

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-55208

Changes to the Child Care Request page

| | | |
|----------------|----------------------------------|---|
| CalSAWS | DOCUMENT APPROVAL HISTORY | |
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Table of Contents

| | | |
|---|---|----|
| 1 | Overview | 4 |
| | 1.1 Current Design..... | 4 |
| | 1.2 Requests..... | 5 |
| | 1.3 Overview of Recommendations..... | 5 |
| | 1.4 Assumptions | 5 |
| 2 | Recommendations..... | 7 |
| | 2.1 Child Care Request Detail..... | 7 |
| | 2.1.1 Overview | 7 |
| | 2.1.2 Child Care Request Detail Page Mockup | 8 |
| | 2.1.3 Description of Changes | 10 |
| | 2.1.4 Page Location | 13 |
| | 2.1.5 Security Updates..... | 13 |
| | 2.1.6 Page Mapping..... | 13 |
| | 2.1.7 Page Usage/Data Volume Impacts | 13 |
| | 2.2 Child Care Program Detail page..... | 13 |
| | 2.2.1 Overview | 13 |
| | 2.2.2 Child Care Program Detail Mockup | 13 |
| | 2.2.3 Description of Changes | 14 |
| | 2.2.4 Page Location | 14 |
| | 2.2.5 Security Updates..... | 14 |
| | 2.2.6 Page Mapping..... | 14 |
| | 2.2.7 Page Usage/Data Volume Impacts | 14 |
| | 2.3 Child Care Request Status Detail..... | 14 |
| | 2.3.1 Overview | 14 |
| | 2.3.2 Child Care Request Status Detail Mockup | 15 |
| | 2.3.3 Description of Changes | 15 |
| | 2.3.4 Page Location | 16 |
| | 2.3.5 Security Updates..... | 16 |
| | 2.3.6 Page Mapping..... | 16 |
| | 2.3.7 Page Usage/Data Volume Impacts | 16 |
| 3 | Requirements..... | 16 |
| | 3.1 Project Requirements..... | 16 |

1 OVERVIEW

Currently, one way to add a new Child Care program to a system case is by creating a new Child Care Request (a CalWorks program is required) through the Child Care Request Detail page. Once a new Child Care Request is created, the Child Care program block (if one does not exist already) is automatically created and will be in a Pending Status. A worker from the same agency that the Child Care Request was associated to, will then update the status of the Child Care Request through the Child Care Request Status Detail page accordingly. Once the status of the Child Care Request is updated, the status of the Child Care program is then automatically be updated accordingly. Lastly, if a Child Care Request need to be transferred from one agency to another, a worker can do this process through the Child Care Request Detail page.

This SCR will update CalSAWS to add more conditions on when a new Child Care Request can be created and to create a journal entry when a new Child Care Request is created. The process for when a Child Care Request is being transferred from one agency to another will also be updated so that the Child Care Request does not need to be reapproved. Lastly, the Funding Source field on the Child Care Program Status Detail page will be limited for APP (Alternative Payment Program) agency staff.

Note: The creation of a new Child Care Request can be done by going through the APP local navigator and accessing the Child Care Request Detail page. This process flow is specific to Los Angeles County only.

1.1 Current Design

1. CalSAWS allows a new Child Care Request to be created when the Create Date for the Child Care Request overlaps with a Child Care Authorization period in the same month that the Child Care Request was created for either Stage 1-Unable to Move to Stage 2, Stage 2 (C2AP) or Stage 3 (C3AP).
2. Multiple Child Care Request can be created through the Child Care Request Detail page if there is not an existing Child Care request that is in Pending or Pending in Progress status.
3. When an APP agency staff transfer a Child Care Request from one agency to another, the Child Care Request status will automatically be updated to Pending Status. This will then require the Child Care Request to be approved again for the new APP agency worker to be assign and be reflected on the Case Summary page.
4. Automatic Journal entry are not created when a new Child Care Request is created.
5. All available options for the Funding Source field on the Child Care Program Status Detail page are available to all workers including APP agency staff even though they do not need to service and/or track CAPP, CPS and Post Adoptions

1.2 Requests

1. Update CalSAWS to not allow a new Child Care Request to be created when the Create Date for the Child Care Request overlaps with a Child Care Authorization period in the same month that the Child Care Request was created for either Stage 1, Stage 1-Unable to Move to Stage 2, Stage 2 (C2AP) or Stage 3 (C3AP).
2. Update the existing validation that display on the Child Care Request Detail page when a user attempts to create a new Child Care Request but there's an existing Child Care Request that is in Pending or Pending in Progress status.
3. Update CalSAWS to not change the status of a Child Care Request back to Pending status when its transferred from one agency to another. Also, automatically reassign the Child Care program to the new APP agency worker.
4. Update CalSAWS to automatically open the Child Care Program Detail page when the status of a Child Care Request is updated.
5. Create an automatic journal when a new Child Care Request is created.
6. Update the Funding Source field on the Child Care Program Status Detail page to only display certain values for APP agency staff.

1.3 Overview of Recommendations

1. Create a new validation on the Child Care Request Detail page to prevent a new Child Care Request to be created when the Create date for the Child Care Request overlaps with a Child Care Authorization period in the same month that the Child Care Request was created, for either Stage 1, Stage 1-Unable to Move to Stage 2, Stage 2 (C2AP), or Stage 3 (C3AP).
2. Update the existing validation message that display on the Child Care Request Detail page when a user attempts to create a new Child Care Request when there is an existing Child Care Request that is in Pending or Pending in Progress status.
3. Update the current logic for when a Child Care Request is being transferred from one APP agency to another to not change the status of a Child Care Request back to Pending and to automatically reassign the Child Care Program to the new APP agency worker.
4. CalSAWS will open the Child Care Program Detail page when the status of a Child Care Request is updated.
5. Create an Automatic Journal when a new Child Care Request is created.
6. The Funding Source field on the Child Care Program Detail page will only display the following values for APP agency staff: Stage 1, Stage 1 – Unable to Move to Stage 2, C2AP, and C3AP.

1.4 Assumptions

1. The use of APP pages and APP Agency Staff process are specific to Los Angeles County.
2. All existing functionalities will remain unchanged unless called out as part of this design.

2 RECOMMENDATIONS

2.1 Child Care Request Detail

2.1.1 Overview

The Child Care Request Detail page allows users/APP agencies staff to access, create or edit a Child Care Request of the participant's/beneficiary's case. Through the Child Care Request Detail page, a new Child Care Request can be created, update the status of a Child Care Request, and reassign the Child Care Request to another APP agency as well. This SCR will update the Child Care Request Detail page to prevent users/APP agencies staff from creating a new Child Care Request under specific conditions, updating the existing logic when a Child Care Request is transferred from one APP agency to another and lastly to generate a journal entry when a Child Care Request is created.

2.1.2 Child Care Request Detail Page Mockup

Child Care Request Detail

*- Indicates required fields Save and Return Cancel

- Unable to add a new Child Care Request due to an existing Child Care Request that is in Pending/Pending in Progress status.
- The case already has a pending request.

Members:

| Name | Age |
|---|-----|
| <input checked="" type="checkbox"/> TESTING, JOHN | 11 |

Request Detail:

Request Status: Pending **Requested Date: *** 04/01/2021

Created Date: 04/14/2021 **Worker Id:**

APP Agency: *

Search By: Agency Name **Agency Name:** PATHWAYS Select

PA129 Date: **Retroactive Payment: *** No

Status of Child Care Arrangement: **Special Needs:**

Provider Name: **Provider Zipcode:**

Where will Child Care be provided: **Provider Relationship:**

Activity:

| Name | Activity Name | Status | Status Date |
|---------------|---------------|--------|-------------|
| No Data Found | | | |

Save and Return Cancel

This Type_1 page took 0.38 seconds to load.

Figure 2.1.1 – Child Care Request Pending/Pending in Progress Validation

Child Care Request Detail

*- Indicates required fields

Save and Return

Cancel

• Unable to add a Child Care Request because Child Care is currently authorized.

• The case already has an Active Child Care Program.

Members:

| <input checked="" type="checkbox"/> | Name | Age |
|-------------------------------------|---------------|-----|
| <input type="checkbox"/> | TESTING, JOHN | 14 |
| <input checked="" type="checkbox"/> | TESTING, JANE | 3 |

Request Detail:

| | |
|---|---|
| Request Status: Pending | Requested Date: * 04/01/2021 |
| Created Date: 04/14/2021 | Worker ID: |
| APP Agency: * | |
| Search By: Agency Name | Agency Name: PATHWAYS <input type="button" value="Select"/> |
| PA129 Date: | Retroactive Payment: * No |
| Status of Child Care Arrangement: | Special Needs: |
| Provider Name: | Provider Zipcode: |
| Where will Child Care be provided: | Provider Relationship: |

Activity:

| <input type="checkbox"/> | Name | Activity Name | Status | Status Date |
|--------------------------|------|---------------|--------|-------------|
| No Data Found | | | | |

Add Activity

Save and Return

Cancel

This [Type 1](#) page took 0.34 seconds to load.

Figure 2.1.2 – Child Care Request Validation

Journal Search

Case Number: B17J007
 Category: All
 Type: All
 Initiated By: All
 Date From: 10/01/2020
 To: 04/14/2021

Results per Page: 25 Search

Search Results Summary Results 1 - 25 of 32

Case - B17J007 - Case Name
 Template: Classic Add Entry

| Date | Type | Description |
|------------|-----------|---|
| 04/14/2021 | Narrative | TESTING, JOHN 14M New Child Care Request created. |

Journal Detail

Case Number: B17J007
 Case Name: Case Name

Entry Information

Journal Category: * All
 Journal Type: * Narrative
 Initiated By: User
 Method of Contact:
 Short Description: * TESTING, JOHN 14M New Child Care Request Created.
 Long Description: Name: TESTING, JOHN 14M
 Created Date: 04/14/2021

(04/14/2021 3:01 PM, Jane Tester, 19FSP1000E, Case Manager)

Figure 2.1.3 – Automatic Journal for new Child Care Request

2.1.3 Description of Changes

1. Update the existing validation that display on the Child Care Request Detail page when a new Child Care Request cannot be created/saved due to an existing Child Care Request that is in Pending or Pending in Progress status as shown on Figure 2.1.1.
 - a. Replace the current validation message from 'Form Error – The case already has a Pending Request.' to 'Unable to add a new Child Care Request due to an existing Child Care Request that is in Pending/Pending in Progress status.'

Note: Change is only to the validation message that is being displayed to the users. There is no change on the existing triggers on when the validation message will be displayed.

2. Create a new validation message on the Child Care Request Detail page.
 - a. Validation will display the following message (as shown on Figure 2.1.2): 'Unable to add a Child Care Request because Child Care is currently authorized.' (Please see below for a list of examples)
 - i. Validation message will display when the worker clicks on the 'Save and Return' button and the date on the 'Created Date' field on the Child Care Request Detail page overlaps with an existing Child Care Authorization Period for Stage 1, Stage 1-Unable to Move to Stage 2, Stage 2 (C2AP), or Stage 3 (C3AP).

1. Users will receive this validation when they try to create a new Child Care Request and the Created Date overlaps with a Child Care Authorization that exists for the Case (regardless of who the Child Care Authorization is for) and it's in one of the following Stage: Stage 1, Stage 1 - Unable to Move to Stage 2, Stage 2 (C2AP), or Stage 3 (C3AP).

Example 1: AU has a Child 1 and Child 2 on Case A. Child 1 has a Child Care authorization (either in Stage 1, Stage 1 - Unable to Move to Stage 2, Stage 2 or Stage 3) from 04/1/2021 through 04/30/2021 on Case A. Child 2 does not have a Child Care Authorization (either in Stage 1, Stage 1 - Unable to Move to Stage 2, Stage 2 or Stage 3). When a user tries to add a Child Care Request for Case A with a Created Date of 04/15/2021, the system will display the following validation message: "Unable to add a Child Care Request because Child Care is currently authorized."

Example 2: AU has Child 1 and Child 2 on Case A, then later Child 2 moved to another Case (Case B) and a new Child Care Request is needed for Case B. Child 1 has a Child Care Authorization (either in Stage 1, Stage 1 - Unable to Move to Stage 2, Stage 2 or Stage 3) between 04/1/2021 through 04/30/2021 on Case A. Child 2 does not have any Child Care Authorization on Case A. When user is creating a new Child Care Request for Case B with a Created Date of 04/15/2021, the system will allow the user to create the new Child Care Request.

Example 3: AU has Child 1 and Child 2 on Case A then Child 1 moved to Case B which already have a Child 3. A new Child Care request is needed for Case B. Child 1 has a Child Care authorization (either in Stage 1, Stage 1 - Unable to Move to Stage 2, Stage 2, or Stage 3) between 04/01/2021 through 04/30/2021 on Case A. When user is trying to create a new Child Care Request for Case B with a Created Date of 04/15/2021 for both Child 1 and Child 3, the system will allow the user to create it. Even though there is a Child Care Authorization (either in Stage 1, Stage 1 - Unable to Move to Stage 2, Stage 2 or Stage 3) for Child 1 on Case A between 04/1/2021 through 04/30/2021, the system will allow the new Child Care Request for Case B, because the Authorization for Child 1 is for Case A and not Case B.

3. Update the existing logic on the Child Care Request Detail page to not change the Request Status when a user change the APP Agency information.
 - a. Update CalSAWS to not change the Child Care Request Status from 'Approved' to 'Pending' automatically when the APP agency information is changed through the Child Care Request Detail page in Edit mode.
 - i. For a Child Care Request with an 'Approved' status the Child Care Program will automatically be reassigned to the Generic Worker and Generic Worker ID that's associated to the new APP agency upon saving the updated Child Care Request.
 1. New Worker and Worker ID information will be reflected on the Child Care Program block on the Case Summary page.

Note: The logic will only be updated specifically for 'Approved' status only (not be changed to Pending status automatically). For all other statuses, existing functionality will not change.

4. Generate a journal entry when a new Child Care Request is created as shown on Figure 2.1.3. The Journal entry will have the following details:
 - a. Journal Entry will automatically be created in a Classic Template.
 - b. Journal Category: All
 - c. Journal Type: Narrative
 - d. Initiated By: User
 - e. Method of Contact: Blank
 - f. Short Description: (Who the Child Care Request was created for [Last Name, First Name Age Gender]) New Child Care Request Created.
 - i. Example: TESTING, JOHN 14M New Child Care Request Created.
 - g. Long Description: Name: <Name of the Child, the Child Care Request was created for> [Last Name, First Name Age Gender] Created Date: <Date the Child Care Request was Created> MM/DD/YYYY
 - i. Example: Name: TESTING, JOHN 14M
Created Date: 04/14/2021

Note: Journal Entry will automatically be created when a new Child Care Request is created. Any changes to the Child Care Request will not update the Journal Entry.

5. Update the field titled 'Worker Id:' to 'Worker ID:'

2.1.4 Page Location

- **Global: Child Care**
- **Local: APP**
- **Task: Add Child Care Request**

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 Child Care Program Detail page

2.2.1 Overview

The Child Care Program Detail page allows users to add, edit or view the details of a participant/beneficiary's Child Care Case. This includes APP agencies staff, being able to edit the Funding Source accordingly. Since APP agencies do not need to service and/or track CAPP, CPS and Post Adoptions this SCR will update the Funding Source field on the Child Care Program Detail page to only display specific values for APP agencies staff.

2.2.2 Child Care Program Detail Mockup

Program Status Detail

*- Indicates required fields

Primary:
JANE TESTING

Funding Source: *
Stage 1
Stage 1 - Unable to Move to Stage 2
C2AP
C3AP
Stage 1

Application Date: *
02/26/2008

Documents Provided Date: *
04/03/2008

Retro Benefits? *
No

Begin Date: *
05/26/2016

End Date:

Last Updated On 05/03/2017 6:03:24 PM By: [529469](#)

This Type 1 page took 11.64 seconds to load.

Save and Return Cancel

Save and Return Cancel

Figure 2.2.1 – Child Care Program Detail Funding Source options for APP agencies staff/worker

2.2.3 Description of Changes

1. Update the Funding Source field on the Child Care Program Detail page to only display the following options for APP agencies staff.
 - a. Stage 1 – Unable to Move to Stage 2
 - b. C2AP
 - c. Stage 1
 - d. C3AP

Note: The Worker ID must be linked to one of the ten APP Agency offices to be considered an APP agency staff.

2.2.4 Page Location

- **Global: Child Care**
- **Local: Case Summary**
- **Task: Child Care Program**

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 Child Care Request Status Detail

2.3.1 Overview

The Child Care Request Status Detail page allows APP agencies staff to specify the status of the Child Care's request. This SCR will update the Child Care Request Status Detail page to trigger the system to direct users to the Child Care Program Detail page automatically when there's a change to the Requested Status.

2.3.2 Child Care Request Status Detail Mockup

Child Care Request Status Detail

*- Indicates required fields

[View History](#) [Save](#) [Cancel](#)

Name:
TESTING, JOHN

Request Detail

| | |
|--|---|
| Request Status: * <input type="text" value="Pending in Progress"/> | Date: 04/14/2021 |
| Trustline Pending: <input type="text"/> | Trustline Verification Date: <input type="text"/> |
| Enhanced Referral Sent: <input type="text"/> | |

[Save](#) [Cancel](#)

This Type_1 page took 0.63 seconds to load.

Figure 2.4.1 – Child Care Request Status Detail page (Reference Only)

2.3.3 Description of Changes

1. Update the system to direct users to the Child Care Program Detail page in 'View' mode from the Child Care Request Status Detail page.
 - a. Users will automatically be redirected to the Child Care Program Detail page (in View mode) upon clicking the 'Save' button under the following conditions:
 - i. The value on the Request Status field was changed and was saved successfully upon clicking the 'Save' button.
 1. If changes were not able to be saved successfully after clicking the 'Save' button, users will remain on the Child Care Request Status Detail page.
Note: If there was no change to the Request Status, users will not be redirected to the Child Care Program Detail page even if the changes were saved successfully.
 - ii. Staff who have the ChildCareProgramDetailView security right to access the Child Program Detail page in View mode.
 1. For Staff that does not have access to the Child Program Detail page (View Mode), it will redirect the user to the Child Care Request Detail page (View mode).

