ]
  }
]
```

2.2.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

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 parameter)

```
{
  "workerNum": "string",
  "bankNumIdentif": "string",
  "statCode": "string",
  "taskCatCode": "string",
  "taskTypeName": "string",
  "taskSubType": "string",
  "dueDate": "2021-03-04",
  "longDescr": "string"
}
```

2.3.4 Response

The Update Task operation will return the following data elements:


```
{
  "taskId": 0,
  "caseNum": "string",
  "workerNum": "string",
  "bankNumIdentif": "string",
  "pgm": "string",
  "taskCatCode": "string",
  "taskTypeName": "string",
  "taskSubType": "string",
  "statCode": "string",
  "createDate": "2021-03-04",
  "assignDate": "2021-03-04",
  "dueDate": "2021-03-04",
  "closeDate": "2021-03-04",
  "longDescr": "string",
  "langCode": "string"
}
```


2.3.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

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.


```
{
  "caseNum": "string",
  "workerNum": "string",
  "bankNumIdentif": "string",
  "pgm": "string",
  "taskCatCode": "string",
  "taskTypeName": "string",
  "taskSubType": "string",
  "dueDate": "2021-03-04",
  "longDescr": "string",
  "langCode": "string"
}
```


2.4.4 Response

The Create Task operation will return the following data elements:


```
{
  "taskId": 0,
  "caseNum": "string",
  "workerNum": "string",
  "bankNumIdentif": "string",
  "pgm": "string",
  "taskCatCode": "string",
  "taskTypeName": "string",
  "taskSubType": "string",
  "statCode": "string",
  "createDate": "2021-03-04",
  "assignDate": "2021-03-04",
  "dueDate": "2021-03-04",
  "closeDate": "2021-03-04",
  "longDescr": "string",
  "langCode": "string"
}
```


2.4.5 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

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
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

CT 10350: Task Category Code
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
Armenian
Assyrian
Bengali
Bosnian
Cambodian
Cantonese (Chinese)
Croatian
Egyptian
English
Farsi
French
German
Greek
Hebrew
Hindi
Hmong
Ilocano
Indonesian

CT 145: Language Code
Italian
Japanese
Korean
Lao
Mandarin (Chinese)
Mien
Other Chinese Language
Other Non-English
Other Sign Language
Persian
Polish
Portuguese
Punjabi
Romanian
Russian
Samoan
Serbian
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

CT 18: Programs (modified)
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-214760 | DDID 2357

FDS: API – Worker Schedule

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sridhar Mullapudi
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/06/2020	1.0	Initial Draft	Sridhar Mullapudi
3/3/2021	1.1	Updated field names to be camel case.	Avi Bandaranayake
3/3/2021	1.1	Added header details	Avi Bandaranayake

Table of Contents

1 OVERVIEW

1.1 Current Design

This is a new API made available to provide the worker schedule data from the CalSAWS system. An API to expose worker schedules does not exist in the CalSAWS system.

1.2 Requests

Create a service that can retrieve, update, and create worker schedules.

1.3 Overview of Recommendations

1. Create a new endpoint to retrieve, update, and create worker schedules.

1.4 Assumptions

1. Results returned will be paginated to 20 values by default.
2. Limit parameter will allow a maximum of 250 values returned by default.
3. Results are limited to county level data.
4. The domain objects primary database Id will be used for sorting by default unless specified otherwise.
5. Code Table values in the appendix are subject to change.
6. Requests and Responses will use Code Table values as described in the appendix.
7. Offset and limits will apply only if paginated results are available.
8. Offset beyond the max available will return a 404 error.
9. Offset and limits will only apply to the root element.
10. Sorting and ordering only applies to the root element.
11. Null or empty values will not be returned in the response objects.
12. Requests sent with improper data types will result in 400 error with a stack trace.

2 RECOMMENDATIONS

2.1 Worker Schedule API

2.1.1 Overview

This API will expose the worker schedule data from the CalSAWS system.

2.1.2 Description of Changes

1. The Worker Schedule API will include the following data elements and error handling. Please refer to the **workerschedule.html** document for the technical specifications and data element definitions.
2. Additional examples and specific error messages may be added during build for the developer portal.

2.1.3 Request

The worker schedule API can be used to get worker schedule for a given time period in CalSAWS.

1. workerNum
2. startDate
3. endDate
4. orderBy

2.1.4 Request Body

The worker schedule API can be used to create or update worker schedule for a given time period in CalSAWS. The request must contain the following fields:


```
{
  "workerNum": 0,
  "begDate": "2021-03-04",
  "begTime": "string",
  "endTime": "string",
  "availTypeCode": "string"
}
```


2.1.5 Response

The Worker Schedule API will return the following data elements:


```
    "workerSchedule": [
      {
        "workerNum": "string",
```

```
    "id": 0,
    "begDate": "2021-03-04",
    "begTime": "string",
    "availTypeCode": "string",
    "apptTypeCode": "string"
  }
]
```

2.1.6 Headers

The following headers are required and included in all operations by the application gateway and do not need to be included in the request.

