

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-48348

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

CalSAWS	DOCUMENT APPROVAL HISTORY	
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# 1 OVERVIEW

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

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

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

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

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

## 1.1 Current Design

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

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

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

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

## 1.2 Requests

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

## 1.3 Overview of Recommendations

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

## 1.4 Assumptions

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

## 2 RECOMMENDATIONS

---

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

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

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

### 2.1 Staff Assignment Detail

#### 2.1.1 Overview

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

## 2.1.2 Staff Assignment Detail Mockup

The screenshot shows a web form titled "Staff Assignment Detail". At the top right, there are two buttons: "Save and Return" and "Cancel". Below the buttons, a red error message is displayed: "• **End Date** - The End Date cannot be set due to current program assignments for this worker." Below the message is a grey box containing the following information:

- Worker Identification:**  
19LS90900R - Sec 00 - Eligibility Worker
- Staff Name:**  
Dan Tester
- Begin Date:**  
09/23/2019
- End Date:**  
[Empty text input field] [Calendar icon]

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

**Figure 2.1.1 – Staff Assignment Detail**

## 2.1.3 Description of Changes

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

## 2.1.4 Page Location

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

## 2.1.5 Security Updates

N/A

## 2.1.6 Page Mapping

N/A

### 2.1.7 Page Usage/Data Volume Impacts

N/A

## 2.2 Case Summary

### 2.2.1 Overview

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

## 2.2.2 Case Summary Mockup

### Case Summary

Case Name <a href="#">Case Name</a>	County Los Angeles	7
--	-----------------------	---

▼ Companion Cases

Case Number	Case Name
<a href="#">Add</a>	

Display:  [View](#)

► Case Flags

► Child Care

▼ CalWORKs

Worker:	No Staff Assigned	Primary Applicant/Recipient:	TEST, JOSEPHINA 35F
Worker ID:	<a href="#">19DP344W16</a>	Language:	English
Program Status:	Active	Phone Number:	(507)946-2663
RE Due Month:	01/2021 <a href="#">Re-Evaluate</a>	Email:	johndoe@calsaws.org
Reporting Type:	Semi-Annual Reporting	Payee:	TEST, JOSEPHINA 35F
SAR Due Month:	07/2020	Application Date:	01/29/2020
Aid Code:	30 - CW-All Other Families (Fed)		
Public Assistance Indicator:			
FBU:	1		

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

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

▼ CalFresh

Worker:	John Carry	Primary Applicant/Recipient:	TEST, JOSEPHINA 35F
Worker ID:	<a href="#">19DP344W13</a>	Language:	English
Program Status:	Discontinued	Phone Number:	(507)946-2663
Discontinued Date:	10/01/2020	Email:	johndoe@calsaws.org
RE Due Month:	11/2020	Payee:	TEST, JOSEPHINA 35F
Aid Code:	0F - TCF	Application Date:	01/29/2020
Meets ESAP Criteria:			
Public Assistance Indicator:	No		
FBU:	1		

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

[View Details](#)

Figure 2.2.1 – Case Summary

## 2.2.3 Description of Changes

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

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

#### 2.2.4 Page Location

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

#### 2.2.5 Security Updates

N/A

#### 2.2.6 Page Mapping

N/A

#### 2.2.7 Page Usage/Data Volume Impacts

N/A

### 2.3 Eligibility Workload Inventory

#### 2.3.1 Overview

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

## 2.3.2 Eligibility Workload Mockup

### Eligibility Workload Inventory

\*- Indicates required fields

<b>Worker ID:</b> 19DP344W16 <input type="button" value="Select"/>	<b>Assignment Type:</b> <input type="text" value="Primary"/>	<b>Display Workload: *</b> <input type="text" value="11/04/2020"/>
<b>Status Effective Date: *</b> <input type="text" value="11/04/2020"/>	<b>Status:</b> <input type="text" value="All"/>	

Results per Page:

#### Search Results Summary

Results 1 - 100 of 1327

1 2 3 4 5 6 7 8 9 10 Next

#### Total Assignments

Cases	576
Programs	1327

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

Figure 2.3.1 – Eligibility Workload Inventory

## 2.3.3 Description of Changes

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

1. Only Programs with 'Discontinued' status will display under the Search Result Summary section.
- v. Ineligible
  1. Only Programs with 'Ineligible' status will display under the Search Result Summary section.
- vi. Pending
  1. Only Programs with 'Pending' status will display under the Search Result Summary section.
2. Update the placement of the 'Status Effective Date:' field to be located underneath the 'Worker ID:' ID field as shown on Figure 2.3.1.

#### 2.3.4 Page Location

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

#### 2.3.5 Security Updates

N/A

#### 2.3.6 Page Mapping

N/A

#### 2.3.7 Page Usage/Data Volume Impacts

N/A

### 2.4 Employment Services Workload Inventory

#### 2.4.1 Overview

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

## 2.4.2 Employment Services Workload Inventory Mockup

### Employment Services Workload Inventory

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

Total Assignments	
Cases	0
Program	0

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

Figure 2.4.1 – Employment Services Workload Inventory

## 2.4.3 Description of Changes

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

- vi. Discontinued
    1. This option will display Programs that have 'Discontinued' status on the 'Status' column under the 'Search Result Summary' section.
  - vii. Exempt
    1. This option will display Programs that have 'Exempt' status on the 'Status' column under the 'Search Result Summary' section.
  - viii. Good Cause
    1. This option will display Programs that have 'Good Cause' status on the 'Status' column under the 'Search Result Summary' section.
  - ix. Non-Comp
    1. This option will display Programs that have 'Non-Comp' status on the 'Status' column under the 'Search Result Summary' section.
  - x. Pending
    1. This option will only display Programs that have 'Pending' status on the 'Program Status' column under the Search Result Summary section.
  - xi. Sanction
    1. This option will display Programs that have 'Sanction' status on the 'Status' column under the 'Search Result Summary' section.
2. Relabel the 'Go' button to 'View'.

#### 2.4.4 Page Location

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

#### 2.4.5 Security Updates

N/A

#### 2.4.6 Page Mapping

N/A

#### 2.4.7 Page Usage/Data Volume Impacts

N/A

## 2.5 Child Care Workload Inventory

### 2.5.1 Overview

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

### 2.5.2 Child Care Workload Mockup

**Child Care Workload Inventory**

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

**Total Assignments**

Cases	0
Programs	0

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

This Type\_1 page took 0.32 seconds to load.

Figure 2.5.1 – Child Care Workload Inventory

### 2.5.3 Description of Changes

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

1. Only Programs with 'Denied' status will display under the Search Result Summary section.
- iv. Discontinued
  1. Only Programs with 'Discontinued' status will display under the Search Result Summary section.
- v. Pending
  1. Only Programs with 'Pending' status will display under the Search Result Summary section.
2. Relabel the 'GO' button to 'View'.

#### 2.5.4 Page Location

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

#### 2.5.5 Security Updates

N/A

#### 2.5.6 Page Mapping

N/A

#### 2.5.7 Page Usage/Data Volume Impacts

N/A

## 2.6 Position Search

### 2.6.1 Overview

The Position Search page allows users to perform a search of office position profiles within the system. This SCR will update the logic used on Caseload Count that is being displayed to disregard programs that are in denied, discontinued or deregistered status.

## 2.6.2 Position Search Screenshot

### Position Search

► Refine Your Search

Search Results Summary							Results 1 - 1 of 1
Worker ID	Worker Level	Office Name	Section ID	Unit ID	Status	Caseload Count	
<a href="#">19DP344W16</a>	Eligibility Worker	034 Lancaster	5Q	4W00	Active	495	

This [Type 1](#) page took 0.38 seconds to load.

Figure 2.6.1 – Position Search Screenshot – Reference only.

## 2.6.3 Description of Changes

1. Update the logic used on the 'Caseload count' field to disregard cases where the program assigned to the position is in denied, discontinued or deregistered status.

## 2.6.4 Page Location

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

## 2.6.5 Security Updates

N/A

## 2.6.6 Page Mapping

Update Page Mapping for the Caseload Count field

## 2.6.7 Page Usage/Data Volume Impacts

N/A

## 2.7 Position Detail

### 2.7.1 Overview

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

### 2.7.2 Position Detail Screenshot

The screenshot displays the 'Position Detail' page. At the top, there is a title 'Position Detail' and three buttons: 'Edit', 'Copy', and 'Close'. Below the title, a legend indicates that an asterisk (\*) denotes required fields. The main content area is titled 'General Position Information' and contains the following data:

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

**Figure 2.7.1 – Position Detail Screenshot – Reference only.**

### 2.7.3 Description of Changes

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

#### 2.7.4 Page Location

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

#### 2.7.5 Security Updates

N/A

#### 2.7.6 Page Mapping

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

#### 2.7.7 Page Usage/Data Volume Impacts

N/A

### 2.8 Workload Reassignment Detail

#### 2.8.1 Overview

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

## 2.8.2 Workload Reassignment Detail Screen Shot

### Workload Reassignment Detail

\*- Indicates required fields Reassign

Unconfirmed Assignments: [0](#)

**From:**

- Worker ID: Select
- Case Number:  Select
- From Any Eligible Position Office: CalSAWS Project Office Select

**Reassign Quantity:**

- Number of Cases:
- Entire Workload

Program: \* - Select - Language: \* Any

Case Flag: - Select - Status: - Select -

**To:**

- Worker ID: Select
- Unit Office: Select Unit: -
- Auto Assign to Eligible Positions Office:  CalSAWS Project Office Select Remove
- Auto Assign to Eligible Position in County

**Effective Date:**

- Effective Date:
- Immediate Assignment

**Reassignment Option**

Automatically Reassign When Activated: \* - Select -

Print New Worker Letter

Reassign

This [Type\\_1](#) page took 2.09 seconds to load.

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

### 2.8.3 Description of Changes

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

### 2.8.4 Page Location

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

### 2.8.5 Security Updates

N/A

### 2.8.6 Page Mapping

N/A

### 2.8.7 Page Usage/Data Volume Impacts

N/A

## 2.9 Batch Regression Test

### 2.9.1 Overview

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

**Section 2.8.3** describes the logic update to disregard cases where the program assigned to the position is in Denied, Discontinued or Deregistered status when determining current case load.

### 2.9.2 Description of Changes

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

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

### 2.9.3 Execution Frequency

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

### 2.9.4 Key Scheduling Dependencies

No Change.

### 2.9.5 Counties Impacted

All Counties.

### 2.9.6 Data Volume/Performance

No change.

### 2.9.7 Failure Procedure/Operational Instructions

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

## 2.10 Update the Life Cycle Reassignment Batch Job

### 2.10.1 Overview

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

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

**Table 2.10.1 – Current End Worker Assignment Logic**

System	Program	Program Status	Program Status Reason	End Worker Assignment on...
<b>C-IV</b>	All programs	Discontinued, Denied, Deregistered	All Program Status Reasons excluding 'Exempt'	Same day of program status effective date
<b>CalSAWS</b>	WTW, REP, GROW, and Cal-Learn	Discontinued, Denied, Deregistered	All Program Status Reasons	Same day of program status effective date
<b>CalSAWS</b>	All Programs excluding the following Medi-Cal, WTW, REP, GROW, and Cal-Learn	Discontinued, Deregistered	All Program Status Reasons excluding 'Exempt'	1 <sup>st</sup> day of the following month after the Discontinued/Deregistered effective begin date
<b>CalSAWS</b>	All Programs excluding the following WTW, REP, GROW, and Cal-Learn	Denied	All Program Status Reasons excluding 'Exempt'	31 <sup>st</sup> day after the Denial action date
<b>CalSAWS</b>	Medi-Cal	Discontinued	All Program Status Reasons excluding 'Exempt'	90 <sup>th</sup> day after the Discontinued effective begin date
<b>CalSAWS</b>	WTW/REP	Sanctioned	All Program Status Reasons	Same day of program status effective date

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

*Note 2: The batch process does not end worker assignment dates retroactively. For example, if the program is closed retroactively, the worker assignment end date is the next date in which the batch job runs to end the worker assignment. Example: WTW is set to Deregistered, effective May 1, 2021. The action to Deregister the WTW program was taken by the worker on May 14<sup>th</sup>, 2021. The Batch Job will detect the WTW status has been closed, and set the worker assignment end date to May 14<sup>th</sup>, 2021.*

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

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

## 2.10.2 Description of Change

1. Update the end worker assignment driving query to derive the appropriate worker assignment end date based on the new configuration table described in section 2.10.2.2. The lookup functionality will derive the worker assignment end date for all programs that have a "Closed" status (Denied, Discontinued, Deregistered, and Sanctioned) as of the Batch Date where the closed program is still assigned to a Worker. If the derived worker assignment end date is on or prior to the Batch Date, set the worker assignment end date to the current Batch Date. If the derived worker assignment end date is in the future, take no action.  
Los Angeles County and C-IV counties will continue to use current functionality when removing a worker assignment. The current rules are displayed below.

**Table 2.10.2.1 – End Worker Assignment Logic Reference**

Migration County	Program	Program Status	Program Status Reason	Rules
57 Migration Counties	All	Discontinued, Denied, Deregistered	All Program Status Reasons excluding 'Exempt'	Immediately end-date worker assignment based on the begin date (effective date) of the program status. See example #5 below.
Los Angeles	WTW, REP, GROW, and Cal-Learn	Discontinued, Denied, Deregistered	All Program Status Reasons	Immediately end-date worker assignment based on the begin date (effective date) of the program status.

Migration County	Program	Program Status	Program Status Reason	Rules
Alpine, Butte, Calaveras, Colusa, El Dorado, Fresno, Humboldt, Los Angeles, Marin, Mendocino, Merced, Nevada, San Joaquin, Orange, Placer, San Diego, Solano, Sonoma, Stanislaus, Tuolumne <b>Note:</b> The list of counties above are the counties who opted into the functionality per DDID 85.	WTW, REP	Sanctioned	All Program Status Reasons	Immediately end-date worker assignment based on the begin date (effective date) of the program status. See example #3 below.
Los Angeles	All Programs excluding the following Medi-Cal, WTW, REP, GROW, and Cal-Learn	Discontinued, Deregistered	All Program Status Reasons excluding 'Exempt'	End-date worker assignment after 1 full calendar month of the Program status begin date (effective date). Note: If a program is closed effective in the middle of the month, then the worker will remain assigned for the remainder of the current month throughout the following month. The worker assignment will be end-dated when the job runs for the first time after the following month. See example #4 below.
Los Angeles	All Programs excluding the following WTW, REP, GROW, and Cal-Learn	Denied	All Program Status Reasons excluding 'Exempt'	End-date worker assignment 31 days after the Denial creation/action date. See example #2 below.

Migration County	Program	Program Status	Program Status Reason	Rules
Los Angeles	Medi-Cal	Discontinued	All Program Status Reasons excluding 'Exempt'	End-date worker assignment 90 days after the Discontinuance Begin date. See <i>example #1</i> below.

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

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

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

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

Example 5: Keith from County 24 is assigned to a CalFresh program that was Denied on June 1<sup>st</sup>, 2021. Batch will remove the worker assignment the same day as the status begin date. The worker assignment end date will be June 1<sup>st</sup>, 2021.

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

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

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

### 2.10.3 Execution Frequency

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

### 2.10.4 Key Scheduling Dependencies

No Change.

### 2.10.5 Counties Impacted

All Counties.

### 2.10.6 Data Volume/Performance

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

### 2.10.7 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...)

## 2.11 Eligibility Workload Inventory Export

### 2.11.1 Overview

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

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

### 2.11.2 Eligibility Workload Inventory Export Sample

Case Number	Primary Applicant	Program	Status	Application Date	Authorization Date	RE Due Date	Incomplete DERs	Carry Forward Status (CFS)

**Figure 2.11.1 – Eligibility Workload Inventory Export Sample**

### 2.11.3 Description of Change

1. Update report logic to accept new status parameter selection. As defined in **Section 2.3.3**, the selection will be one of the below options:
  - b. All
  - c. Active
  - d. Denied
  - e. Discontinued
  - f. Ineligible
  - g. Pending

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

#### 2.11.4 Report Location

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

#### 2.11.5 Counties Impacted

The update will be available to all counties.

### 2.12 Automated Regression Test

#### 2.12.1 Overview

Implement automated regression test coverage of the new Program Status search criteria on the three Workload Inventory pages.

#### 2.12.2 Description of Change

Create/update test scripts to perform searches and verify at least one applicable result on each of the following pages by Program Status:

1. Eligibility Workload Inventory
2. Employment Services Workload Inventory
3. Child Care Workload Inventory

## 3 SUPPORTING DOCUMENTS

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

## 4 REQUIREMENTS

### 4.1 Project Requirements

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

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

**CA-201756**

**NOMI Interview Due Date to be 30 days from  
application date**

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Imran Bashir
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/23/20	1.0	Initial Creation	Imran Bashir
09/03/20	2.0	Modified assumptions as per comments from Committee meeting notes.	Imran Bashir
05/13/2021	3.0	Content Revision- Add batch updates in Section 2.4	Sowmya Coppisetty
06/24/2021	4.0	Updated the example to have the correct dates.	Rainier Dela Cruz

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## 1. OVERVIEW

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LRS/CalSAWS generates the CF 386 CalFresh Notice of Missed Interview (NOMI) form, when the CalFresh intake or recertification interview appointment is missed. The 'interview due by date' populated on the NOMI is currently 9 calendar days from the initial missed appointment date.

Per Policy 63-300.461 and per ACIN I-14-06, the 'interview due by date' on the CF 386 NOMI must populate 30 calendar days following the application date, excluding weekends and holidays. When the 30<sup>th</sup> day falls on a weekend or holiday, the next business day will be populated. Also, per ACL 19-10, when a household misses their recertification interview appointment, the NOMI shall be dated to reflect the end of the current certification period, even when the certification end date falls on a weekend or a holiday.

### **Examples:**

#### **When 30<sup>th</sup> day fall on the weekday**

The household applied on 4/1/2020 and missed their CalFresh (CF) intake interview appointment on 4/6/2020. The NOMI will generate on the night of 4/6/2020 and state that the household must complete the interview by Friday, 5/1/2020. When the household fails to complete the interview, the NOA DFA 377.1A CalFresh Denial NOA will generate on the night of 5/1/2020.

#### **When 30<sup>th</sup> day fall on the weekend**

The household applied on 5/1/2020 and missed their interview appointment on 5/5/2020. The CF 386 CalFresh NOMI will generate on the night of 5/5/2020 and state that the household must complete the interview by Monday, 6/1/2020 since the 30<sup>th</sup> calendar day falls on a weekend. When the household fails to complete the interview, the NOA DFA 377.1A CalFresh Denial NOA will generate on the night of 6/1/2020.

In addition, for missed recertification interview appointments, per MPP 63-300.46, when a household misses their initial recertification interview appointment, the CWD will send the household a NOMI (CF 386). When this occurs, the NOMI shall be dated to reflect the end of the current certification period, even when the certification end date falls on a weekend or a holiday.

The CalFresh Denial NOA DFA 377.1A generates on the 30<sup>th</sup> day following the application date for missed interview appointments. The NOA DFA 377.1A will be updated to generate on next business day if the 30<sup>th</sup> day from the application date falls on a weekend or holiday.

### 1.1. Current Design

The 'interview due by date' on the CF 386 CalFresh 'Notice of Missed Interview' (NOMI) form is 9 working days from the missed appointment date.

The CalFresh Denial batch for the NOA DFA 377.1A CalFresh Denial NOA currently runs during the weekends.

### 1.2. Request

1. Update the 'interview due by date' on the CF 386 CalFresh 'Notice of Missed Interview (NOMI)' form to 30 calendar days from the application date for missed CalFresh intake interview appointments.
2. Use the end of the current certification period as the 'interview due by date' for missed CalFresh recertification interview appointments, even when the certification end date falls on a weekend or a holiday.
3. Update the CalFresh Denial batch schedule for the NOA DFA 377.1A to not run on a weekend or holiday.
4. Update the conditions and batch schedule of the daily batch EDBC sweep job PB00E472 that denies CalFresh program when the applicant has missed the intake interview and has a NOMI form.

### 1.3. Recommendation

1. Update the 'interview due by date' on the CF 386 CalFresh 'Notice of Missed Interview (NOMI)' form to be 30 calendar days from the application date for missed CalFresh intake interview appointments. If the 30<sup>th</sup> day falls on a weekend or holiday, then the due date will be the next business day. When determining the 30<sup>th</sup> calendar day, the application date is counted as day zero.
2. Use the end of the current certification period as the 'interview due by date' on the CF 386 CalFresh NOMI for missed CalFresh recertification interview appointments, even when the certification end date falls on a weekend or a holiday.
3. Change the scheduling of the Denial batch for the NOA DFA 377.1A to generate on the next business day if the 30<sup>th</sup> day falls on a weekend or holiday. When determining the 30<sup>th</sup> calendar day, the application date is counted as day zero.
4. Update the conditions of the batch EDBC job PB00E472 to calculate the batch run date to be 30 days following the application date.
5. Update the batch scheduler for the batch EDBC job PB00E472 to not run the job on a weekend (i.e. Saturday and Sunday).

### 1.4. Assumption

1. Headers will not be changed.
2. No additional text is required on the CF386 form aside from the State provided language.

3. No change to the triggering conditions of the Form CF386.
4. No additional text is required on the Denial NOA.
5. FDDs related to the Form CF386 will not be updated in this effort.
6. Utilizing existing functionality to track different holidays of different counties.
7. A separate CA-211762 is in progress to update the DFA 377.1A CalFresh Notice of Denial (03/02) in all threshold languages in the template repository.

## 2. RECOMMENDATIONS

---

### 2.1. Notice of missed interview Form CF 386 for intake

#### 2.1.1. Overview

The CF 386 CalFresh NOMI is used to alert the customer that they have missed their CalFresh interview appointment and informs them of the due date to complete their interview or their CalFresh benefits will be denied or discontinued.

The 'interview completion due by date' on the NOMI form (CF 386) currently populates 9 working days from the initial missed appointment date. Per Policy 63-300.461, the date on the NOMI form must be modified to 30 calendar days from the application date.

**State Form:** CF 386 (2/14)

**Current Programs:** CalFresh and cases with a CalFresh segment

**Current Forms Category:** Form

**Form Mockups/Examples:** See Supporting Documents #1, 2.

**Existing Languages:**

- Armenian
- Cambodian
- Chinese
- English
- Farsi
- Korean
- Russian
- Spanish
- Tagalog
- Vietnamese

#### 2.1.2. Description of Change

##### 2.1.2.1. Updates to Form Variable Population

Change the population of interview date from 9 days to 30 days.

If 30<sup>th</sup> day is either holiday/weekend, then the next business day is the interview date.

VARIABLE NAME	POPULATION	FORMATTING	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
Missed Interview Date	<p>Date of interview that was missed by the customer</p> <p>Editable when the form is generated from the Template Repository. Pre-populated and static when form is generated through batch NOMI processing</p>	Arial Font Size 12	N	Y
Next Interview Due Date	<p>Date interview must be completed by (Interview Date is calculated 30 calendar days from application date. When determining the 30<sup>th</sup> calendar day, the application date is counted as day zero. If the 30<sup>th</sup> day is either a holiday/weekend, then the next business day is the interview date).</p> <p>Editable when the form is generated from the Template Repository. Pre-populated and static when form is generated through batch NOMI processing.</p>	Arial Font Size 12	N	Y

## 2.2. Notice of Missed Interview Form CF 386 for recertification

### 2.2.1. Overview

For missed CalFresh Recertification interview appointments, the CF 386 CalFresh NOMI shall be dated to reflect the end of the current certification period, even when the certification end date falls on a weekend or a holiday.