2.3.4 Page Location

- **Global: Child Care**
- **Local: APP**
- **Task: Child Care Request Search**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|-------------|---|--|
| 2.28.2.18.2 | The LRS shall include functionality to support child care services, as specified by COUNTY, including: a. Child care provider information; b. Child care performance reports; c. Alert notices and NOA s; d. Tracking of activity and authorizations by child and case; e. Tracking of payments issued; and f. Alternative Payment Program (APP) information. | CalSAWS was updated to only allow a new Child Care Request to be updated in certain conditions for APP agency staff and to not require Child Care Request to be reapproved when APP agency are updated. Funding Source values were updated on the Child Care Program Detail page to be specific for APP agency staff. Lastly, a new automatic journal will be generated upon creation of a new Child Care Request. |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-57452

ACWDL 17-32: Updates to Failure to Respond NOAs

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| | Prepared By | Tiffany Huckaby |
| | Reviewed By | Sreekanth Kalvoju, Geetha Ramalingam |

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| | | | |

Table of Contents

| | | |
|---|---|----|
| 1 | Overview | 4 |
| | 1.1 Current Design..... | 4 |
| | 1.2 Requests..... | 4 |
| | 1.3 Overview of Recommendations..... | 4 |
| | 1.4 Assumptions | 4 |
| 2 | Recommendations..... | 5 |
| | 2.1 Add New NOA Medi-Cal Action Fragment | 5 |
| | 2.1.1 Overview | 5 |
| | 2.1.2 Description of Change..... | 5 |
| | 2.2 Add New NOA MAGI Failed to Respond Reason Fragment | 7 |
| | 2.2.1 Overview | 7 |
| | 2.2.2 Description of Change..... | 7 |
| | 2.3 Add New NOA Non-MAGI Failed to Respond Reason Fragment..... | 10 |
| | 2.3.1 Overview | 10 |
| | 2.3.2 Description of Change..... | 10 |
| | 2.4 Remove Obsoleted Non-MAGI Failure to Respond NOA Verbiage | 13 |
| | 2.4.1 Overview | 13 |
| | 2.4.2 Description of Change..... | 13 |
| | 2.5 Remove Obsoleted MAGI Failure to Respond NOA Fragment..... | 15 |
| | 2.5.1 Overview | 15 |
| | 2.5.2 Description of Change..... | 16 |
| 3 | Supporting Documents | 17 |
| 4 | Requirements..... | 18 |
| | 4.1 Project Requirements..... | 18 |

1 OVERVIEW

This SCR is to update the verbiage on the NOAs for Failure to Respond based on ACWDL 17-32. Two new NOA reasons (MAGI and non-MAGI) will be added to replace existing fragments in CalSAWS for the MAGI RE Packet, non-MAGI RE Packet and Mixed Household RE Packet.

1.1 Current Design

CalSAWS generates NOAs for Failure to Respond based on ACWDLs 15-27 and 15-27E.

1.2 Requests

Add new NOA reasons fragments using verbiage provided by ACWDL 17-32 for the MAGI RE Packet, Non-MAGI RE Packet and Mixed Household RE Packet.

1.3 Overview of Recommendations

1. Add a new NOA MAGI Failed to Respond Reason Fragment.
2. Add a new NOA non-MAGI Failed to Respond Reason Fragment.
3. Remove no longer used NOA Fragment verbiage from the system.

1.4 Assumptions

1. Medi-Cal RE Packets were updated with CA-216432 in the 21.07 release. The MAGI RE Packet, Non-MAGI RE Packet and Mixed Household RE Packet will use the updated versions of the Failed to Respond verbiage in newly generated NOAs while the Medi-Cal RE Packets that were removed, with the exception of the ABD MC RE Packet and LTC MC RE Packet, will only have the currently existing verbiage for historical months.

Note: CA-216432 will remove the following Packets: MC Redetermination, MC LTC Packet, MSP Packet, MC 604 IPS Packet and Pre-ACA MC RE Packet.

2. The Mixed Household RE Packet for Failed to Respond will trigger a mixed non-MAGI/MAGI NOA with both new NOA Fragments (non-MAGI and MAGI) listed with the applicable program persons.
3. The two new NOA fragment reasons will require the 90 day NOA verbiage. This effort will be using the existing CalSAWS 90 day NOA verbiage and variable population. The existing 90-day verbiage in CalSAWS matches MEDIL 16-04.
4. The two new NOA fragment reasons will not generate with the MAGI Individual Action (H_TN_ACTION2) on mixed non-MAGI/MAGI NOAs as these fragments are on program level.
5. CA-214024 will add the missing Translations for Common Fragment to allow Medi-Cal NOAs to generate in all CalSAWS supported Threshold Languages. Until this is implemented only a subset of the Threshold Languages will generate for Medi-Cal NOAs. CA-228191 has been created for when the rest of the Threshold languages for the Medi-Cal Failed to Respond Fragments can be added.

6. Currently NOAs are generated per Program block and this effort will not change that functionality. A mixed non-MAGI/MAGI NOA will only generate if the program persons are on the same Program block.
7. Updates via in CA-209422 will still apply to the new Failure to Respond NOAs.

2 RECOMMENDATIONS

2.1 Add New NOA Medi-Cal Action Fragment

2.1.1 Overview

This recommendation is adding a new Medi-Cal NOA Action Fragment for the Failed to Respond Reason Fragments being added in this SCR. The new Failed to Respond Fragments will be generated on a program level, however when generated on a mixed non-MAGI/MAGI NOA both Failed to Respond Reason Fragments may be applicable. This new Action Fragment will be generated for this scenario to clearly state which persons are failing Medi-Cal for Failed to Respond and which persons are failing MAGI for Failed to Respond.

State Form/NOA: Action verbiage pulled from existing Medi-Cal Fragments

Program(s): Medi-Cal (MAGI and non-MAGI)

Action Type: Discontinuance

Repeatable: N

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

Note: Additional Threshold languages will be added with CA-228191.

2.1.2 Description of Change

2.1.2.1 Create new Medi-Cal Action Fragment XDP

Add a new XDP for the Medi-Cal Action fragment for Failed to Respond Reasons.

NOA Mockups/Examples: See Supporting Documents #3 for NOA Mockup.

| DESCRIPTION | TEXT | FORMATTING* |
|-------------|---|--------------------|
| Static | Medi-Cal benefits will be discontinued for: | Arial Font Size 10 |

| | | |
|--|-------------------|--|
| | <LIST_OF_PERSONS> | |
|--|-------------------|--|

*English only, Spanish and threshold will generate based on project standards for that language.

2.1.2.2 Add Generation for new Medi-Cal Action Fragment XDP

This new Medi-Cal Action Fragment will generate on a NOA when either:

- One of the new Failed to Respond NOA Reason Fragments (See Recommendations 2.2 and 2.3) generate on a non-MAGI/MAGI NOA.
- A MAGI NOA is generated and the entire program has not failed for Failure to Respond.

Ordering on NOA: This will generate prior to the Failed to Respond Reason Fragments (See Supporting Documents #3 for NOA mockup)

2.1.2.3 Add Fragment Variable Population for MC Action Fragment

The new Medi-Cal Action Fragment will have one variable.

| VARIABLE NAME | POPULATION | FORMATTING* |
|-------------------|--|--------------------|
| <LIST_OF_PERSONS> | <p>When the Action Fragment is generating for:</p> <ul style="list-style-type: none"> • The MAGI Failed to Respond Reason: List of Program Person Names that were formerly receiving MAGI • The non-MAGI Failed to Respond Reason: List of Program Person Names that were formerly receiving non-MAGI <p>Example Population: "John Doe Jane Doe"</p> | Arial Font Size 10 |

*English only, Spanish and threshold will generate based on project standards for that language.

Variables Requiring Translations: N/A

2.2 Add New NOA MAGI Failed to Respond Reason Fragment

2.2.1 Overview

This recommendation is adding a new MAGI NOA fragment with verbiage provided by ACWDL 17-32.

State Form/NOA: NOA verbiage from ACWDL 17-32

NOA Template:

- MAGI NOA Template (H_NOA_TEMPLATE)
- Mixed non-MAGI/MAGI Template (MH_NOA_TEMPLATE)

Program(s): Medi-Cal (MAGI only)

Action Type: Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes, existing CalSAWS version at time of implementation

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

Note: Additional Threshold languages will be added with CA-228191.

2.2.2 Description of Change

2.2.2.1 Create Fragment XDP

Add new Medi-Cal Failure to Respond Reason Fragment that matches verbiage on ACWDL 17-32.

NOA Mockups/Examples: See Supporting Documents # 1 for NOA mockup.

| DESCRIPTION | TEXT | FORMATTING* |
|-------------|---|-----------------------|
| Static | Your Medi-Cal is ending on <DATE> because you did not provide the renewal information that we asked for. We need you to give us proof of your household income to see if you can still get Medi-Cal. Please call us, visit your county social services office, or return your completed and signed renewal form to give us this information. Some examples of proof of your income are a paystub, your most | Arial Font Size 10 |

| DESCRIPTION | TEXT | FORMATTING* |
|-----------------------------------|---|--------------------|
| | recent tax return, a letter from your employer, or a benefits award letter. | |
| Static – Existing 90 day verbiage | You can still get Medi-Cal, but you need to give us more information. We need it within 90 days, by <DATE1>. We can give you Medi-Cal from <DATE2> if you are eligible. If we do not get the information by <DATE1>, you must reapply for Medi-Cal. | Arial Font Size 10 |

*English only, Spanish and threshold will generate based on project standards for that language.

2.2.2.2 Add Fragment Generation

Generate the new MAGI Failure to Respond Reason fragment when one of the following is true:

- a. In the newly run Medi-Cal EDBC the program status is Discontinued with the "Failed to Complete Redetermination" negative action reason and the following is true:
 - There is either a MAGI RE Packet, or Mixed Household RE Packet on the case and it currently has a status of either 'Sent' or 'Generated'.
 - There is at least one existing Medi-Cal EDBC for the current Benefit month and in the most recent saved Medi-Cal EDBC of the existing Medi-Cal EDBCs for that month there is at least one person with a MAGI aid code

or

there is not a previously existing Medi-Cal EDBC for the current Benefit month and there is at least one Medi-Cal EDBC for the previous month and in the most recent saved Medi-Cal EDBC for the previous month there is at least one person with a MAGI aid code.
- b. In the newly run Medi-Cal EDBC the program is still active however program persons have failed for "Failed to Complete Redetermination and the following is true:
 - There is either a MAGI RE Packet, or Mixed Household RE Packet on the case and it currently has a status of either 'Sent' or 'Generated'.
 - There is at least one existing Medi-Cal EDBC for the current Benefit month and in the most recent saved Medi-Cal EDBC of the existing Medi-Cal EDBCs for that month there is at least one program person with a MAGI aid code that in the currently run EDBC has the status reason of "Failed to Complete Redetermination".

or

there is not a previously existing Medi-Cal EDBC for the current Benefit month and there is at least one Medi-Cal EDBC for the previous month and in the most recent saved Medi-Cal EDBC for the previous month there is at least one person with a MAGI aid code that in the currently run EDBC has the status reason of "Failed to Complete Redetermination".

Action Fragment: New Medi-Cal Action Fragment, see Recommendation 2.1

Message Fragment: MAGI Regulation Message (H_TN_MESSAGE1) and will also generate with the MAGI NOA Footer (H_STATIC_FOOTER)

Ordering on NOA: Generates immediately after the associated Action Fragment and prior to the MAGI Regulation Message. Existing Fragment Order of mixed non-MAGI/MAGI NOAs applies to this fragment.

2.2.2.3 Add Fragment Variable Population

The new Medi-Cal Failure to Respond Reason Fragment will have one new variable. The Medi-Cal 90 day verbiage section will populate with the existing variable population logic used by all 90 day verbiage fragments.

| VARIABLE NAME | POPULATION | FORMATTING* |
|---------------|--|--------------------|
| <DATE> | Last day of the newly run EDBC Benefit Month. For example, "01/31/2021" | Arial Font Size 10 |

*English only, Spanish and threshold will generate based on project standards for that language.

2.2.2.4 Add Regulations for new Medi-Cal Failure to Respond Reason

The following Regulations that were associated to the previous Failure to Respond Reason will be added when the new MAGI Failure to Respond Reason is generated on a NOA:

New Regulations: California Code of Regulations Title 22 Section 50175, 50189 and WIC 14005.37(i)

2.2.2.5 Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Medi-Cal Failure to Respond Fragment.

NOA Reference on Document List Page: FAILED TO RESPOND

NOA Title: Existing Medi-Cal Discontinuance (MC_TN_NOA_TYPE)

NOA Title Requires Translations: No

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

NOA Footer Requires Translations: No

2.3 Add New NOA Non-MAGI Failed to Respond Reason Fragment

2.3.1 Overview

This recommendation is adding a new non-MAGI NOA fragment with verbiage provided by ACWDL 17-32.

State Form/NOA: NOA verbiage from ACWDL 17-32

NOA Template:

- Non-MAGI NOA Template (MC_NOA_TEMPLATE)
- Mixed non-MAGI/MAGI Template (MH_NOA_TEMPLATE)

Program(s): Medi-Cal (Non-MAGI only)

Action Type: Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes, existing CalSAWS version at time of implementation

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

Note: Additional Threshold languages will be added with CA-228191.

2.3.2 Description of Change

2.3.2.1 Create Fragment XDP

Add a new Medi-Cal Failure to Respond Reason Fragment that matches the verbiage on ACWDL 17-32.

NOA Mockups/Examples: See Supporting Documents # 2 for NOA mockup.

| DESCRIPTION | TEXT | FORMATTING* |
|-------------|---|-----------------------|
| Static | Your Medi-Cal is ending on <DATE> because you did not provide the renewal information that we asked for. We need you to give us information about the | Arial Font Size 10 |

| | | |
|-----------------------------------|---|--------------------|
| | <p>following to see if you can still get Medi-Cal:</p> <ul style="list-style-type: none"> • Proof of your property. Some examples of proof of your property are bank account statements, investments statements, or titles for property that you own. • Proof of your income. Some examples of proof of your income are a paystub, your most recent tax return, a letter from your employer, or a benefits award letter. <p>Please call us, visit your county social services office, or return your completed and signed renewal form to give us this information.</p> | |
| Static – Existing 90 day verbiage | You can still get Medi-Cal, but you need to give us more information. We need it within 90 days, by <DATE1>. We can give you Medi-Cal from <DATE2> if you are eligible. If we do not get the information by <DATE1>, you must reapply for Medi-Cal. | Arial Font Size 10 |

*English only, Spanish and threshold will generate based on project standards for that language.

2.3.2.2 Add Fragment Generation

Generate the new non-MAGI Failure to Respond Reason fragment when one of the following is true:

- a. There is either a ABD MC RE Packet, LTC MC RE Packet (historical months as this is no longer available), Non-MAGI RE Packet and Mixed Household RE Packet on the case and the following is true:
 - o In the newly run Medi-Cal EDBC the program status is Discontinued with the "Failed to Complete Redetermination" negative action reason.
 - o The ABD MC RE Packet, LTC MC RE Packet, Non-MAGI RE Packet or Mixed Household RE Packet is either in the "Sent" or "Generated" status.
 - o There is at least one existing Medi-Cal EDBC for the current Benefit month and in the most recent saved Medi-Cal EDBC of the existing Medi-Cal EDBCs for that month there is at least one person with a non-MAGI aid code

or

there is not a previously existing Medi-Cal EDBC for the current Benefit month and there is at least one Medi-Cal EDBC for the previous month and in the most recent saved Medi-Cal EDBC for the previous month there is at least one person with a non-MAGI aid code.

Action Fragment: New Medi-Cal Action Fragment, see Recommendation 2.1

Message Fragment: N/A

Ordering on NOA: Generates immediately after the associated Action Fragment. Existing Fragment Order of mixed non-MAGI/MAGI NOAs applies to this fragment.

2.3.2.3 Add Fragment Variable Population

The new Medi-Cal Failure to Respond Reason Fragment will have one new variable. The Medi-Cal 90 day verbiage section will populate with the existing variable population logic used by all 90 day verbiage fragments.

| VARIABLE NAME | POPULATION | FORMATTING* |
|---------------|--|--------------------|
| <DATE> | Last day of the newly run EDBC Benefit Month. For example, "01/31/2021" | Arial Font Size 10 |

*English only, Spanish and threshold will generate based on project standards for that language.

2.3.2.4 Add Regulations for new Medi-Cal Failure to Respond Reason

The following Regulations that were associated to the previous Failure to Respond Reason will be added when the new non-MAGI Failure to Respond Reason is generated on a NOA:

New Regulations: California Code of Regulations Title 22 Section 50175, 50189 and WIC 14005.37(i)

2.3.2.5 Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Medi-Cal Failure to Respond Fragment.

NOA Reference on Document List Page: FAILED TO RESPOND

NOA Title: Existing Medi-Cal Discontinuance (MC_TN_NOA_TYPE)

NOA Title Requires Translations: No

NOA Footer: MC 239

NOA Footer Requires Translations: No

2.4 Remove Obsolete Non-MAGI Failure to Respond NOA Verbiage

2.4.1 Overview

Update the existing Medi-Cal non-MAGI Failed to Respond NOA Reason Fragment to no longer generate for the Non-MAGI RE Packet, LTC MC RE Packets, and Mixed MC RE Packets as the verbiage is being replaced with the new Fragments from Recommendations 2.2 and 2.3.