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county.

X-App-Id: This header is added to all requests by the application gateway. This is a unique App-id that is created for each county application during the onboarding process. This Id should be referenced against a mapping table with staff Ids (one App-Id per staff id) that will in turn be used for database audit fields (created_by, updated_by) when an application creates or updates data in the CalSAWS system.

2.1.7 Error Message

The Worker Schedule API will return error messages in the following Scenarios:

1. Bad request. body/parameter {parameter name} is invalid. {Reason}
2. Bad request. start_date and end_date should be within 7 days.
3. Bad request. start_time and end_time values should be in 15 min increments.
4. Authorization information is missing or invalid.
5. Worker schedule with the specified {param name(s)} was not found.
6. Request Timeout.
7. Internal Server Error.

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2357	The CONTRACTOR shall create a service for the 58 Counties that returns, updates and creates a worker schedule utilizing a CalSAWS API. When a worker number, begin date and end date is provided, the service will return the worker schedule between the specified begin and end date including the availability and scheduled appointments over fifteen-minute increments. The begin and end date filters will be limited to seven days. Worker schedules can be updated or created utilizing the API and including all required information as specified by the CalSAWS.	The API complexity accounts for including the ability to read, write, and update worker schedules. It also includes the ability to search for worker schedules utilizing a variety of parameters.	Create worker schedule 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 219: Appointment Type/ appt_type_code
Single
Multiple

CT 290: Availability Category Code/ avail_type_code
Available
Available for IN/ES
Unavailable
Available for Appraisal
Available for NC
MSUDRP
Vacation Days
Desk Time
Leave
Lunch
Telecommuting Days

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219543 | CIV-108152

Test Effort for the CalFresh SSA COLA

(Deferred to 03/2022)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Barillas Michael
	Reviewed By	Dana Peterson, Amy Gill, Balakumar Murthy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/14/2020	1.0	Initial Design	Michael Barillas
3/11/2021	2.0	Revisions based on change being deferred to 03/2022. This SCR is repurposed for Test efforts.	Amy Gill
3/12/2021	3.0	Updated Case ID field length	Amy Gill
3/16/2021	4.0	Updated Inbound Case ID length based on feedback from DHCS	Amy Gill
4/23/2021	5.0	Content Revision to include Verification record in DCR	Amy Gill

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1 OVERVIEW

Supplemental Security Income (SSI) and State Supplementary Payment (SSP) income, recorded on the Other Program Assistance (OPA) page, is not automatically updated when the SSA COLA changes are applied to the Systems.

AB 1811 reversed the CalFresh (CF) eligibility policy known as “cash-out,” under which SSI/SSP recipients were ineligible for CF. SSI/SSP income is now countable as Unearned Income in the CF budget determination.

This SCR will provide a proof of concept for testing with MEDS to update the OPA records of types ‘SSI/SSP’ and ‘SSI Only’ with the SSI and/or SSP income information received from the MEDS.

1.1 Current Design

SSI/SSP assistance is not automatically updated when the Social Security Administration (SSA) Cost of Living Adjustments (COLA) changes are applied to the Systems.

1.2 Requests

This SCR is to test a proof of concept with MEDS to prepare for the CalFresh SSA COLA which has been deferred to March 2022.

The Systems will generate and send a file to MEDS containing CalFresh persons receiving SSI or SSI/SSP Income. After sending the file, MEDS will provide a one-time response file that includes elements in the initial outbound file, as well as additional SSI and/or SSP payment amounts. CalSAWS will process the inbound file and update OPA records with the new SSI or SSI/SSP amounts. CalSAWS will generate an exceptions list containing records that could not be processed.

1.3 Overview of Recommendations

For testing purposes only:

1. Create a one-time outbound file for CalFresh persons receiving SSI or SSI/SSP Income and send to MEDS.
2. Process a one-time Inbound MEDS SSI/SSP COLA Response File containing the data in the CalSAWS outbound file as well as additional SSI and/or SSP Payment Amounts.
3. Create an exceptions list for all unprocessed records in the Inbound MEDS SSI/SSP COLA Response File.

Note: The file will not be implemented in Production at this time. This effort is only to test the proof of concept and validate the data exchanged with MEDS. Production effort is deferred until March 2022.

1.4 Assumptions

1. There is no 2021 COLA for State Supplementary Payment (SSP) amounts. Persons with OPA records of ‘SSP Only’ (CalSAWS only) will not be included in the file exchange with MEDS and data update.