### 2.2.2. Description of Change

When a household misses their initial recertification interview appointment, the CWD will send the household a NOMI (CF 386), per MPP 63-300.46. When this occurs, the NOMI shall be dated to reflect the end of the current certification period, even when the certification end date falls on a weekend or a holiday (ACL 19-10).

VARIABLE NAME	POPULATION	FORMATTING	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
Missed Interview Date	Date of interview that was missed by the customer  Editable when the form is generated from the Template Repository. Pre-populated and static when form is generated through batch NOMI processing	Arial Font Size 12	N	Y
Next Interview Due Date	Date interview must be completed by (end of the current certification period, even when the certification end date falls on a weekend or a holiday)  Editable when the form is generated from the Template Repository. Pre-populated and static when form is generated through batch NOMI processing.	Arial Font Size 12	N	Y

## 2.3. Denial NOA DFA 377.1A

### 2.3.1. Overview

The scheduling of Denial NOA batch will be updated. Currently Batch job PB00R533 is schedule from Monday to Saturday.

### 2.3.2. Description of Change

To change the schedule to Monday to Friday a separate BSCR will be created to change the schedule of Denial NOA batch (Job PB00R533).

## 2.4. Update Batch job PB00E472

**Commented [CB1]:** We need to allow counties to opt in or out of this Batch job.

### 2.4.1. Overview

Update the conditions of the daily batch EDBC sweep job PB00E472 that denies CalFresh program when the applicant has missed the intake interview and has a NOMI form generated.

### 2.4.2. Description of Change

1. Update the conditions of the batch job ~~PB00E472~~ ~~PB00E472~~ to calculate the batch run date ~~and the NOMI generation date~~ to be 30 days from the application date to align with the conditions of batch job PB00R533 that generates a CalFresh denial NOA DFA 377.1A.

The updated conditions for the job will be as follows-

- a. The program is CalFresh.
- b. The program is not Transitional CalFresh.
- c. The program status is Pending.
- d. Batch run date is ~~on the 30th~~ days from the application date.
- e. The NOMI (CF 386) form was sent to the applicant prior to the 30th day after the application date.
- f. The latest intake interview status is 'No Show', 'Scheduled' or 'Rescheduled', and the interview appointment date is between the application date and the 30th day from the application date. The appointment type code must be either General Appointment with sub type code of Telephone Interview Intake or Intake Interview.

- ~~1-2~~. Create a BSCR to change the schedule of the batch EDBC job to Monday to Friday.

Note: If the 30th day from application date is a ~~Sunday~~ ~~weekend~~ or holiday then batch will run on the next business day.

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**Commented [CB2]:** Should be weekend.

### 2.4.3. Execution Frequency

Daily- Monday to Friday

### 2.4.4 Key Scheduling Dependencies

[Schedule this batch job to run before PB00R533](#)

### 2.4.4. Counties Impacted

All counties

### 2.4.5. Data Volume/Performance

No Change

### 2.4.6. 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.).

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## 3. SUPPORTING DOCUMENTS

Ref. #	Document	Functional Area	Description	Attachment
1	CF 386 (02/14)	CalFresh	State newest version English	 CF386_EN_02_14_State Version.pdf
2	CF 386_SP(02/14)	CalFresh	State newest version Spanish	 CF386_SP_02-14_State Version.pdf

## 4. REQUIREMENTS

### 5.12.4 Project Requirements

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REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.1	<p>The LRS shall produce the NOA in a timely manner, in accordance with Turner waiver requirements, containing the following:</p> <ul style="list-style-type: none"> <li>a. Case and applicant/participant identifying information and address;</li> <li>b. The proposed action(s) being taken by the COUNTY department;</li> <li>c. The effective date of the proposed action(s);</li> <li>d. The reason(s) for the proposed action(s);</li> <li>e. Time periods covered, including retroactive periods;</li> <li>f. Turner format requirements as appropriate;</li> <li>g. The complete federal, State, or COUNTY manual section(s), including subsection(s) supporting the proposed action(s);</li> <li>h. The budget calculations/computations by program, including gross income test and net income test;</li> <li>i. The overpayment/underpayment and/or over issuance/under-issuance amount and/or calculations;</li> <li>j. The worker s name, file number, addressee, mailing address, sending Local Office Site s address, telephone number, email address, and hours of availability;</li> <li>k. Instructions regarding the filing of an appeal and appeals-specific contact information;</li> <li>l. Date and time of notification;</li> <li>m. Variable individual/case LRS Data including the name(s) of individual(s) affected by the authorized action,</li> </ul>	<ul style="list-style-type: none"> <li>1) Update the 'interview due by date' on the CF 386 CalFresh 'Notice of Missed Interview (NOMI)' form to 30 calendar days from the application date for missed CalFresh intake interview appointments.</li> <li>2) Use the end of the current certification period as the 'interview due by date' for missed CalFresh recertification interview appointments, even when the certification end date falls on a weekend or a holiday.</li> <li>3) Update the CalFresh Denial batch schedule for the NOA DFA 377.1A to not run on a weekend or holiday.</li> <li>4) Update the conditions of the batch job PB00E472 to calculate the batch run date and the NOMI generation date to be 30 days from the application date.</li> </ul>

	<p>income reporting threshold amounts, and time on aid information;</p> <p>n. Freeform text based on County-specified user that was added to clarify the NOA, unless prohibited by federal and State regulations and COUNTY policies.;</p> <p>and</p> <p>o. Collection calculation and amount, if applicable.</p>	
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# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-202854

Implement the IVR Inbound Outbound Report

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Greg Deogracia
	Reviewed By	Ravneet Bhatia, Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/28/2020	1.0	Initial Release	Greg Deogracia
3/19/2020	1.1	Content Revision 1 Update Report requirements to be operational with QLIK environment.  1.4 Assumptions 2 Recommendations 2.1.2 Report Filters 3 Supporting Documentation 6 Appendix	Greg Deogracia

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# 1 OVERVIEW

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For C-IV CalSAWS migration planning, SCR CA-202554 was created to enable the IVR Inbound / Outbound Report in Calsaws. At this time, only C-IV counties will be utilizing the report with future planning being reviewed to enable reporting for LRS/Region 6.

## 1.1 Current Design

Users residing in a C-IV county with a Customer Service Center have access to detailed inbound Interactive Voice Response (IVR) data through EGain. Summary reports containing inbound and outbound IVR information are manually generated and sent to the Regional Project Managers via the project status report on a bi-monthly basis.

## 1.2 Requests

1. Migrate the C-IV IVR Inbound/Outbound Report, report logic and Report Parameters to CalSAWS.
2. Enable the report for C-IV counties only.

**Note:** It is also currently planned that future considerations will be made for accommodation of LRS/Region 6 IVR Inbound/Outbound Reports.

## 1.3 Overview of Recommendations

1. Migrate the C-IV IVR Inbound/Outbound Report, report logic and Report Parameters to CalSAWS.
2. Enable the report for C-IV counties only.

## 1.4 Assumptions

1. No Impact to other reports.
2. It is currently planned that future considerations will be made for accommodation of LRS/Region 6 IVR Inbound/Outbound Reporting.
3. Reports shall be updated and reformatted to be operational with Qlik applications environment.

## 2 RECOMMENDATIONS

### 2.1 IVR Inbound Outbound Report Mockup

Mockup - IVR Inbound Outbou...

CalSAWS Inbound IVR Summary

Return to Filters County: - Run Date: 1/14/2021 Data as of: 1/14/2021 User: userid

Outbound IVR Summary Begin Date: - End Date: -

Date	Total	Language / English	Language / Spanish	EBT / BIC	Benefit Info.	Change PIN	Document Status	Office Hous	Request Forms	Transferred to Worker
Grand Total	0	0	0	0	0	0	0	0	0	0
-	0	0	0	0	0	0	0	0	0	0

Figure 2.1.1 – Inbound IVR Summary

Mockup - IVR Inbound Outbou...

CalSAWS Outbound IVR Summary

Return to Filters County: - Run Date: 1/14/2021 Data as of: 1/14/2021 User: userid

Outbound IVR Details Begin Date: - End Date: -

Date	Total Attempted	Answered	Unsuccessful	English	Spanish	Appointment Reminders	Missing Document Reminders
Grand Total	0	0	0	0	0	0	0
-	0	0	0	0	0	0	0

Figure 2.1.2 – Outbound IVR Summary

Mockup - IVR Inbound Outbou...

CalSAWS Outbound IVR Details

Return to Filters

County: - Run Date: 1/14/2021 Data as of: 1/14/2021 User: userid

Inbound IVR Summary

Begin Date: - End Date: -

Outbound IVR Details

Date	Case Number	Case Name	Person Name	Language	Worker	Answered/ Unsuccessful	Type
<b>Grand Total</b>	0	0	0	0	0	0	0
-	0	0	0	0	0	0	0

**Figure 2.1.3 – Outbound IVR Details**

### 2.1.1 Description of Change

The IVR Inbound Outbound Report will be re-created in the Qlik application environment as an On Request report. There are no logic modifications required.

1. Re-create the C-IV IVR Inbound/Outbound Report in QLIK for CalSAWS
2. Migrate C-IV IVR Inbound/Outbound Report logic in CalSAWS
3. Enable reporting for C-IV counties only

All Report columns are defined as below:

#### Inbound IVR Summary Columns

Column Header	Description
Date	The report date of IVR inbound calls formatted as MM/DD/YYYY.
Total	The total number of IVR inbound calls for the specified Date value.
Language: English	The total number of IVR inbound calls for the specified Date value in English.
Language: Spanish	The total number of IVR inbound calls for the specified Date value in Spanish.
Option: EBT/BIC	The total number of times an IVR inbound call for the specified Date went through the EBT/BIC option.
Option: Benefit Info.	The total number of times an IVR inbound call for the specified Date went through the Benefit Information option.
Option: Change PIN	The total number of times an IVR inbound call for the specified Date went through the Change PIN option.
Option: Document Status	The total number of times an IVR inbound call for the specified Date

	went through the Document Status option.
Option Office Hours	The total number of times an IVR inbound call for the specified Date went through the Office Hours option.
Option Request Forms	The total number of times an IVR inbound call for the specified Date went through the Request Forms option.
Option Transferred to Worker	The total number of times an IVR inbound call for the specified Date went through the Transferred to Worker option.

#### Outbound IVR Summary Columns

Column Header	Description
Date	The report date of IVR outbound calls formatted as MM/DD/YYYY.
Total Attempted	The total number of IVR outbound call attempts that were made on the specified Date.
Answered	The total number of IVR outbound calls for the specified Date that were answered.
Unsuccessful	The total number of IVR outbound calls for the specified Date that were not answered.
English	The total number of IVR outbound calls for the specified Date that were not in Spanish.
Spanish	The total number of IVR outbound calls for the specified Date that were in Spanish.
Appointment Reminders	The total number of IVR outbound calls for the specified Date that were regarding Appointment Reminders.

Missing Document Reminders	The total number of IVR outbound calls for the specified Date that were regarding Missing Document Reminders.
----------------------------	---

### Outbound IVR Details Columns

Column Header	Description
Date	The Date that the IVR outbound call was placed within selected Report Parameters formatted as MM/DD/YYYY.
Case Number	The Case Number of the Case that the IVR outbound call was placed for.
Case Name	The Case Name of the Case that the IVR outbound call was placed for.
Person Name	The first and last name of the person that the IVR outbound call was placed for.
Language	The Language that the IVR outbound call was placed in. English or Spanish will populate in this column only.
Worker	The Worker Number of the worker associated to the Call Log record of the IVR outbound call.
Answered/Unsuccessful	This column will populate Answered if the IVR outbound call was recorded as being answered, otherwise, this column will populate with Unsuccessful. Possible values are: <ul style="list-style-type: none"> <li>• Answered</li> <li>• Unsuccessful</li> </ul>
Type	The Type of the IVR outbound call. Possible Values are: <ul style="list-style-type: none"> <li>• Appointment/Activity</li> <li>• Missing Document</li> </ul>

## 2.1.2 Report Filters

Upon selection of the On Request report type found in CalSAWS, the user will be taken to the appropriate QLIK application and presented with the Report Filters.

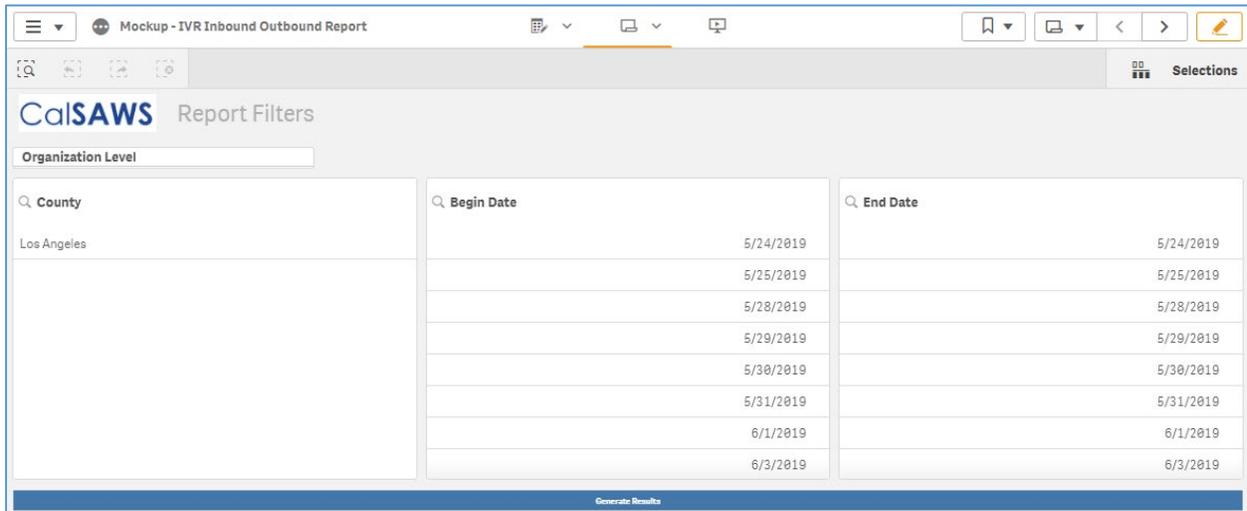


Figure 2.1.2.1 – Inbound Outbound Report Filters

### 1. Migrate C-IV IVR Inbound Outbound Report and configuration in QLIK for CalSAWS.

- **Country:** Defaults to the UserID County
- **Begin Date:** Restricts the base population of the report to include records where the IVR inbound and outbound call dates are on or after the Begin Date.
- **End Date:** Restricts the base population of the report to include records where the IVR inbound and outbound call dates are on or before End Date.

## 2.1.3 Report Location

**Global:** Reports

**Local:** On Request

**Task:** Administrative

**Title:** IVR Inbound Outbound Report

**Description:** Provides statistical summary information for IVR Inbound and Outbound calls as well as supporting details for IVR Outbound calls.

#### **2.1.4 Counties Impacted**

No change to current county entitlement configuration.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Location
1	Reports	Mockup – Inbound Outbound IVR Report	QLIK Sense Hub / Streams / Reports Teams Design

### 4 REQUIREMENTS

#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.4.4	The LRS shall include ad hoc capabilities that allow COUNTY-specified Users to create multiple ad hoc reports simultaneously, as specified by COUNTY.	This SCR is migrating existing reports as needed by the counties.

### 5 OUTREACH

N/A

### 6 APPENDIX

#### 6.1 Examples of Report Scenarios

##### Inbound IVR Summary

Example	Date	Language English	Language Spanish	Option EBT/BIC	Option Benefit Info.	Option Request Forms	Option Office Hours
1	11/05/2020	1					1

2	11/10/2020	1	1	1		1	
3	11/11/2020	0	2		2		

- Example #1: Report date is November 5, 2020. There was one Inbound Call handled in English with an enquiry for Office Hours.
- Example #2: Report date is November 10, 2020. There were two calls, one handled in English and one handled in Spanish. The enquires were one each for EBT/BIC and Request for a Form.
- Example #3: Report date is November 11, 2020. There were two calls handled in Spanish and both calls were for Benefit Info.

### Outbound IVR Summary

Example	Date	Total Attempted	Answered	Unsuccessful	English	Spanish	Appointment Reminders
1	11/07/2020	484	325	159	429	55	484
2	11/10/2020	372	273	99	333	39	372
3	11/11/2020	572	408	164	525	47	572
4	11/12/2020	506	339	167	460	46	506

- All Examples show the report Date and total count of representative columns for that date.

### Outbound IVR Details

Example	Date	Person Name	Language	Answered/Unsuccessful	Type
1	11/03/2020	Last Name, First Name	English	Answered	Appointment/Activity
2	11/03/2020	Last Name, First Name	Spanish	Answered	Appointment/Activity
3	11/03/2020	Last Name, First Name	English	Unsuccessful	Appointment/Activity
4	11/03/2020	Last Name, First Name	English	Answered	Missing Document

- Example #1: Report date is November 3, 2020. The call was to Last Name, First Name in English. The call was Answered and Type was Appointment/Activity.

- Example #2: Report date is November 3, 2020. The call was to First Name, Last Name in Spanish. The call was Answered and Type was Appointment/Activity.
- Example #3: Report date is November 3, 2020. The call was to First Name, Last Name in English. The call was Unsuccessful and Type was Appointment/Activity.
- Example #4: Report date is November 3, 2020. The call was to First Name, Last Name in English. The call was Answered and Type was Missing Documents.

## 6.2 Exporting From QLIK

Extracting report data from QLIK is provided through multiple options. These options are as HTML, Image, PDF or CVS data. Further data adjustments may be made within the respective application used for that purpose. To Export data, perform a mouse right click while the mouse pointer is within the data area of the report. The options are displayed as below:

The diagram illustrates the export options available for a QLIK report. It shows a right-click context menu with the following options:

- Share
- Take snapshot
- Open snapshot library
- Export

The 'Export' option is highlighted, leading to a sub-menu with the following options:

- Back
- Embed
- Export as an image
- Export to PDF
- Export data

The 'Embed' option leads to an 'Embed' panel. This panel includes a preview of the report data, which is a table titled 'Inbound IVR Summary'. The table has columns for 'Date', 'Time', 'Language', 'Agent', 'Status', 'Result', 'Phone', 'Account', 'City', 'Agent', and 'Transfer'. Below the preview, there are settings for 'General' (Allow interaction, Enable context menu, Allow selections) and 'Language' (Default). At the bottom, there is an 'Iframe to embed in your web page' section with a 'Copy' button and a link to 'Open preview in new tab'.

## Export Image Example

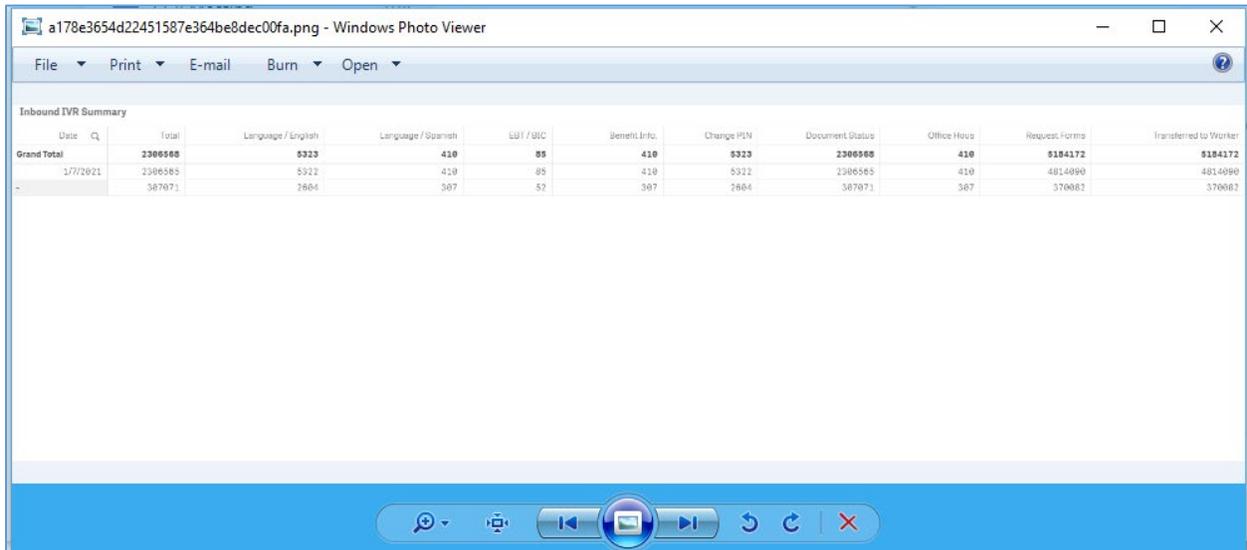


Figure 6.2.1 – Image Export

## Export PDF Example

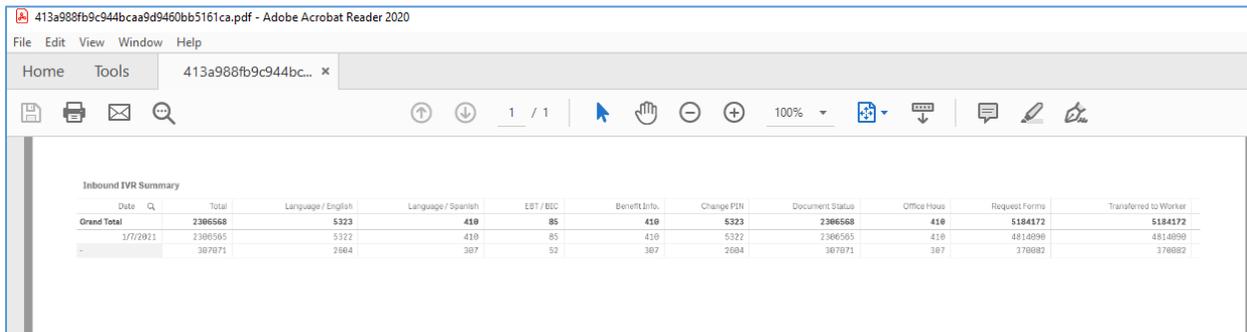


Figure 6.2.2 – PDF Export

## Export data Example

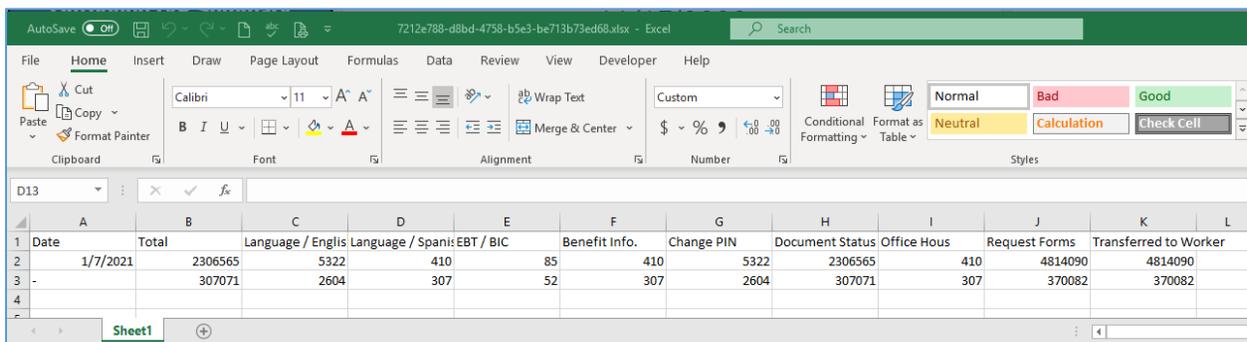


Figure 6.2.3 – PDF Export

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

SCR CA-209638 Add Threshold Languages for  
FC/KG COLA NOA Fragments

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Phong Xiong
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/20/2020	1.0	Initial Draft	Phong Xiong
8/27/2020	1.1	Updated as per Build and System Test review	Phong Xiong
6/10/2021	1.2	Content Revision 1 - Updates to Sections 1, 1.13, & 1.4 - Updates to Sections 2, 2.2, & 2.3 - Added new section 2.4	Phong Xiong

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<b>2.3</b>	<b>Update KG COLA NOA Title .....</b>	<b>Error! Bookmark not defined.</b>
<b>2.3.1</b>	<b>Overview .....</b>	<b>Error! Bookmark not defined.</b>
<b>2.3.2</b>	<b>Description of Title Update .....</b>	<b>Error! Bookmark not defined.</b>
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<b>2.5.2</b>	<b>Description of Template Update .....</b>	<b>9</b>
2.6	Update FC/KG COLA NOA Approval Budget – BUDGT_FC_APPROVAL.xdp .....	10
2.6.1	Overview .....	10
2.6.2	Description of Template Update .....	11
3	Requirements .....	11
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## 1 OVERVIEW

---

This document details the changes necessary in LRS/CalSAWS for the Foster Care (FC) and Kin-GAP (KG) COLA NOA fragments implemented as a part of SCRs CA-206310/CIV-100485 to be translated into all threshold languages. The templates and approval budget that are generated for the FC/KG COLA NOAs are also translated.