Reason Fragment Name and ID: MC_TN_FAIL_REDETER_RESPONSE_M400 (ID: 6897)

State Form/NOA: Verbiage provided by ACWDL 15-27 and 15-27E.

Current NOA Template(s):

- Non-MAGI NOA Template (MC_NOA_TEMPLATE)
- Mixed non-MAGI/MAGI Template (MH_NOA_TEMPLATE)

Current Program(s): Medi-Cal (non-MAGI)

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes, this will automatically generate with the current CalSAWS version.

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

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

2.4.2 Description of Change

2.4.2.1 Update Existing Failed to Respond Fragment XDP

This effort will update the existing Failed to Respond Fragment for non-MAGI to no longer include verbiage that will be replaced with the new Fragment from Recommendations 2.3.

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

| DESCRIPTION | EXISTING TEXT | UPDATE |
|-------------|---|--|
| Static | <p>Your Medi-Cal will end because:</p> <p>You did not complete the redetermination process. In order to complete our review of your annual redetermination or change in circumstance, we needed the following information from you:</p> | No Change. |
| Dynamic | <ul style="list-style-type: none"> • Your current residence address • Verification of Your citizenship or immigration status, if it has changed. • Your income • Your expenses and deductions • Information about blindness, disability or incapacity • Your property and any changes in property. • Who lives in Your household and if there have been any changes. | No Change, keep for historical EDBC when there exists a Pre-ACA MC RE Packet. |
| Dynamic | <ul style="list-style-type: none"> • Your current residence address • Your income • Your Social Security Number • Your property and any changes in property. | Remove , this formerly generated for LTC MC RE Packets and will be replaced by new non-MAGI Fragment from Recommendation 2.3. |
| Dynamic | <ul style="list-style-type: none"> • Your current residence address • Your income • Your Social Security Number • Who lives in your household and if there have been any changes. | No Change, keep for historical EDBC when there exists a MSP Packet. |
| Dynamic | <ul style="list-style-type: none"> • Your current residence address • Verification of Your citizenship or immigration status, if it has changed. • Your income • Your expenses and deductions • Information about blindness, disability or incapacity • Your property and any changes in property. • Who lives in Your household and if there have been any changes. • Who is in your tax household (all people you claim or could claim on your taxes as dependents, if you are not required to file taxes). • If anyone is deceased or incarcerated. | Remove , this formerly generated for Mixed MC RE Packet and will be replaced by new non-MAGI and MAGI Fragments from Recommendations 2.2 and 2.3. |

| DESCRIPTION | EXISTING TEXT | UPDATE |
|--------------------------|---|--|
| Dynamic | <ul style="list-style-type: none"> • Your current residence address • Verification of Your citizenship or immigration status, if it has changed. • Your income • Your expenses and deductions • Information about blindness, disability or incapacity • Your property and any changes in property. • Who lives in Your household and if there have been any changes. | No Change, keep for historical EDBC when there exists a MC 604 IPS Packet. |
| Static | We asked you for that information, but we have not received it and it is needed to complete your annual redetermination or process your change in circumstances. Medi-Cal benefits will be discontinued for: | No Change. |
| Dynamic | <NAME> is a child whose Medi-Cal benefits were suspended. They are now discontinued. This means that the child will need to re-apply for Medi-Cal when s/he is no longer incarcerated. | No Change. |
| Static (90 day verbiage) | You can still get Medi-Cal, but you need to give us more information. We need it within 90 days, by <DATE1>. We can give you Medi-Cal from <DATE2> if you are eligible. If we do not get the information by <DATE1>, you must reapply for Medi-Cal. | No Change. |

2.4.2.2 Update Generation Conditions of Failed to Respond Fragment

Update the existing non-MAGI Failed to Respond Fragment to no longer generate for a Non-MAGI RE Packet, LTC MC RE Packet, or Mixed MC RE Packet.

Note: MC 14A functionality is obsolete and should no longer be a generation condition of this Fragment. Any existing logic that exists in the system should be removed regarding the MC 14A.

2.5 Remove Obsolete MAGI Failure to Respond NOA Fragment

2.5.1 Overview

Turn off the existing Medi-Cal MAGI Failed to Respond NOA Reason Fragment as the verbiage is being replaced with the new Fragment from Recommendation 2.2.

2.5.2 Description of Change

Remove generation and variable population logic associated to the existing Medi-Cal MAGI Failed to Respond NOA Reason Fragment (H_TN_FAIL_REDETERM_RESPONSE_H400, ID: 6893). Turn off Fragment in database in all available languages (Armenian, Cambodian, Chinese, English, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese).

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|--|--------------------------------|
| 1 | NOA | NOA MAGI Failed to Respond Reason Mockup | MAGI_FAILED_TO_RESPOND.pdf |
| 2 | NOA | NOA Non- MAGI Failed to Respond Reason Mockup | NON_MAGI_FAILED_TO_RESPOND.pdf |
| 3 | NOA | NOA mixed non-MAGI/MAGI Failed to Respond Reasons Mockup | MIXED_HH_FAILED_TO_RESPOND.pdf |

4 REQUIREMENTS

4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|------------------------|--|---|
| (CAR-1239) 2.18.3.3 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. | <p>This update will produce the updated NOAs regarding Failure to Respond for based off of Renewal Forms.</p> |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208434

Populate Responsible Party field on the
Transaction Detail Page

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

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------|-------------------------|-----------------------------|---------------|
| 2/11/2021 | 1.0 | Initial Version | Jimmy Tu |
| 6/15/2021 | 1.1 | Changes as per R6 comments. | Jimmy Tu |
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Table of Contents

| | | |
|-------|---|----|
| 1 | Overview | 5 |
| 1.1 | Current Design..... | 5 |
| 1.2 | Requests..... | 5 |
| 1.3 | Overview of Recommendations..... | 5 |
| 1.4 | Assumptions | 5 |
| 2 | Recommendations..... | 6 |
| 2.1 | Recovery Account Detail Page | 6 |
| 2.1.1 | Overview | 6 |
| 2.1.2 | Transaction Detail Page Mockup..... | 6 |
| 2.1.3 | Description of Changes | 6 |
| 2.1.4 | Page Location | 6 |
| 2.1.5 | Security Updates..... | 6 |
| 2.1.6 | Page Mapping..... | 7 |
| 2.1.7 | Page Usage/Data Volume Impacts | 7 |
| 2.2 | Batch Updates..... | 7 |
| 2.2.1 | Overview | 7 |
| 2.2.2 | Description of Change..... | 7 |
| 2.2.3 | Execution Frequency..... | 8 |
| 2.2.4 | Key Scheduling Dependencies | 8 |
| 2.2.5 | Counties Impacted | 8 |
| 2.2.6 | Data Volume/Performance..... | 8 |
| 2.2.7 | Failure Procedure/Operational Instructions..... | 8 |
| 2.3 | Automated Regression Test..... | 8 |
| 2.3.1 | Overview | 8 |
| 2.3.2 | Description of Changes | 8 |
| 3 | Supporting Documents | 9 |
| 4 | Requirements..... | 9 |
| 4.1 | Project Requirements..... | 9 |
| 4.2 | Migration Requirements..... | 9 |
| 5 | Migration Impacts | 10 |
| 6 | Outreach..... | 10 |
| 7 | Appendix..... | 10 |

1 OVERVIEW

1.1 Current Design

When a worker terminate, activates, or voids an account from the Recovery Account Detail page, the system does not populate the responsible party which is a required field on the Transaction Detail page and users are not able to edit the transaction to fill in the responsible party field because the edit button is only displayed if the recovery account associated is in an active status and the transaction types are not "Back out" or "Refund".

1.2 Requests

1. Populate the responsible party field on the Recovery Account Transaction created when a user transfers out, voids or terminates a recovery account from the Recovery Account Detail page.

1.3 Overview of Recommendations

1. Populate the responsible party field on the Recovery Account Transactions created when a user transfers out, voids or terminates a recovery account from the Recovery Account Detail page.
2. Update the Uncollectible Recovery Account batch job to populate the Responsible Party Field on the recovery account transaction.

1.4 Assumptions

1. After this SCR is implemented, the worker can reactivate a terminated or voided recovery account and the responsible party field will be carried over from the previous transaction (if the previous transaction has a responsible party populated) to the new transaction.
2. This SCR will not clean up any existing records and will only be implemented for transaction records going forward.
3. The responsible party field on the transaction summary and transaction detail page will be populated with the responsible party selected on the Recovery Account.

2 RECOMMENDATIONS

2.1 Recovery Account Detail Page

2.1.1 Overview

The Recovery Account Detail Page allows the worker to add, edit, or view recovery accounts for overpayments and over issuances. The worker can also transfer out, void, or terminate a recovery account from this page.

2.1.2 Transaction Detail Page Mockup

No Change.

2.1.3 Description of Changes

1. Populate the responsible party (from the Recovery Account Detail Page) on the Recovery Account Transactions created when a user transfers out, voids or terminates a recovery account from the Recovery Account Detail page.
 - a. In the scenario that there is more than one active responsible party listed on the recovery account, populate based on the following priority:
 - i. Populate the responsible party field with the primary applicant.
 - ii. Populate the responsible party field with the first assigned responsible party person (based on ID).
 - iii. Populate the responsible party field with the first assigned responsible party resource (based on ID).
 - b. In the scenario that all responsible parties listed on the recovery account are inactive, the responsible party field will be blank.

2.1.4 Page Location

- **Global:** Fiscal
- **Local:** Collections
- **Task:** Transaction Summary

2.1.5 Security Updates

1. Security Rights

| Security Right | Right Description | Right to Group Mapping |
|----------------|-------------------|------------------------|
| | | |

| Security Right | Right Description | Right to Group Mapping |
|----------------|-------------------|------------------------|
| | | |
| | | |

2. Security Groups

| Security Group | Group Description | Group to Role Mapping |
|----------------|-------------------|-----------------------|
| | | |
| | | |
| | | |

2.1.6 Page Mapping

None.

2.1.7 Page Usage/Data Volume Impacts

None.

2.2 Batch Updates

2.2.1 Overview

These batch updates will be to populate the responsible party and transaction method fields on the Transaction Detail page and Recovery Account Transaction table.

2.2.2 Description of Change

1. Update the Uncollectible Recovery Account batch job to include logic to populate the **responsible party** field on the recovery account transaction when a Recovery Account becomes terminated.
 - a. In the scenario that there is more than one active responsible party listed on the recovery account, populate based on the following priority:

- i. Populate the responsible party field with the primary applicant.
 - ii. Populate the responsible party field with the first assigned responsible party person (based on ID).
 - iii. Populate the responsible party field with the first assigned responsible party resource (based on ID).
- b. In the scenario that all responsible parties listed on the recovery account are inactive, the responsible party field will be blank.

2.2.3 Execution Frequency

No Change.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

All 58 counties will be impacted.

2.2.6 Data Volume/Performance

No Change.

2.2.7 Failure Procedure/Operational Instructions

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

2.3 Automated Regression Test

2.3.1 Overview

Create new (or update applicable existing) automated regression test scripts to verify the Responsible Party population when a single applicable action is performed.

2.3.2 Description of Changes

Create new (or update applicable existing) scripts to cover the following scenario:

1. In the context of an existing Recovery Account where the primary applicant is active, perform one of the following actions: Transfer out, void, terminate. Verify that the responsible party field is populated with the primary applicant.

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|-------------|------------|
| | | | |
| | | | |

4 REQUIREMENTS

4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|----------|---|---|
| 3.8.1.20 | <p>The LRS shall be loaded with the edited and purified case and client data. When appropriate, new data elements required for the LRS Data shall be updated with default values. The LRS database shall be populated with data including:</p> <ul style="list-style-type: none"> a. Online Payment history attained from existing sources; b. Current and historical data from existing COUNTY, ancillary, and interfacing systems ; and c. All data from the DPSS Systems, DCFS Systems, and other legacy systems including active and inactive cases. | <p>The CalSAWS is being updated to have the Transaction Detail page updated and populated with a responsible party.</p> |

4.2 Migration Requirements

| DDID # | REQUIREMENT TEXT | Contractor Assumptions | How Requirement Met |
|--------|------------------|------------------------|---------------------|
| | | | |

| | | | |
|--|--|--|--|
| | | | |
|--|--|--|--|

5 MIGRATION IMPACTS

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

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213675 | DDID 347

Migrate Rush Warrant Functionality and Warrant
Print Stocks to CalSAWS - Phase 2

| | | |
|----------------|----------------------------------|-------------------|
| CalSAWS | DOCUMENT APPROVAL HISTORY | |
| | Prepared By | Rainier Dela Cruz |
| | Reviewed By | Amy Gill |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------|-------------------------|-----------------------------|-------------------|
| 03/25/2021 | 1.0 | Initial Revision | Rainier Dela Cruz |
| 06/17/2021 | 1.1 | Updates per QA comments. | Rainier Dela Cruz |
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| | | | |
| | | | |
| | | | |

Table of Contents

| | | |
|-------|--|----|
| 1 | Overview | 5 |
| 1.1 | Current Design..... | 5 |
| 1.2 | Requests..... | 5 |
| 1.3 | Overview of Recommendations..... | 5 |
| 1.4 | Assumptions | 5 |
| 2 | Recommendations..... | 6 |
| 2.1 | Alameda County Rush Warrant Template..... | 6 |
| 2.1.1 | Overview | 6 |
| 2.1.2 | Description of Change..... | 6 |
| 2.2 | Contra Costa County Rush Warrant Template..... | 8 |
| 2.2.1 | Overview | 8 |
| 2.2.2 | Description of Change..... | 8 |
| 2.3 | Fresno County Rush Warrant Template | 10 |
| 2.3.1 | Overview | 10 |
| 2.3.2 | Description of Change..... | 10 |
| 2.4 | Orange County Rush Warrant Template..... | 12 |
| 2.4.1 | Overview | 12 |
| 2.4.2 | Description of Change..... | 12 |
| 2.5 | Placer County Rush Warrant Template | 14 |
| 2.5.1 | Overview | 14 |
| 2.5.2 | Description of Change..... | 14 |
| 2.6 | Sacramento County Rush Warrant Template..... | 16 |
| 2.6.1 | Overview | 16 |
| 2.6.2 | Description of Change..... | 16 |
| 2.7 | San Francisco County Rush Warrant Template | 18 |
| 2.7.1 | Overview | 18 |
| 2.7.2 | Description of Change..... | 18 |
| 2.8 | Santa Barbara County Rush Warrant Template | 20 |
| 2.8.1 | Overview | 20 |
| 2.8.2 | Description of Change..... | 20 |
| 2.9 | Santa Clara County Rush Warrant Template..... | 22 |
| 2.9.1 | Overview | 22 |

| | | |
|--------|--|----|
| 2.9.2 | Description of Change..... | 22 |
| 2.10 | Ventura County Rush Warrant Template | 24 |
| 2.10.1 | Overview | 24 |
| 2.10.2 | Description of Change..... | 24 |
| 3 | Supporting Documents | 27 |
| 4 | Requirements..... | 30 |
| 4.1 | Migration Requirements..... | 30 |

1 OVERVIEW

As part of SCR CA-207467, the Rush Warrant templates for the 39 C-IV Counties were migrated to CalSAWS and the Rush Warrant functionality was enabled to generate the Rush Warrant templates from the Issuance Detail page.

1.1 Current Design

The Rush Warrant templates for the CalWIN Migration Counties do not exist in CalSAWS.

1.2 Requests

Add the Rush Warrant templates for the CalWIN Migration Counties.

1.3 Overview of Recommendations

1. Create the Rush Warrant templates for the 10 CalWIN Migration Counties.
2. Add population logic for the Rush Warrant templates.

1.4 Assumptions

1. Currently, San Mateo County does not issue out rush (same-day) warrants.
2. The rush warrant templates for the following CalWIN counties will be implemented with SCR **CA-229976**: San Diego, San Luis Obispo, Santa Cruz, Solano, Sonoma, Tulare, and Yolo.
3. The rush warrant alignment testing with the CalWIN counties will be conducted with SCR **CA-212167**.