2. Batch EDBC run will be implemented with CA-222221 for CF programs with a person for whom the data change was processed from Section 2.2.

2 RECOMMENDATIONS

2.1 Create a new MEDS Outbound SSI/SSP COLA Request File

2.1.1 Overview

For testing purposes, create a one-time outbound file to send to MEDS containing CalFresh persons receiving SSI or SSI/SSP Income.

2.1.2 Description of Change

1. Create a new MEDS SSI/SSP Data table to store the data provided to MEDS.
2. Create a database script to populate a one-time outbound file to MEDS for all CalFresh Persons receiving SSI or SSI/SSP Income. This one-time file will include the following population:
    a. Active CalFresh persons who are active as of May 1, 2021
    b. Have an open (high-dated) OPA record of type SSI Only or SSI/SSP.
3. The Outbound File will be a pipe-delimited flat text file. The File will have a Header with the following format:
    a. **[CONSORTIUM]_Annual SSI COLA_YYYY_MMDDYY**
        i. **[CONSORTIUM] (CalSAWS/CIV/CalWIN)**
        ii. **YYYY (Calendar Year)**
        iii. **MMDDYY (File Process Date)**
4. The File Body Contents will have the following format and order:

Outbound Data Elements	Description	Field Length and Formatting
Case ID	This column can be used by each SAWS to identify the person or case within the SAWS System. C-IV and CalSAWS will use this element to pass in the Person Unique ID.	10 – Pad with trailing spaces to meet fixed length of 10
County Code	County Code of the County of Responsibility	2
Last Name	Beneficiary's Last Name	Variable

Outbound Data Elements	Description	Field Length and Formatting
First Name	Beneficiary's First Name	Variable
Middle Initial	Beneficiary's Middle Initial	Variable
Social Security Number (SSN)	Beneficiary's SSN	9
CIN	Beneficiary's CIN	9
DOB	Beneficiary's DOB	8(MMDDYYYY)

5. The File will have a Trailer section in the following format:
    a. **SSI Annual COLA_[Record Count]**
        i. **[Record Count] - The number of records in the file's body section.**

2.1.3 Estimated Number of Records Impacted/Performance

Approximately 340,000 records across all 40 Counties:

CalSAWS: ~ 210,000 records

C-IV: ~ 130,000 records

2.2 Process the new Inbound MEDS SSI/SSP COLA Response File (Test Only)

2.2.1 Overview

After receiving the initial Request file from the SAWS outlined in section 2.1, MEDS will provide the SAWS with a one-time Response file that includes the elements outlined in the Request file, as well as additional SSI and/or SSP Payment Amounts.

For testing purposes, process the inbound file, update OPA records for SSI Only or SSI/SSP Amount and create a journal entry for cases in which the OPA records were automated.

2.2.2 Description of Change

1. Retrieve and process the Inbound File. The file will be a pipe-delimited flat text file. Store the data received in the new MEDS SSI/SSP Data table for subsequent processing
    a. The File will have a Header with the following format:
        i. **<CONSORTIUM>_ANNUAL_SSI_COLA_<YEAR>_<FILEDATE>_DHCS RESPONSE**
        ii. **<CONSORTIUM> (CalSAWS or C-IV)**

iii. **<YEAR> - 2021**

iv. **<FILEDATE> - Date of File Creation**

b. The File Body Contents will have the following Format:

Inbound Data Elements	Description	Field Length and Formatting
Case ID	This column can be used by each SAWS to identify the person or case within the SAWS System. C-IV and CalSAWS will use this element to pass in the Person Unique ID.	Up to 10 – DHCS will remove trailing spaces
County Code	County Code of the County of Responsibility	2
Last Name	Beneficiary's Last Name	Variable
First Name	Beneficiary's First Name	Variable
Middle Initial	Beneficiary's Middle Initial	Variable
SSN	Beneficiary's SSN	9
CIN	Beneficiary's CIN	9
DOB	Beneficiary's DOB	8(MMDDYYYY)
MEDS SSI Paid Amt	This data element identifies the cumulative Federal SSI payment(s) actually paid to the recipient under Title XVI.	7 XXXX.XX
MEDS SSP Paid Amt	This data element identifies the cumulative State supplementation payment(s) actually paid to the recipient in the current SDX month.	7 XXXX.XX

c. The File will have a Trailer section in the following format:

i. Annual SSI Cola_<record count>

1. <record count> - The number of records in the file's body section.

2. Create a DCR to process records within the inbound file and update the OPA records for persons who are Active on a CF program as of May 1, 2021 and have a high-dated OPA record.
    a. Requirements to Process Record
        i. MEDS Record Types must match the nature of the systems record type. Example: If the existing record in the System is SSI Only, the MEDS SSI Paid Amt must not be blank and the MEDS SSP Paid Amt must be blank or 0.
        ii. If the SSI and/or SSP amounts from MEDS match the amounts currently captured in CalSAWS, do not update the existing high dated OPA record and do not add to the exceptions list.