**Note:** These changes will only be implemented to LRS/CalSAWS.

### 1.1 Current Design

Currently, the NOA fragments implemented with SCRs CA-206310/CIV-100485 are only available in English and Spanish.

### 1.2 Requests

Add the FC/KG COLA NOA fragments in all threshold languages.

### 1.3 Overview of Recommendations

1. Translate the FC/KG COLA NOA fragments and title from SCRs CA-206310/CIV-100485 to all threshold languages.
2. The templates that hold the FC/KG COLA NOA fragments must also be translated.
3. Translate the Approval Budget used for FC/KG COLA NOAs.

### 1.4 Assumptions

1. The triggering conditions of the original FC/KG NOA fragments implemented with SCRs CA-206310/CIV-100485 remain not updated with this SCR.
2. The existing variables will not be updated with this SCR.
3. There is no change to the template except for the translations. The templates in sections 2.3 and 2.4 will be updated to match the changes of SCR CA-207382, "remove any System, Los Angeles County, or Agency references from NOA templates and fragments for the 57 Migration Counties".
4. The NA Back 9 translations needed for the FC and KG COLA NOAs are already available in the system.
5. The regulations section translations needed for the templates in sections 2.3 and 2.4 are already available in the system.
6. The page numbers/verbiage "Page # of #" of the NOAs are not translated.
7. These changes are for all counties.

## 2 RECOMMENDATIONS

---

The recommendations are to translate the NOA fragments and FC/KG NOA title implemented with SCRs CA-206310/CIV-100485 into all threshold languages. The FC/KG COLA NOA templates and approval budget will also be translated.

## 2.1 Update FC/KG COLA NOA Fragments

### 2.1.1 Overview

The NOA fragments initially implemented with SCR CA-206310 is to be added in all other threshold languages.

**Fragment Name and ID:** FC\_KG\_CH\_COLA\_ACTION5 & 4128  
KG\_CH\_COLA\_RSN & 7620  
FC\_CH\_COLA\_RSN & 7619

**Current Program(s):** Foster Care & Kin-GAP

**Current Action Type:** Update for EDBC Online & Batch in a COLA month with an increase in COLA rate.

**Current Fragment Level:** Program Level

**Currently Repeatable:** Yes, the FC/KG EDBC (online and/or batch) is run for COLA month and there is an increase in FC/KG monthly rate amount compared to the monthly rate amount of previous Accepted and Saved EDBC.

**Existing Languages:**

English and Spanish

Note: Fragments KG\_CH\_COLA\_RSN and FC\_CH\_COLA\_RSN have the same exact text. Both fragments will need to be updated with the translations.

### 2.1.2 Description of Updates

The NOA fragments will be translated into the following “Updated Languages.”

**Updated Languages:**

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

**Current Fragment Text:**

FC_KG_CH_COLA_ACTION5 & 4128	“As of {Date}, your rate has increased from {PriorAmount} to {NewAmount}.”  Here’s why:
KG_CH_COLA_RSN & 7620 FC_CH_COLA_RSN & 7619	“The California Necessities Index (CNI) has increased.”

KG_CH_COLA_RSN & 7476	
KG_CH_COLA_RSN & 7475	

## 2.2 Update FC/KG COLA NOA Title

### 2.2.1 Overview

As per SCR CA-209638, the NOA title initially implemented with SCR CA-206310 is to be added in all other threshold languages. The NOA titles for Foster Care and Kin-GAP are different; their respective titles will be translated as well.

NOA Title for FC/KG and KG non-CCR COLA NOAs – ‘Notice of Action – Rate Change’

**Fragment Name and ID:** FC\_CH\_NOA\_TYPE\_EN.xdp & 3121

#### Existing Languages:

English and Spanish

NOA	Fragment Name	Verbiage
Foster Care CCR COLA NOA	FC_CH_NOA_TYPE_CCR	NOTICE OF ACTION – Change 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
Kin-GAP CCR COLA NOA	KG_CH_NOA_TYPE_CCR	NOTICE OF ACTION – CHANGE For Kinship - Guardians Only
Foster Care non-CCR COLA NOA & Kin-GAP non-CCR COLA NOA	FC_CH_NOA_TYPE	NOTICE OF ACTION - Rate Change

### 2.2.2 Description of Title Update

The NOA titles will be translated into the following “Updated Languages.”

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**Updated Languages:**

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

**2.3 Update FC COLA NOA Template – FC\_KG\_COLA\_NOA\_TEMPLATE.xdp**

**2.3.1 Overview**

The FC\_NOA\_TEMPLATE holds the FC/KG COLA NOA fragments and will need to be translated as well.

**State Form/NOA:** N/A

**Existing Template Revision Date:** N/A

**Current Program(s):** Foster Care & Kin GAP

**Includes NA Back 9:** Yes

**Existing Languages:**

English and Spanish

**2.3.2 Description of Template Update**

The FC\_NOA\_TEMPLATE will be translated into the following "Updated Languages."

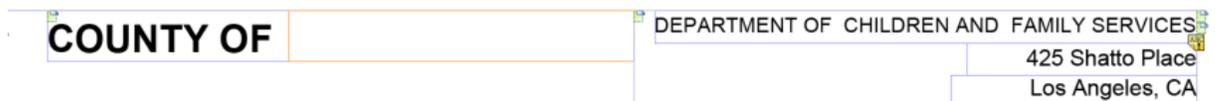
**Updated Languages:**

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

**Updated Template Layout:**

1. Remove all hard-coded addresses on the header of the templates. Replace with "State of California" text.

Foster Care Template – Old



Foster Care Template – Updated

**COUNTY OF**

STATE OF CALIFORNIA

- 2. Add the "State of California" text to the header for missing verbiage.  
Foster Care Template – Old

**COUNTY OF**

Foster Care Template – Updated

**COUNTY OF**

STATE OF CALIFORNIA

- 3. The verbiage of 'COUNTY OF' on the template headers will remain in English regardless of which language the NOA is generated, except for Spanish.

**CONDADO DE**

STATE OF CALIFORNIA

**COUNTY OF**

STATE OF CALIFORNIA

- 4. The header of the continuation page for the template is also translated.
  - a. The 'COUNTY OF' verbiage for the continuation page still follows #3 above.

**NOTICE OF ACTION**  
Continuation Page

**COUNTY OF**

NOTICE DATE: \_\_\_\_\_  
CASE NAME: \_\_\_\_\_  
CASE NUMBER: \_\_\_\_\_  
**WORKER NAME:** \_\_\_\_\_  
TELEPHONE NUMBER: \_\_\_\_\_

## 2.4 Update KG COLA NOA Template

### 2.4.1 Overview

The KG\_NOA\_TEMPLATE holds the KG COLA NOA fragments and will need to be translated as well.

**State Form/NOA:** N/A

**Existing Template Revision Date:** N/A

**Current Program(s):** Kin-GAP

**Includes NA Back 9:** Yes

**Existing Languages:**

English and Spanish

### 2.4.2 Description of Template Update

The KG\_NOA\_TEMPLATE will be translated into the following "Updated Languages."

**Updated Languages:**

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

**Updated Template Layout:**

1. Remove all hard-coded addresses on the header of the templates. Replace with "State of California" text.

Kin-GAP Template – Old

<b>COUNTY OF</b>		DEPARTMENT OF CHILDREN AND FAMILY SERVICES
		425 Shatto Place
		Los Angeles, CA

Kin-GAP Template – Updated

**COUNTY OF**

STATE OF CALIFORNIA

2. Add the "State of California" text to the header for missing verbiage.

Kin-GAP Template – Old

**COUNTY OF** \_\_\_\_\_

Kin-GAP Template – Updated

**COUNTY OF**

STATE OF CALIFORNIA

3. The verbiage of 'COUNTY OF' on the template headers will remain in English regardless of which language the NOA is generated, except for Spanish.

**CONDADO DE**

STATE OF CALIFORNIA

**COUNTY OF**

STATE OF CALIFORNIA

4. The header of the continuation page for the template is also translated.  
a. The 'COUNTY OF' verbiage for the continuation page still follows #3 above.

**NOTICE OF ACTION**  
Continuation Page

**COUNTY OF** \_\_\_\_\_

NOTICE DATE: \_\_\_\_\_  
CASE NAME: \_\_\_\_\_  
CASE NUMBER: \_\_\_\_\_  
**WORKER NAME:** \_\_\_\_\_  
TELEPHONE NUMBER: \_\_\_\_\_

## 2.5 Update FC/KG COLA NOA Approval Budget – BUDGT\_FC\_APPROVAL.xdp

### 2.5.1 Overview

The FC approval budget displays on the NOA for an approval action type. This budget will populate on the FC/KG COLA NOA when the rate has increased.

**State Form/NOA:** N/A

**Existing Template Revision Date:** N/A

**Current Program(s):** Foster Care & Kin-GAP

**Includes NA Back 9:** Yes

**Existing Languages:**

English and Spanish

### 2.5.2 Description of Template Update

The BUDGT\_FC\_APPROVAL.xdp will be translated into the following “Updated Languages.”

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.

**Updated Languages:**

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

## 3 REQUIREMENTS

---

### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.3 CAR-1207	The LRS shall include the ability to add threshold languages for written material, including notices, NOAs, forms, flyers, letters, and stuffers, as required	Adding translated NOA fragments and template to

	by COUNTY, as well as for any other language for which the State provides a translation.	template repository in all threshold languages.
--	--	---

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-212833

Remove Selected Non-State LRS Forms from the  
system



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# 1 OVERVIEW

---

Region 6 has identified a list of 23 non-state Forms that have not been printed in the last year. These Forms are considered obsolete and can be removed from the LRS/CalSAWS system. This change will remove these Forms from the Template Repository and remove any Form Generation Triggers associated with each. This will be an LRS-only change.

## 1.1 Current Design

23 Non-State Forms currently in the LRS Template Repository have not been generated within the past year.

## 1.2 Requests

Remove selected non-state Forms from the LRS Template Repository.

## 1.3 Recommendations

1. Remove selected Forms from the LRS Template Repository
2. Remove Trigger Conditions for **GN 6055**

## 2 RECOMMENDATIONS

---

### 2.1 Remove selected Forms from the LRS Template Repository

Remove the following Forms from the LRS Template Repository:

Form Number	Form Name	Language(s)
GN 6055*	GAIN/GROW Vocational Assessment Invoice	EN
GN 6120	Confidentiality Agreement	EN
GN 6141	Los Angeles County's List of Self-Initiated Programs	EN
GN 6142	Welfare-to-Work Grant Program Certification Form (3/10)	EN
GN 6204	Cal-Learn Checklist	EN
GN 6339	Request for CalWORKs Documents needed for Child Care due to New Child	EN, SP, Threshold
MC-1 Fraud	MEDI-CAL EARLY FRAUD DETECTION PREVENTION REFERRAL	EN
NOA 992	Notice of Action Vehicle Diagnosis & Repair Program	EN, SP, Threshold
PA 1164	NOTICE OF POTENTIAL ELIGIBILITY REQUEST FOR VERIFICATION 60 - DAY POSTPARTUM PROGRAM	EN
PA 1866	Food Stamps Shared Housing/Utility Costs Supplemental Questionnaire	EN
PA 334	Record of Investigative Activity	EN
PA 4035	Direct Rent Appointment Notice	EN
PA 4045	ATTENTION U.S. CITIZENS	EN, SP
PA 6034	Share-of-Cost Flyer	EN, SP, Threshold
PA 6075	Redetermination Informational Material	EN
PA 6076	Do You Receive Medi-Cal and IHSS?	EN, SP
WFP&I 1239	Overpayment Calculation Form	EN
WFP&I 1263	CalFresh Overissuance Calculation	EN

WFP&I 23	Fraud Investigation Interim Report	EN
WFP&I CALC 1	CALCULATION	EN
WFP&I CC-A-IV-502	Positive Fraud -Overpayment Amount	EN
WFP&I EDMS	WFP&I EDMS Cover Letter	EN
WFP&I FIS	Fingerprint Identification Services	EN

\*Form has Trigger Conditions which must also be removed.

Forms must be removed in all languages. Forms must be end-dated with the date of this SCR's release.

## 2.2 Remove Trigger Conditions for GN 6055

GN 6055 is currently triggered via batch. The following conditions remaining in the system must also be removed as a part of this change:

Form Number	Trigger Condition(s)
<a href="#">GN 6055</a> Batch Job: PB19F210	Auto-trigger this form via batch when vocational and learning disability assessments have been completed.  Control for 10 business days and require a return envelope.

### 3 SUPPORTING DOCUMENTS

---

Ref #	Document	Functional Area	Description	Attachment
1	GN 6055 FDD	GAIN	FDD for GN 6055 - GAIN/GROW Vocational Assessment Invoice	 GN 6055 GAIN Invoice.pdf

### 4 REQUIREMENTS

---

#### 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.	Removes NOAs that are not state-mandated and have not been utilized in the past year.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-214059

DDID 2520 Imaging Reports

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

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

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# 1 OVERVIEW

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

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

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

## 1.1 Current Design

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

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

## 1.2 Requests

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

## 1.3 Overview of Recommendations

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

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

## 1.4 Assumptions

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

## 2 RECOMMENDATIONS

### 2.1 Imaging Reports

#### 2.1.1 Imaging - Documents Captured Report – Mockup

CalSAWS Staff Documents Captured																	
Return to Filters		County				Run Date				Data as of							
Staff Documents Captured		-				2/10/2021				8/1/2020							
External Documents Captured																	
Staff Documents Captured																	
Created By	Staff Name	Office Number	Number of Docu...	Number of Pages Captur...	Single Case	Multi Case	SIU	Hearl...	RDB	Retur... Mail	CWS	AAP	IHSS	QA/QC	Ignore Barco...	Import / Virtual Captur...	
Totals			0	0	0	0	0	0	0	0	0	0	0	0	0	0	
-	-	-	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

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

CalSAWS External Documents Captured					
Return to Filters		County		Run Date	Data as of
Staff Documents Captured		-		2/10/2021	8/1/2020
External Documents Captured		6/30/2020			
External Documents Captured					
Captured Source	Office Number	Number of Documents Captured		Number of Pages Captured	
Totals		0		0	
-	-	0		0	

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

## 2.1.2 Imaging - Initial QA Report - Mockup

CalSAWS Initial QA Report									
Return to Filters		County San Bernardino		Run Date 2/10/2021		Data as of 7/1/2020			
		Total 1							
Initial QA Report									
User	Staff Name	Office	Document ID	Bundle ID	Creation Time	Applicable Date	Received Date		
-	-	-	-	-	-	-	-		

Figure 2.1.2.1- Imaging - Initial QA Report – Mockup

## 2.1.3 Imaging - Exception Queues Aging Report - Mockup

CalSAWS Summary							
Return to Filters		County San Bernardino		Run Date 2/10/2021		Data as of 7/1/2020	
Barcode Verification	No Case	Exception	Reindex	Full Reindex	Person Select		
Queue	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue	
-	0	0	0	0	0	0	

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

CalSAWS Barcode Verification								
Return to Filters		County San Bernardino		Run Date 2/9/2021		Data as of 7/1/2020		
Return to Summary								
Barcode Verification	No Case	Exception	Reindex	Full Reindex	Person Select			
Office Queue Number	Confidential	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue	
Totals		0	0	0	0	0	0	
-	-	0	0	0	0	0	0	

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

CalSAWS No Case									
Return to Filters		County	Run Date	Data as of					
Return to Summary		San Bernardino	2/9/2021	7/1/2020					
Barcode Verification	No Case	Exception	Reindex	Full Reindex	Person Select				
No Case									
Office Queue Number	Q	Confidential	Q	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
Totals				0	0	0	0	0	0
-	-	-	-	0	0	0	0	0	0

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

CalSAWS Exception									
Return to Filters		County	Run Date	Data as of					
Return to Summary		San Bernardino	2/10/2021	7/1/2020					
Barcode Verification	No Case	Exception	Reindex	Full Reindex	Person Select				
Exception									
Office Queue Number	Q	Confidential	Q	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
Totals				0	0	0	0	0	0
-	-	-	-	0	0	0	0	0	0

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

CalSAWS Reindex									
Return to Filters		County	Run Date	Data as of					
Return to Summary		San Bernardino	2/9/2021	7/1/2020					
Barcode Verification	No Case	Exception	Reindex	Full Reindex	Person Select				
Reindex									
Office Queue Number	Q	Confidential	Q	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
Totals				0	0	0	0	0	0
-	-	-	-	0	0	0	0	0	0

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

CalSAWS Full Reindex									
Return to Filters		County	Run Date	Data as of					
Return to Summary		San Bernardino	2/9/2021	7/1/2020					
Barcode Verification	No Case	Exception	Reindex	Full Reindex	Person Select				
Full Reindex									
Office Queue Number	Q	Confidential	Q	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
Totals				0	0	0	0	0	0
-	-	-	-	0	0	0	0	0	0

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

Return to Filters		County		Run Date		Data as of			
Return to Summary		San Bernardino		2/9/2021		7/1/2020			
Barcode Verification	No Case	Exception	Reindex	Full Reindex	Person Select				
<b>Person Select</b>									
Office Queue Number	Q	Confidential	Q	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
<b>Totals</b>				0	0	0	0	0	0
-				0	0	0	0	0	0

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

## 2.2 Description of Changes

### 1) Imaging - Document Captured Report

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

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

#### Staff Documents Captured Tab

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

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

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

#### External Documents Captured tab

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

## 2) Imaging - Initial QA Report

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

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

### Initial QA Report Tab (Single sheet)

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

## 3) Imaging - Exception Queues Aging Report

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

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

### Summary sheet (Single sheet)

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

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

Detail sheets (Multiple sheets)

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

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

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

## 2.3 Report Location

### 2.3.1 Report selection

**Global Navigation:** Reports

**Local Navigation:** On Request\*

**Task Navigation:** Administrative

**Name:** Imaging - Document Capture Report

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

**Global Navigation:** Reports

**Local Navigation:** On Request\*

**Task Navigation:** Administrative

**Name:** Imaging - Initial QA Report

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

**Global Navigation:** Reports

**Local Navigation:** On Request\*

**Task Navigation:** Administrative

**Name:** Imaging - Exception Queues Aging Report

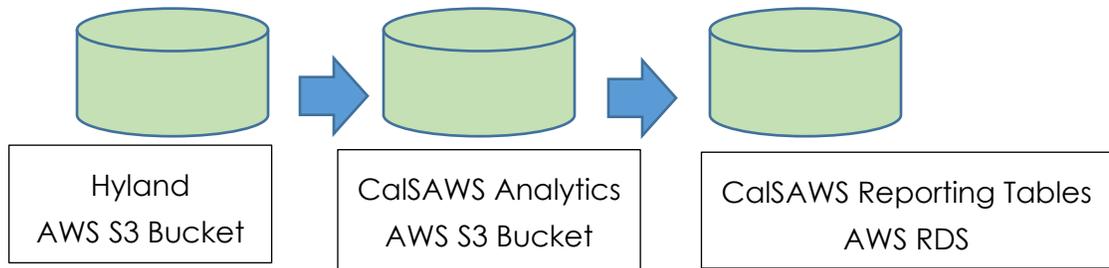
**Description:** This report shows the total number of documents displayed by increasing day increments in the defined workflow queues. Each tab displays the number of incremental days documents created by a specific office have been in the queue

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

### 2.3.2 Imaging Data Flow

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

#### High level flowchart of Imaging database



#### High level steps for the nightly data consumption

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

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

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

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

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

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

### 2.3.3 Imaging Data Format

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

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

#### 1) Documents Captured Report

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

Data:

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

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

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

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

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

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

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

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

Report Datapoints Tab 1:

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

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

Report Datapoints Tab 2:

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

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

## 2) Initial QA Report

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

Data:

San Bernardino Case, [chris.v@c90](mailto:chris.v@c90), Vasquez, Christopher, San Bernardino - 01, 321Z457\_00RZ1CK2Q003PRL, 987654321, 07/01/2020 03:24 PM, 07/01/2020, 07/01/2020, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, [chris.v@c90](mailto:chris.v@c90), Vasquez, Christopher, San Bernardino - 01, 321Z457\_00RZ1CK2Q003ZZZ, , 07/01/2020 05:00 PM, 07/01/2020, 07/02/2020, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

### Report Datapoints Items In Queue

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

## 3) Exception Queues Aging Report

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

Data:

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

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

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

### Report Datapoints

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

## 2.3.4 Report Filters

### 1) Imaging - Document Captured Report Filters

CalSAWS Report Filters

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

Generate Results

### 2) Imaging – Initial QA Report Filters

CalSAWS Report Filters

Q Office	Q County
01	San Bernardino

Generate Results

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

CalSAWS Report Filters

Q Office	Q County
10	San Bernardino

Generate Results

## 2.4 Security Updates

### Security Rights

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

### Security Groups

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

**Note:** Reference Section 3 Supporting Documents, [Item 1](#)

## **2.5 Report Mapping**

N/A

## **2.6 Report Usage/Data Volume Impacts**

N/A

### 3 SUPPORTING DOCUMENTS

---

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

Number	Functional Area	Description	Attachment
1	Online Security	Security matrix for the capture button being added to the Case Summary page.	<a href="#">Online Security Matrix</a>
2	Reports	CalSAWS Logo Sample	

### 4 MIGRATION REQUIREMENTS

---

#### 4.1 Migration Requirements

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

## **5 OUTREACH**

---

N/A

## **6 APPENDIX**

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-215121

DDID 2643: Add GEN 100 - Examples of Verification (11/20) in threshold languages

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Maria Jensen
	Reviewed By	Suresh Mullaguri

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/30/2021	0.1	Initial Draft	Maria Jensen
06/18/2021	1.0	Content Revision: Adding Imaging fields	Maria Jensen
06/29/2021	1.1	Adding Assumption about EN/SP Imaging fields	Maria Jensen

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# 1 OVERVIEW

---

SCR CA-215120 added the GEN 100 - Examples of Verification (11/20) State form to the CalSAWS system in English and Spanish only.