2 RECOMMENDATIONS

2.1 Alameda County Rush Warrant Template

2.1.1 Overview

The rush warrant template for Alameda County does not exist in CalSAWS. Create the rush warrant template for Alameda County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.1.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: AD Rush Warrant

Form Number: AD Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #1

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|----------------|----------------------------|
| Field 1 | Payment Amount | The amount of the payment. |
| Field 2 | Issuance Date | The date of the issuance. |
| Field 3 | Case Number | The case number. |
| Field 4 | Aid Code | The aid code. |

| Field | Field Value | Population |
|----------|------------------------|-----------------------------------|
| Field 5 | Worker Number | The worker number. |
| Field 6 | Payee Name | The payee name. |
| Field 7 | Payment Amount Written | The payment amount written out. |
| Field 8 | Case Name | The case name. |
| Field 9 | Payee Address | The address of the payee. |
| Field 10 | Category | The issuance category. |
| Field 11 | Benefit Month | The benefit month of the payment. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

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

2.2 Contra Costa County Rush Warrant Template

2.2.1 Overview

The rush warrant template for Contra Costa County does not exist in CalSAWS. Create the rush warrant template for Contra Costa County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.2.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: CC Rush Warrant

Form Number: CC Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #2

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|--------------------------|----------------------------------|
| Field 1 | Payment Amount | The payment amount. |
| Field 2 | Issuance Date | The issuance date. |
| Field 3 | Benefit Month | The benefit month of the payment |
| Field 4 | Payee Name | The name of the payee. |
| Field 5 | Payment Amount Written | The payment amount written out. |
| Field 6 | Program Type | The name of the program. |
| Field 7 | Payment Amount Formatted | The formatted payment amount. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

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

2.3 Fresno County Rush Warrant Template

2.3.1 Overview

The rush warrant template for Fresno County does not exist in CalSAWS. Create the rush warrant template for Fresno County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.3.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: FR Rush Warrant

Form Number: FR Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #3

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|------------------------|-----------------------------------|
| Field 1 | Payment Amount | The amount of the payment. |
| Field 2 | Issuance Date | The date of the issuance. |
| Field 3 | Benefit Month | The benefit month of the payment. |
| Field 4 | Payment Amount Written | The payment amount written out. |
| Field 5 | Payee Name | The payee's name. |
| Field 6 | Case Name | The case name. |
| Field 7 | Payee Address | The payee's address. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

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

2.4 Orange County Rush Warrant Template

2.4.1 Overview

The rush warrant template for Orange County does not exist in CalSAWS. Create the rush warrant template for Orange County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.4.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: OR Rush Warrant

Form Number: OR Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #4

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|------------------------|---------------------------------|
| Field 1 | Issuance Date | The date of the issuance. |
| Field 2 | Payment Amount | The amount of the payment. |
| Field 3 | Payee Name | The name of the payee. |
| Field 4 | Case Name | The case name. |
| Field 5 | Payment Amount Written | The payment amount written out. |
| Field 6 | Aid Code | The aid code. |
| Field 7 | Case Number | The case number. |
| Field 8 | Worker Number | The worker number. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

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

2.5 Placer County Rush Warrant Template

2.5.1 Overview

The rush warrant template for Placer County does not exist in CalSAWS. Create the rush warrant template for Placer County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.5.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: PA Rush Warrant

Form Number: PA Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #5

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|------------------------|---------------------------------|
| Field 1 | Issuance Date | The date of the issuance. |
| Field 2 | Payment Amount | The amount of the payment. |
| Field 3 | Payee Name | The name of the payee. |
| Field 4 | Payment Amount Written | The payment amount written out. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

| Additional Options | Option for Template |
|---------------------|---------------------|
| Special Paper Stock | N/A |
| Enclosures | No |
| CW/CF e-sign | No |

| Additional Options | Option for Template |
|-----------------------------|---------------------|
| Check to Sign | No |
| Post to Self Service Portal | No |

2.6 Sacramento County Rush Warrant Template

2.6.1 Overview

The rush warrant template for Sacramento County does not exist in CalSAWS. Create the rush warrant template for Sacramento County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.6.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: SA Rush Warrant

Form Number: SA Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #6

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|---------------|---------------------------|
| Field 1 | Issuance Date | The date of the issuance. |
| Field 2 | Payee Name | The name of the payee. |

| Field | Field Value | Population |
|---------|--------------------------|---------------------------------|
| Field 3 | Payment Amount Formatted | The formatted payment amount. |
| Field 4 | Payment Amount Written | The payment amount written out. |
| Field 5 | Case Name | The case name. |
| Field 6 | Payment Amount | The payment amount. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

| Additional Options | Option for Template |
|---------------------|---------------------|
| Special Paper Stock | N/A |
| Enclosures | No |

| Additional Options | Option for Template |
|-----------------------------|---------------------|
| CW/CF e-sign | No |
| Check to Sign | No |
| Post to Self Service Portal | No |

2.7 San Francisco County Rush Warrant Template

2.7.1 Overview

The rush warrant template for San Francisco County does not exist in CalSAWS. Create the rush warrant template for San Francisco County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.7.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: SF Rush Warrant

Form Number: SF Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #7

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|----------------|---------------------|
| Field 1 | Payment Amount | The payment amount. |
| Field 2 | Issuance Date | The issuance date. |

| Field | Field Value | Population |
|----------|--------------------------|-----------------------------------|
| Field 3 | Benefit Month | The benefit month of the payment. |
| Field 4 | Payment Amount Written | The payment amount written out. |
| Field 5 | Payee Name | The name of the payee. |
| Field 6 | Aid Code | The aid code. |
| Field 7 | Issuance Category | The issuance category. |
| Field 8 | Case Name | The case name. |
| Field 9 | Case Number | The case number. |
| Field 10 | Payment Amount Formatted | The formatted payment amount. |
| Field 11 | Control Number | The control number. |
| Field 12 | Worker Number | The worker number. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

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

2.8 Santa Barbara County Rush Warrant Template

2.8.1 Overview

The rush warrant template for San Barbara County does not exist in CalSAWS. Create the rush warrant template for San Barbara County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.8.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: SR Rush Warrant

Form Number: SR Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #8

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|------------------------|-----------------------------------|
| Field 1 | Payment Amount | The payment amount. |
| Field 2 | Issuance Date | The issuance date. |
| Field 3 | Benefit Month | The benefit month of the payment. |
| Field 4 | Payment Amount Written | The payment amount written out. |
| Field 5 | Payee Name | The name of the payee. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

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

2.9 Santa Clara County Rush Warrant Template

2.9.1 Overview

The rush warrant template for Santa Clara County does not exist in CalSAWS. Create the rush warrant template for Santa Clara County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.9.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: SC Rush Warrant

Form Number: SC Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #9

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|------------------------|---------------------------------|
| Field 1 | Payment Amount | The payment amount. |
| Field 2 | Issuance Date | The issuance date. |
| Field 3 | Payee Name | The name of the payee. |
| Field 4 | Payment Amount Written | The payment amount written out. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

| Additional Options | Option for Template |
|---------------------|---------------------|
| Special Paper Stock | N/A |
| Enclosures | No |

| Additional Options | Option for Template |
|-----------------------------|---------------------|
| CW/CF e-sign | No |
| Check to Sign | No |
| Post to Self Service Portal | No |

2.10 Ventura County Rush Warrant Template

2.10.1 Overview

The rush warrant template for Ventura County does not exist in CalSAWS. Create the rush warrant template for Ventura County.

State Form: N/A

Programs: N/A

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

2.10.2 Description of Change

1. Create the XDP source file for the rush warrant template.

Form Header: N/A

Form Title: VE Rush Warrant

Form Number: VE Rush Warrant

Template Description: The warrant print check stock template will only be used for Local Warrant and Rush Warrant information to print in the designated area for each county's custom check stock. It will not be saved to the case, sent to the central print facility, barcoded, available on the Distributed Documents page or on the Template Repository page.

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Languages: English

Form Mockups/Examples: See Supporting Documents #10

2. Populate the rush warrant template as follows:

| Field | Field Value | Population |
|---------|----------------|---------------------|
| Field 1 | Payment Amount | The payment amount. |
| Field 2 | Issuance Date | The issuance date. |

| Field | Field Value | Population |
|---------|------------------------|-----------------------------------|
| Field 3 | Benefit Month | The benefit month of the payment. |
| Field 4 | Payee Name | The name of the payee. |
| Field 5 | Payment Amount Written | The payment amount written out. |
| Field 6 | Issuance Category | The issuance category. |

Please refer to Supporting Document #11 for more details.

3. The rush warrant template has the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | N | N | N |

4. The rush warrant template has the following mailing options:

| Mailing Options | Option for Template |
|------------------------|---|
| Mail-To (Recipient) | N/A |
| Mailed From (Return) | N/A |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | N/A |
| Mailing Priority | N/A Technical Note: Currently, the column in the Document Template table is not nullable. Set this value to '01'. |
| Return Envelope Type | N/A |

5. The rush warrant template has the following barcodes:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

6. The rush warrant template has the following additional options:

| Additional Options | Option for Template |
|---------------------|---------------------|
| Special Paper Stock | N/A |

| Additional Options | Option for Template |
|-----------------------------|---------------------|
| Enclosures | No |
| CW/CF e-sign | No |
| Check to Sign | No |
| Post to Self Service Portal | No |

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------------|---|--|
| 1 | Client Correspondence | Alameda County Rush Warrant Template Mockups | Alameda County Rush Warrant Mockup.pdf Alameda County Rush Warrant - Default Person.pdf Alameda County Rush Warrant - Default Vendor.pdf Alameda County Rush Warrant - FC, HT, HP.pdf |
| 2 | Client Correspondence | Contra Costa County Rush Warrant Template Mockups | Contra Costa County Rush Warrant Mockup.pdf Contra Costa County Rush Warrant - Default Person.pdf Contra Costa County Rush Warrant - GAGR.pdf Contra Costa County Rush Warrant - HP.pdf Contra Costa County Rush Warrant - HT.pdf Contra Costa County Rush Warrant - IN.pdf |
| 3 | Client Correspondence | Fresno County Rush Warrant Template Mockups | Fresno County Rush Warrant Mockup.pdf Fresno County Rush Warrant - Default Person.pdf Fresno County Rush Warrant - Default Vendor.pdf Fresno County Rush Warrant - HP, HT.pdf |
| 4 | Client Correspondence | Orange County Rush Warrant Template Mockups | Orange County Rush Warrant Mockup.pdf Orange County Rush Warrant - Default Person.pdf |

| Number | Functional Area | Description | Attachment |
|--------|-----------------------|--|---|
| | | | Orange County Rush Warrant - Default Vendor.pdf Orange County Rush Warrant - CW, WTW, FC, KG, AAP.pdf |
| 5 | Client Correspondence | Placer County Rush Warrant Template Mockups | Placer County Rush Warrant Mockup.pdf Placer County Rush Warrant - Default Person.pdf Placer County Rush Warrant - CW, HT, HP.pdf |
| 6 | Client Correspondence | Sacramento County Rush Warrant Template Mockups | Sacramento County Rush Warrant Mockup.pdf Sacramento County Rush Warrant - Default Person.pdf Sacramento County Rush Warrant - Default Vendor.pdf Sacramento County Rush Warrant - HT, HP.pdf |
| 7 | Client Correspondence | San Francisco County Rush Warrant Template Mockups | San Francisco County Rush Warrant Mockup.pdf San Francisco County Rush Warrant - Default Person.pdf San Francisco County Rush Warrant - CW, HT, HP.pdf San Francisco County Rush Warrant - GA GR.pdf |
| 8 | Client Correspondence | Santa Barbara County Rush Warrant Template Mockups | Santa Barbara County Rush Warrant Mockup.pdf Santa Barbara County Rush Warrant - Default Person.pdf |

| Number | Functional Area | Description | Attachment |
|--------|-----------------------|--|---|
| 9 | Client Correspondence | Santa Clara County Rush Warrant Template Mockups | Santa Clara County Rush Warrant Mockup.pdf Santa Clara County Rush Warrant - Default Peson.pdf Santa Clara County Rush Warrant - CW, HT, HP, GAGR, IN.pdf |
| 10 | Client Correspondence | Venture County Rush Warrant Template Mockups | Venture County Rush Warrant Mockup.pdf Ventura County Rush Warrant - Default Person.pdf Ventura County Rush Warrant - IHSS.pdf |
| 11 | Client Correspondence | Warrant Template Variation | CalWIN Warrant Variations.xlsx |

4 REQUIREMENTS

4.1 Migration Requirements

| DDID # | REQUIREMENT TEXT | Contractor Assumptions | How Requirement Met |
|--------|--|---|--|
| 347 | <p>"The CONTRACTOR shall migrate the following for the 57 Counties:</p> <ol style="list-style-type: none"> 1) Rush Warrant functionality 2) County Warrant Print Stock Templates for C-IV counties 3) The 18 County Warrant Print Stock Template Files from CalWIN" | <ul style="list-style-type: none"> - The County Warrant Print Stock Templates that exist in C-IV and CalWIN at the time the existing Rush Warrant functionality is migrated will also be ported into CalSAWS. - The Rush Warrant functionality will only be applicable to the C-IV and CalWIN counties. - Existing Rush Warrant functionality will remain unchanged. | <p>Added the rush warrant templates for the CalWIN counties.</p> |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215096

Add CW 63 – Request for Income And/Or
Resource Verification (11/20) in threshold
languages

| | | |
|----------------|----------------------------------|------------------|
| CalSAWS | DOCUMENT APPROVAL HISTORY | |
| | Prepared By | Raj Devidi |
| | Reviewed By | Suresh Mullaguri |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------|-------------------------|-----------------------------|---------------|
| 06/07/2021 | 1.0 | Initial Draft | Raj Devidi |
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| | | | |

Table of Contents

| | | |
|---|---|---|
| 1 | Overview | 4 |
| | 1.1 Current Design..... | 4 |
| | 1.2 Requests..... | 4 |
| | 1.3 Overview of Recommendations..... | 4 |
| | 1.4 Assumptions | 4 |
| 2 | Recommendations..... | 5 |
| | 2.1 Add Form CW 63 - Request for Income And/Or Resource Verification in threshold languages | 5 |
| | 2.1.1 Overview | 5 |
| | 2.1.2 Create Form CW 63 XDPs in threshold languages..... | 5 |
| | 2.2 Add all programs to program drop down in Template Repository for CSF 166 - Free Format NOA (CF) (11/2020)..... | 6 |
| | 2.2.1 Overview | 6 |
| 3 | Supporting Documents | 7 |
| 4 | Requirements..... | 7 |
| | 4.1 Migration Requirements..... | 7 |

1 OVERVIEW

SCR CA-215097 added the CW 63 – Request for Income And/Or Resource Verification (11/20) State form to the CalSAWS system in English and Spanish only.

This SCR will add the CW 63 – Request for Income And/Or Resource Verification (11/20) form to CalSAWS in the remaining supported threshold languages.

This SCR will update CSF 166 – Free Format NOA (CF)(11/2020) form title and description.

1.1 Current Design

Currently the CW 63 State form is implemented in the CalSAWS system in English and Spanish with the version date of 11/20. Currently CSF 166 - Free Format NOA (CF) (11/2020) form is generating only for CalFresh program from Template Repository.

1.2 Requests

1. Implement State Form CW 63 - Request for Income And/Or Resource 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.
2. Add all the programs in the Program drop down in Template Repository for CSF 166 - Free Format NOA (CF) (11/2020).

1.3 Overview of Recommendations

1. Add State Form CW 63 - Request for Income And/Or Resource Verification (11/20) in the 11 supported threshold languages.
2. Add all programs to program drop down list in Template Repository for CSF 166 - Free Format NOA (CF) (11/2020)
3. Change the CSF 166 - Free Format NOA (CF) (11/2020) form title and descriptions.

1.4 Assumptions

1. The CW 63 form in threshold languages will have CalSAWS Standard Header in respective threshold language.
2. Form population logic, Document parameters, Print Options, Mailing and Barcode requirements for threshold CW 63 forms remain the same as existing CW 63 English and Spanish forms.

2 RECOMMENDATIONS

2.1 Add Form CW 63 - Request for Income And/Or Resource Verification in threshold languages

2.1.1 Overview

This SCR will add the State form CW 63 – Request for Income And/Or Resource Verification (revision 11/20) to the CalSAWS system in the remaining threshold languages.

State Form: CW 63 (11/20)

Programs: CalWORKs, CalFresh, and Medi-Cal Programs

Attached Forms: None

Forms Category: Form

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 CW 63 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 #1

Form Title (Document List Page Displayed Name): Request for Income And/Or Resource Verification Form

Template Description: This form is used by counties to notify Customers that facts were discovered to be different from those reported on the Cash Aid or CalFresh application and that actions may be taken to correct this misinformation if Customer does not prove the facts by a specific date.

Form Number: CW 63

Include NA Back 9: No

Imaging Form Name: Request for Income/Resource Verification

Imaging Document Type: Verification Requests

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

2. Add Form CW 63 to the Template Repository in the rest of the threshold languages for all 58 counties.

2.2 Add all programs to program drop down in Template Repository for CSF 166 - Free Format NOA (CF) (11/2020)

2.2.1 Overview

This SCR will add all the programs to program drop down in Template Repository for CSF 166 – Free Format NOA (CF) (11/2020) and update descriptions as listed below.

1. Update form title, template description and imaging form name.

Form Title (Document List Page Displayed Name): Free Format NOA

Template Description: Free Format NOA

Imaging Form Name: Free Format NOA

Programs: All Programs

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|------------------------------|---|
| 1 | Correspondence | CW 63 Threshold Languages | CW_63_Arabic.pdf CW_63_Armenian.pdf CW_63_Cambodian.pdf CW_63_Chinese.pdf CW_63_Farsi.pdf CW_63_Hmong.pdf CW_63_Korean.pdf CW_63_Lao.pdf CW_63_Russian.pdf CW_63_Tagalog.pdf CW_63_Vietnamese.pdf |

4 REQUIREMENTS

4.1 Migration Requirements

| DDID # | REQUIREMENT TEXT | Contractor Assumptions | How Requirement Met |
|--------|---|--|---|
| 2631 | The CONTRACTOR shall update the PA 2494 - IEVS Applicant/Participant Contact Letter in the CalSAWS Software as follows: 1) Relabel the button and update the trigger on the IEVS Applicant Detail page to generate the CW 63 instead of the PA 2494. | 1. Estimate is for updating the form in English. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. | With SCR CA-215096, form CW 63 – Request for Income And/Or Resource Verification will be added to the CalSAWS system in the 11 supported threshold languages. |

| | | | |
|--|--|--|--|
| | 2) Hide the PA 2494 in the Template Repository for all counties. | | |
|--|--|--|--|

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215171

DDID 2670: Add GEN 202 - Verification of
Employment/Earnings (08/20) in threshold
languages

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

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------|-------------------------|--|---------------|
| 03/23/2021 | 0.1 | Initial Draft | Maria Jensen |
| 04/21/2021 | 0.2 | QA Comments fixes: Added Requirements section Fixed CalSAWS reference Added Header specification Added Barcode mention | Maria Jensen |
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| | | | |
| | | | |

Table of Contents

| | | |
|---|---|---|
| 1 | Overview | 4 |
| | 1.1 Current Design..... | 4 |
| | 1.2 Requests..... | 4 |
| | 1.3 Overview of Recommendations..... | 4 |
| | 1.4 Assumptions | 4 |
| 2 | Recommendations..... | 5 |
| | 2.1 Add Form GEN 202 - Verifications of Employment/Earnings in threshold languages..... | 5 |
| | 2.1.1 Overview | 5 |
| | 2.1.2 Create Form GEN 202 XDPs in threshold languages..... | 5 |
| 3 | Supporting Documents | 7 |
| 4 | Requirements..... | 8 |
| | 4.1 Migration Requirements..... | 8 |

1 OVERVIEW

SCR CA-215170 added the GEN 202 – Verification of Employment/Earnings (08/20) State form to the CalSAWS system in English and Spanish only.