        Note: Only CF programs with a person for whom the data change is processed will be included in the Batch EDBC run.
        iii. For any records that do not fall under the categories above, the record will be added to the 'MEDS SSI/SSP COLA Exception List' (Section 4.1).
    b. DCR Requirements **(Test only)**
        i. End-Date the existing OPA Record with an end-date of 4/30/2021.
        ii. Copy the data elements from the previous OPA record, making the following updates:
            1. Set the Begin Date to 5/1/2021
            2. Set the End Date to "High Date" (the record will be open-ended).
            3. If the existing OPA record is of type: "SSI Only":
                a. Set the 'Amount or Value of Services' (DOLLAR_AMT) to the MEDS SSI Paid Amt. A value of 0 is acceptable for 'MEDS SSI Paid Amt'.
            4. If the existing OPA record is of type: "SSI/SSP":
                a. Set the SSI Payment to the MEDS SSI Paid Amt.
                b. Set the SSP Payment to the MEDS SSP Paid Amt.
                c. Set the 'DEEM_INC_AMT' with the total sum of 'SSI_PMT' and 'SSP_PMT'.
            5. Create a Verification record associated to the OPA record.
                a. Set the Verification Status to 'Verified'
                b. Set the Verification Request Date, Due Date, and Received Date to system date.

    Note: The data change will not be implemented in Production at this time. This effort is only to test the proof of concept and validate the data exchanged with MEDS. Production effort is deferred until March 2022.

3. Create a DCR **(Test Only)** to add a new Journal Entry for cases in which the data change was processed for at least one person. The person is Active as of May 1, 2021 on a CalFresh program on the case. The Journal will have the following details. One journal entry per case will be made:
    a. Long Description: Other Program Assistance entries for <Person Names> have been automatically updated via Batch to reflect data received from MEDS for the 2021 CalFresh SSI/SSP COLA on <Process Date>.
    b. Short Description: SSA COLA Other Program Assistance Record Update
    c. Type Code: Interfaces
    d. Filter Code: Interfaces
4. Conduct a test exchange file with MEDS.

2.2.3 Estimated Number of Records Impacted/Performance

Approximately 340,000 records across all 40 Counties:

CalSAWS: ~ 210,000 records

C-IV: ~ 130,000 records

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.4	The LRS shall match LRS Data from external interfaces to an applicant s or participant s case record and update the LRS database when appropriate.	This SCR is updating SSI only and SSI/SSP amount values in accordance to the values returned by MEDS.

4 OUTREACH (TEST ONLY)

4.1 Lists

This list includes records received via the MEDS SSI/SSP COLA file that could not be processed.

List Name: MEDS SSI/SSP COLA Exception List
List Criteria: This list includes records received via the MEDS SSI/SSP COLA file in which the SSI/SSP information does not match the between MEDS and the System. For example, the person has an 'SSI Only' OPA record in the System but the return file included an SSP Paid Amount. Also includes records that could not be automatically updated due to some other reason, such as the System has more than one ongoing type of OPA record, and the System is unable to determine which OPA record to update.
Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker
- Benefit Month

Additional Column(s):

- CIN
- Last Name
- First Name
- Middle Initial
- MEDS SSI Paid Amount
- MEDS SSP Paid Amount

Frequency: One-time

The list will not be posted to the web portal as this effort if for testing only.

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-220977 – Rekey Nuance Voice Biometrics Speaker ID, and Migrate Predictive Handling Batch Job

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester
	Reviewed By	Pramod Ramesh, Dheeraj Muralidara, and Henry Lee

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/22/2021	0.1	Initial version	Jared Kuester
03/30/2021	0.2	Content Revision updates	Nithya Chereddy
04/19/2021	0.3	Content Revision 2 updates	Nithya Chereddy

Contents

1 OVERVIEW

The C-IV County Amazon Connect contact centers voice biometrics system's Speaker ID currently matches the C-IV PERS_ID. The Speaker ID needs to be updated to match the rekeyed PERS_ID in CalSAWS.

To regularly update the accuracy of the Predictive Handling a batch job updates a table with percentage weights of predictions. This batch job needs to be migrated to CalSAWS.

1.1 Current Design

The Nuance Speaker_ID matches the PERS_ID in C-IV.

The C-IV IVR Predictive Handling batch job does not exist in CalSAWS.

CSF 105 is the 'Appointment Letter'. This form was migrated to CalSAWS with the SCR CA-214990.

1.2 Requests

Rekey the Speaker_ID to match the PERS_IDs in CalSAWS.

Migrate the C-IV IVR Predictive Handling batch job to CalSAWS.