This SCR will add the GEN 100 - Examples of Verification (11/20) form to CalSAWS in the remaining supported threshold languages.

## 1.1 Current Design

Currently the GEN 100 State form is implemented in the CalSAWS system in English and Spanish with the version date of 11/20.

## 1.2 Requests

Implement State Form GEN 100 - Examples of Verification (11/20) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

## 1.3 Overview of Recommendations

Add State Form GEN 100 - Examples of Verification (11/20) in the 11 supported threshold languages.

## 1.4 Assumptions

1. Document Parameters, Print Options, Mailing Requirements and Barcode Options for GEN 100 threshold language forms remain the same as existing GEN 100 English and Spanish forms.
2. Form header will consist of the CalSAWS Standard Header in Threshold Language on page 1, followed by a blank page, then CDSS static labels on page 3.
3. After adding Imaging fields to the GEN 100 form, the English and Spanish versions will also inherit this update as a consequence.

## 2 RECOMMENDATIONS

---

### 2.1 Add Form GEN 100 - Examples of Verification in threshold languages

#### 2.1.1 Overview

This SCR will add the State form GEN 100 – Examples of Verification (revision 11/20) to the CalSAWS system in the remaining threshold languages.

**State Form:** GEN 100 (11/20)

**Programs:** All programs

**Attached Forms:** None

**Forms Category:** Forms

**Template Repository Visibility:** All Counties

**Languages:**

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

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

#### 2.1.2 Create Form GEN 100 XDPs in threshold languages

1. The newly added threshold languages will be made available in the Template Repository. Please see the Supporting Documents #1 for details.

**Form Header:** CalSAWS Standard Header in Threshold Language (page 1); CDSS static labels (page 3)

**Form Title (Document List Page Displayed Name):** Examples of Verification

**Template Description:** This form is used to give customers examples of verification.

**Form Number:** GEN 100

**Include NA Back 9:** No

**Imaging Form Name:** Examples of Verification

**Imaging Document Type:** Verification Requests

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

2. Add Form GEN 100 to the Template Repository in the rest of the threshold languages for all 58 counties.

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

3. The Print Options and Mailing Requirements for Form GEN 100 will carry over to the rest of the threshold languages.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	GEN 100 Threshold Languages	GEN_100_Arabic.pdf GEN_100_Armenian.pdf GEN_100_Cambodian.pdf GEN_100_Chinese.pdf GEN_100_Farsi.pdf GEN_100_Hmong.pdf GEN_100_Korean.pdf GEN_100_Lao.pdf GEN_100_Russian.pdf GEN_100_Tagalog.pdf GEN_100_Vietnamese.pdf

## 4 REQUIREMENTS

---

### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2643	The CONTRACTOR shall add State form GEN 100 - Examples of Verification to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.	<ol style="list-style-type: none"> <li>1. Estimate is for implementing the new form in English and Spanish.</li> <li>2. Spanish translations will be provided by the Consortium.</li> <li>3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.</li> <li>4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.</li> </ol>	With SCR CA-215121, form GEN 100 – Examples of Verification will be added to the CalSAWS system in the 11 supported threshold languages.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-215664

GA/GR Employment Services Phase 1

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Taylor Fitzhugh
	Reviewed By	

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/01/2021	1.0	Initial Draft	Taylor Fitzhugh
06/10/2021	2.0		Taylor Fitzhugh

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## 1 OVERVIEW

---

This SCR is updating the Employment Services program solution for the General Assistance/General Relief programs.

### 1.1 Current Design

Currently, the system has only one employment services program for the Los Angeles County General Assistance/General Relief solution. Activities are associated to the Employment Services programs.

### 1.2 Requests

The current GROW program functionality is specific to Los Angeles County. A new Employment Services program will be created to support the needs of the other 57 counties.

### 1.3 Overview of Recommendations

1. Add a new Employment Services program.
2. Add activities to support the new Employment Services program

### 1.4 Assumptions

1. The changes within this SCR will not impact LA county rules, unless explicitly specified.
2. The employment services program will be hidden for each county until that county migrates.

## 2 RECOMMENDATIONS

---

### 2.1 Program Detail

#### 2.1.1 Overview

The "Program Detail" page is used to add new programs to an existing case.

#### 2.1.2 Program Detail Mockup

##### Program Detail

---

\* - Indicates required fields

Select Program: \*

GA/GR Employment Services

Figure 2.1.1.1 – Program Detail

#### 2.1.3 Description of Changes

1. Add the "GA/GR Employment Services" program to the Select Program dropdown. A list of reference table values for the new program can be found in Appendix item A
2. Update the program filtering logic to only display the GROW program for a county supporting the General Assistance/General Relief program related to the "GA" program code.
3. Update the program filtering logic to only display the GA/GR Employment Services program for a county supporting the General Assistance/General Relief program related to the "GR" program code, General Assistance – Managed or General Assistance – Non-Managed programs.

Note: Filtering logic updates will affect all pages currently utilizing the filtering logic. This list can be found in Appendix Item B.

#### 2.1.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** New Program

#### 2.1.5 Security Updates

No security updates.

### 2.1.6 Page Mapping

Add page mappings for the new page title.

### 2.1.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

## 2.2 Case Summary

### 2.2.1 Overview

The "Case Summary" page displays a short amount of information for all programs and case members based on the view month. This page will be expanded to also display program information for the New GA/GR Employment Services program.

### 2.2.2 Case Summary Mockup

GA/GR Employment Services				
<b>Worker:</b>	Worker Name		<b>Primary Applicant/Recipient:</b>	Doe, John 21M
<b>Worker ID:</b>	<a href="#">34LS009F00</a>		<b>Language:</b>	English
<b>Program Status:</b>	Pending		<b>Phone Number:</b>	
			<b>Email:</b>	
<b>FBU:</b>	1		<b>Payee:</b>	Doe, John 21M
			<b>GR Application Date:</b>	06/01/2021
<b>Name</b>	<b>Role</b>	<b>Role Reason</b>	<b>Status</b>	<b>Status Reason</b>
<a href="#">Doe, John 21M</a>	MEM		Pending	
<a href="#">View Details</a>				

Figure 2.2.2.1 – Case Summary (GA/GR Employment Services)

### 2.2.3 Description of Changes

1. Worker: The name of the Staff assigned to the position that is assigned to the program.
2. Worker ID: The Identifier for the position. This field will be a hyperlink to the Worker Detail page for the selected position. When no staff is assigned to the position, this field will be blank.
3. Program Status: The status of the program on the given view Date.
4. FBU: The Family Budget Unit for the program.
5. Primary Applicant/Recipient: The primary applicant of the program on the given view date.
6. Language: The spoken Language of the primary Applicant.

7. Phone Number: The main phone number for the primary Applicant.
8. Email: The email of the primary applicant.
9. Payee: The Payee of the program on the given view date.
10. GR Application Date: The application date of the Parent General Assistance/General Relief program on the same case.
11. Name: This field will list the names of the participant on the program. The name will be a hyperlink to the Program Person History page for the program person selected if the user has the 'PersonHistoryView' right associated to their profile.
12. Role: The Role code of the program person at the given view date.
13. Role Reason: The Reason the role was assigned at the given view date.
14. Status: The status of the participant in the program at the given view date.
15. Status Reason: The status reason of the participant's program status at the given view date.
16. View Details: This button will navigate to the GA/GR Employment Services Detail page for the associated program.

#### 2.2.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** Case Summary

#### 2.2.5 Security Updates

No security updates.

#### 2.2.6 Page Mapping

Add page mappings for the new page title.

#### 2.2.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

### 2.3 Employment Services Workload Inventory

#### 2.3.1 Overview

The "Employment Services Workload Inventory" page displays a list of the Employment Services programs associated with the given worker. This page will be updated to include the GA/GR Employment Services program.

## 2.3.2 Employment Services Workload Inventory Mockup

### Employment Services Workload Inventory

Worker ID: 19AS00008Y <input type="button" value="Select"/>	Display Workload: * <input type="text" value="03/31/2021"/>	Status Effective Date: * <input type="text" value="04/01/2021"/>						
Results per Page: <input type="text" value="100"/> <input type="button" value="Go"/>								
<b>Search Results Summary</b>		<b>Results 1 - 1 of 1</b>						
<b>Total Assignments</b>								
Cases	1							
Program	1							
Case Number	Name	Program	Program Status	Program Status Reason	Program Review Date	Activity	Activity Review Date	Benefit Program Status
<a href="#">L000000</a>	Doe, John 26M	GE	Deregistered	Conversion				Denied

Figure 2.3.2.1 – Employment Services

### 2.3.3 Description of Changes

1. Add the GA/GR Employment Services program to the existing page logic. The program will display as 'GE'.

### 2.3.4 Page Location

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

### 2.3.5 Security Updates

No security updates.

### 2.3.6 Page Mapping

No page mapping updates.

### 2.3.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

## 2.4 GA/GR Employment Services Detail

### 2.4.1 Overview

The "GA/GR Employment Services Detail" page displays the program information for a given month.

### 2.4.2 GA/GR Employment Services Detail Mockup

#### GA/GR Employment Services Detail

\* - Indicates required fields

[View History](#)

[Issuance Method](#)

[Edit](#)

[Close](#)

Date: \*

08/01/2021

##### Program Information

Status: \* Pending      Status Reason:      Source: \* Other

Application Date: \*

06/01/2021

Automatically Reassign When Activated:

No

##### Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees
Doe, John 21M	Primary Applicant/Recipient	06/01/2021		
Doe, John 21M	Payee	06/01/2021		

##### Program Persons

Name	Role	Role Reason	Status	Status Reason
<a href="#">Doe, John 21M</a>	MEM		Pending	

##### Secondary Assignment

Worker

[View History](#)

[Issuance Method](#)

[Edit](#)

[Close](#)

Figure 2.4.2.1 – GA/GR Employment Services Detail (View Mode)

## GA/GR Employment Services Detail

\* - Indicates required fields

View History Save and Return Cancel

Date: \*

08/01/2021 View Date

**Program Information**

Status: \* Pending Status Reason: Source: \* Other

Application Date: \* 08/01/2021

Automatically Reassign When Activated: No

**Administrative Roles**

Name	Administrative Role	Begin Date	End Date	Use Between Payees	
Doe, John 21M	Primary Applicant/Recipient	06/01/2021			Edit
Doe, John 21M	Payee	06/01/2021			Edit

Add

**Program Persons**

Name	Role	Role Reason	Status	Status Reason	
<a href="#">Doe, John 21M</a>	MEM		Pending		Edit

**Secondary Assignment**

Worker

[Worker Name](#) Remove Worker

View History Save and Return Cancel

Figure 2.4.2.2 – GA/GR Employment Services Detail (Edit Mode)

### 2.4.3 Description of Changes

1. View History button: This button will navigate the worker to the "GA/GR Employment Services Detail History" "GA/GR Employment Services History" page.
2. Edit button: This button will refresh the page in 'Edit' mode. This button is only available in 'View' mode.
3. Close button: This button will navigate the worker to the Case Summary page. This button is only available in 'View' mode.

4. Save and Return button: Saves the changes that have been made to the "GA/GR Employment Services Detail" page and will navigate the worker to the Case Summary page. This button is only available in 'Edit' mode.
5. Cancel button: Returns the worker to the Case Summary page. This button is only available in 'Edit' mode.
6. Date: The view date of the program information This is a required field.
7. View Date button: Pressing this button will refresh the page with the program information as of the Date. This button is only available in 'Create'/'Edit' mode.
8. Program Information Section
  - a. Status: Status of the program as of the Date. This field is required.
  - b. Status Reason: Reason for the value displayed in the Status column.
  - c. Source: Source of the Application that is tied to the Status as of the Date. This field is required.
  - d. Application Date Program Begins On: Date of Application for the program that is tied to the Status as of the Date. This field is required.
  - e. Automatically Reassign When Activated: This field will be a Yes/No dropdown that will let the current case be reassigned through an overnight batch job after being Activated through EDBC.
9. Administrative Roles section
  - a. Name: Name of the person assigned to the Administrative Roles as of the Date.
  - b. Administrative Role: Administrative Role that is assigned to the person in the Name column.
  - c. Begin Date: Date that the person in the Name column was assigned to the Administrative Role.
  - d. End Date: Date that the person in the Name column ended the Administrative Role.
  - e. Edit button: Navigate the worker to the Administrative Role Detail page in 'Edit' mode. This button is only available in 'Create'/'Edit' mode.
  - f. Add button - Navigate the worker to the Administrative Role Detail page in 'Create' mode. This button is only available in 'Create'/'Edit' mode.
10. Program Persons section
  - a. Name: Name of the Program Person. This field will be a hyperlink that navigates the user to the GA/GR Employment Services Person Detail page in view mode.
  - b. Role: Role of the Person as of the Date.
  - c. Role Reason: Reason for the value displayed in the Role column.
  - d. Status: Status of the Person as of the Date.
  - e. Status Reason: Reason for the value displayed in the Status column.
11. Secondary Assignment section

- a. Worker: Name of the Worker that is assigned as a secondary assignment. Clicking on the Worker will navigate the worker to the Worker Detail page.
- b. Select button: Pressing button will navigate the worker to the Select Worker page to find a worker for the secondary assignment. This button is only available in 'Create'/'Edit' mode.
- c. Remove Worker button: Pressing the button will Remove the secondary assignment. This button is only available in 'Create'/'Edit' mode.

#### 2.4.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** Case Summary

#### 2.4.5 Security Updates

No security updates.

#### 2.4.6 Page Mapping

Add page mappings for the new page title.

#### 2.4.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

### 2.5 GA/GR Employment Services Status List

#### 2.5.1 Overview

The "GA/GR Employment Services Status List" page displays a list of the work registration records and program statuses related to a particular individual's GA/GR Employment Services program.

## 2.5.2 GA/GR Employment Services Status List Mockup

### GA/GR Employment Services Status List

\* - Indicates required fields

Display by Name: \*  
Doe, John 21M

From:

To:

Review Date:

Edit

View

Work Registration

Status	Status Reason	Begin Date	End Date
<input type="checkbox"/> <a href="#">Employable</a>		06/01/2021	

Remove

Add

Edit

View History

Program

Status	Status Reason	Begin Date	End Date
<a href="#">Pending</a>		06/01/2021	

Add Status

Edit

Figure 2.5.2.1 – GA/GR Employment Services Status List

### 2.5.3 Description of Changes

1. The left-hand task navigation option will only display if the case has the GA/GR Employment Services program. This option will be restricted based on the "CustomerParticipationListView" security right.
2. Display by Name: This dropdown will list all valid Case Members.
3. From: This date will be the minimum date that any records displaying must be active for.
4. To: This date will be the maximum date that any records displaying must be active for.
5. View: This button will execute a search for based on the Display by fields.
6. Edit: This button will allow the user to modify the "Review Date".
7. Review Date: This field is a date field. This field will default to blank.
8. Work Registration: This section will show the work registration records of Type "GA/GR ES" related to the person listed in the "Display by Name" field. This table will have the following fields:
  - a. Status: The Work Registration status. This will be a hyperlink to the Work Registration Detail page in View Mode when the user has the "WorkRegistrationDetailView" right.

- b. Status Reason: The status reason for the Work Registration.
  - c. Begin Date: The begin date of the Work Registration.
  - d. End Date: The end date of the Work Registration.
  - e. Edit: This button will take the user to the Work Registration Detail page in Edit mode. This button will only display when the user has the "WorkRegistrationDetailView" right.
  - f. View History: This button will open the Transaction History Detail page for the related Work Registration record.
9. Add: This button will take the user to the "Work Registration Detail" page in Create mode. The type will be defaulted to "GA/GR ES" for the new Work Registration record. This button will only display when the user has the "WorkRegistrationDetailEdit" right.
10. Remove: This button will remove all selected Work Registration records. This button will only display when the user has the "WorkRegistrationListRemove" right.
11. Program: This section will show the Status of the program. This table will display the following results:
- a. Status: The Status of the program.
  - b. Status Reason: The status reason for the Program.
  - c. Begin Date: The date the program status began.
  - d. End Date: The date the program status ends.

#### 2.5.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** GA/GR Employment Services

#### 2.5.5 Security Updates

No security updates.

#### 2.5.6 Page Mapping

Add page mappings for the new page title.

#### 2.5.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

## 2.6 GA/GR Employment Services Status Detail

### 2.6.1 Overview

The "GA/GR Employment Services Status Detail" page is used to display or create detailed information regarding a program status.

### 2.6.2 GA/GR Employment Services Status Detail Mockup

#### GA/GR Employment Services Status Detail

\* - Indicates required fields Close

<b>Status:</b> *	<b>Status Reason:</b> *
Active	Conversion
<b>Begin Date:</b> *	<b>End Date:</b>
11/04/2019	07/31/2021

Close

Figure 2.6.2.1 – GA/GR Employment Services Status Detail – (View)

#### GA/GR Employment Services Status Detail

\* - Indicates required fields Save and Return Cancel

<b>Status:</b> *	<b>Status Reason:</b> *
Active	Participating
<b>Begin Date:</b> *	<b>End Date:</b>
03/01/2021	

Save and Return

Cancel

Figure 2.6.2.2 – GA/GR Employment Services Status Detail – (Create)

### 2.6.3 Description of Changes

1. Status: This dropdown will only be editable in Create Mode. This field will be a dropdown field with the following options:
  - a. Sanction
  - b. Pending
  - c. Non-Comp

- d. Deregistered
  - e. Active
2. Status Reason: The Status Reason dropdown will not display when the Status is "Pending". This dropdown will only be editable in Create Mode. This field will be a dropdown with the following options based on the associated Status value:
- a. Active
    - i. Participating
    - ii. Pending Appraisal
    - iii. No Activity
  - b. Sanction
    - i. CA - Failed to keep Case Manager Appointment
    - ii. FO - Failed to keep Orientation
    - iii. OS - Failed to keep Workforce Investment Act Activity
    - iv. JC - Failed to keep Job Readiness Training
    - v. YT - Failed to keep Youth Activity
    - vi. YT - Failed to keep Summer Youth Employment Activity
    - vii. YT - Failed to keep CSE Activity
    - viii. YT - Failed to keep CSBG Activity
    - ix. ST - Failed to keep Short-Term Training Activity
    - x. SP - Failed to keep Self-Initiated Program
    - xi. DM - Failed to keep Domestic Violence Services
    - xii. MH - Failed to keep Mental Health Services
    - xiii. MH - Failed to keep Clinical Assessment
    - xiv. VA - Failed to keep Vocational Assessment Appointment
    - xv. TA - Failed to keep Education Training
    - xvi. TA - Failed to keep Literacy
    - xvii. TA - Failed to keep GED Activity
    - xviii. JS - Failed to keep Intensive Case Management Activity
    - xix. WT - Failed Job/Training Offered
    - xx. WT - Failed Family Reunification
    - xxi. WR - Failed to keep Employment Needs Evaluation Activity
    - xxii. WR - Failed to keep Day Reporting Center Activity
    - xxiii. WR - Failed to keep Job Fair Activity
    - xxiv. FT - Failed to keep Career Opportunities Resources & Employment
    - xxv. FT - Failed to keep Pathway To Success Activity
    - xxvi. FT - Failed to keep Life Skill Activity
    - xxvii. OP - Failed to keep Office Occupations Activity
    - xxviii. OP - Failed to keep Security Officer Training
    - xxix. OP - Failed to keep Security Officer Assessment
    - xxx. OP - Failed to keep Computer Application Class Activity
    - xxxi. NC - Failed to keep Non-Custodial Parent Activity
    - xxxii. OS - Failed to keep One-Stop Activity
  - c. Non-Comp
    - i. CA - Failed to keep Case Manager Appointment
    - ii. FO - Failed to keep Orientation

**Commented [TF1]:** Check if we can use different status reasons

- iii. JC - Failed to keep Job Readiness Training
  - iv. SP - Failed to keep Self-Initiated Program
  - v. DM - Failed to keep Domestic Violence Services
  - vi. MH - Failed to keep Mental Health Services
  - vii. MH - Failed to keep Clinical Assessment
  - viii. VA - Failed to keep Vocational Assessment Appointment
  - ix. TA - Failed to keep Education Training
  - x. TA - Failed to keep Literacy
  - xi. TA - Failed to keep GED Activity
  - xii. JS - Failed to keep Intensive Case Management Activity
  - xiii. WT - Failed Job/Training Offered
  - xiv. WT - Failed Family Reunification
  - xv. WR - Failed to keep Employment Needs Evaluation Activity
  - xvi. WR - Failed to keep Day Reporting Center Activity
  - xvii. WR - Failed to keep Job Fair Activity
  - xviii. FT - Failed to keep Career Opportunities Resources & Employment
  - xix. FT - Failed to keep Pathway To Success Activity
  - xx. FT - Failed to keep Life Skill Activity
  - xxi. OP - Failed to keep Office Occupations Activity
  - xxii. OP - Failed to keep Security Officer Training
  - xxiii. OP - Failed to keep Security Officer Assessment
  - xxiv. OP - Failed to keep Computer Application Class Activity
  - xxv. NC - Failed to keep Non-Custodial Parent Activity
  - xxvi. OS - Failed to keep One-Stop Activity
  - xxvii. OS - Failed to keep Workforce Investment Act Activity
  - xxviii. YT - Failed to keep Youth Activity
  - xxix. YT - Failed to keep Summer Youth Employment Activity
  - xxx. YT - Failed to keep CSE Activity
  - xxxi. YT - Failed to keep CSBG Activity
  - xxxii. ST - Failed to keep Short-Term Training Activity
  - xxxiii. Refused job offer/Voluntarily quit job
  - xxxiv. JC - Failed to keep Job Readiness Training for Youth
  - xxxv. YT - Failed to keep GROW Transition-Age Youth Employment Program (GTEP)
  - xxxvi. YT - Failed to keep GROW Youth Employment Program (GYEP)
  - xxxvii. RP - Failed to keep Rapid Employment & Promotion
- d. Deregistered
- i. Terminated due to time limit
  - ii. Change to Unemployable
  - iii. Terminated due to 0-day sanction
  - iv. Terminated due to 30-day sanction
  - v. Terminated due to 60-day sanction
  - vi. Terminated due to other GR reasons
3. Begin Date: The begin date of the program status
4. End Date: The End date of the program status

5. Save and Return: This button will only appear in Create mode. This button will save the new status and navigate the user to the GA/GR Employment Services Status List page.
6. Cancel: This button will only appear in Create mode. This button will discard the new status changes and navigate the user to the GA/GR Employment Services Status List page.
7. Close: This button will only appear in View mode. This button will navigate the user to the GA/GR Employment Services Status List page.