This SCR will add the GEN 202 – Verification of Employment/Earnings (08/20) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the GEN 202 State form is implemented in the CalSAWS system in English and Spanish with the version date of 08/20.

1.2 Requests

Implement State Form GEN 202 - Verifications of Employment/Earnings (08/20) 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 202 - Verifications of Employment/Earnings (08/20) in the 11 supported threshold languages.

1.4 Assumptions

1. The GEN 202 form will have as header the CalSAWS standard header.

2 RECOMMENDATIONS

2.1 Add Form GEN 202 - Verifications of Employment/Earnings in threshold languages

2.1.1 Overview

This SCR will add the State form GEN 202 – Verification of Employment/Earnings (revision 08/20) to the CalSAWS system in the remaining threshold languages.

State Form: GEN 202 (08/20)

Programs: All

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 202 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

Form Title (Document List Page Displayed Name): Verification of Employment/Earnings

Template Description: This form is used by counties to gather employment information when a new job is reported.

Form Number: GEN 202

Include NA Back 9: No

Imaging Form Name: Verif of Employment/Earning

Imaging Document Type: Income

Form Mockups/Examples: See Supporting Document #1 for PDF Mockups

2. Add Form GEN 202 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 Barcode Options for Form GEN 202 will carry over to the rest of the threshold languages.
4. The Print Options and Mailing Requirements for Form GEN 202 will carry over to the rest of the threshold languages.
5. The Variable Population for Form GEN 202 will carry over to the rest of the threshold languages.

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|--------------------------------|---|
| 1 | Correspondence | GEN 202 Threshold Languages | GEN_202_Arabic.pdf GEN_202_Armenian.pdf GEN_202_Cambodian.pdf GEN_202_Chinese.pdf GEN_202_Farsi.pdf GEN_202_Hmong.pdf GEN_202_Korean.pdf GEN_202_Lao.pdf GEN_202_Russian.pdf GEN_202_Tagalog.pdf GEN_202_Vietnamese.pdf |

4 REQUIREMENTS

4.1 Migration Requirements

| DDID # | REQUIREMENT TEXT | Contractor Assumptions | How Requirement Met |
|--------|--|--|--|
| 2670 | <p>The CONTRACTOR shall add State Form GEN 202 - Verification of Employment/Earning to the CalSAWS Software.</p> <p>The CONTRACTOR shall relabel the button and update the trigger on the IEVS pages to generate the GEN 202 instead of the PA 2419, and hide the PA 2419 in the Template Repository for all counties.</p> | <ol style="list-style-type: none"> 1. Estimate is for adding the State Form in the threshold languages. 2. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 3. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/create d. Consortium staff will be modifying or creating FDDs. | <p>With SCR CA-215171, form GEN 202 - Verification of Employment/Earnings will be added to the CalSAWS system in the 11 supported threshold languages.</p> |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217869

Modify LRS CalSAWS Self Service Kiosk Check-In Application to work with the new CalSAWS Self Service Kiosk Portal

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---------|---------------------------|--|
| | Prepared By | Erika Kusnadi-Cerezo |
| | Reviewed By | Long Nguyen, Michael Wu, Balakumar Murthy, Shilpa Suddavanda, Himanshu Jain, Sumet Patil, Abel Lopez, Kenneth Lerch, Christopher Vasquez |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|----------|------------------|----------------------|----------------------|
| 5/3/2021 | 1.0 | Initial | Erika.Kusnadi-Cerezo |
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Table of Contents

| | | |
|-------|---|----|
| 1 | Overview | 5 |
| 1.1 | Current Design..... | 5 |
| 1.2 | Requests..... | 5 |
| 1.3 | Overview of Recommendations..... | 5 |
| 1.4 | Assumptions | 6 |
| 2 | Recommendations..... | 7 |
| 2.1 | CalSAWS Self Service Kiosk Application | 7 |
| 2.1.1 | Overview | 7 |
| 2.1.2 | CalSAWS Self Service Kiosk Application Mockup..... | 7 |
| 2.1.3 | Description of Changes | 18 |
| 2.1.4 | Page Location | 22 |
| 2.1.5 | Security Updates..... | 22 |
| 2.1.6 | Page Mapping..... | 22 |
| 2.1.7 | Page Usage/Data Volume Impacts | 23 |
| 2.2 | CalSAWS Lobby Check-In Application..... | 23 |
| 2.2.1 | Overview | 23 |
| 2.2.2 | CalSAWS Lobby Check-In Application Mockup | 23 |
| 2.2.3 | Description of Changes | 36 |
| 2.2.4 | Page Location | 39 |
| 2.2.5 | Security Updates..... | 40 |
| 2.2.6 | Page Mapping..... | 40 |
| 2.2.7 | Page Usage/Data Volume Impacts | 40 |
| 2.3 | CalSAWS Lobby Check-In Application web service | 40 |
| 2.3.1 | Overview | 40 |
| 2.3.2 | Description of Change..... | 40 |
| 2.3.3 | Execution Frequency..... | 41 |
| 2.3.4 | Key Scheduling Dependencies | 41 |
| 2.3.5 | Counties Impacted | 41 |
| 2.3.6 | Data Volume/Performance..... | 41 |
| 2.3.7 | Interface Partner..... | 41 |
| 2.3.8 | Failure Procedure/Operational Instructions..... | 41 |
| 2.4 | CalSAWS Self Service Kiosk Application web services | 41 |

| | | |
|-------|---|----|
| 2.4.1 | Overview | 41 |
| 2.4.2 | Description of Change | 41 |
| 2.4.3 | Execution Frequency..... | 45 |
| 2.4.4 | Key Scheduling Dependencies | 45 |
| 2.4.5 | Counties Impacted | 45 |
| 2.4.6 | Data Volume/Performance..... | 45 |
| 2.4.7 | Interface Partner..... | 45 |
| 2.4.8 | Failure Procedure/Operational Instructions..... | 45 |
| 3 | Supporting Documents | 46 |
| 4 | Requirements..... | 46 |
| 4.1 | Project Requirements..... | 46 |

1 OVERVIEW

Los Angeles County have two different Lobby Solution that they use at their county offices to assists customers. The first being the CalSAWS Self Service Kiosk application that customers directly use on their own and the other is the CalSAWS Lobby Check-In application that are used by county workers. Both applications have the ability to check-in customers when they visit the county offices, submit documents and provide information in regard to the customer case. As part of CA-207252 (DDID 1778) the CalSAWS Lobby Check-In application was expanded to support all 58 counties and to remove majority of the application dependency from the Your Benefits Now (YBN) application, however the change to the CalSAWS Self Service Kiosk application was limited due to the application being closely dependent on YBN. This SCR will remove all dependency on YBN for both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application and to work with the new Hyland Imaging Solution.

1.1 Current Design

The CalSAWS Self Service Kiosk application is currently only available to Los Angeles County and the application is incorporated with Los Angeles County specific graphics and logos. Secondly, customers who are using the CalSAWS Self Service Kiosk application will first need to Log-in and this process is dependent on the YBN application. Lastly, when customers are submitting documents through the CalSAWS Self Service Kiosk application, documents are being sent to EDMS (Electronic Document Management System).

As part of CA-207252 the Lobby Check-In application was updated to support all 58 counties and majority of the application dependency to YBN was removed. However, the ability to search for an individual using the customer YBN User Name (LA offices only) and IVR/Customer ID remained along with the ability to Check-In a customer by searching for the customer YBN Appt Number.

1.2 Requests

Remove all dependency from YBN application for both the CalSAWS Self Service Kiosk and the CalSAWS Lobby Check-In application. Update the CalSAWS Self Service Kiosk application to with the ability to upload documents to the new CalSAWS Imaging System (Hyland).

1.3 Overview of Recommendations

1. Update the CalSAWS Self Service Kiosk application's look and feel to no longer be county specific.
2. Upgrade the CalSAWS Self Service Kiosk application with new webservices that will communicate to CalSAWS without going through YBN.
3. Upgrade the CalSAWS Self Service Kiosk application with new webservices to communicate to Hyland Imaging system.
4. Update both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application to use customer's BenefitsCal credential instead of the customers YBN credential in order to pull up customers information.

5. Remove from both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application the option to pull up customers information using YBN specific credentials (Customer ID/IVR and YBN Username Customer).
6. Remove the option to Check-In a customer by using the YBN Appt Number from the CalSAWS Lobby Check-In application.
7. Update the Purpose of Visit options on the CalSAWS Lobby Check-In application.
8. Port over the existing web services that are used for the CalSAWS Self Service Kiosk Application to the Lobby Springboot App.
9. Create new web services for the CalSAWS Lobby Check-In and CalSAWS Self Service Kiosk application in order to pull Case information by using participants BenefitsCal User Name.

1.4 Assumptions

1. Updates to the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application are done at the same time Los Angeles County goes live with BenefitsCal and Hyland Imaging Solution.
2. The San Fernando Valley version of the CalSAWS Lobby Check-in Application and CalSAWS Self Service Kiosk Application will not be updated as part of this effort. Any changes needed to the San Fernando Valley version of the CalSAWS Lobby Check-In Application and CalSAWS Self Service Kiosk Application will need to be done by the Los Angeles ISD (Internal Services Department) team.
3. The BenefitsCal website is: <http://benefitscal.org/> and user will need to use an E-Mail address in order to log in.
4. The CalSAWS Self Service Kiosk will use existing webservice that was implemented under CA-214026 to allow documents/images to be upload to Hyland Imaging System.
5. CA-229814 will expand the CalSAWS Self Service Kiosk application to support all 58 Counties.

2 RECOMMENDATIONS

Update the CalSAWS Self Service Kiosk application's look and feel to support all 58 counties and remove the ability to use YBN specific credential from both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application will be removed. Both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application will be updated with the ability to use customers BenefitsCal credential in order to pull their case information. The CalSAWS Self Service Kiosk application will be upgraded with new webservices to communicate to CalSAWS without going through YBN and to also communicate to Hyland Imaging System.

2.1 CalSAWS Self Service Kiosk Application

2.1.1 Overview

The CalSAWS Self Service Kiosk application was designed to work specifically for Los Angeles County. It is currently integrated into the Your Benefits Now (YBN) Application and have Los Angeles County specific graphics and logos. This SCR will update the CalSAWS Self Service Kiosk Application look and feel to no longer be county specific. Secondly, the CalSAWS Self Service Kiosk Application will be updated to communicate directly to CalSAWS without having to go through YBN and also be updated to communicate to the new Hyland Imaging System.