Add the functionality to generate CSF 105 form though IVR.

1.3 Overview of Recommendations

1. Rekey the Speaker ID in Nuance to match the rekeyed PERS_ID in CalSAWS
2. Migrate the IVR Predictive Handling batch job to CalSAWS.
3. Implement the Business logic to generate the CSF 105 form though IVR.

1.4 Assumptions

1. Nuance Voice Biometrics only applies to the 39 C-IV Counties.
2. Predictive Handling is only used by San Bernardino county.
3. CSF 105 can be generated through IVR only for San Bernardino county.
4. CSF 105 form will not be posted to the Self-Service Portal with this SCR.
5. The IVR functionality that is currently migrated with this SCR will only be available to C-IV migration counties. Los Angeles County and the CalWIN Migration Counties will inherit this functionality when they transition to the new CalSAWS IVR solution.
6. If a new appointment is not requested through IVR, the CSF 105 form will not generate.
7. CSF 105 form is only visible for C-IV migration counties through Template Repository.

8. If there are multiple programs on a case and the programs have different workers, then the logic (migrated through this SCR) will pick a random worker from the list of active workers associated to programs where the participant is the primary applicant. This is the functionality in C-IV currently.
9. CSF 105 form will not have appointment details if generated from the Template Repository.

2 RECOMMENDATIONS

2.1 Rekey the Speaker ID

2.1.1 Overview

The Nuance Voice Biometrics system identifies a caller with the Speaker ID column internally in their system. The Speaker ID matches the PERS_ID in C-IV. With he migration of C-IV to CalSAWS, the PERS_ID will be rekeyed. The Nuance Speaker ID must be rekeyed to match the new IDs.

2.1.2 Description of Change.

1. Rekey the Nuance Speaker ID to match the PERS_ID column in CalSAWS.
    a. This will match the rekey being done as part of the C-IV Converstion effort.

2.2 IVR Predictive Handling Batch Job

2.2.1 Overview

The IVR Predictive Handling Batch job updates the prediction weights used to make the most accurate predition as possible. The prediction is made each time a customer with a phone number associated to an active case calls into the San Bernardino county IVR.

2.2.2 Description of Change

1. Migrate the C-IV IVR Predictive Handling batch job PB36M500 to CalSAWS.
    a. Updates are made to the following tables.

    i. AGGRUSR.PRDTVE_HANDL_DATA
    ii. AGGRUSR.PRDTVE_HANDL_WEIGHT
b. Update PERS_ID in PRDTVE_HANDL_DATA to have rekeyed values.
c. Install R on batch server to enable running R scripts.
d. Make any needed changes to Predictive Handling scripts for updating Predictive Handling weights for a more accurate prediction.

2.2.3 Execution Frequency

Monthly

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

San Bernardino County

2.2.6 Data Volume/Performance

< 3 minutes to run in C-IV batch

2.2.7 Interface Partner

Amazon Connect

2.2.8 Failure Procedure/Operational Instructions

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

2.3 Generate CSF 105 form when requested though IVR

2.3.1 Overview

The functionality of generating the CSF 105 form though IVR for San Bernardino county does not exist in the CalSAWS.

2.3.2 Description of Change

1. Add business logic to generate CSF 105 form when requested through IVR. Business logic will perform the following actions if the person requesting the form has a valid Mailing Address and a newly created Appointment.
    a. Generate the form in person's written language. CSF 105 form will generate in English if the CSF 105 form is not available in the person's written language.
    b. Generate the CSF 105 form with Printed Centrally option.
2. Create the 'Generated Document Failed: Review' task for the worker if the CSF 105 form could not be generated through IVR.
   Note: The task will be created to the worker based on the below mentioned program hierarchy. i.e., a task will be created for the CW program worker if there is a CW program on the case, if the CW program does not exist, the logic will look for the MC program to find the worker associated to the MC program and so on. Program hierarchy is listed below.
    a. CalWORKS
    b. Medi-Cal
    c. CalFresh
    d. Welfare-to-Work
    e. Other programs
3. Request Parameters:

CalSAWS Field Name	Type	Comments	Required
personId	Long	Person's unique ID	Y
newAppointmentID	Long	Appointment unique ID	Y
formType	String	CSF 105	Y

APPENDIX

Amazon Connect - https://aws.amazon.com/connect/features/

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-222989

ID fields in the CalSAWS Application need to be updated to support larger values.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Philip McGinty
	Reviewed By	Online Build and Test

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/13/2021	1.0	Initial Draft	Philip McGinty
02/04/2021	2.0	Updated Section 1.0 based on BA feedback	Philip McGinty
3/25/2021	2.1	Design Clarification for the 'Select Staff' page location and current design descriptions for specific pages	Philip McGinty
4/19/2021	3.0	Updated Section 2.1.3 to remove the "Job Order Id" field on the "Job Order Search Detailed Results" page from this design doc	Philip McGinty

Table of Contents

1 OVERVIEW

ID fields in the CalSAWS Application need to be updated to allow for a search with larger values.