#### 2.6.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** GA/GR Employment Services

#### 2.6.5 Security Updates

No security updates.

#### 2.6.6 Page Mapping

Add page mappings for the new page title.

#### 2.6.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

### 2.7 Resource Search

#### 2.7.1 Overview

The resource search page is used to find existing Organizations within the system. This page will be updated to include the new Category and Type options linked specifically for the new GA/GR Employment Services program.

## 2.7.2 Resource Search Mockup

### Resource Search

\*- Indicates required fields

<b>Name:</b> <input type="text"/>	<b>ID:</b> <input type="text"/>	<b>Status:</b> <input type="text" value="All"/>
<b>Category:</b> <input type="text" value="Provider"/>		<b>OES Code:</b> <input type="button" value="Select"/>
<b>Service Category:</b> <input type="text" value="GA/GR Employment Services"/>	<b>Service Type:</b> <input type="text"/>	
<b>Vendor ID:</b> <input type="text"/>	<b>Tax ID:</b> <input type="text"/>	<b>License/Trustline ID:</b> <input type="text"/>
<b>Starting Address: *</b> <input type="text" value="123 MAIN ST"/>		
<b>City: *</b> <input type="text" value="NORWALK"/>	<b>State: *</b> <input type="text" value="CA"/>	<b>Zip Code:</b> <input type="text" value="90650"/>
<b>Maximum Distance From Address: *</b> <input type="text" value="50 miles"/>		
<b>Job Order Category:</b> <input type="text"/>	<b>Job Order ID:</b> <input type="text"/>	
<b>Job Order Title:</b> <input type="text"/>		

Results per Page:

Figure 2.2.2.1 – Resource Search

## 2.7.3 Description of Changes

1. Add the following Service Category and Service Type Combinations:
  - a. GA/GR Employment Services
    - i. Adult Basic Education
    - ii. Appraisal
    - iii. Assessment
    - iv. Community Services
    - v. Domestic Abuse Services
    - vi. Drug or Alcohol Rehabilitation
    - vii. Education
    - viii. Employment
    - ix. Employment Services
    - x. English Language Training
    - xi. Homeless
    - xii. Job Club

- xiii. Job Search
- xiv. Mental Health Services
- xv. On-the-Job Training
- xvi. Orientation
- xvii. Other
- xviii. Secondary School
- xix. Skills Training
- xx. Substance Abuse Services
- xxi. Vocational Rehabilitation
- xxii. Vocational Training
- xxiii. Work Experience
- xxiv. Workfare

#### 2.7.4 Page Location

- **Global:** Resource Databank
- **Local:** Resources
- **Task:** Resource Search

#### 2.7.5 Security Updates

No security updates.

#### 2.7.6 Page Mapping

No page mapping updates.

#### 2.7.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

### 2.8 Select Activity

#### 2.8.1 Overview

The "Select Activity" page is used to allow the worker to select the type of activity that they wish to create for the participant.

## 2.8.2 Select Activity Mockup

### Select Activity

\*- Indicates required fields

Cancel

Search

<b>Activity Number:</b> <input type="text"/>	<b>Provider:</b> <input type="text"/>	
<b>Category: *</b> GA/GR Employment Services ▼	<b>Type:</b> -Select- ▼	
<b>OES Code:</b> Select		
<b>Status: *</b> Active	<b>Start Date:</b> <input type="text"/>	
<b>Search by proximity to the following address:</b>		
<b>Address Line 1: *</b> 17 SHAUGHNESSY TERRACE		
<b>City: *</b> LOS ANGELES	<b>State: *</b> CA ▼	<b>ZIP Code:</b> 90047
<b>Maximum Distance From Address: *</b> 20 miles ▼		

Results per Page: 25 ▼ Search

Cancel

Figure 2.8.2.1 – Select Activity

## 2.8.3 Description of Changes

1. Add the following Service Category and Service Type Combinations:
  - a. GA/GR Employment Services
    - i. Adult Basic Education
    - ii. Appraisal
    - iii. Assessment
    - iv. Community Services
    - v. Domestic Abuse Services
    - vi. Drug or Alcohol Rehabilitation
    - vii. Education
    - viii. Employment
    - ix. Employment Services
    - x. English Language Training
    - xi. Homeless
    - xii. Job Club
    - xiii. Job Search
    - xiv. Mental Health Services
    - xv. On-the-Job Training
    - xvi. Orientation
    - xvii. Other

- xviii. Secondary School
- xix. Skills Training
  - xx. Substance Abuse Services
- xxi. Vocational Rehabilitation
- xxii. Vocational Training
- xxiii. Work Experience
- xxiv. Workfare

#### 2.8.4 Page Location

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

#### 2.8.5 Security Updates

No security updates.

#### 2.8.6 Page Mapping

No page mapping updates.

#### 2.8.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

### 2.9 Service Detail

#### 2.9.1 Overview

The "Service Detail" is used to indicate the type of services a resource can provide.

## 2.9.2 Service Detail Mockup

### Service Detail

\* - Indicates required fields

Save Cancel

**Service Information**

Service ID: Vendor ID:

Service Category: \* GA/GR Employment Services Service Type: \* - Select -

**Service Address** \*  
123 Main St  
LOS ANGELES, CA 90064-1709 Edit

Is this Service accessible by public transportation: Language:   
Phone Number: ext:   
Start Date: \* 03/02/2021 End Date: \*   
Status: \* Active Status Date: \*   
Hours of Operation:   
Additional Comments:   
Contact Person Name:   
Worker ID: \* 90LS00AW00 Select

**Contract Information**

Is this Service contracted (and no contracted Activities exist)? \* No

Save Cancel

Figure 2.9.2.1 – Select Activity

### 2.9.3 Description of Changes

1. Add the following Service Category and Service Type Combinations:

- a. GA/GR Employment Services
  - i. Adult Basic Education
  - ii. Appraisal
  - iii. Assessment
  - iv. Community Services
  - v. Domestic Abuse Services
  - vi. Drug or Alcohol Rehabilitation
  - vii. Education
  - viii. Employment
  - ix. Employment Services
  - x. English Language Training
  - xi. Homeless
  - xii. Job Club
  - xiii. Job Search
  - xiv. Mental Health Services
  - xv. On-the-Job Training
  - xvi. Orientation
  - xvii. Other
  - xviii. Secondary School
  - xix. Skills Training
  - xx. Substance Abuse Services
  - xxi. Vocational Rehabilitation
  - xxii. Vocational Training
  - xxiii. Work Experience
  - xxiv. Workfare

#### 2.9.4 Page Location

- **Global:** Resource Databank
- **Local:** Resources
- **Task:** Services

#### 2.9.5 Security Updates

No security updates.

#### 2.9.6 Page Mapping

No page mapping updates.

#### 2.9.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

### 3 REQUIREMENTS

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2313	<p>The CONTRACTOR must design, implement and test GA/GR Program functionality leveraging LRS as is whenever possible. This includes:</p> <ol style="list-style-type: none"> <li>1) Page Availability by County (Page Configurable)</li> <li>2) Parts of page available; Data Collection (Page Configurable for GA/GR only)</li> <li>3) Values contained within a field (Reference Table Configurable – Drop down values)</li> <li>4) A County Level Administration page for the following areas:               <ol style="list-style-type: none"> <li>a) Amount of benefits issued by program by case ( Max grant amount, rent, utilities etc.. for EDBC calculation)</li> <li>b)Real/Personal Property and Resource limits</li> <li>c)Time Clock settings EDBC rule</li> <li>d) Household Composition- Only rule turn on/off is available but cannot define the composition applicable by county. This is not current CalWIN functionality</li> </ol> </li> </ol>	<p>Requirement 1: This will be configurable using county security roles.</p> <p>Requirement 2: Parts of the page will not be configurable by County</p> <p>Requirement 3: All dropdown will use Standard values where applicable. Online: No Updates to the Resource Databank are required to track Employment Service Activities. No new pages are required to track the GR Employment Service Program for the CalWIN Counties</p> <p>Requirement 4: The County admin page will be implemented in CalSAWS and will only be used by County Admin to affect specified rules and conditions. Not all rules will be available</p>	<p>New Activity Types are being added in support of the new Employment services program.</p>

<p>e) HH Reporting responsibilities</p> <p>5) Methods of benefit issuance(s)</p> <p>    i) Proration- will be based on the BDA field populated by the user</p> <p>    ii) Immediate Need - use rush indicator in EDBC</p> <p>6) Eligibility Determination required</p> <p>    i) Beginning Date of Aid set manually by the county</p> <p>    ii) Residency (This is for EDBC rule and not the number of days)</p> <p>7) Non-System Determined manual value entered – no EDBC</p> <p>8) Employment Services Program Participation Required</p> <p>    i) Assessment</p> <p>    ii) Orientation</p> <p>    iii) Activities</p> <p>9) County Defined Aid Codes within the MEDS identified range</p> <p>10) Hearings</p> <p>    i) Aid Paid Pending</p> <p>11) Counties will have the opportunity to opt in/opt out of specific pages/functionality</p>	<p>to be controlled from the county Admin page. The impacts from these updates will not be immediate but will occur overnight.</p> <p>Requirement 5.1 and 6.2:</p> <p>Eligibility: This will be handled as part of GA/GR rules in CalSAWS as mentioned in the DDID #2314</p> <p>Requirement 5.2: Fiscal: No updates are required to select the immediacy indicator (Rush or Routine and Manually issued)</p> <p>Requirement 6.1: This will be handled manually by the worker.</p> <p>Requirement 7: Eligibility: The CalSAWS manual EDBC solution will be leveraged for this requirement.</p> <p>Requirement 8: Fiscal: 1. No Updates to the Resource Databank are required to track</p>	
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		<p>Employment Service Activities.</p> <p>2. No updates are required to the county specific fiscal interface to support the GR Employment service program</p> <p>Requirement 8.1, 8.2, 8.3</p> <p>Batch and Interfaces:</p> <p>Create 6 new GR Employment Service Program Automation batch jobs for 57 counties and make these county configurable.</p> <ol style="list-style-type: none"> <li>1. Employment Service Deregistration</li> <li>2. Worker assignment</li> <li>3. Worker removal.</li> <li>4. 3 batch jobs for closing of activities (when the GA program is discontinued, when the participant didn't submit the progress report)</li> </ol> <p>Note:</p> <p>The existing 20 GROW employment service status change batch jobs will remain LA county specific and will not be available/configured for the other 57 counties.</p> <p>The existing 15 GROW employment services batch jobs (includes</p>	
--	--	---	--

		<p>deregistration, Employment services management, Worker assignment, non-compliance management) will remain LA county specific and will not be available/configured for the other 57 counties.</p> <p>Requirement 10: Eligibility: The existing aid paid pending business functionality of CalWORKs in CalSAWS will be repurposed for GA/GR.</p> <p>Requirement 11: Online/Fiscal: This will be maintained by the county administrators and no changes are required in CalSAWS.</p>	

## 4 APPENDIX

### A. Program Reference table values

<b>Code_Num_Identif</b>	<b>GE</b>
<b>SHORT_DECODE_NAME</b>	<b>GA/GR Employment Services</b>
Program Code	Y
Other Assistance Program Code	N
Considered Public Assistance	N
FS Count in Allotment	N
Multiple Programs Allowed	Y
Organization as Payee	Y
Intake Program	Y
Report Inter-County Transfer	N
Eligibility EDBC Indicator	N
NOABenefitType	
Caseload Search Indicator	Y
Intake Redetermination Flag	N
WDTIP Program Codes	
External Programs	
Manual EDBC Indicator	N
Redetermination Indicator	N
Recovery Account Indicator	Y
Allow Service Arrangement	Y
Aid Code Base Program	GR
Un-Reimbursed Assistance Program Codes	N
SIU Referred Program	Y
RA Uncollectible Status	Y
Uncollectible Cash	Y
IPV Programs	N
Is Application Considered	Y
Time Limits Program	
C4Yourself	
Managed Application	N
EICT	
EICT Programs	
Reception Log Program Codes	GE
RCC Programs	
Call Log Program Codes	GA/GR Employment Services
LALegacyPgmCodes	

Case Flag Programs	
Receipt Programs	Y
Program Hierarchy	13
YBN_Outbound	GE
Job Development Activity	
ES Search Code	Y
Change Reason Program	
Distinguish between DCFS and DPSS Programs	DPSS
Spanish	
Pending Authorization Days To Complete	0
Program Code to Display	GE
EBT Stagger Program	N
YBN_EW_Communication	GE
Program Rescission Time Limit	0
Recovery Account Assignment	GR
Leader Program Name	
Authorized Representative	N
Program to display online	GA/GR Employment Services
Activity Agreement programs	N
Batch EDBC All programs mode	N
Available for EDBC Threshold	N
Available for supportive Services	Y

- B. List of Affected Pages
- a. Best Practice Detail
  - b. Best Practice Search
  - c. Call Log Detail
  - d. Care and Maintenance Fund Detail
  - e. Computation Request Detail
  - f. Create QA/QC Batch
  - g. Distributed Documents Search
  - h. Eligibility Non-Compliance List
  - i. Findings Detail
  - j. Fiscal History Search
  - k. Foster care Recovery Account Detail
  - l. Hearing Detail
  - m. Invoice Search
  - n. Money Management List
  - o. Office Detail
  - p. Other Program Assistance Detail
  - q. Pending Authorizations
  - r. Pending Workload Assignment List
  - s. Performance Analysis detail
  - t. Program Detail

- u. Quality Review Detail
- v. Receipt Mass Upload Search
- w. Reception Log Detail
- x. Recovery Account Detail
- y. Recovery Account Search
- z. Recovery Account Workload Inventory
- aa. Reminders List
- bb. Report Search
- cc. Select Document
- dd. Service Arrangements List
- ee. Special Investigation Detail
- ff. Special Investigations Referral
- gg. Standards Detail
- hh. Template Repository Search
- ii. Unreimbursed Assignment pool
- jj. Valuable Request Search
- kk. Verification Detail
- ll. Workload Reassignment Detail

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-223586

NA BACK 9 Legal Aid Address Updates

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Tiffany Huckaby
	Reviewed By	Amy Gill

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
2/04/2021	0.1	Initial Design	Tiffany Huckaby
03/23/2021	0.2	Minor cosmetic/formatting updates	Amy Gill
6/18/2021	0.3	Added clarifications per Build/ST concerns	Tiffany Huckaby

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# 1 OVERVIEW

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This effort is updating the Legal Aid Address section on the CalSAWS NA BACK 9 to make it large enough to contain the Legal Aid Addresses for migration counties.

## 1.1 Current Design

Currently the Legal Aid Address sections on the NA BACK 9 Form and NA BACK 9 NOA versions only hold between 5 and 6 lines of county information which is large enough to populate the Legal Aid Address for Los Angeles County. Currently there are potentially seven lines of information that can be used for a Legal Aid Address.

## 1.2 Requests

Update the NA BACK 9 Form and NOA versions to include space for the following lines of information for the Legal Aid Address:

- Contact Name
- Organization
- Address Line One
- Address Line Two
- City, State, Zip
- Primary Phone Number / Fax
- Toll Free Phone Number

## 1.3 Overview of Recommendations

Update the following NA BACK 9 versions that exist in CalSAWS to include enough space to populate all possible Legal Aid Address information:

- CMSP Form NA BACK 9
- DCFS NA BACK 9
- GA/GR NA BACK 9
- MAGI NA BACK 9 for Forms
- MAGI NA BACK 9 for NOAs
- NA BACK 9 for NOAs
- NA BACK 9 for CSF 165
- Template Repository NA BACK 9

## 1.4 Assumptions

1. This effort is only updating the NA BACK 9. No other Forms/NOAs will be updated with this effort.
2. This effort is only updating the space to populate the Legal Aid Address. No other updates to the NA BACK 9 will be implemented with this effort.
3. This effort is not updating the CMSP Legal Back for dynamically generated NOAs via EDBC. Currently this NOA Fragment expands to fit the size of the Legal Aid Address.
4. LA county currently does not have Legal Aid address information that spans seven lines, however, if LA county in the future updates their Legal Aid is to

include any of this information the NA Back 9 will populate the updated version.

## 2 RECOMMENDATIONS

---

### 2.1 Update CMSP NA Back 9 for Forms

This recommendation will update the CMSP Forms NA BACK 9 version.

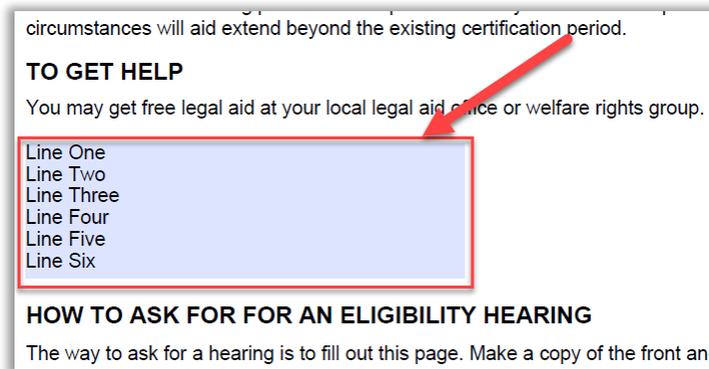
#### 2.1.1 Overview

Currently the CMSP NA BACK 9 generates with CMSP Forms that are available in the Template Repository (CMSP100, CMSP239A, CMSP239B). It currently only has space for six lines of information for the Legal Aid Address.

**State Form:** NA BACK 9

**Current Programs:** MC - CMSP

**Existing Languages:** English and Spanish



circumstances will aid extend beyond the existing certification period.

**TO GET HELP**  
You may get free legal aid at your local legal aid office or welfare rights group.

Line One  
Line Two  
Line Three  
Line Four  
Line Five  
Line Six

**HOW TO ASK FOR FOR AN ELIGIBILITY HEARING**  
The way to ask for a hearing is to fill out this page. Make a copy of the front and

A red arrow points to the six-line text input field, and a red box highlights the lines.

#### 2.1.2 Description of Change

##### 2.1.2.1 Updates to Form XDP

Update the CMSP NA BACK (CMSP\_NA\_BACK9) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

**Updated Languages:** English and Spanish

the same until the hearing process is completed or until your certification period circumstances will aid extend beyond the existing certification period.

### TO GET HELP

You may get free legal aid at your local legal aid office or welfare rights group.

Contact Name  
Organization  
Address Line One  
Address Line Two  
City, State, Zip  
Primary Phone Number / Fax  
Toll Free Phone Number

### HOW TO ASK FOR FOR AN ELIGIBILITY HEARING

## 2.2 Update NA Back 9 for Foster Care, Kin-GAP, and AAP NOAs

This recommendation will update the NA BACK 9 version that generates for the DCFS programs in the system.

### 2.2.1 Overview

Currently the DCFS NA BACK 9 generates with the AAP, Foster Care, and Kin-GAP NOAs. It also generates with Forms RFA100 and RFA100A. It currently only has space for five lines of information for the Legal Aid Address.

**State Form:** NA BACK 9

**Current Programs:** AAP, FC, KG

**Existing Languages:** English and Spanish

<p><b>YOUR HEARING RIGHTS</b> 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.</p> <p>If you ask for a hearing <u>before</u> an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:</p> <ul style="list-style-type: none"><li>• Your Cash Aid or Medi-Cal will <u>stay the same</u> while you wait for a hearing.</li><li>• Your Child Care Services may stay the same while you wait for a hearing.</li><li>• Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.</li></ul> <p>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:</p> <p>Yes, lower or stop: <input type="checkbox"/> Cash Aid <input type="checkbox"/> CalFresh <input type="checkbox"/> Child Care</p> <p><b>While You Wait for a Hearing Decision for:</b> <b>Welfare to Work:</b> You do not have to take part in the activities.</p> <p>You may receive child care payments for employment and for activities approved by the county before this notice.</p> <p>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.</p>	<p><b>TO ASK FOR A HEARING:</b></p> <ul style="list-style-type: none"><li>• Fill out this page.</li><li>• 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.</li><li>• Send or take this page to:</li></ul> <p><b>OR</b></p> <ul style="list-style-type: none"><li>• Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.</li></ul> <p><b>To Get Help:</b> 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.</p> <p>Line One Line Two Line Three Line Four Line Five</p> <p>If you do not want to go to the hearing alone, you can bring a friend or someone with you.</p> <p><b>HEARING REQUEST</b></p>
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## 2.2.2 Description of Change

### 2.2.2.1 Updates to Form XDP

Update the DCFS NA BACK (NA\_BACK9\_DCFS\_FRAGMENT, ID: 671) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

#### Updated Languages: English and Spanish

**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 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.

**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:

**OR**

- Call toll free: 1-800-952-5253 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.

Contact Name  
Organization  
AddrLine1  
AddrLine2  
city, State, Zip  
primaryPhoneNumber / Fax  
tollFreePhoneNumber

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

**HEARING REQUEST**

## 2.3 Update GA/GR NA Back 9

This recommendation will update the GA/GR NA BACK 9 version.

### 2.3.1 Overview

Currently the GA/GR NA BACK 9 generates with the GA/GR NOAs from the Template Repository (CSF106, CSF107, CSF108, CSF109, CSF110, CSF111). It currently only has space for five lines of information for the Legal Aid Address.

Note: CA-216163 will turn on GA NOAs for migration counties. A note has been added to the SCR (CA-216163) to verify that these fields are populated correctly at the time they are turned on in the system.

**State Form:** N/A, created from County feedback

**Current Programs:** GA/GR

## Existing Languages: English and Spanish

<ul style="list-style-type: none"><li>• Fill out this page.</li><li>• 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.</li><li>• Send or take this page to:</li></ul> <div style="background-color: #e0e0ff; height: 60px; width: 100%;"></div> <p style="text-align: center;"><b>OR</b></p> <ul style="list-style-type: none"><li>• Call toll free: <b>1-800-952-5253</b> or for hearing or speech impaired who use TDD <b>1-800-952-8349</b>.</li></ul> <p><b>To Get Help:</b> 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.</p> <div style="border: 1px solid red; padding: 5px;"><p>Line One Line Two Line Three Line Four Line Five</p></div> <p>If you do not want to go to the hearing alone, you can bring a friend or someone with you.</p>	<table border="1"><tr><td>BIRTH DATE</td><td>PHONE NUMBER</td></tr><tr><td colspan="2">STREET ADDRESS</td></tr><tr><td>CITY</td><td>STATE ZIP CODE</td></tr><tr><td>SIGNATURE</td><td>DATE</td></tr><tr><td>NAME OF PERSON COMPLETING THIS FORM</td><td>PHONE NUMBER</td></tr><tr><td colspan="2"><input type="checkbox"/> 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.)</td></tr><tr><td>NAME</td><td>PHONE NUMBER</td></tr><tr><td colspan="2">STREET ADDRESS</td></tr><tr><td>CITY</td><td>STATE ZIP CODE</td></tr></table> <div style="background-color: #e0e0ff; height: 100px; width: 100%;"></div>	BIRTH DATE	PHONE NUMBER	STREET ADDRESS		CITY	STATE ZIP CODE	SIGNATURE	DATE	NAME OF PERSON COMPLETING THIS FORM	PHONE NUMBER	<input type="checkbox"/> 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
	BIRTH DATE	PHONE NUMBER																	
STREET ADDRESS																			
CITY	STATE ZIP CODE																		
SIGNATURE	DATE																		
NAME OF PERSON COMPLETING THIS FORM	PHONE NUMBER																		
<input type="checkbox"/> 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																		

## 2.3.2 Description of Change

### 2.3.2.1 Updates to Form XDP

Update the GA/GR NA BACK (NA\_BACK9\_FRAGMENT\_GAGR) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

**Updated Languages:** English and Spanish

• 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:

OR

• Call toll free: 1-800-952-5253 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.