2.1.2 CalSAWS Self Service Kiosk Application Mockup

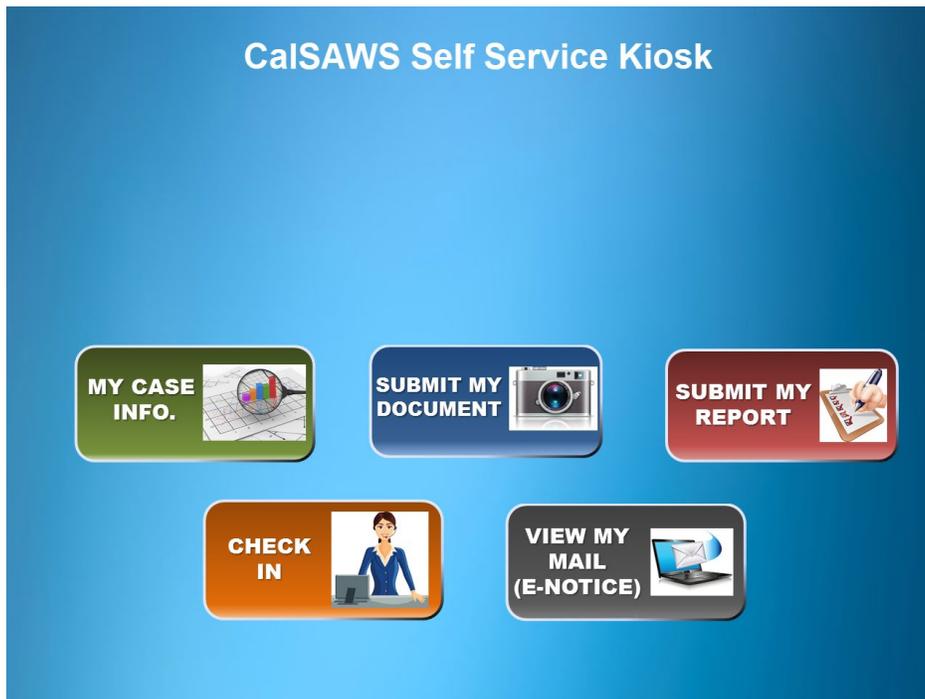


Figure 2.1.1 – CalSAWS Self Service Kiosk App Main Screen



Figure 2.1.2 – CalSAWS Self Service Kiosk App My Case Info Screen

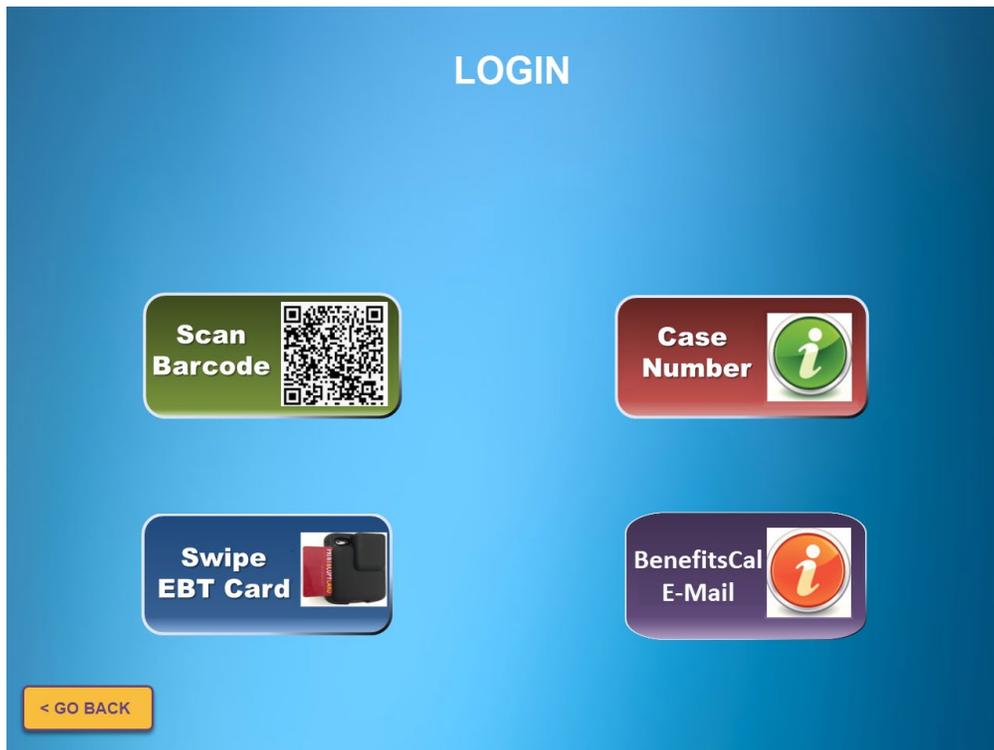


Figure 2.1.3 – CalSAWS Self Service Kiosk App Login Screen

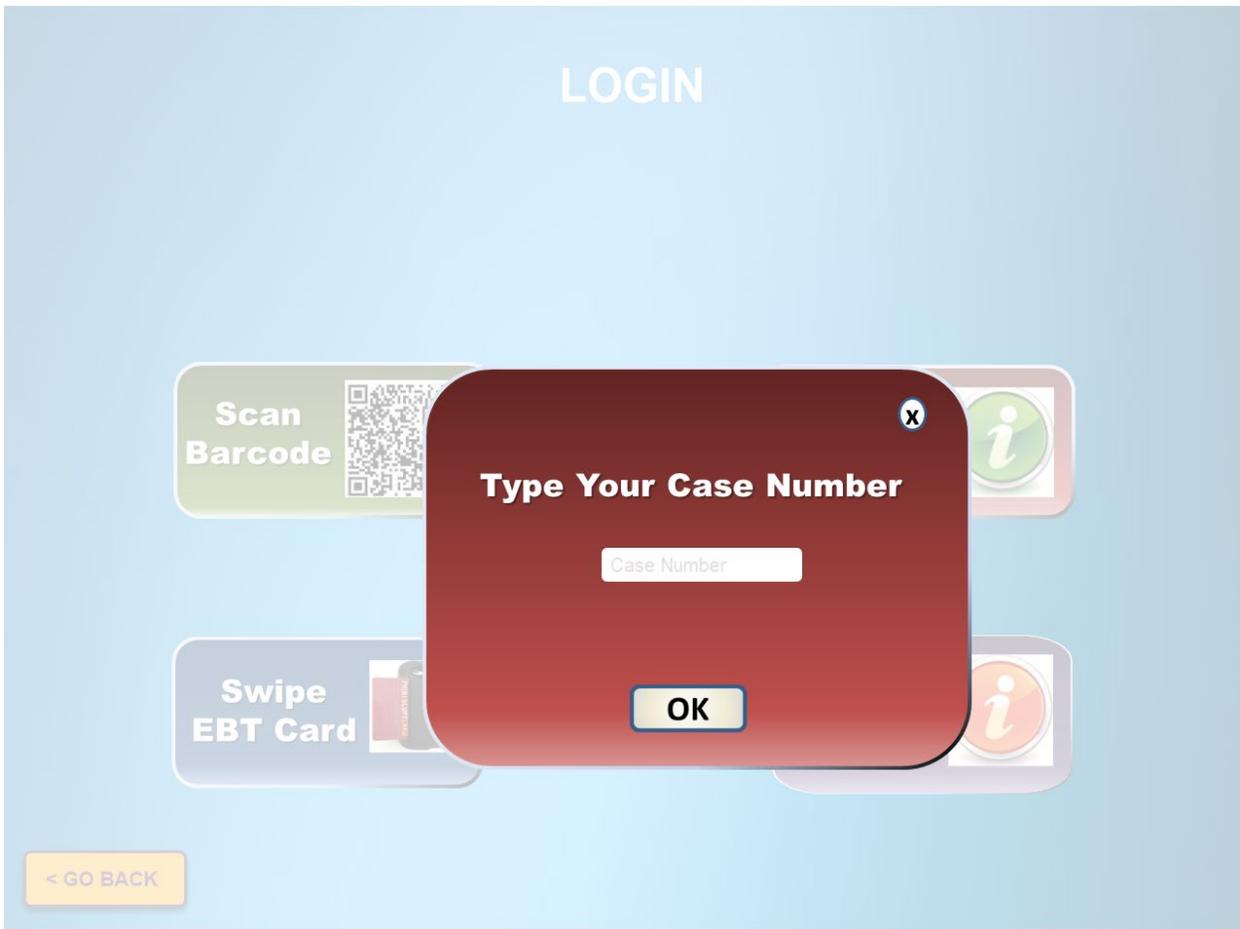


Figure 2.1.4 – CalSAWS Self Service Kiosk App Login_Case Number Screen

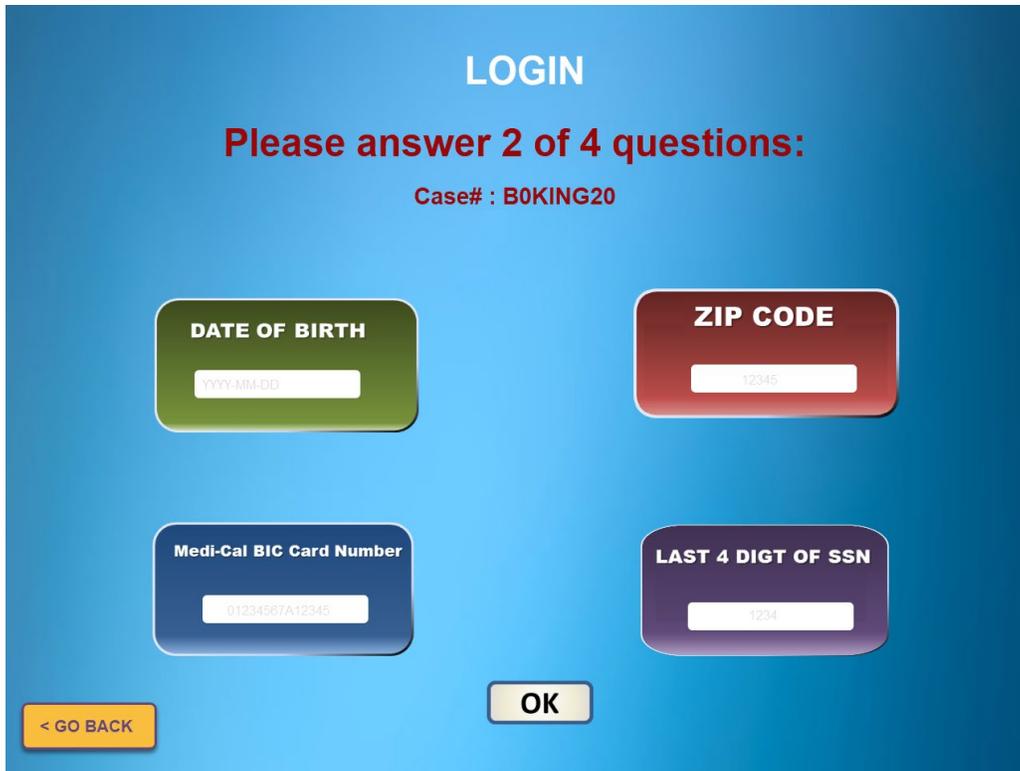


Figure 2.1.5 – CalSAWS Self Service Kiosk App Login_Case Number Screen

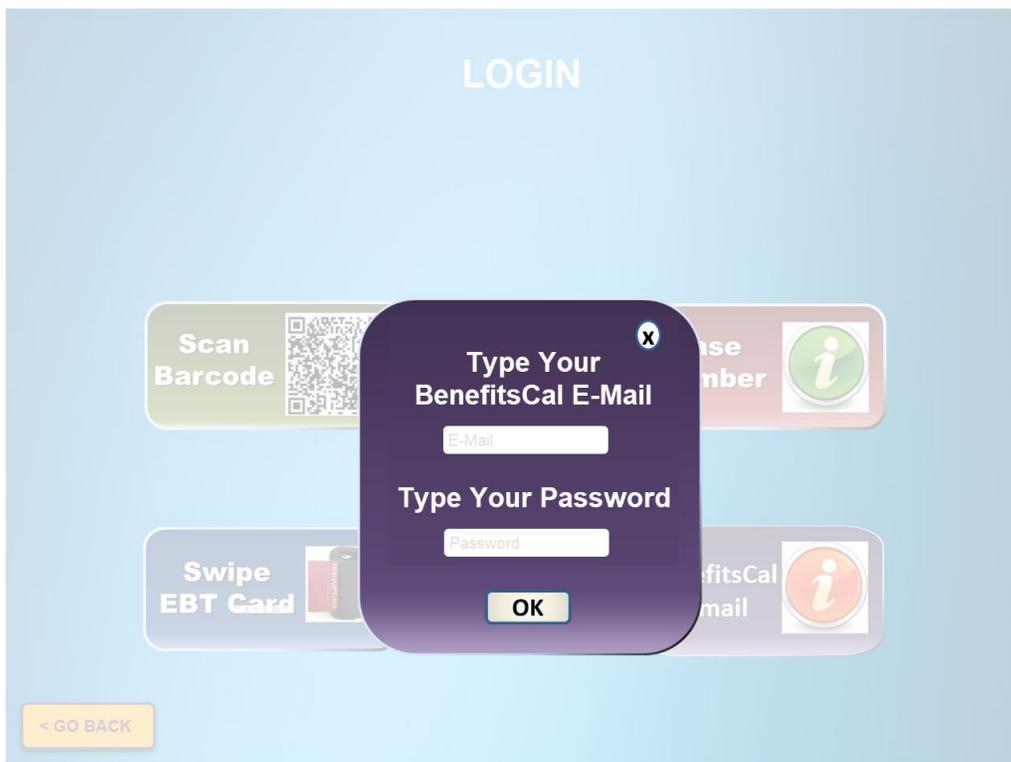


Figure 2.1.6 – CalSAWS Self Service Kiosk App Login_BenefitsCal Screen



Figure 2.1.7 – CalSAWS Self Service Kiosk Error message for BenefitsCal E-Mail

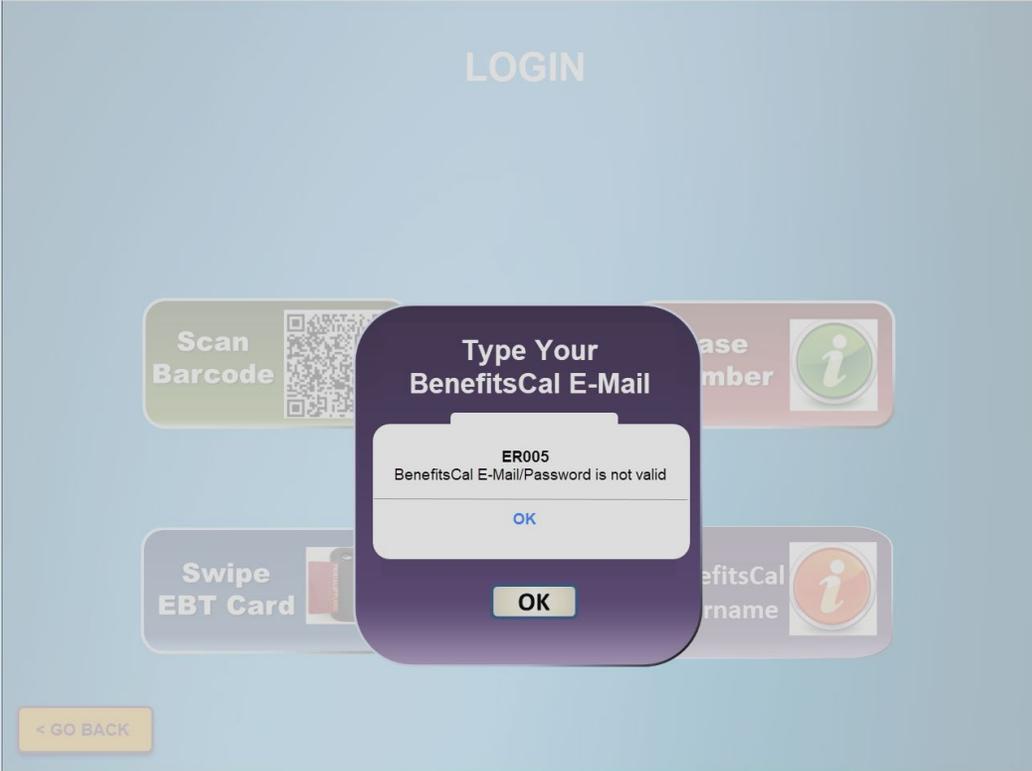


Figure 2.1.8 – CalSAWS Self Service Kiosk Error message for BenefitsCal E-Mail

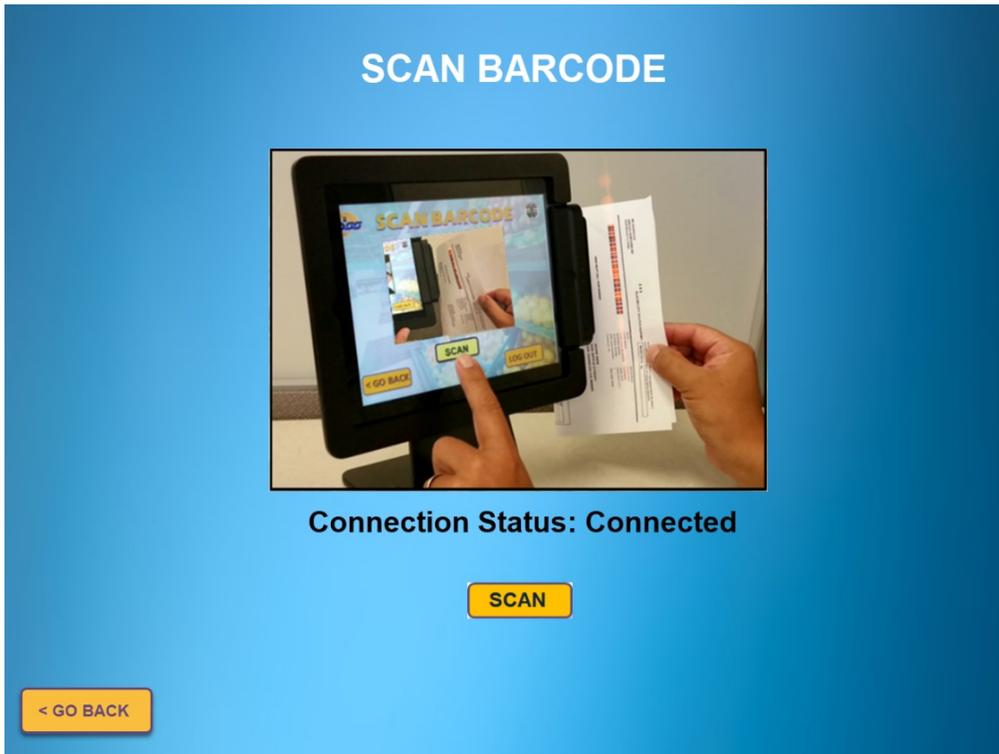


Figure 2.1.9 – CalSAWS Self Service Kiosk App Scan Barcode Screen

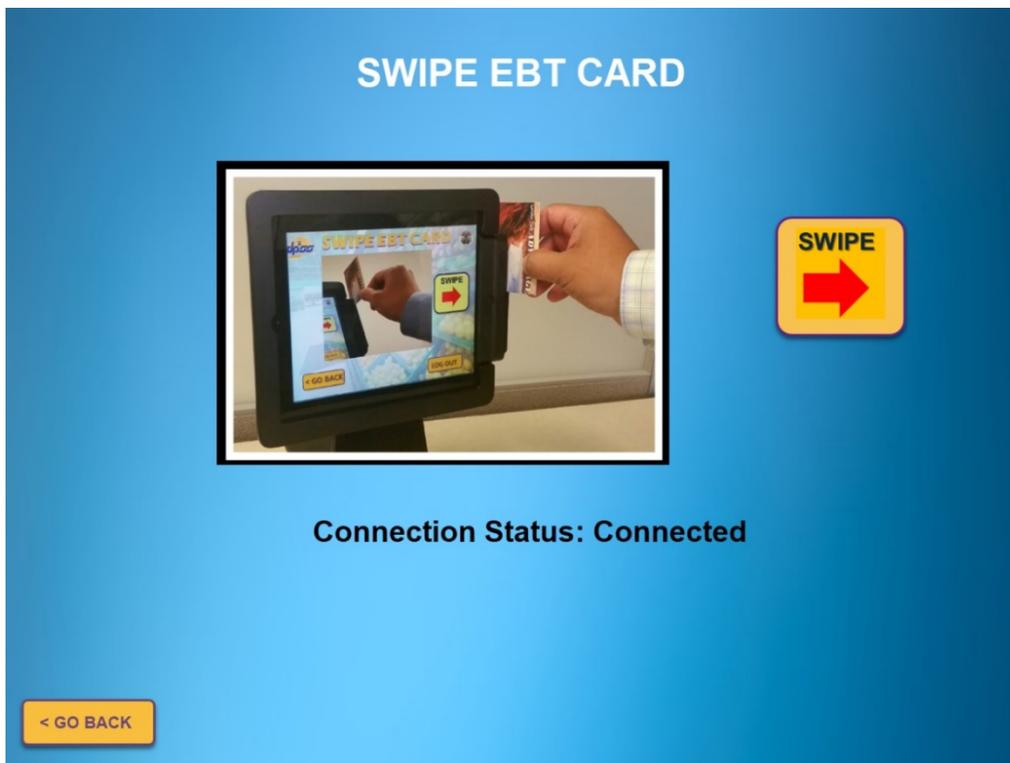