1.1 Current Design

ID fields in the CalSAWS system vary in length allowed on the page, when being searched. Currently, there is a concern over ID numbers being converted that will be a larger value than can be supported currently. This can be solved by increasing the value of IDs that can be searched for specific fields.

1.2 Requests

Update the searchable ID fields in CalSAWS that do not support a search of 10 digits, to allow for a search of up to 10 digits.

1.3 Overview of Recommendations

1. Update the applicable ID fields to support a search of up to 10 digits
2. Update the length of the Staff ID fields to be able to display 10 digits

1.4 Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.

2 RECOMMENDATIONS

2.1 Increase Various Fields to Support a Value Length of 10

2.1.1 Overview

ID fields in the CalSAWS system vary in length allowed on the page, when being searched. The fields used for IDs will be updated to allow for a search of up to 10 digits.

2.1.2 Mockup - N/A

2.1.3 Description of Changes

1. Update the validation logic for the following fields on their respective pages to allow for a search of up to 10 digits:

Page	Field
Distributed Documents Search	Resource ID
Foster Care Resource Search	Resource ID
Job Order Search	Job Order ID
~~Job Order Search Detailed Results~~	~~Job Order ID~~
Journal Search	Resource ID
Money Management Resource Search	ID
Resource Databank Reassignment	Resource ID
Recovery Account Search	Recovery Account Number
Resource Request Search	Request ID
Resource Search	ID
Select Resource	ID
Select Service and Provider	Resource ID
Tax Intercept Account Search	Recovery Account Number
Treasurer and Tax Collector Account Search	Recovery Account Number

2. Note: The 'Select Resource' and the 'Select Service and Provider' pages have dynamic titles.

2.1.4 Page Location

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

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 Staff Search Page and Select Staff Page

2.2.1 Overview

Currently the Staff ID fields on the Staff Search and Select Staff page only display 9 digits. This change will update the fields to be able to display 10 digits.

2.2.2 Staff Search and Select Staff Mockup

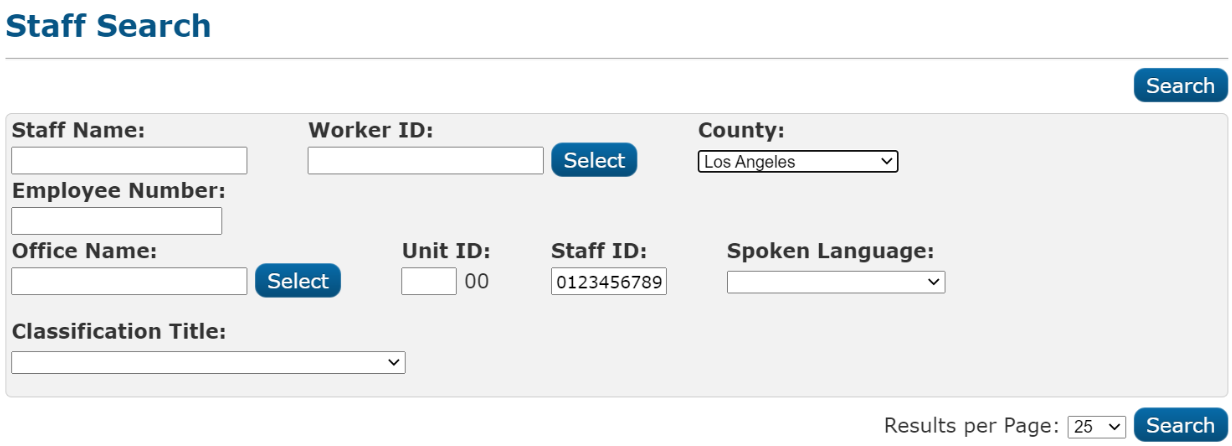

Figure 2.2.2.1 – Staff Search page

2.2.3 Description of Changes

1. Update the following fields on their respected page, to display a length of 10 digits:

Page	Field
Staff Search	Staff ID
Select Staff	Staff ID

- Note: The mockup applies to the Select Staff page as well.

2.2.4 Page Location

1. Staff Search page

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

2. Select Staff page

- **Global:** Reports
- **Local:** Subscriptions
- **Task:** Subscriptions → Add Subscriptions

~~No specific location available.~~

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

[Document what requirements are being addressed with this design and how they are being met]

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.4.17	The LRS shall maintain online case LRS Data consistent with COUNTY, State, and federal case record retention requirements.	Searchable ID fields will be updated to support case records.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226000

DDID 34 – Task Management

Legacy Task Category

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/10/2021	1.0	Initial Revision	Mayuri Srinivas
4/20/2021	1.1	Content Revision #1 • Removed "Worklist PR RE" page from the list that consists of "Legacy" Task Category dropdown menu in section 2.1.2.1	Rakan Ali

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1 OVERVIEW

This design describes modifications to the CalSAWS System to introduce a new Task Category to support Legacy Task Types.