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.)

Contact Name  
 Organization  
 AddrLine1  
 AddrLine2  
 city, State, Zip  
 primaryPhoneNumber / Fax  
 tollFreePhoneNumber

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

BIRTH DATE	PHONE NUMBER
STREET ADDRESS	
CITY	STATE ZIP CODE
SIGNATURE	DATE
NAME OF PERSON COMPLETING THIS FORM	PHONE NUMBER
NAME	PHONE NUMBER
STREET ADDRESS	
CITY	STATE ZIP CODE

## 2.4 Update MAGI NOA NA Back 9

This recommendation will update the MAGI NOA NA BACK 9 version.

### 2.4.1 Overview

Currently the MAGI NA BACK 9 generates with the dynamically generated MAGI NOAs from EDBC. It currently only has space for four lines of information for the Legal Aid Address.

**State Form:** NA BACK 9

**Current Programs:** MC - MAGI

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

**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 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.

**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**

- Call toll free: 1-855-795-0634 toll free, 1-800-952-8349 TDD, 1-916-651-2789 Fax

**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.

Line One  
 Line Two  
 Line Three  
 Line Four

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

**HEARING REQUEST**

## 2.4.2 Description of Change

### 2.4.2.1 Updates to Form XDP

Update the MAGI NOA NA BACK (NA\_BACK\_9\_MAGI\_FRAGMENT, ID: 672) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

**Updated Languages:** Armenian, Cambodian, Chinese, English, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese

**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 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

**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**

- Call toll free: 1-855-795-0634 toll free, 1-800-952-8349 TDD, 1-916-651-2789 Fax

**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.

Contact Name  
 Organization  
 AddrLine1  
 AddrLine2  
 city, State, Zip  
 primaryPhoneNumber / Fax  
 tollFreePhoneNumber

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

**HEARING REQUEST**

## 2.5 Update MAGI NA Back 9

This recommendation will update the MAGI NA BACK 9 version that generates for the CSF143.

### 2.5.1 Overview

Currently the MAGI NA BACK 9 generates with the CSF143. It currently only has space for six lines of information for the Legal Aid Address.

**State Form:** NA BACK 9

**Current Programs:** MC - MAGI

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

**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

**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.

Line One  
Line Two  
Line Three  
Line Four  
Line Five  
Line Six

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

HEARING REQUEST

### 2.5.2 Description of Change

#### 2.5.2.1 Updates to Form XDP

Update the MAGI NA BACK (NA\_BACK9\_MAGI\_FRAG) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

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

<p><b>YOUR HEARING RIGHTS</b>          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.</p> <p>If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:</p> <ul style="list-style-type: none"> <li>Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.</li> <li>Your Child Care Services may stay the same while you wait for a hearing.</li> <li>Your CalFresh benefits will stay the same until the hearing or the end of your certification period, whichever is earlier.</li> </ul> <p>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:</p> <p>Yes, lower or stop: <input type="checkbox"/> Cash Aid <input type="checkbox"/> CalFresh <input type="checkbox"/> Child Care</p>	<p><b>TO ASK FOR A HEARING:</b></p> <ul style="list-style-type: none"> <li>Fill out this page.</li> <li>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.</li> <li>Send or take this page to:</li> </ul> <p>California Department of Social Services          State Hearings Division, ACAB          744 P Street, MS 9-17-97          Sacramento, CA 95814</p> <p>OR fax to 1-916-651-2789</p> <ul style="list-style-type: none"> <li>Call toll free: 1-855-795-0634 or for hearing or speech impaired who use TDD, 1-800-952-8349.</li> </ul> <p><b>To Get Help:</b> You can ask about your hearing rights or for 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.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Contact Name              Organization              Address Line One              Address Line Two              City, State, Zip              Primary Phone Number / Fax              Toll Free Phone Number</p> </div> <p>If you do not want to go to the hearing alone, you can bring a friend or someone with you.</p>
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## 2.6 Update NA Back 9 for NOAs

This recommendation will update the NA BACK 9 version that generates on NOAs via EDBC.

### 2.6.1 Overview

Currently this version of the NA BACK 9 is the default NA BACK 9 fragment for NOAs that generate via EDBC. It also generates on Forms from the Template Repository (CSF107, CSF108, CSF109, CSF110, CSF111, NA1277). It currently only has space for six lines of information for the Legal Aid Address.

**State Form:** NA BACK 9

**Current Programs:** MC, CF, SNB/TNB, CW, RCA, CAPI

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

<p><b>YOUR HEARING RIGHTS</b>          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.</p> <p>If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:</p> <ul style="list-style-type: none"> <li>Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.</li> <li>Your Child Care Services may stay the same while you wait for a hearing.</li> <li>Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.</li> </ul> <p>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:</p> <p>Yes, lower or stop: <input type="checkbox"/> Cash Aid <input type="checkbox"/> CalFresh <input type="checkbox"/> Child Care</p> <p><b>While You Wait for a Hearing Decision for:</b>  <b>Welfare to Work:</b>          You do not have to take part in the activities.</p> <p>You may receive child care payments for employment and for activities approved by the county before this notice.</p>	<p><b>TO ASK FOR A HEARING:</b></p> <ul style="list-style-type: none"> <li>Fill out this page.</li> <li>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.</li> <li>Send or take this page to:</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.</li> </ul> <p><b>To Get Help:</b> 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.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Line One              Line Two              Line Three              Line Four              Line Five              Line Six</p> </div> <p>If you do not want to go to the hearing alone, you can bring a friend or someone with you.</p>
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## 2.6.2 Description of Change

### 2.6.2.1 Updates to Form XDP

Update the NA BACK (NA\_BACK9\_FRAGMENT, ID: 670) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

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

**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 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

**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:

**OR**

- Call toll free: 1-800-952-5253 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.

Contact Name  
Organization  
Address Line One  
Address Line Two  
City, State, Zip  
Primary Phone Number / Fax  
Toll Free Phone Number

**HEARING REQUEST**

## 2.7 Update NA Back 9 for CSF165

This recommendation will update the NA BACK 9 version that generates on the CSF165.

### 2.7.1 Overview

Currently this version of the NA BACK 9 generates on the CSF165. It currently only has space for six lines of information for the Legal Aid Address.

**State Form:** NA BACK 9

**Current Programs:** MC

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

<p><b>YOUR HEARING RIGHTS</b>  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.</p> <p>If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:</p> <ul style="list-style-type: none"> <li>Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.</li> <li>Your Child Care Services may stay the same while you wait for a hearing.</li> <li>Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.</li> </ul> <p>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:</p> <p>Yes, lower or stop: <input type="checkbox"/> Cash Aid <input type="checkbox"/> CalFresh  <input type="checkbox"/> Child Care</p>	<p><b>TO ASK FOR A HEARING:</b></p> <ul style="list-style-type: none"> <li>Fill out this page.</li> <li>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.</li> <li>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</li> <li>Call toll free: 1-855-795-0634 or for hearing or speech impaired who use TDD, 1-800-952-8349.</li> </ul> <p><b>To Get Help:</b> 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.</p> <div style="border: 1px solid black; padding: 2px;"> Line One  Line Two  Line Three  Line Four  Line Five  Line Six </div> <p>If you do not want to go to the hearing alone, you can bring a friend or someone with you.</p>
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## 2.7.2 Description of Change

### 2.7.2.1 Updates to Form XDP

Update the NA BACK (NA\_BACK9\_NOAFF) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

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

<p><b>YOUR HEARING RIGHTS</b>  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.</p> <p>If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:</p> <ul style="list-style-type: none"> <li>Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.</li> <li>Your Child Care Services may stay the same while you wait for a hearing.</li> <li>Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.</li> </ul> <p>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:</p> <p>Yes, lower or stop: <input type="checkbox"/> Cash Aid <input type="checkbox"/> CalFresh  <input type="checkbox"/> Child Care</p>	<p><b>TO ASK FOR A HEARING:</b></p> <ul style="list-style-type: none"> <li>Fill out this page.</li> <li>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.</li> <li>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</li> <li>Call toll free: 1-855-795-0634 or for hearing or speech impaired who use TDD, 1-800-952-8349.</li> </ul> <p><b>To Get Help:</b> 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.</p> <div style="border: 1px solid black; padding: 2px;"> Contact Name  Organization  Address Line One  Address Line Two  City, State, Zip  Primary Phone Number / Fax  Toll Free Phone Number </div> <p>If you do not want to go to the hearing alone, you can bring a friend or someone with you.</p>
---	--

## 2.8 Update NA Back 9 for Template Repository

This recommendation will update the NA BACK 9 version that generates on Forms available in the Template Repository.

## 2.8.1 Overview

Currently this version of the NA BACK 9 is the default NA BACK 9 for Forms generated from the Template Repository. It currently only has space for five lines of information for the Legal Aid Address.

See Supporting Documents #1 for list of Forms that use this version of the NA BACK 9.

**State Form:** NA BACK 9

**Current Programs:** MC, CF, CW, CL, WTW

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

**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 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

**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:

**OR**

- Call toll free: 1-800-952-5253 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.

Line One  
Line Two  
Line Three  
Line Four  
Line Five

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

## 2.8.2 Description of Change

### 2.8.2.1 Updates to Form XDP

Update the NA BACK (NA\_BACK9\_FRAG) to have enough space (seven lines of text) to populate with all applicable Legal Aid Address Information.

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

**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 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:

**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:

**OR**

- Call toll free: 1-800-952-5253 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.

Contact Name  
 Organization  
 Address Line One  
 Address Line Two  
 City, State, Zip  
 Primary Phone Number / Fax  
 Toll Free Phone Number

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

**HEARING REQUEST**  
 I want a hearing due to an action by the Welfare Department of

## 2.9 Update NA BACK 9 Variable Population for Legal Aid Address

### 2.9.1 Overview

The Legal Aid Address population for the NA BACK 9 NOA fragments and Forms need to consistently add the required fields for the Legal Aid Address.

### 2.9.2 Description of Change

Update the NOA and Form logic to add the following existing fields (DOC\_DATA) to the NA BACK 9 versions in the previous recommendations.

- Contact Name
- Organization
- Address Line One
- Address Line Two
- City, State, Zip
- Primary Phone Number / Fax
- Toll Free Phone Number

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	Recommendation 2.8 Forms that use generic NA BACK 9	See CA-223586 Recommendation 2-8 Form Listing.xlsx



## 4 REQUIREMENTS

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### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.7 (CAR-1211)	The LRS shall include reference to the local legal aid office and administrative hearing/appeals office on the reverse side of NOAs, based on program.	This update is to allow for Legal Aid Addresses to appropriately display for all counties on the reverse side of NOAs (NA Back9).

# CalSAWS

California Statewide Automated Welfare System

## **Design Documents**

CA-224183

Add BRM for Forms using Prepaid/Non-Prepaid  
Envelopes

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Nithya Chereddy
	Reviewed By	

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
03/04/2021	1.0	Original	Nithya Chereddy
03/31/2021	1.1	Adding Imaging details for forms	Nithya Chereddy
05/18/2021	1.2	Adding mapping for missing District Office	Nithya Chereddy
06/23/2021	1.3	Content Revision 1 updates	Nithya Chereddy

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# 1 OVERVIEW

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The purpose of this change is to add Business Reply Mail (BRM) envelopes for the forms which currently use Prepaid/Non-Prepaid envelopes in Los Angeles County.

The forms in CalSAWS are assigned a priority number. Priority 6 forms currently use a Pre-Paid envelope and Priority 7 forms currently use a Non-Prepaid envelope.

## 1.1 Current Design

Certain forms in CalSAWS (Priority 6 and Priority 7) are currently mailed out with a Prepaid/Non-Prepaid envelopes.

## 1.2 Requests

1. Add the BRM envelope to specified Priority 6 and Priority 7 forms, which are currently mailed out with Prepaid and Non-Prepaid envelopes.
2. Update the priority of the specified forms to Priority 1.
3. Add Imaging Details for forms which are missing Imaging Barcode.

## 1.3 Overview of Recommendations

1. Add the BRM envelope to the below listed Priority 6/Priority 7 forms.
  - a. CAL 11 - Cal-Learn Notice of Incomplete Grades
  - b. CF 303 - Replacement or Disaster Supplement Affidavit
  - c. PA 528 - Statement of Responsible Relative
  - d. ABPSSI-1 - General Relief Request for SSI / SSP Application Information
  - e. SOC 807 - CAPI Request for Waiver of Overpayment Recovery - Income/Expenses
  - f. WTW EOA1 - CALWORKS EDUCATIONAL OPPORTUNITY AND ATTAINMENT (EOA) PROGRAM APPLICATION FORM
  - g. CW 25 - Supplemental Statement of Facts - Minor Parent
  - h. CW 1725 - School Attendance / Enrollment Verification
2. Update the above listed Priority 6 and Priority 7 forms to Priority 1 and route them back to the Centralized/District addresses.

**Note:** Priority 1 was initially used for standard mail envelopes without a return envelope. As of the SCR CA-201214, which was implemented in 20.11 release, Priority 1 was updated to accommodate standard mail envelopes with/without BRM return envelope.
3. Update the Priority of the MC 194, SOC 814 and CW 82 forms to Priority 1.

Note: These are currently Print Local only forms.
4. Add Imaging Barcode for the forms listed in Supporting Document 10.

## 1.4 Assumptions

1. BRM addresses for C-IV Migration counties were added to CalSAWS with CA-201214. SCR CA-217127 will migrate BRM addresses for CalWIN Migration counties.
2. Form versions are not being updated with this SCR.
3. New threshold language forms will not be added with this SCR.
4. Mock office data will be used for testing C-IV BRM addresses.
5. The bundling job is only available for Los Angeles County currently. The bundling jobs for the Migration Counties are being migrated with **SCR CA-207312**.
6. The forms listed in this SCR currently do not include a BRM envelope. This SCR adds a BRM header and BRM envelope to these forms. After this SCR goes live, workers should only reprint these forms locally, this condition is only for the forms that were generated before the go live date of this SCR. Reprinting centrally will error out the forms that were generated before the go live date of this SCR. Reprint centrally and Reprint locally options will function the same way as they function today for the forms listed in this SCR that are generated after this SCR goes live.

**Scenario 1:** Form will error out if the form is generated on 07/20/2021, SCR goes live on 07/26/2021 and the worker is trying to reprint the form centrally on 08/11/2020.

**Scenario 2:** Form will not error out if the form is generated on 08/01/2021, and the worker is trying to reprint the form locally/centrally on 08/08/2021.

7. SCR CA-215143 will replace the PA 1725 form with CW 1725.
8. The same routing logic listed in this SCR will apply for both DCFS and DPSS programs.
9. If correspondence is generated from a district office for which the BRM mapping is not available, then the form will exception out and it will be part of the exception report.
10. Correspondence could be generated from a non-district office. If the non-district office is tied to a district office, the office relationship can be viewed in Admin -> Office Admin -> Office -> Office Detail -> Office Relationship. Below is the screenshot

Office Relationship		
Office 1	Type	Office 2
GAIN - EL MONTE 04	4 - GAIN to GAIN Region's Cashier Office	GAIN - SAN GABRIEL VALLEY REG

11. If correspondence is generated from a non-district office which is not tied to a district address, then the form will exception out and it will be part of the exception report.
12. Form will exception out if it is generated from a non-district office which is tied to a district office, but the BRM mapping is not available for the district office.

13. A non-district office could be tied to multiple district offices. In such case a random district office will be picked to find the BRM mapping.

## 2 RECOMMENDATIONS

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### 2.1 Add BRM envelopes to Forms

#### 2.1.1 Overview

The forms listed in the below section are currently mailed out with Prepaid/Non-Prepaid envelopes.

#### 2.1.2 Description of Change

1. Add the BRM envelope to the below listed forms.
2. Update the Priority number for the below listed forms to Priority 1.

No.	Form Number	Form Title	Languages Available	Existing Priority - Envelope type
1.	CAL 11	Cal-Learn Notice of Incomplete Grades	EN	6 – Prepaid
2.	CF 303	Replacement or Disaster Supplement Affidavit	EN, SP	6 – Prepaid
3.	PA 528	Statement of Responsible Relative	EN, SP, AE, CA, CH, TG, KO, RU, VI	6 – Prepaid
4.	ABPSSI-1	General Relief Request for SSI / SSP Application Information	EN	6 – Prepaid
5.	SOC 807	CAPI Request for Waiver of Overpayment Recovery - Income/Expenses	EN	7 – Non-Prepaid
6.	WTW EOA1	CALWORKS EDUCATIONAL OPPORTUNITY AND ATTAINMENT (EOA) PROGRAM APPLICATION FORM	EN	7 – Non-Prepaid
7.	CW 25	Supplemental Statement of Facts - Minor Parent	EN, SP, CA, CH, RU, VI	7 – Non-Prepaid

No.	Form Number	Form Title	Languages Available	Existing Priority - Envelope type
8.	CW 1725	School Attendance/Enrollment Verification	EN, SP, AE, AR, CA, CH, FA, TG, HM, KO, LA, RU VI	7 – Non-Prepaid

\*Language Codes: EN – English, SP – Spanish, AE – Armenian, AR – Arabic, CA- Cambodian, CH – Chinese languages, FA – Farsi, TG – Tagalog, HM – Hmong, KO – Korean, LA – Lao, RU – Russian, VI – Vietnamese.

See Supporting Documents #1 through #8 for Mockups

## 2.2 Route Forms to Centralized Location/District Office Address

### 2.2.1 Overview

Priority 6 and Priority 7 forms currently do not have a BRM envelope. With this effort the priority for these forms will be updated to Priority 1 and a BRM envelope will be added to these forms.

### 2.2.2 Description of Change

1. Route the forms (listed in section 2.1.2) to the Expo Park location for the below listed District Offices for Los Angeles County.

**Centralized office address for Expo Park:**

DPSS – CSU EXPO PARK  
3833 S VERMONT AVE  
LOS ANGELES CA 90037-9920

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
1.	Belvedere	05
2.	Southwest Special	08
3.	West Valley	82
4.	East Valley	11
5.	Metro Special Office	70
6.	San Fernando Branch	32

7.	Metro Family	13
8.	Pasadena	03
9.	Wilshire Special Office	10
10.	Glendale	02
11.	Santa Clarita Branch	51
12.	Lancaster	34
13.	Lancaster General Relief Office	67

- Route the forms (listed in section 2.1.2) to the San Gabriel/El Monte Centralized location for the below listed District Offices for Los Angeles County.

**Centralized office address for San Gabriel/El Monte:**

DPSS – CSU EL MONTE/SAN GABRIEL  
3400 AERO JET AVE  
EL MONTE CA 91731-9935

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
1.	Pomona	36
2.	Metro East	15
3.	Cudahy	06
4.	Compton	26
5.	Norwalk	40
6.	Southwest Family	83
7.	El Monte (San Gab. V. Serv. Center)	04
8.	San Gabriel Valley	20
9.	Lincoln Heights	66
10.	Child Medi-Cal Enroll. Project	16
11.	Management Information Evaluation	L6

- Route the forms (listed in section 2.1.2) to the La Cienega Centralized location for the below listed District Offices for Los Angeles County.

**Centralized office address for La Cienega:**

DPSS – CSU LA CIENEGA  
9800 S LA CIENEGA BLVD FL 11  
INGLEWOOD CA 90301-9958

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
1.	Exposition Park Family Service Center	12
2.	Florence	17
3.	South Central	27
4.	South Special	07
5.	South Family	31
6.	Metro North Office	38
7.	Rancho Park	60
8.	Paramount Office	62
9.	Civic Center	14
10.	Long Term Care	80
11.	Medi-Cal Mail-In Branch	89

4. For the C-IV Migration counties, populate the centralized office information on the BRM header if the county has a centralized location and populate the district office information on the BRM header if the county does not have a centralized location.

**Technical Note:** CT15 REFER\_TABLE\_19\_DESCR has the information of whether a County has a Centralized or Non-Centralized office.

## 2.3 Update Priority for the Print Local Only Forms

### 2.3.1 Overview

The forms MC 194, SOC 814 generate with Priority 6 and CW 82 generate with Priority 7. These forms can only be printed locally as per existing functionality.

### 2.3.2 Description of change

Update the priority for MC 194, SOC 814 and CW 82 forms to Priority 1. As these are print local only forms, a BRM envelope will not be added to these forms.

## 2.4 Add Imaging Barcode for forms

### 2.4.1 Overview

For the new CalSAWS Imaging Solution, all applicable Forms will need to have the standardized 2D imaging barcode for documents to be properly imaged and tracked for a customer.

### 2.4.2 Description of Change

1. Apply a DCR to the forms mentioned in Supporting Document 10 to enable Imaging Barcode and to add the Imaging Document Type, Imaging Form Name.
2. Display the standardized 2D imaging barcode on the forms mentioned in Supporting Document 10.

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	CAL 11	CAL11.PDF
2.	Correspondence	CF 303	CF303.PDF
3.	Correspondence	PA 528	PA528.PDF
4.	Correspondence	ABPSSI-1	ABPSSI-1.PDF
5.	Correspondence	SOC 807	SOC807.PDF
6.	Correspondence	WTW EOA1	WTWEOA1.PDF
7.	Correspondence	CW 25	CW25.PDF

8.	Correspondence	CW 1725	CW1725.PDF
9.	Correspondence	Coversheet Sentences Translation	Translations.PDF
10.	Correspondence	List of forms to include Imaging Barcode	List of forms to include Imaging Barcode.xlsx

## 4 REQUIREMENTS

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.3.3.2.8	The LRS shall accommodate various envelope sizes for mailing while conforming to USPS standards for mail piece size.	<p>A BRM envelope has been added for the below mentioned forms.</p> <ul style="list-style-type: none"> <li>• CAL 11</li> <li>• CF 303</li> <li>• PA 528</li> <li>• ABPSSI-1</li> <li>• SOC 807</li> <li>• WTW EOA1</li> <li>• CW 25</li> <li>• CW 1725</li> </ul>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-225987

DDID 34

Task Management

Guided Navigation Updates

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Rakan Ali, Mayuri Srinivas
	Reviewed By	Justin Dobbs

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/22/2021	1.0	Initial Revision	Rakan Ali
6/24/2021	1.1	Content Revision #1 <ul style="list-style-type: none"> <li>• Recommendation to update Header of Guided Navigation/Task Navigation panel</li> <li>• Updated Guided Navigation attribute editability</li> <li>• Updated Section 3 - Guided Navigation Inventory</li> </ul> Update the logic in Task Guided Navigation Hyperlink Conditions section <ul style="list-style-type: none"> <li>• Remove the Task is "assigned to the logged in user" condition for all three scenarios</li> </ul>	Mayuri Srinivas Rakan Ali

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# 1 OVERVIEW

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This design includes recommendations to enhance Task Guided Navigation functionality.

## 1.1 Current Design

The CalSAWS System Worklist pages include functionality to navigate a user through one or more pages within a predefined page set while working a Task. This functionality is referred to as Guided Navigation.