Figure 2.1.10 – CalSAWS Self Service Kiosk App Swipe EBT Card Screen



Figure 2.1.11 – CalSAWS Self Service Kiosk App Self Check In Screen

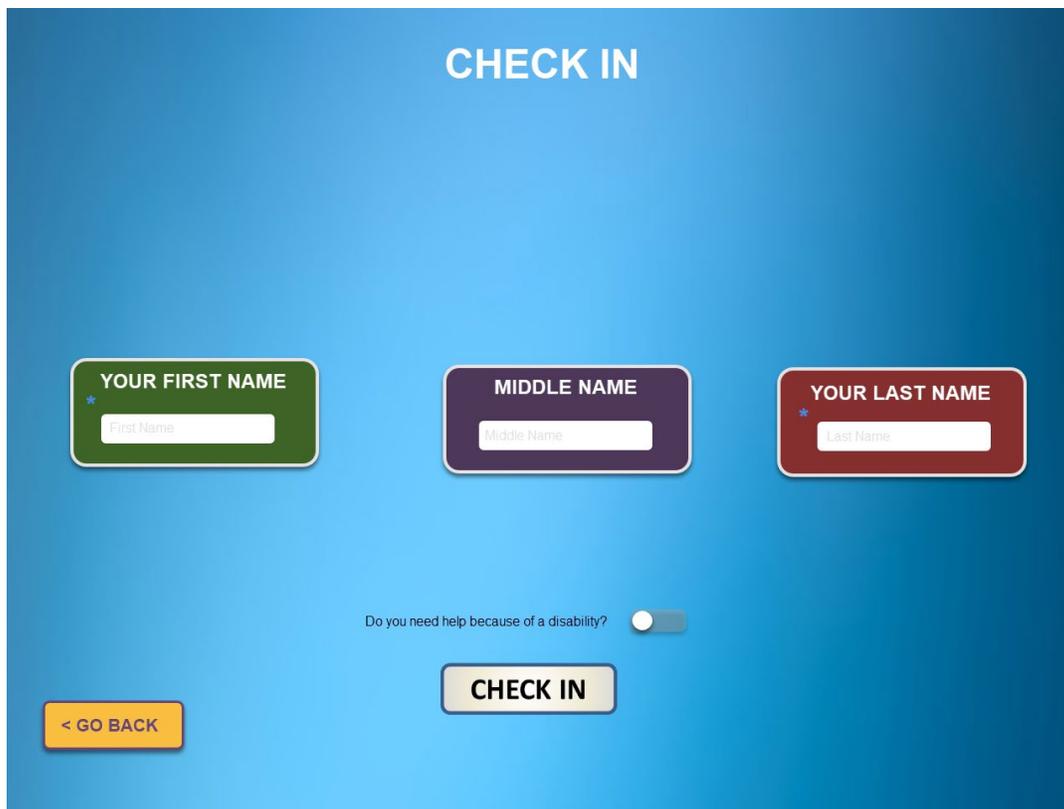


Figure 2.1.12 – CalSAWS Self Service Kiosk App Check In Screen

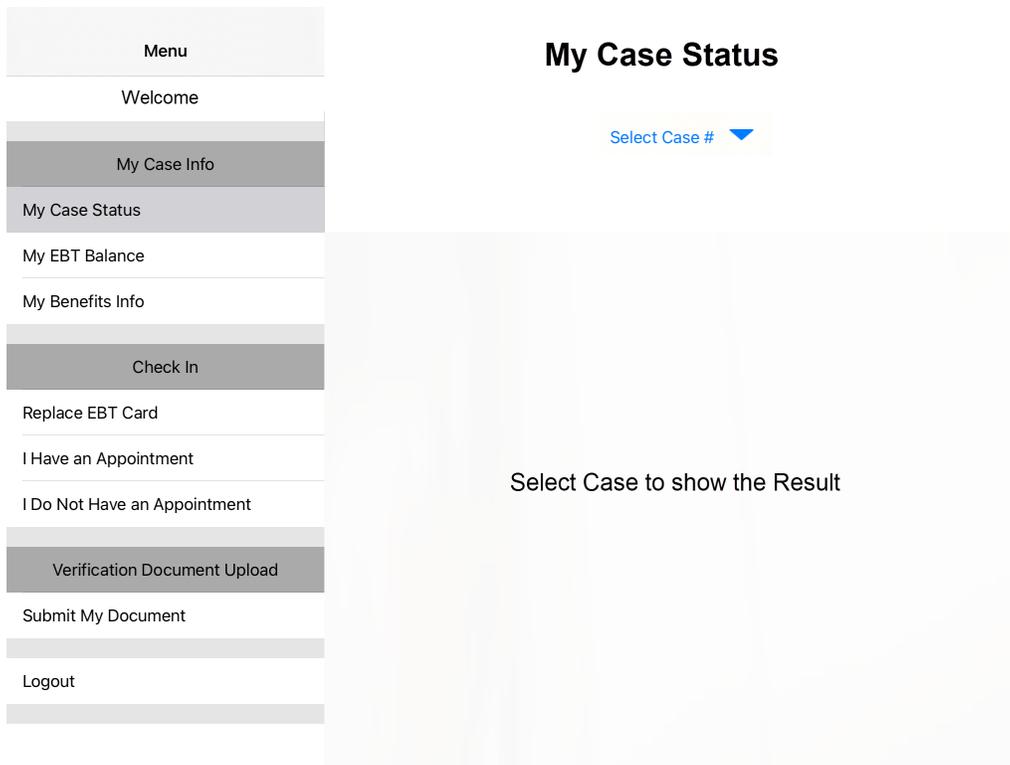


Figure 2.1.13 – CalSAWS Self Service Kiosk App Menu_My Case Info Screen

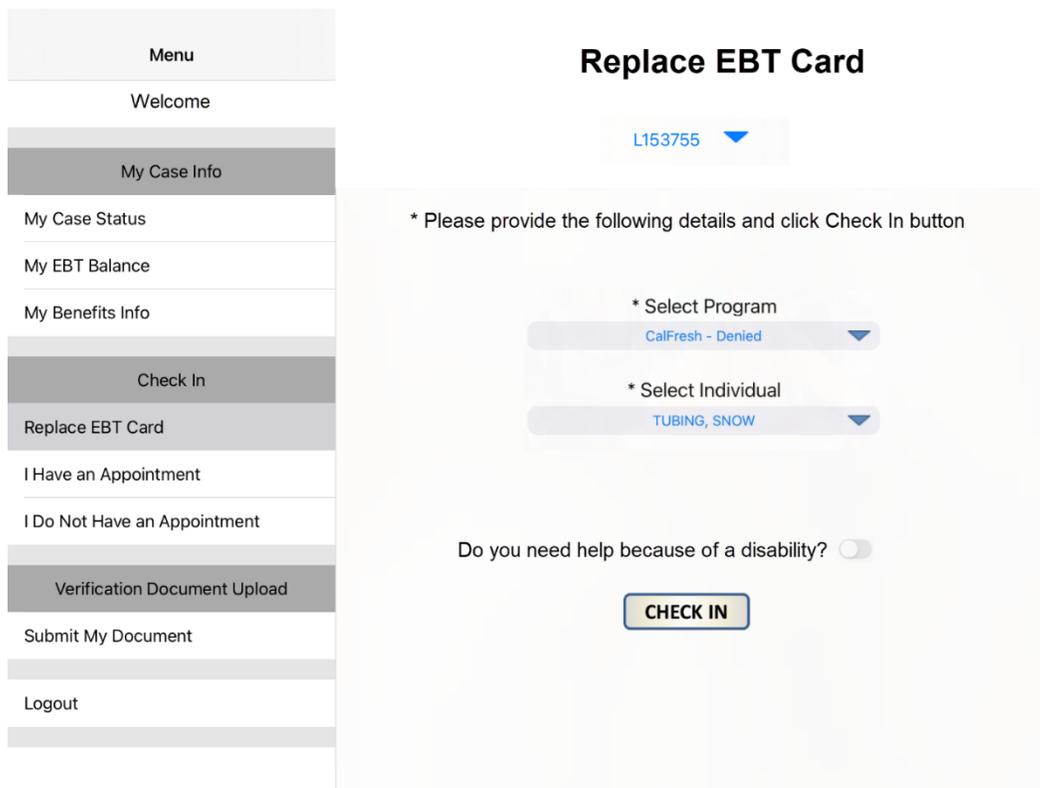


Figure 2.1.14 – CalSAWS Self Service Kiosk App Menu_Check-In_ Replace EBT Card

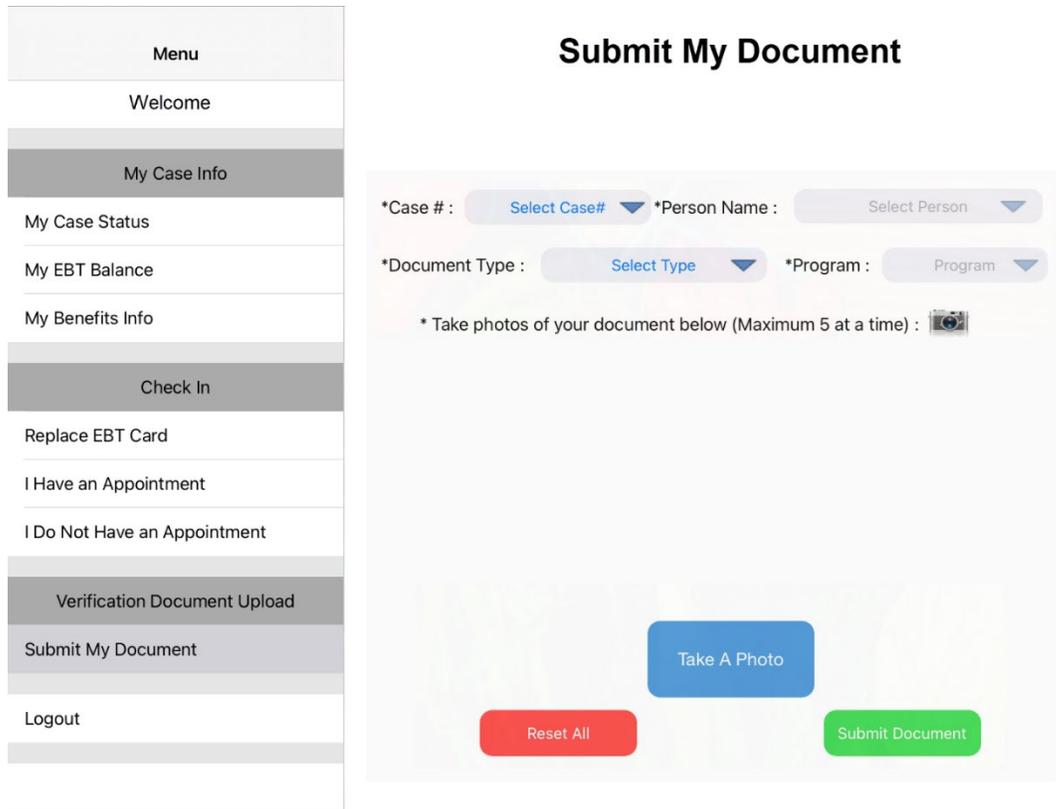


Figure 2.1.15 – CalSAWS Self Service Kiosk App Menu_Submit My Document Screen



Figure 2.1.16 – CalSAWS Self Service Kiosk Icon for Apple device

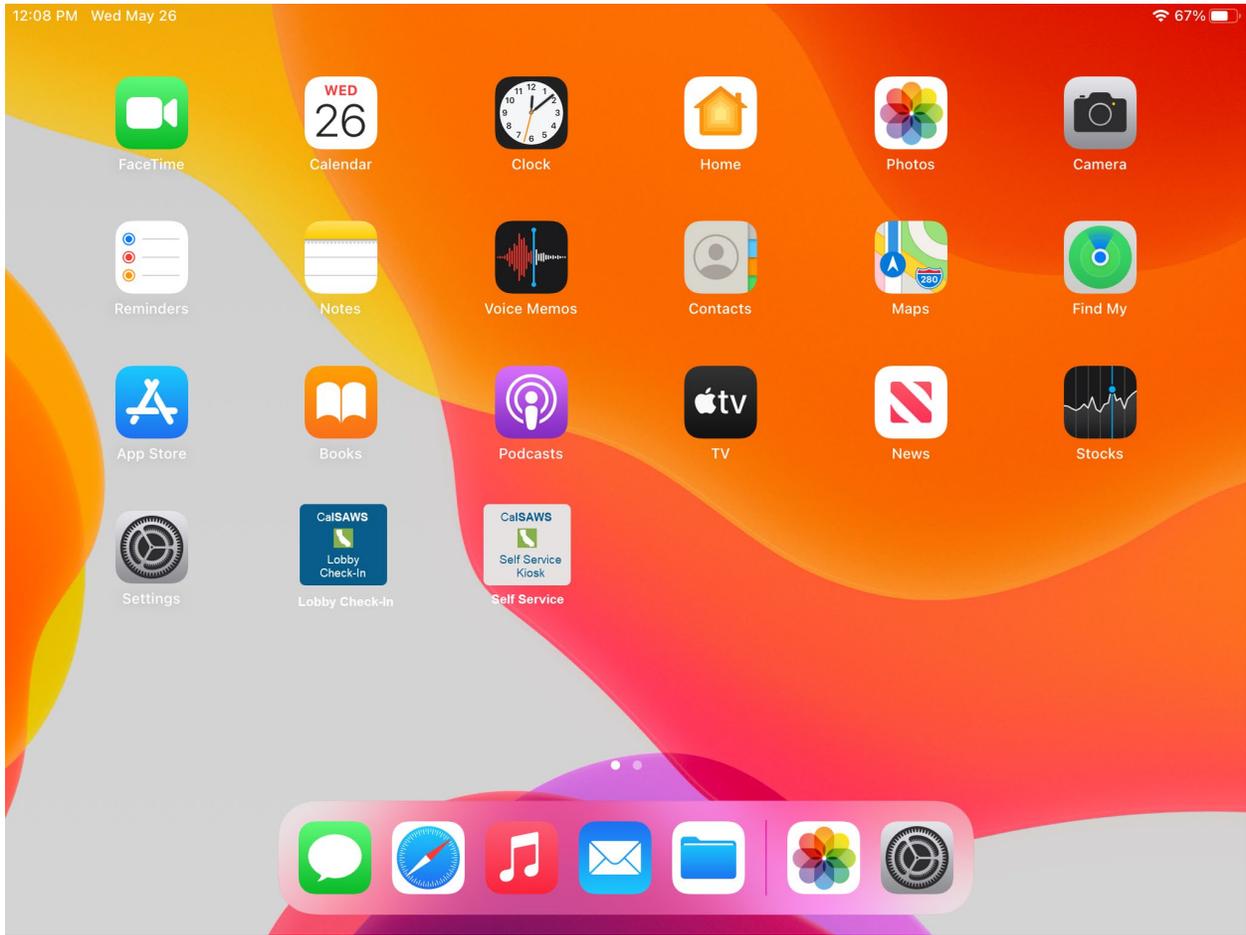


Figure 2.1.17 – CalSAWS Self Service Kiosk Icon for Apple device

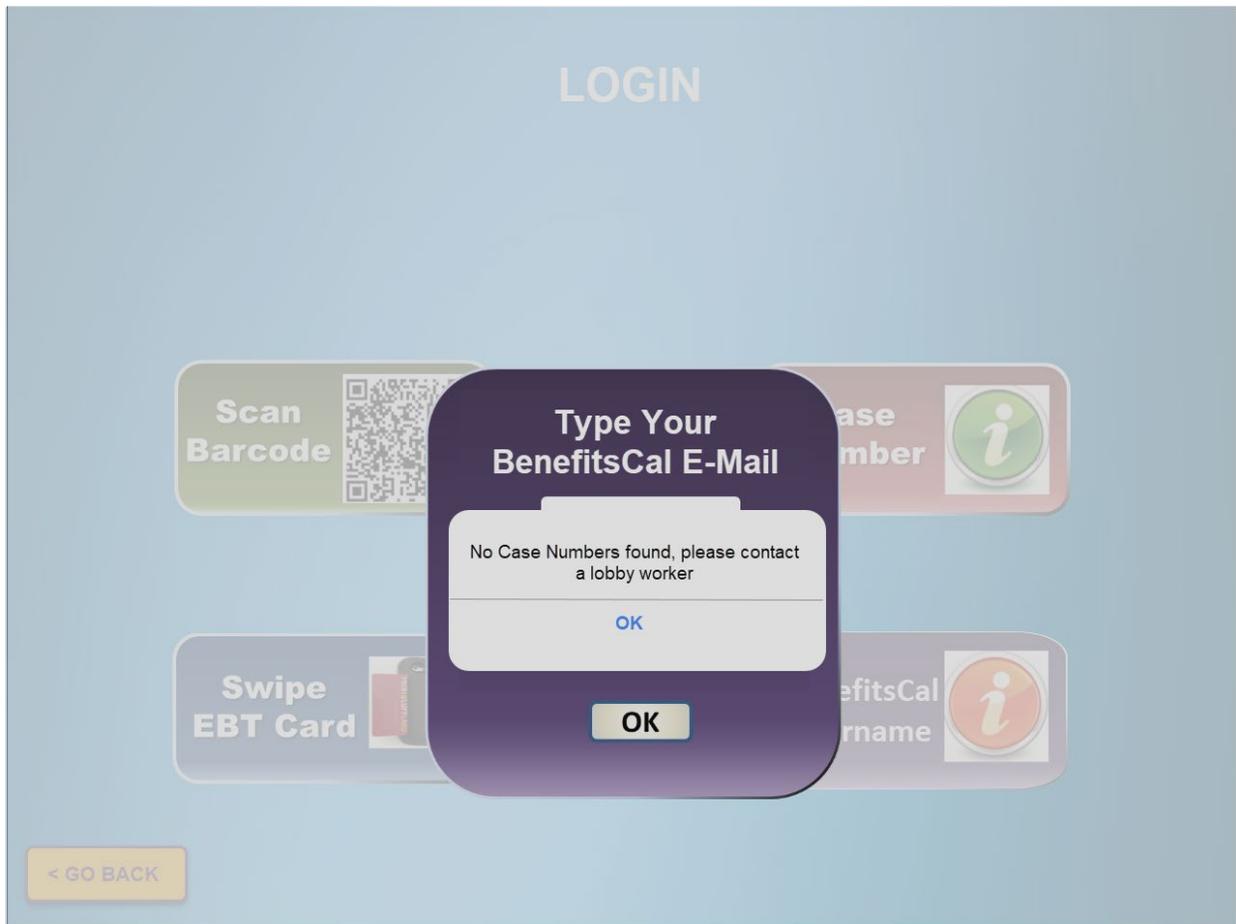


Figure 2.1.18 – CalSAWS Self Service Kiosk Error message for BenefitsCal E-Mail

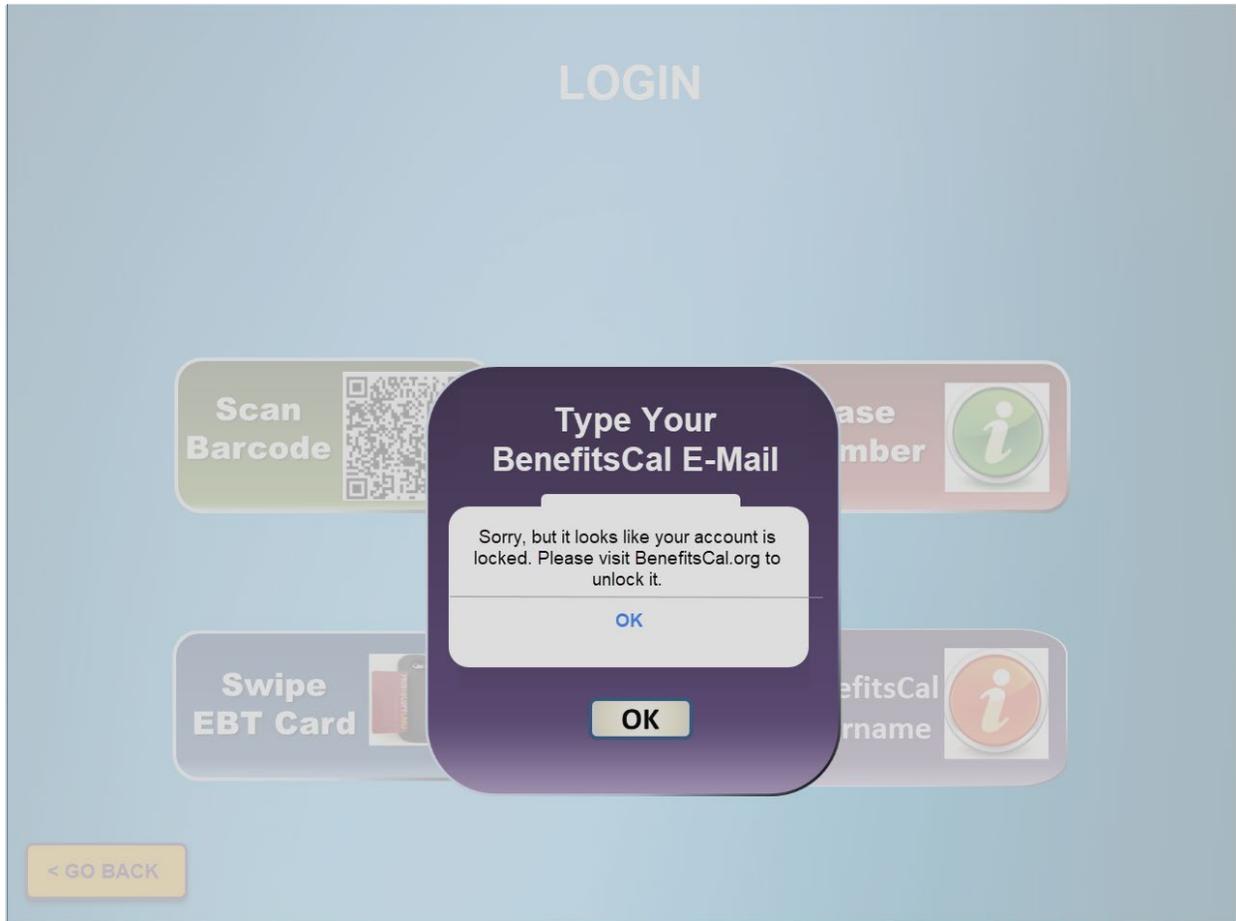


Figure 2.1.19 – CalSAWS Self Service Kiosk Error message for BenefitsCal account locked