1.1 Current Design

The C-IV and CalSAWS Systems both support customizable Task Types via the Task Type Detail page. SCR CA-214928 introduced customizable Task Types to the CalSAWS System per DDID 34 in November of 2020.

Task Types within the CalSAWS System are required to be associated to a Task Category. The Task Type Detail page in the C-IV System does not include a Task Category attribute.

1.2 Requests

Introduce a new Task Category that will be associated to converted Task Types. This attribute is necessary to support Task assignment and distribution functionality in the CalSAWS System.

1.3 Overview of Recommendations

1. Add a Legacy Task Category to the CalSAWS System to support converted Task Types.

1.4 Assumptions

1. C-IV System converted Task Types will all be associated to the "Legacy" Task Category.
2. C-IV System converted Positions will by default have the "Legacy" Task Category selected in the Tasks panel of the Position Detail page.
3. Task functionalities that are reliant on evaluations of the Task Category attribute do not require logic modifications to function appropriately with the addition of a new Legacy Task Category.

2 RECOMMENDATIONS

2.1 Legacy Task Category

2.1.1 Overview

Each Task Type within the CalSAWS System is required to be associated to a Task Category. There is no such attribute in the C-IV System. A new Task Category is required to support converted Task Types. This section outlines the recommendations to introduce a new Task Category to support converted Task Types and Positions.

2.1.2 Description of Changes

1. Add a "Legacy" Task Category to the CalSAWS System. This Task Category will be available for use for all CalSAWS Counties.
   Technical: The code value for this Task Category must be "LC".

   a. The "Legacy" Task Category will appear in Task Category dropdown menus on the following online pages per current requirements and ordering of each field:
      i. Pop Up - Task Search
      ii. Pop Up – Task Detail
      iii. Task Type List
      iv. Task Type Detail
      v. Task Reassignment Detail
      vi. Worklist
      vii. Worklist – Task Detail

   For additional details of the above pages, reference design documentation in the following enhancements:

   - CA-214928: DDID 34
   - CA-221629: DDID 34 Continued
   - CA-214929: DDID 655

   b. The "Legacy" Task Type Category value will function as follows on the Task Type Detail page:

Page Mode	"Legacy" Task Category Behavior
View	The Category attribute of the Task Type will display; "Legacy" if the Category of the Task Type is "Legacy".

Page Mode	"Legacy" Task Category Behavior
Edit	If the Task Type Category value is not "Legacy" when Edit mode is initiated, "Legacy" will not be a selectable option in the Category dropdown menu. If the Task Type Category value is "Legacy" when Edit mode is initiated, "Legacy" will remain a selectable option in the Category dropdown menu until the "Save and Return" button is clicked. If the Category value is changed to a value other than "Legacy" and the page is saved, via the Save and Return button, subsequent edits to the Task Type will not include "Legacy" in the Category dropdown menu.
Create	The Category drop down menu will not include the "Legacy" value. Newly created Task Types cannot be associated to a "Legacy" Task Category.

Note: Additional online pages other than the Task Type Detail page that display the Task Category attribute do NOT require logic modifications to display the new "Legacy" Task Category value.

2.2 Bank Detail Page

2.2.1 Overview

The Bank Detail page allows users to view, create and manage Banks within the CalSAWS System. The Bank Detail page contains a "Task Categories" section allowing a Bank to be configured to receive one or more Task Categories via the Office Distribution processing.