The Task Pop-Up pages accessible with the Utilities "Tasks" link also allow users to work Tasks. The Task Pop-Up pages do not include the capability to initiate Guided Navigation.

## 1.2 Requests

Modify the CalSAWS System to allow initiation of Guided Navigation from the Task Pop-Up pages.

## 1.3 Overview of Recommendations

1. Update the logic that determines whether to display a Guided Navigation hyperlink on the Worklist, Worklist PR RE and Pending Authorizations pages to no longer be fully reliant on a specific Task Type name.
2. Incorporate a Guided Navigation hyperlink on the Task Pop-Up pages.
3. Update the Automated Action Detail page to include an attribute allowing users to turn on/off Guided Navigation for Automated Actions that have a Guided Navigation page set defined.
4. Update Deputy Authorization Task Type names.

## 1.4 Assumptions

1. The Guided Navigation experience currently available on the Worklist, Worklist PR RE and Pending Authorizations pages will not be modified. This design only modifies the logic that determines whether to display the Guided Navigation hyperlink on these pages.
2. There will be no modifications to the Authorization Task processing with the renaming of the Deputy Authorization Task Type names.
3. Automated Actions/Task Types outside of the inventory workbook in the Supporting Documents section do not have a Guided Navigation page set defined.
4. Guided Navigation page sets that currently exist and function for Los Angeles county will remain available for Los Angeles county.

## 2 RECOMMENDATIONS

This section will outline recommendations to update Task pages in the CalSAWS System to allow users to initiate Task Guided Navigation from the Task Pop-Up pages.

### 2.1 Task Guided Navigation Hyperlink Conditions

#### 2.1.1 Description of Changes

1. Update the Task Guided Navigation Hyperlink display logic. A Task Guided Navigation hyperlink will display on the online pages referenced in Recommendation #2.2 when one or more of the following scenarios are met:

Scenario	County	Description
1	All	<ul style="list-style-type: none"> <li>The Task is a "system task", which is a Task that is tied to specific processing within the CalSAWS System. These Task Types are available in the CalSAWS System for reference only and are not configurable.</li> </ul> <p>Reference the workbook within the Supporting Documents section for an inventory of "system" tasks.</p>
2	All	<ul style="list-style-type: none"> <li>The Task originated from an Automated Action with an associated Guided Navigation page set.</li> <li>The Guided Navigation attribute on the Automated Action Detail page is "Yes".</li> </ul> <p>Reference the workbook within the Supporting Documents section for an inventory of Automated Actions that will display the Guided Navigation attribute.</p>
3	Los Angeles	<ul style="list-style-type: none"> <li>The Task does not meet Scenario #1 or #2.</li> <li>The Task Type of the Task was loaded into the configurable Task Type framework via Phase I of DDID 34 (CA-214927). Los Angeles county Task Types that were loaded into the configurable Task Type framework at this time each have a guided navigation page set defined.</li> </ul> <p>Reference the workbook within the Supporting Documents section for an inventory of Los Angeles county Task Types that are not "system" tasks, not Automated Actions and have a guided navigation page set defined.</p>

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**Technical:** The guided navigation page-set lookup logic is currently based on specific Task Type names that existed for Los Angeles county as of the 20.09 release. Update the guided navigation lookup framework to incorporate logic to determine the guided navigation page set by using a combination of the County Code of the user that clicked the hyperlink, Task Scenario Code (indicating a Task resulted from an Automated Action), and/or the Task Type name. Guided Navigation page sets that currently exist and function for Los Angeles county will remain available for Los Angeles county.

Guided navigation page sets for CalSAWS System Automated Tasks that have been moved into the Automated Action framework via DDID 1629 will be available for all CalSAWS counties for which the Automated Action has been configured via DDID 1629. Similarly, guided navigation page sets for CalSAWS System Automated Tasks that are "system tasks" will be available for all CalSAWS counties. Tasks that result from Automated Actions introduced via DDID 1628 will not display a hyperlink as a Guided Navigation page set is not available.

If Guided Navigation is initiated from one of the Task Pop-Up pages, and the page set defines a completion page, the final page in the flow will be the CalSAWS Homepage. The completion page for Guided Navigation that is initiated from the Worklist pages will not be modified. The completion page that is displayed is dependent on the page that initiated the Guided Navigation page flow. This function is due to the complex processing in the CalSAWS System guided navigation architecture that will not be completely reworked with this enhancement.

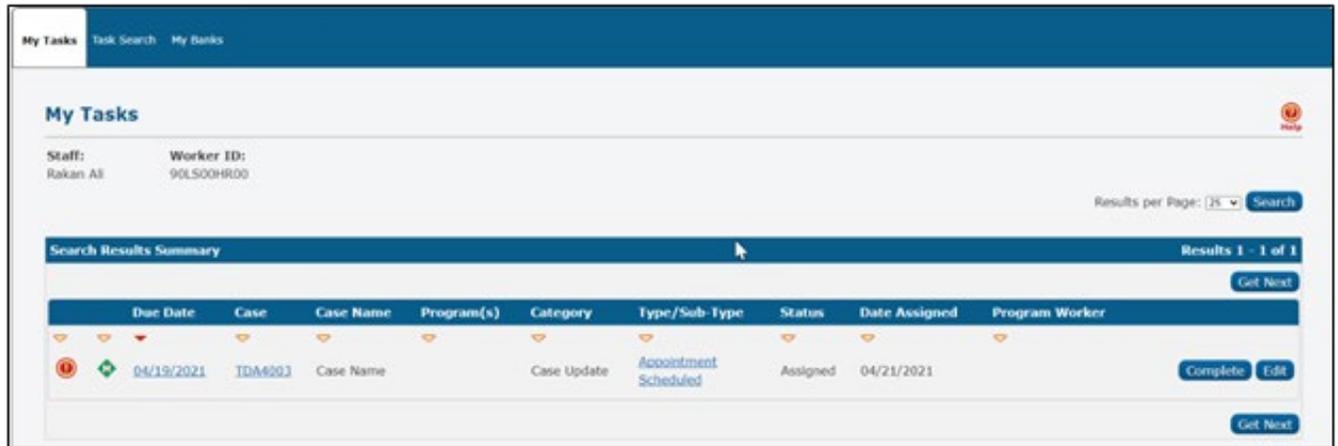
For example, a worker clicks the Guided Navigation hyperlink from a Task Pop up page, works through half of the pages in the page flow, logs out and goes to lunch. The worker returns after lunch, logs into CalSAWS and re-initiates Guided Navigation for the same Task, but this time they click the hyperlink on the Worklist page, when the end of the page flow is reached, the Homepage will be displayed as opposed to the Worklist page.

## 2.2 Update/Add the Task Guided Navigation Hyperlink on Task Pages

### 2.2.1 Description of Changes

1. Update the following Task Pages to display a Guided Navigation Hyperlink when applicable:

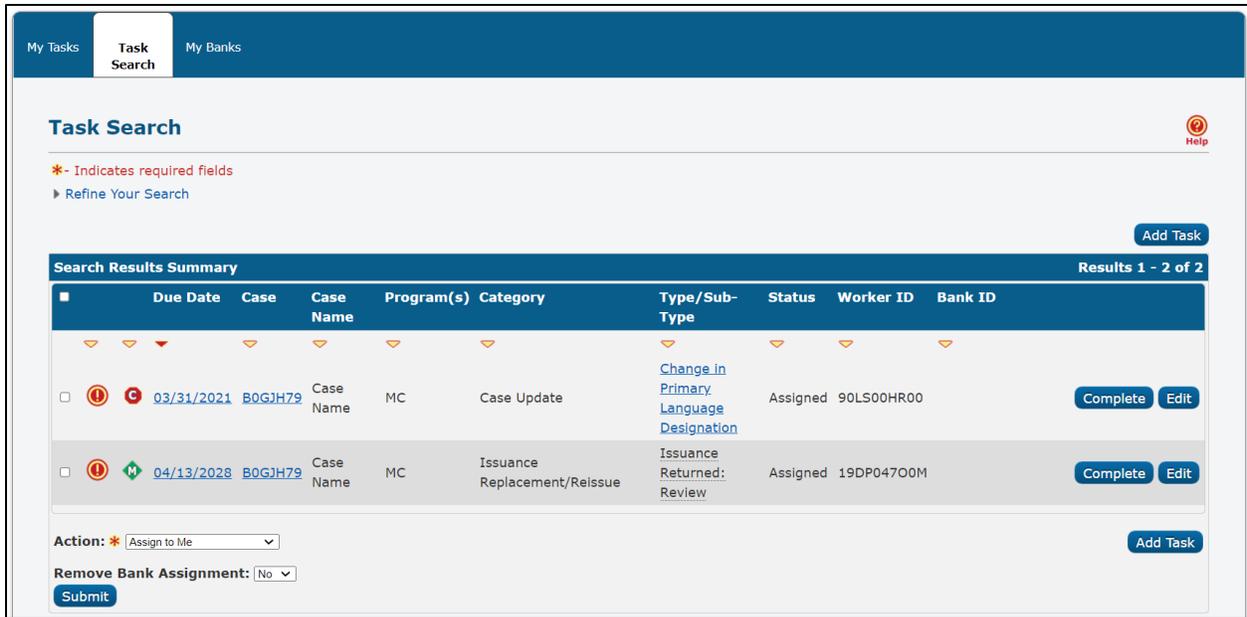
a. My Tasks Pop-Up



**Figure 2.2.1.2.a-1 – Task Pop-Up My Tasks Page Mockup**

- i. Update the Task Pop-Up My Tasks page to display the Task Type/Sub-Type value as a hyperlink to initiate Guided Navigation when available per Section 2.1. If guided navigation is not available or has been turned off for a particular Task, the attribute will display as plain text. Note: The display behavior of the Long Description hover box that displays on mouseover of this field will not be impacted.  
**Behavior:** When the hyperlink is clicked, the Task Detail overlay for the Task will display in the Pop-Up window and Guided Navigation will be initiated in the main CalSAWS window. On click of a Guided Navigation hyperlink within the Task Pop-Up window, no additional pop-up windows will be opened.

b. Task Search Pop-Up



**Figure 2.2.1.2.b-1 – Task Pop-Up Task Search Page Mockup**

- i. Update the Task Pop-Up Task Search page to display the Task Type/Sub-Type value as a hyperlink to initiate Guided Navigation when available. If guided navigation is not available or has been turned off for a particular Task, the attribute will display as plain text. Note: The display behavior of the Long Description hover box that displays on mouseover of this field will not be impacted.

**Behavior:** When the hyperlink is clicked, the Task Detail overlay for the Task will display in the Pop-Up window and Guided Navigation will be initiated in the main CalSAWS window. On click of a Guided Navigation hyperlink within the Task Pop-Up window, no additional pop-up windows will be opened.

c. Task Pop-Up Task Detail Page

**Task Detail**  
Result 1 of 1 - 3

\*- Indicates required fields

Buttons: Edit, Print, Close

<b>Case Number:</b> B0GJH79	<b>Case Name:</b> Case Name	<b>Program(s): *</b> Medi-Cal - PORFIRIO CONNOR	<b>Status: *</b> Assigned	<b>Reference Number:</b>
<b>Category: *</b> Case Update	<b>Type: *</b> <a href="#">Change in Primary Language Designation</a>	<b>Sub-Type:</b>	<b>Priority:</b> Critical	
<b>Due Date: *</b> 03/31/2021	<b>Date Created:</b> 03/30/2021	<b>Worker Assigned Date:</b> 04/28/2021		
<b>Assign to Program Worker:</b> No	<b>Worker ID:</b> 90LS00HR00	<b>Bank ID:</b>	<b>Automated Action:</b> No	

**Long Description:**

▶ Instructions

**Figure 2.2.1.2.c-1 – Task Pop-Up Task Detail Page Mockup**

- i. Update the Task Pop-Up Task Detail page to display the Task Type value as a hyperlink to initiate Guided Navigation when available. If guided navigation is not available or has been turned off for a particular Task, the attribute will display as plain text.

**Behavior:** When the hyperlink is clicked, Guided Navigation will be initiated in the main CalSAWS window. On click of a Guided Navigation hyperlink within the Task Pop-Up window, no additional pop-up windows will be opened.

2. Update the Header verbiage of the Task Navigation panel to be "Guided Navigation" when in the context of a Task Guided Navigation page set.
3. Update the Guided Navigation Hyperlink display logic per Section 2.1 on the following Task pages.
  - a. Worklist  
Guided Navigation hyperlink field: "Type / Sub-Type"
  - b. Worklist PR RE  
Guided Navigation hyperlink field: "Type / Sub-Type"
  - c. Pending Authorizations  
Guided Navigation hyperlink field: "Type"

## 2.3 Automated Action Detail Page

### 2.3.1 Overview

The Automated Action Detail page is accessible from the Automated Action List page. This page allows the User to view and configure Automated Action attributes.

### 2.3.2 Automated Action Detail Page Mockup

#### Automated Action Detail

---

##### Action Information

<b>Name:</b> 180 Day EC Good Cause set to expire	<b>Type:</b> Create Task	<b>Status: *</b> Active <input type="button" value="v"/>
<b>Program(s):</b> FC	<b>Run Date:</b> Daily(Mon-Sat)	<b>Source:</b> Batch
<b>Scenario:</b> Emergency Caregiver Good Cause date set to expire		

---

##### Task Information

<b>Task Type: *</b> <input type="button" value="180-Day EC Good Cause set to expire"/> <input type="button" value="v"/>	<b>Default Due Date:</b> 30 days
<b>Due Date:</b> <input type="button" value="Default Due Date"/> <input type="button" value="v"/>	<b>Program Worker:</b> <input type="button" value="Currently Assigned Worker"/> <input type="button" value="v"/>
<b>Initial Assignment:</b> <input type="button" value="Program Worker/Bank"/> <input type="button" value="v"/>	<b>Default Bank ID:</b> <input type="text"/> <input type="button" value="Select"/>
<b>Guided Navigation: *</b> <input type="button" value="No"/> <input type="button" value="v"/>	
<b>Long Description:</b> 180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.	

Figure 2.3.2.1 – Automated Action Detail Mockup Edit Mode

### Automated Action Detail

Edit Close

---

#### Action Information

<b>Name:</b> 180 Day EC Good Cause set to expire	<b>Type:</b> Create Task	<b>Status: *</b> Active
<b>Program(s):</b> FC	<b>Run Date:</b> Daily(Mon-Sat)	<b>Source:</b> Batch
<b>Scenario:</b> Emergency Caregiver Good Cause date set to expire		

---

#### Task Information

**Task Type: \***  
180-Day EC Good Cause set to expire

<b>Due Date:</b> Default Due Date	<b>Default Due Date:</b> 30 days
<b>Initial Assignment:</b> Program Worker/Bank	<b>Program Worker:</b> Currently Assigned Worker
	<b>Default Bank ID:</b>

**Guided Navigation: \***  
No

**Long Description:**  
180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.

Edit Close

**Figure 2.3.2.2 – Automated Action Detail Mockup View Mode**

### 2.3.3 Description of Changes

1. Update the Automated Action Detail page to include a Guided Navigation attribute. The Guided Navigation attribute will be used by the logic described in Section 2.1 for display of a Guided Navigation hyperlink for a Task.
  - a. Guided Navigation **(required)** – This dropdown field indicates if Tasks that result from the Automated Action have been enabled for Guided Navigation. Options include:
    - i. Yes – This option enables Guided Navigation for existing Tasks in the Assigned and In Process Statuses and any Tasks created in the future through the specific Automated Action.
    - ii. No – This option disables Guided Navigation for the Tasks created through the specific Automated Action.
  - b. The attribute will display on the page if the Automated Action has a Guided Navigation page set defined. For example, Automated Actions that have been added to the CalSAWS System as part of

DDID 1628 (C-IV System Automated Actions) do not have a Guided Navigation page set defined, so the attribute will not display. Reference the workbook in the Supporting Documents section for an inventory of Automated Actions that will display the attribute.

c. This field will not be editable for the following Automated Actions:

- i. Clearance
- ii. Clearance: CMIPSI
- iii. Clearance: ICT
- iv. Clearance: e-Application
- v. Intake

d. For Automated Actions that will display the Guided Navigation attribute, the value will be set to "No" initially for all Automated Actions/counties other than Los Angeles. The attribute will initially be set to "Yes" for Los Angeles county Automated Actions that have a guided navigation page set available.

#### 2.3.4 Page Validations

N/A

#### 2.3.5 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin

Click on a hyperlink of the desired result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.

The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

#### 2.3.6 Security Updates

N/A – No Changes to Security

#### 2.3.7 Page Mapping

Update page mapping for the Automated Action Detail page to include the Guided Navigation attribute.

#### 2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

## 2.4 Deputy Authorization Task Types

### 2.4.1 Description of Changes

1. Update the Authorization Task Type names that reference “Deputy” to now reference “2nd Level”. **Technical:** Guided Navigation task type name references while looking up a Guided Navigation page set will also be updated.

Previous Names:

- Deputy Authorization – Invoice
- Deputy Authorization - Transaction Refund
- Deputy Authorization - Issuance Replacement/Reissue
- Deputy Authorization - Payment Request (Lvl 1)
- Deputy Authorization - Payment Request (Lvl 2)
- Deputy Authorization - Valuable (Lvl 1)
- Deputy Authorization - Valuable (Lvl 2)
- Deputy Authorization EDBC

Updated Names:

- 2nd Level Authorization – Invoice
- 2nd Level Authorization - Transaction Refund
- 2nd Level Authorization - Issuance Replacement/Reissue
- 2nd Level Authorization - Payment Request (Lvl 1)
- 2nd Level Authorization - Payment Request (Lvl 2)
- 2nd Level Authorization - Valuable (Lvl 1)
- 2nd Level Authorization - Valuable (Lvl 2)
- 2nd Level Authorization EDBC

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Task Management	Guided Navigation Inventory	 Guided Navigation Inventory.xlsx

## 4 REQUIREMENTS

### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
34	<p>The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows:</p> <ol style="list-style-type: none"> <li>1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base</li> <li>2) Create a common task management data model</li> <li>3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution)</li> <li>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</li> <li>5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing methodologies</li> <li>6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker</li> <li>7) Update the LRS Task</li> </ol>	<ul style="list-style-type: none"> <li>- CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV.</li> <li>- CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks.</li> <li>- OBIEE Task Dashboard will be migrated over to new tool prior to Task Management implementation.</li> </ul>	<p>This design introduces a recommendation that will support Guided Navigation and process flow of completing Tasks, while considering configurable Automated Actions and "System Tasks".</p>

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

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N/A

## 6 OUTREACH

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N/A

## 7 APPENDIX

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N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-226064

CalSAWS Automated Tasks  
(Outside of DDID 1629 Inventory)  
Task Management

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Justin Dobbs, Mayuri Srinivas, Rakan Ali
	Reviewed By	Sarah Cox, Dymas Pena, Pandu Gupta, Carlos Albances

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/31/2021	1.0	Initial Revision	Justin Dobbs
6/29/2021	1.1	Content Revision #1 <ul style="list-style-type: none"> <li>• Update the Default Date to "Immediately" for the following Automated Task - Kin-GAP Program: Rate Threshold.</li> <li>• Add additional program codes to the following Automated Tasks:               <ul style="list-style-type: none"> <li>○ RCA Program: No WTW Activity</li> <li>○ CalWORKs/RCA Program: Child Deceased</li> <li>○ CalWORKs Program: Discontinued</li> </ul> </li> <li>• Update the Task Type and Long Description for AAP Program: Placement Finalization Date Modification</li> </ul>	Rakan Ali

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# 1 OVERVIEW

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This design outlines modifications to a population of existing CalSAWS automated tasks to function per the Automated Action framework introduced with CA-214928 (DDID 34 – Unified Task Management).

## 1.1 Current Design

The CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 includes recommendations to introduce Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties.

## 1.2 Requests

Update a population of automated CalSAWS tasks to function within the Automated Action framework.

## 1.3 Overview of Recommendations

Update a population of automated CalSAWS tasks to function within the Automated Action framework.

## 1.4 Assumptions

1. SCRs CA-214927 and CA-214928 related to DDID 34 have set up the underlying data model and front-end Automated Action pages to support Automated Action processing.
2. Not all batch processes require modifications to be configured to run for 58 counties. The Automated Actions defined in this document that do not have a recommendation to modify the batch process to be 58 county friendly will function for 58 counties natively, they are Los Angeles specific, or DDID 1787 has already accounted for the migration of C-IV System specific batch processes into the CalSAWS System.

## 2 RECOMMENDATIONS

This section will outline recommendations to adjust a population of CalSAWS automated tasks to function within the Automated Action framework.

### 2.1 Update CalSAWS Automated Tasks Per Automated Action Framework

#### 2.1.1 Overview

The Automated Action framework allows county users a level of configurability for automated task generation. For example, the county can choose to deactivate a specific automated task within their county outside of the project enhancement process. They also can define attributes such as Task Type, Task Sub-Type, the due dates and initial assignment information for the resulting tasks through the Automated Action Detail page. (Reference CA-214928 – DDID 34 for the specifics of the Automated Action pages).

This section outlines the modifications required to support a population of CalSAWS automated tasks in the Automated Action framework.

#### 2.1.2 Automated Action Detail – Reference Example

The screenshot displays the 'Automated Action Detail' interface. It features a title bar with 'Automated Action Detail' and two buttons: 'Edit' and 'Close'. The main content is divided into two sections: 'Action Information' and 'Task Information'. The 'Action Information' section includes fields for Name, Type, Status, Program(s), Run Date, and Source. The 'Task Information' section includes fields for Task Type, Task Sub-Type, Due Date, Default Due Date, Initial Assignment, and Default Assignment. A 'Long Description' field is also present at the bottom of the task information section. The interface uses a blue and white color scheme with clear labels and values.

Action Information		
<b>Name:</b> 180 Day EC Good Cause set to expire	<b>Type:</b> Create Task	<b>Status: *</b> Inactive
<b>Program(s):</b> FC	<b>Run Date:</b> Daily(Mon-Sat)	<b>Source:</b> Batch
<b>Scenario:</b> Emergency Caregiver Good Cause date set to expire		

Task Information	
<b>Task Type: *</b> Absent Parent	<b>Task Sub-Type:</b> Absent Parent I
<b>Due Date:</b> Default Due Date	<b>Default Due Date:</b> 30 day
<b>Initial Assignment:</b> Default Assignment	<b>Default Assignment:</b> Current Program Worker
<b>Long Description:</b> 180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.	

Figure 2.1.1 – Automated Action Detail

### 2.1.3 Description of Changes

Update the following CalSAWS automated tasks to define the required Automated Action attributes in order to function with the Automated Action Framework. (Please reference the Automated Action Detail page in Figure 2.1.1 for display of the attributes.)

**Technical:** Unless specifically stated otherwise, the below Automated Actions will be available and Active for LA county as the automated Tasks currently exist within the CalSAWS System. For the C-IV and CalWIN counties, the Status will initially be Inactive with a blank Task Type and Task Sub-Type. This is because each county can set a custom Task Type for each Automated Action. If a C-IV or a CalWIN county decides to Activate one of these Automated Actions, the page validation will require that the county also select a Task Type to be used. The subset of Automated Actions defined below that currently exist in the C-IV System will have a status of Inactive and a blank Task-Type and Sub-Type. The conversion processes that will bring the C-IV counties to the CalSAWS System will bring over the county specific configurations for these Automated Actions that exist in the C-IV System at the time of cutover.