2.2.2 Bank Detail Page Mockup

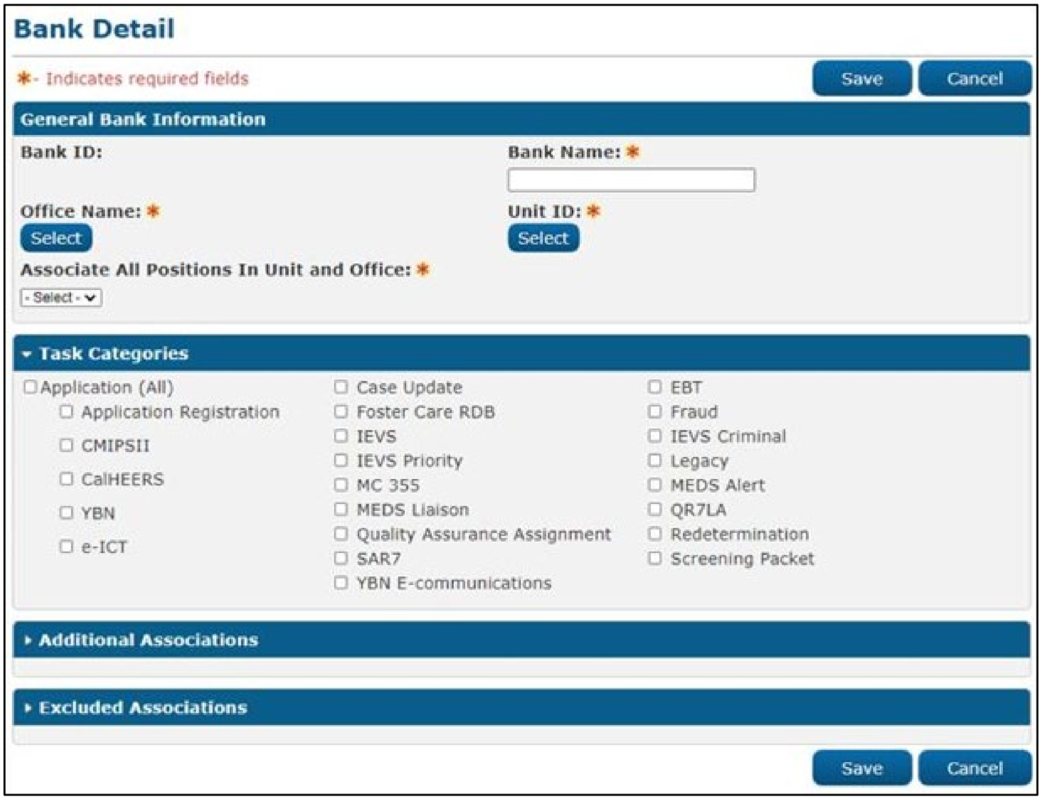

Figure 2.2.2.1 – Bank Detail Page Mockup

2.2.3 Description of Changes

1. Add the "Legacy" Task Category as a selectable option in the Task Categories Panel of the Bank Detail page. Underlying logic of the page will not be modified.

2.2.4 Page Location

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

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 Position Detail Page

2.3.1 Overview

The Position Detail page allows configuration of various attributes related to a Position. The Tasks panel allows a Position to be configured for receipt of one or more Categories of Tasks.

2.3.2 Position Detail – Tasks Panel Mockup

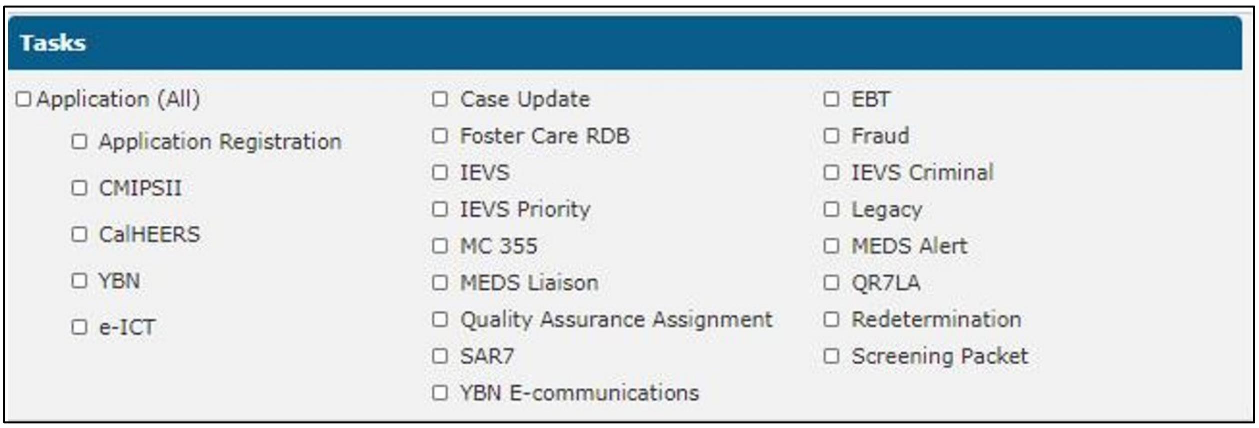

Figure 2.3.2.1 – Position Detail – Tasks Panel Mockup

2.3.3 Description of Changes

1. Add the "Legacy" Task Category as a selectable option in the Task Categories Panel of the Position Detail page. Underlying logic of the page will not be modified.

2.3.4 Page Location

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

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
34	The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows: 1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base 2) Create a common task management data model 3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution) 4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County 5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing methodologies 6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker 7) Update the LRS Task	- CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV. - CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks. - OBIEE Task Dashboard will be migrated over to new tool prior to Task Management implementation.	This design introduces a recommendation that will support converted Task Types so as to not impact task functionality currently available to C-IV System users.

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

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A