Attribute values such as "Program(s)" and "Run Date" are based on the existing logic of the automated Task in the CalSAWS System. The current processing was evaluated to determine which programs the Task is applicable to, how the due date is calculated and when the automated Task creation runs. Automated Actions configured for the Initial Assignment value of "Current Program Worker" will set the "Action" attribute to "Assign to Program Worker" at Task creation.

1. RCA Program: No WTW Activity
  - a. Action Information
    - i. Name: RCA Program: No WTW Activity
    - ii. Type: Create Task
    - iii. Status: Active
    - iv. Program(s): RE
    - v. Run Date: Daily(Mon-Sat)
    - vi. Source: Batch
    - vii. Scenario: An RCA program is Active and 30 or more days have passed without a WTW activity. Take appropriate action.
  - b. Task Information
    - i. Task Type: RCA/TCVAP to be in a WTW activity within 30 days of Approval.
    - ii. Task Sub-Type: N/A
    - iii. Due Date: Default Due Date

- iv. Default Due Date: 7 days
    - v. Initial Assignment: Default Assignment
    - vi. Default Assignment: Current Program Worker
    - vii. Long Description: RCA/TCVAP No activity open in the last 30 days
  - c. Modify the batch process (PB19A235) to evaluate data for all CalSAWS counties.
- 2. ABAWD Time Clock: Exceeded
  - a. Action Information
    - i. Name: ABAWD Time Clock: Exceeded
    - ii. Type: Create Task
    - iii. Status: Active
    - iv. Program(s): CF
    - v. Run Date: Daily(Mon-Sat)
    - vi. Source: Batch
    - vii. Scenario: A participant has exceeded the Able Bodied Adults Without Dependents (ABAWD) 3-month time clock.
  - b. Task Information
    - i. Task Type: Participant exceeded the ABAWD 3-month time clock
    - ii. Task Sub-Type: N/A
    - iii. Due Date: Default Due Date
    - iv. Default Due Date: 3 days
    - v. Initial Assignment: Default Assignment
    - vi. Default Assignment: Current Program Worker
    - vii. Long Description: Batch was unable to process EDBC for an ABAWD on the CalFresh Program that has exceeded their time limit. The attempted benefit month was {benefitMonth} and it skipped for the following reasons: {skipReasons}. Please review the case and take appropriate action.
- 3. AAP Program: Placement Finalization Date Modification
 

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

  - a. Action Information
    - i. Name: AAP Program: Placement Finalization Date Modification
    - ii. Type: Create Task
    - iii. Status: Active
    - iv. Program(s): AA
    - v. Run Date: Daily(Mon-Fri)

- vi. Source: Batch
  - vii. Scenario: An Adoption Assistance Program request for Placement Finalization Date modification has been received.
- b. Task Information
- i. Task Type: Received DCFS AAP record for case modification for Placement Finalization Date.
  - ii. Task Sub-Type: N/A
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 10 days
  - v. Initial Assignment: Default Assignment
  - vi. Default Assignment: Current Program Worker
  - vii. Long Description: Adoption case information has been received for modification of PLACEMENT FINALIZATION DATE as {PLACEMENT\_FINALIZATION\_DATE}.
4. Quality Review: Findings
- a. Action Information
- i. Name: Quality Review: Findings
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): All Programs
  - v. Run Date: Real Time
  - vi. Source: Online
  - vii. Scenario: Quality Review information has been entered for review.
- b. Task Information
- i. Task Type: Quality Review Findings
  - ii. Task Sub-Type: N/A
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 5 days
  - v. Initial Assignment: Default Assignment
  - vi. Default Assignment: Quality Review Task Worker
  - vii. Long Description: Quality Review Findings
- c. The Default Assignment value of "Quality Review Task Worker" will employ the same logic that is currently used in the CalSAWS System for this automated Task, which is the Worker that the Quality Review has been escalated to for review. Note: This is the default assignment that will be set to preserve current functionality available for Los Angeles county. The county may change the assignment options on the Automated Action Detail page as needed.

5. CalWORKs/RCA Program: Child Deceased
  - a. Action Information
    - i. Name: CalWORKs/RCA Program: Child Deceased
    - ii. Type: Create Task
    - iii. Status: Active
    - iv. Program(s): CL, CW, RC, RE, WT
    - v. Run Date: Daily(Mon-Sat)
    - vi. Source: Batch
    - vii. Scenario: A CalWORKs or RCA Active child is deceased. Take appropriate action.
  - b. Task Information
    - i. Task Type: Review for Good Cause and WTW Services - deceased child reported
    - ii. Task Sub-Type: N/A
    - iii. Due Date: Default Due Date
    - iv. Default Due Date: 15 days
    - v. Initial Assignment: Default Assignment
    - vi. Default Assignment: Current Program Worker
    - vii. Long Description: Review for Good Cause and WTW Services - deceased child reported: {Deceased Individual Name}. Decease Date: {deceasedDate}.
  
6. Cal-Learn Program: Non Compliance Appointment Scheduled
  - a. Action Information
    - i. Name: Cal-Learn Program: Non Compliance Appointment Scheduled
    - ii. Type: Create Task
    - iii. Status: Active
    - iv. Program(s): CL
    - v. Run Date: Daily(Mon-Sat)
    - vi. Source: Batch
    - vii. Scenario: A Cal-Learn non compliance appointment has been scheduled for an active Cal-Learn participant
  - b. Task Information
    - i. Task Type: Cal-Learn Appointment result is not set
    - ii. Task Sub-Type: N/A
    - iii. Due Date: Default Due Date
    - iv. Default Due Date: 7 days
    - v. Initial Assignment: Default Assignment
    - vi. Default Assignment: Current Program Worker
    - vii. Long Description: Cal-Learn Appointment result is not set

- c. Modify the batch process (PB19A228) to evaluate data for all CalSAWS counties.

7. CalWORKs Program: Discontinued

- a. Action Information
  - i. Name: CalWORKs Program: Discontinued
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): CL, CW, RE, WT
  - v. Run Date: Daily(Mon-Sat)
  - vi. Source: Batch
  - vii. Scenario: A CalWORKs program has been Discontinued and the Case contains an Active WTW, REP or Cal-Learn program.

- b. Task Information

- i. Task Type: CalWORKs terminated
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 10 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: CalWORKs terminated

- c. Modify the batch process (PB19A230) to evaluate data for all CalSAWS counties.

8. Kin-GAP Program: Rate Threshold

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles county.

- a. Action Information

- i. Name: Kin-GAP Program: Rate Threshold
- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): KG
- v. Run Date: Daily(Mon-Fri)
- vi. Source: Batch
- vii. Scenario: A Kin-GAP Program rate exceeds the standard rate. Take appropriate action.

- b. Task Information

- i. Task Type: Kin-GAP Rate Threshold
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: Immediately
- v. Initial Assignment: Default Assignment

- vi. Default Assignment: Current Program Worker
- vii. Long Description: Kin-GAP standard rate of {rateAmount} exceeds the standard rate

9. Adoption Assistance Program: Recipient Active on Foster Care

- a. Action Information
  - i. Name: Adoption Assistance Program: Recipient Active on Foster Care
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): AA
  - v. Run Date: Daily(Mon-Sat)
  - vi. Source: Batch
  - vii. Scenario: An Active Adoption Assistance Program person is Active on a Foster Care program.
- b. Task Information
  - i. Task Type: Child AAP to FC
  - ii. Task Sub-Type: N/A
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 3 days
  - v. Initial Assignment: Default Assignment
  - vi. Default Assignment: Current Program Worker
  - vii. Long Description: Child AAP to FC

10. Child Placement: Deletion Failed

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

- a. Action Information
  - i. Name: Child Placement: Deletion Failed
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): FC
  - v. Run Date: Daily (Mon-Fri)
  - vi. Source: Batch
  - vii. Scenario: A child placement deletion has failed during DCFS file processing. Take appropriate action.
- b. Task Information
  - i. Task Type: Child Placement Deletion Failed
  - ii. Task Sub-Type: N/A
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 7 days
  - v. Initial Assignment: Default Assignment

- vi. Default Assignment: Actioning Worker
- vii. Long Description: Child Placement Deletion Failed. DCFS Eligibility Worker to review case and make necessary changes.

- c. The Default Assignment value of "Actioning Worker" will employ the same logic that is currently used in the CalSAWS System for this Automated Action.

#### 11. AAP Program: Placement Finalization Date and Removal Date Modification

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

- a. Action Information
  - i. Name: AAP Program: Placement Finalization Date and Removal Date Modification
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): AA
  - v. Run Date: Daily (Mon-Fri)
  - vi. Source: Batch
  - vii. Scenario: An Adoption Assistance Program request for Placement Finalization Date and Placement Removal Date modification has been received.
  
- b. Task Information
  - i. Task Type: Received DCFS AAP record for case modification for Placement Removal Date and Placement Finalization Date.
  - ii. Task Sub-Type: N/A
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 10 days
  - v. Initial Assignment: Default Assignment
  - vi. Default Assignment: Current Program Worker
  - vii. Long Description: Adoption case information has been received for modification of PLACEMENT FINALIZATION DATE as {PLACEMENT\_FINALIZATION\_DATE} and PLACEMENT REMOVAL DATE as {PLACEMENT\_REMOVAL\_DATE}.

#### 12. Document Received: PA 2418B

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

- a. Action Information

- i. Name: Document Received: PA 2418B
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): All Programs
  - v. Run Date: Real Time
  - vi. Source: Online
  - vii. Scenario: An IEVS-IFDS/NHR Statement Regarding Employment for Discontinued Participants (PA 2418B) has been received.
- b. Task Information
    - i. Task Type: IEVS IFDS Verification Received
    - ii. Task Sub-Type: N/A
    - iii. Due Date: Default Due Date
    - iv. Default Due Date: 20 days
    - v. Initial Assignment: Default Assignment
    - vi. Default Assignment: IEVS Worker
    - vii. Long Description: PA 2418B has been received, review IEVS Abstract and take appropriate actions.
- c. The Default Assignment value of "IEVS Worker" will employ the same logic that is currently used when this Task is triggered, which assigns to the Worker associated to the IEVS interface file record.

13. Document Received: MC 355

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

- a. Action Information
  - i. Name: Document Received: MC 355
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): MC
  - v. Run Date: Real Time
  - vi. Source: Online
  - vii. Scenario: A Medi-Cal Request for Information (MC 355) has been received.
- b. Task Information
  - i. Task Type: MC 355 Verifications Received
  - ii. Task Sub-Type: N/A
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 5 days

- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Update the MC 355 Detail page with verifications received and corresponding Financial/Non-Financial pages.

#### 14. TNB 4 Recertification Packet Received

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

- a. Action Information
  - i. Name: TNB 4 Recertification Packet has been received
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): NB
  - v. Run Date: Real Time
  - vi. Source: Online
  - vii. Scenario: A TNB 4 Recertification Packet has been received.
  
- b. Task Information
  - i. Task Type: TNB4 Packet Received
  - ii. Task Sub-Type: N/A
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 5 days
  - v. Initial Assignment: Default Assignment
  - vi. Default Assignment: Current Program Worker
  - vii. Long Description: TNB4 received

#### 15. Document Received: SAR 73

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County.

- a. Action Information
  - i. Name: Document Received: SAR 73
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): CW
  - v. Run Date: Real Time
  - vi. Source: Online
  - vii. Scenario: A Senior Parent Semi-Annual Income Report (SAR 73) has been received.
  
- b. Task Information

- i. Task Type: SAR73 Received
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 3 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: SAR73 has been received

16. Customer Report Received: Non-MAGI Screening Packet

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County

- a. Action Information
  - i. Name: Customer Report Received: Non-MAGI Screening Packet
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): MC
  - v. Run Date: Real Time
  - vi. Source: Online
  - vii. Scenario: A Non-MAGI Screening Packet has been received.
- b. Task Information
  - i. Task Type: Non-MAGI Screening Packet Received
  - ii. Task Sub-Type: N/A
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 3 days
  - v. Initial Assignment: Default Assignment
  - vi. Default Assignment: Current Program Worker
  - vii. Long Description: Non-MAGI Screening Packet Received

17. Customer Report Received: Non-MAGI Turning 65 Packet

This Automated Action is specific to Los Angeles, it will only be configured and available for Los Angeles County

- a. Action Information
  - i. Name: Customer Report Received: Non-MAGI Turning 65 Packet
  - ii. Type: Create Task
  - iii. Status: Active
  - iv. Program(s): MC
  - v. Run Date: Real Time

- vi. Source: Online
- vii. Scenario: A Non-MAGI Turning 65 Packet has been received.

b. Task Information

- i. Task Type: Non-MAGI Turning 65 Packet Received
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 3 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: Non-MAGI Turning 65 Packet Received

18. Remove the following Task Types from the CalSAWS System. These Task Types are not tied to any automated CalSAWS System functionality. These Task Types are also not available for manual Task creation. If the listed Task Type is not associated to any Task records, remove it completely. If the Task Type is associated to at least one Task record, update the Task Type to be treated as a Los Angeles county custom Task Type:

- General E-communications
- GROW E-communications
- GAIN E-communications
- WTW 24-Month Time Clock Extender to end in one month
- Contact Participant - CW SAR Reminder
- Unexpected Fingerprint Match
- Supportive Services Report GN6008 due
- Progress Report Due
- A child is 18 years old but has not graduated from High school
- A child has graduated from High school and/or turns 18 years old
- A child graduated from High school or turned 19 years old, Please review
- Episode End
- FC Case Created
- Images Received
- New Assignment-Program
- Infant Supplement
- Exception Task
- Document/Verification Received
- Redetermination Received
- Provider not Licensed

**Technical:** End date the associated code table entries in category 399 for the referenced Task Types.

19. Rename the “YBN e-Communications” Task Category to be “Self Service Portal Communications”. This adjustment is strictly cosmetic and does not impact underlying functionality.
20. Add the following Task Categories to the CalSAWS System. These Task Categories will be available for use by all CalSAWS Counties.
  - a. “VITA”  
(**Technical:** The code value for this Task Category must be “VT”)
  - b. “External Agency Admin”  
(**Technical:** The code value for this Task Category must be “EA”)

The Task Categories above 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 and design documentation in the following enhancements:

- CA-214928: DDID 34
- CA-221629: DDID 34 Continued
- CA-214929: DDID 655

### 3 SUPPORTING DOCUMENTS

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N/A

## 4 REQUIREMENTS

### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1629	<p>The CONTRACTOR shall update the existing LRS automated tasks, as specified in the "Task Management LRS Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as update current task configurations for Los Angeles County into the CalSAWS Software as default settings for Los Angeles County.</p>	<ul style="list-style-type: none"> <li>- Existing thresholds for authorization based tasks will remain the same, and threshold amounts will not be configurable by county.</li> <li>- Support for mapping CalWIN automated tasks to LRS automated tasks is not included.</li> <li>- Automated tasks included in this DDID would be set to "Inactive" at cutover for CalWIN counties.</li> <li>- Please refer to CalSAWS Agreement Exhibit U Schedule 1 – Attachment 1 Contractor Assumptions Inventory List, worksheet 'LRS Automated Tasks'</li> </ul>	<p>A population of automated Tasks in LRS/CalSAWS are being converted into the Automated Action framework with this enhancement.</p>

## 5 MIGRATION IMPACTS

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N/A

## 6 OUTREACH

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N/A

## 7 APPENDIX

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N/A

# CalSAWS

California Statewide Automated Welfare System

## Design Document

DDID 2359

SCR CA-222514 – FDS APIs Documentation using  
AWS Developer Portal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Adnan Bukhari
	Reviewed By	Milind Nirgun

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR

DRAFT

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## 1 OVERVIEW

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### 1.1 Requests

Per 2359, provide the API Solution documentation, accessible from the API gateway's built-in developer portal functionality, which includes:

- 1) General description of the entire API Solution and business objects
- 2) Provide simple getting started descriptions and code examples
- 3) Document each API call separately, with parameters and their values explained (Example available at <https://stripe.com/docs/api>)
- 4) Provide examples of each call being made accompanied with details about the requests and responses
- 5) Adopting a menu of links for easy navigation (<https://stripe.com/docs/api>)
- 6) Explain and exemplify request headers, API responses and error codes
- 7) Provide developers with the ability to make live calls from the documentation page
- 8) Create one clear code example for authentication and making a call in the Java, C# and Python programming languages
- 9) Create clear example code for general use cases in the Java language
- 10) Provide a downloadable set of API descriptions in PDF, CSV and Open API specification

Ongoing maintenance of the API Solution documentation will be included as part of future maintenance and enhancement efforts.

### 1.2 Overview of the solution

- Use the serverless developer portal to catalog CalSAWS APIs
- AWS developer portal is an application to make CalSAWS APIs available to the API consumers. The AWS Serverless Developer Portal is to publish API Gateway managed APIs directly from API Gateway.
- AWS Developer Portal uses Amazon Cognito for security, all developer accounts who need access to developer portal should be created in Amazon Cognito

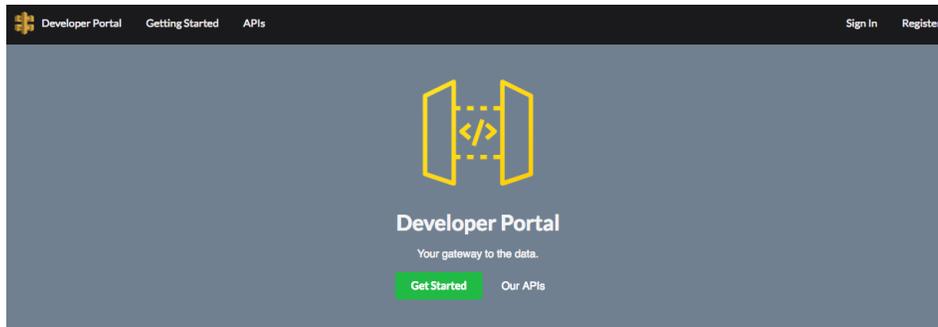
### 1.3 Assumptions

- This portal is for developers only to learn more about the APIs by accessing the documentation and testing them.
- Each API is developed in RESTful manner and OpenAPI specification is created part of the design.
- The Counties are on-boarded to access the APIs at run time.
- Backend APIs are developed and accessible by AWS Developer Portal

## 2 SOLUTION DETAILS

### 2.1 FDS Developer Portal – [Contents]

On the landing page of the developer portal, developers should be able to find the following items:



#### EXPLORE AND BUILD

Read the Getting Started guide to learn how to hit the ground running to get an application up and running in no time.

See what APIs we have to offer, including extensive documentation, and generated SDKs.

Sign in to manage your subscriptions, see your current usage, get your API Key, and test against our live API.

Page	Description
Home	Portal home page that describes the APIs that are showcased. Serves as default home page for the portal (index.html).
APIs	List of available FDS APIs. E.g. Journal, Task  Note: The contents of this page are auto-generated based on the APIs that you publish to the portal.
Sign in	Sign in page for registered users.
Terms and Conditions	Describing the usage of APIs

Commented [NMD1]: There needs to be a section on the on-boarding of developers and how they get access to the Portal. We want to route that through the Helpdesk ticket process and so we need to make sure that is documented.

Commented [BAA2R1]: I have added section 2.2

## 2.2 Developer Signup

The developers are required to sign in to access the API developer portal. AWS API Developer Portal provides self-registration.

1. The developers register using the registration link on the landing page...
2. A user account is created, and an email is sent to the developer.
3. The developer creates a help desk ticket attaching the email.
4. The Developer Portal Admin reviews and take necessary steps before approving or rejecting the request
5. Once the account is approved developer can access the APIs for testing.

## 2.3 Published APIs

FDS has a list of APIs. These APIs will be developed in different releases. The developer portal should include these APIs as these are implemented and provide an interface to view the documentation and test the APIs.

For example following is the description of Journal API.



```
8   description: Returns journal
9   entries
10  paths:
11    /journals:
12      get:
13        tags:
14          - Journals
15        summary: Returns journal
16        details
17        description: ""
18        parameters:
19          - name: case_num
20            in: query
21            description: The case
22              number of the requested
23              case
24            required: true
25            schema:
26              type: string
27          - name: start_date
28            in: query
29            description: The start
30              date for date range...
```

**Journal**  
1.0.0 OAS3

Journal details and description

Servers  
https://someURL... ▾

**Journals** Returns journal entries ▾

Last Saved: 1:39:44 am - Dec 8, 2020

The developer portal provides a Try it out link, as shown below.

```

8 description: Returns journal
9 paths:
10 /journals:
11 get:
12 tags:
13 - Journals
14 summary: Returns journal
15 details
16 description: ""
17 parameters:
18 - name: case_num
19 in: query
20 description: The case
21 number of the requested
22 case
23 required: true
24 schema:
25 type: string
26 - name: start_date
27 in: query
28 description: The start
29 date of a date range OR
30 a specific date is used by
31 itself. Format MM/DD/YYYY
  
```

**GET /journals** Returns journal details

Parameters Try it out

Name	Description
<b>case_num</b> * required string (query)	The case number of the requested case <input type="text" value="case_num - The case number of the requested case"/>
start_date string (query)	The start date of a date range OR a specific date is used by itself. Format MM/DD/YYYY <input type="text" value="start_date - The start date of a date range OR a specific date is used by itself. Format MM/DD/YYYY"/>
end_date	The end date of a date range OR a specific date is used by itself. Format MM/DD/YYYY

### 3 REQUIREMENTS

#### 3.1 Developer Portal Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met
2359	The CONTRACTOR shall develop the API Solution documentation, accessible from the API gateway's built-in developer portal functionality, which includes:	By implementing AWS Developer Portal and customizing it.
	1) General description of the entire API Solution and business objects	The Portal home page will provide a general description.
	2) Provide simple getting started descriptions and code examples	For each API client code can be generated using swagger tool and included in the portal
	3) Document each API call separately, with parameters and their values explained (Example available at <a href="https://stripe.com/docs/api">https://stripe.com/docs/api</a> )	Open API documentation is required for each API
	4) Provide examples of each call being made accompanied with details about the requests and responses	Developer Portal provides this capability

**Commented [NMD3]:** We may have to specify how we are meeting each requirement here. Perhaps screenshots of examples where applicable and rest can be description of how this solution meets that requirement. If it is a feature of the Gateway itself, document that from the Gateway documentation.

**Commented [BAA4R3]:** I have added it...

DDID #	REQUIREMENT TEXT	How Requirement Met
	5) Adopting a menu of links for easy navigation ( <a href="https://stripe.com/docs/api">https://stripe.com/docs/api</a> )	Developer portal organize the APIs for easier flow.
	6) Explain and exemplify request headers, API responses and error codes	Part of the Open API speciation
	7) Provide developers with the ability to make live calls from the documentation page	Developer portal organize the APIs for easier flow.
	8) Create one clear code example for authentication and making a call in the Java, C# and Python programming languages	For each API client code can be generated using swagger tool and included in the portal
	9) Create clear example code for general use cases in the Java language	For each API client code can be generated using swagger tool and included in the portal
	10) Provide a downloadable set of API descriptions in PDF, CSV and Open API specification	Developer portal organize the APIs for easier flow.

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