2.1.3 Description of Changes

1. Update the background of the CalSAWS Self Service Kiosk application to a gradient blue screen for the following screens:
 - a. Main Screen (Figure 2.1.1)
 - b. My Case Info Screen (Figure 2.1.2)
 - c. Login Screen (Figure 2.1.3)
 - d. Login Screen_Case Number_2 out of 4 questions screen (Figure 2.1.5)
 - e. Scan Barcode Screen (Figure 2.1.9)
 - f. Swipe EBT Card Screen (Figure 2.1.10)
 - g. Self Check In Screen (Figure 2.1.11)
 - h. Check In Screen (Figure 2.1.12)
2. Update the background of the CalSAWS Self Service Kiosk application to gradient blue screen with a white overlay for the following screens:
 - a. Login_Type Your Case Number Screen (Figure 2.1.4)
 - b. Login_Type Your BenefitsCal E-Mail and Password Screen (Figure 2.1.6 through Figure 2.1.8)

3. Update the Menu Screen of the CalSAWS Self Service Kiosk application as below:
 - a. Update the background of the main Menu screen to a white and gray background along with the color of the header from white to black for each screen that is accessible through the Menu screen as shown on Figure 2.1.13 through 2.1.15.
 - i. Changes to the background and the font color of the header will apply to all the screens that are accessed by choosing one of the option from the Menu options located on the left hand side of the screen.
 1. My Case Status
 2. My EBT Balance
 3. My Benefits Info
 4. Replace EBT Card
 5. I have an Appointment
 6. I Do Not Have an Appointment
 7. Submit My Document

Note: The background color for the Menu option located on the left hand side of the screen will be unchanged.
 - b. Update the message that display below 'Menu' on the Menu option located on the left hand side from 'Welcome XXXX' to just 'Welcome'.
 - i. XXXX referenced either the YBN Username (if participants logged in using their YBN Username) or the participants Customer ID.
 - c. Update the value that translate to the Reception Log Visit Purpose field to 'Other/Information' for participants that are checking in through the 'I Do Not have an Appointment'.
4. Update the Header on the Main screen from 'DPSS SELF SERVICE' to 'CalSAWS Self Service Kiosk' as shown on Figure 2.1.1.
5. Update both the 'SUBMIT MY REPORT' and 'VIEW MY MAIL (E-NOTICE)' options from the Main Screen to point to the BenefitsCal website instead of the Your Benefits website.
 - a. Users who choose one of these options will be redirected to the BenefitsCal website automatically.
 - i. BenefitsCal website: <http://benefitscal.org/>
6. Remove the options 'YOUR PHONE NUMBER' and 'YOUR ZIP CODE' from the CHECK IN screen as shown on Figure 2.1.12.
 - a. CHECK IN screen will only have the options of 'YOUR FIRST NAME', 'MIDDLE NAME', and 'YOUR LAST NAME'.
7. Update the barcode icon on the 'Scan Barcode' option on the LOGIN screen to a QR code icon as shown on Figure 2.1.3
8. Remove the option titled 'Username or Customer ID" from the LOGIN screen of the CalSAWS Self Service Kiosk application.
9. Update the background text that display on the text field for the option 'Medi-Cal BIC Card Number' found on the 'Login Screen_Case Number_2 out of 4 questions' screen from 'Medi Cal BIC Card Number' to '01234567A12345' as reference on Figure 2.1.5)

10. Add a new option titled 'BenefitsCal E-Mail' to the LOGIN screen of the CalSAWS Self Service Kiosk Application as shown on Figure 2.1.3.
 - a. New option titled 'BenefitsCal E-Mail' will be located below the 'Case Number' option and to the right of the 'Swipe EBT Card' option.
 - b. Choosing the 'BenefitsCal E-Mail' option will update the screen and an overlay will display with the following (reference Figure 2.1.6):
 - i. Overlay will have two editable text fields:
 1. First editable text field will be titled 'Type Your BenefitsCal E-Mail'.
 - a. First editable text field will be located at the top of the overlay.
 - b. Editable text field will have the text 'E-Mail' in the background.
 - i. Text will be in Gray color.
 2. Second editable text field will be titled 'Type your Password'.
 - a. Second editable text field will be located right below the 'Type Your BenefitsCal E-mail' editable text field.
 - b. Editable text field will have the text 'Password' in the background.
 - i. Text will be in Gray color.
 - ii. Clicking on the editable text field will bring up the keyboard.
 - iii. An 'X' icon will display on the top right hand side of the overlay.
 1. Clicking on the 'X' icon will close the overaly and users will be redirected back to the Login Page (Figure 2.1.3)
 - iv. An 'OK' button will display at the bottom of the overlay.
 1. Clicking the 'OK' button will invoke the newly created webservices (reference Section 2.4 for more detail on the webservices) that will be used to authenticate the BenefitsCal E-Mail and Password against ForgeRock.

Note: For BenefitsCal E-mail and Password that was able to be authenticated successfully by Forgerock, the corresponding GUID will be provided. The GUID will then be used to search in CalSAWS for all the Case Number that belongs to LA County.

- a. For a BenefitsCal E-mail and Password that was able to be authenticated successfully by Forgerock and returns Case Numbers that belong to LA County (the BenefitsCal

E-mail are link to Case Numbers through a GUID), participants will be redirected to one of the following screens within the main menu screen.

- i. The screen that the User will be redirected to from the Menu option will be dependent on the option that the user selected prior to Logging in.
 1. Example: When user select the 'Submit My Document' option from the Main Screen and then Log In, the user will be redirected to the Submit My Document screen within the main Menu screen.
 2. Lists of screens within the main Menu screen:
 - a. My Case Status
 - b. My EBT Balance
 - c. My Benefits Info
 - d. Replace EBT Card
 - e. I have an Appointment
 - f. I Do Not Have an Appointment
 - g. Submit My Document

Note: The screen that the user will be redirected to after they log in is based on the option that the user selected prior to logging in is an existing functionality.

- b. Display the following error message for BenefitsCal E-mail and Password that was able to be authenticated successfully by ForgeRock but does not return any Case Numbers that belong to LA County (the BenefitsCal E-mail are link to Case Numbers through a GUID) as shown on Figure 2.1.18.
 - i. 'No Case Numbers found, please contact a lobby worker'.
- c. For BenefitsCal E-Mail and Password that was not able to be authenticated successfully by Forgerock, display the following error message:
 - i. 'ER005 BenefitsCal E-Mail/Password not valid' as shown on Figure 2.1.8.
 - ii. For a BenefitsCal E-Mail and Password that was not able to be authenticated successfully by

Forgerock after 5 attempts display the following message: as shown on Figure 2.1.19.

1. 'Sorry, but it looks like your account is locked. Please visit BenefitsCal.org to unlock it.'

Note: Participants will need to go to BenefitsCal.org directly in order to reset their password.

2. Display the following pop up message 'BenefitsCal E-Mail and Password are mandatory.' when the 'OK' button is click but no information was inputted in either one or both editable text fields as shown on Figure 2.1.7.
 - a. Clicking on the 'OK' button on the pop up message will close the pop up message.
 - b. Clicking on the 'OK' button on the pop up message will close the pop up message.
11. Update the 'CalSAWS Self Service Kiosk' icon that display on the Apple device.
 - a. The CalSAWS Self Service Kiosk icon will be updated to the image as reference on Figure 2.1.16 and Figure 2.1.17.
 - i. Icon will have a gray background and have CalSAWS written on top, Self Service Kiosk at the bottom both in blue color along with an image in the middle of California in white with green background.
 12. Update the CalSAWS Self Service Kiosk to upload documents to Hyland Imaging Solution.

Note: Users will continue to be automatically be logged out of the CalSAWS Self Service Kiosk application after 1.5 minutes when it is left idle.

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 CalSAWS Lobby Check-In Application

2.2.1 Overview

The CalSAWS Lobby Check-In application allows worker to check-in customers that are visiting the county office. This SCR will update the application to remove the option for workers to look up customers by using the customer's YBN credentials, adding an option to look up customers using their BenefitsCal username and lastly the Purpose of Visit options will be updated.

2.2.2 CalSAWS Lobby Check-In Application Mockup

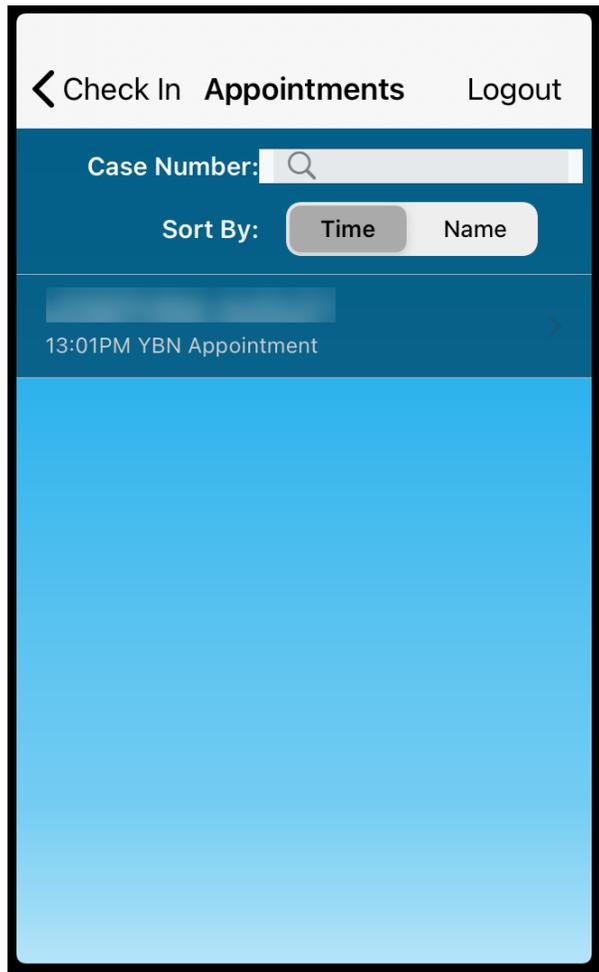


Figure 2.2.1 – Appointment screen

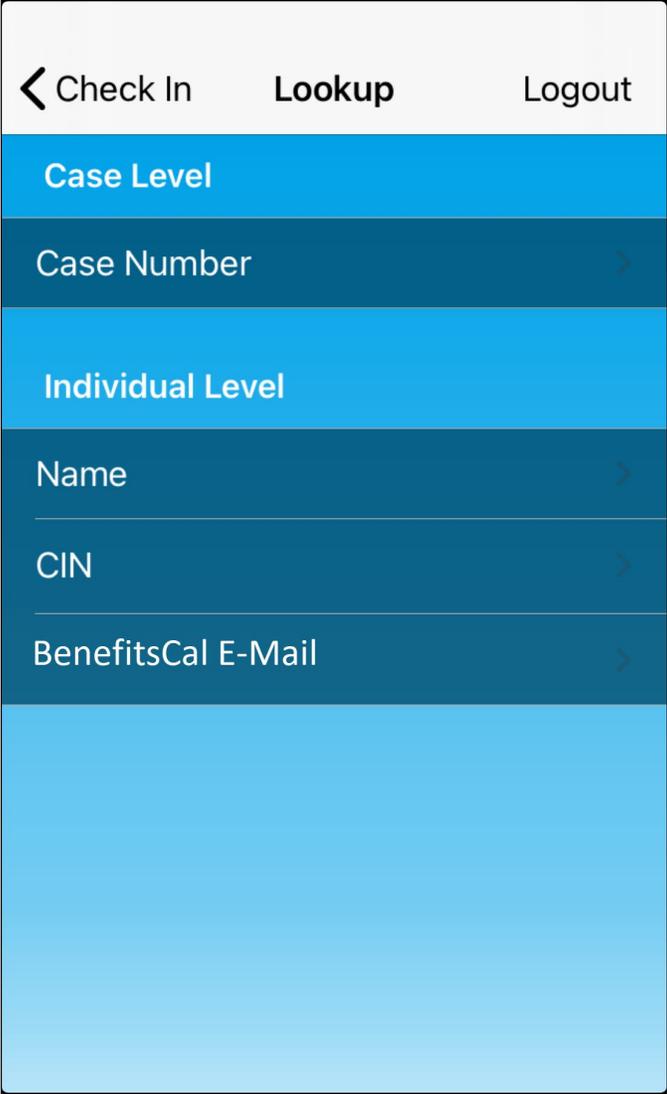


Figure 2.2.2 – Lookup screen

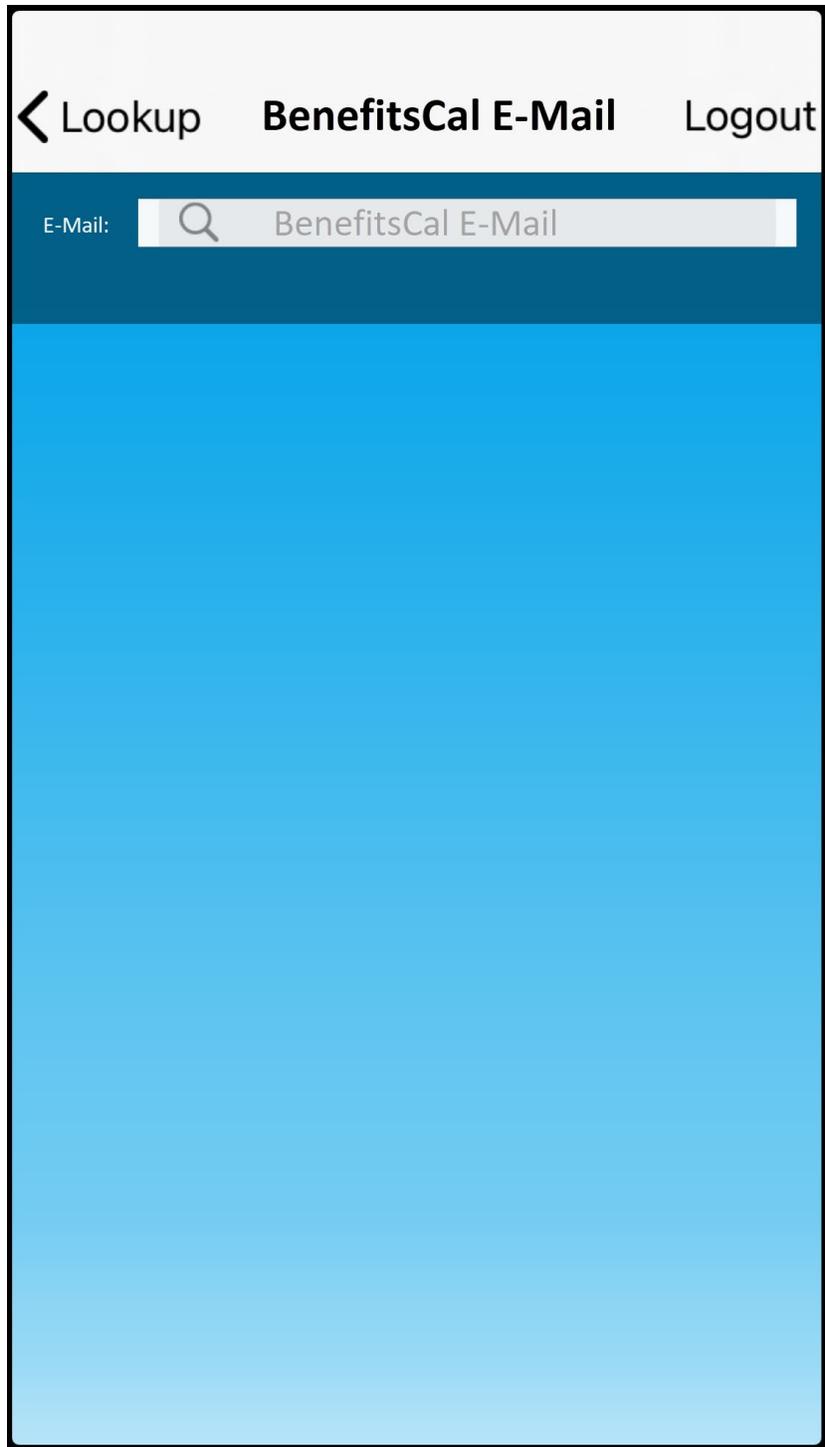


Figure 2.2.3 – BenefitsCal E-Mail Name screen

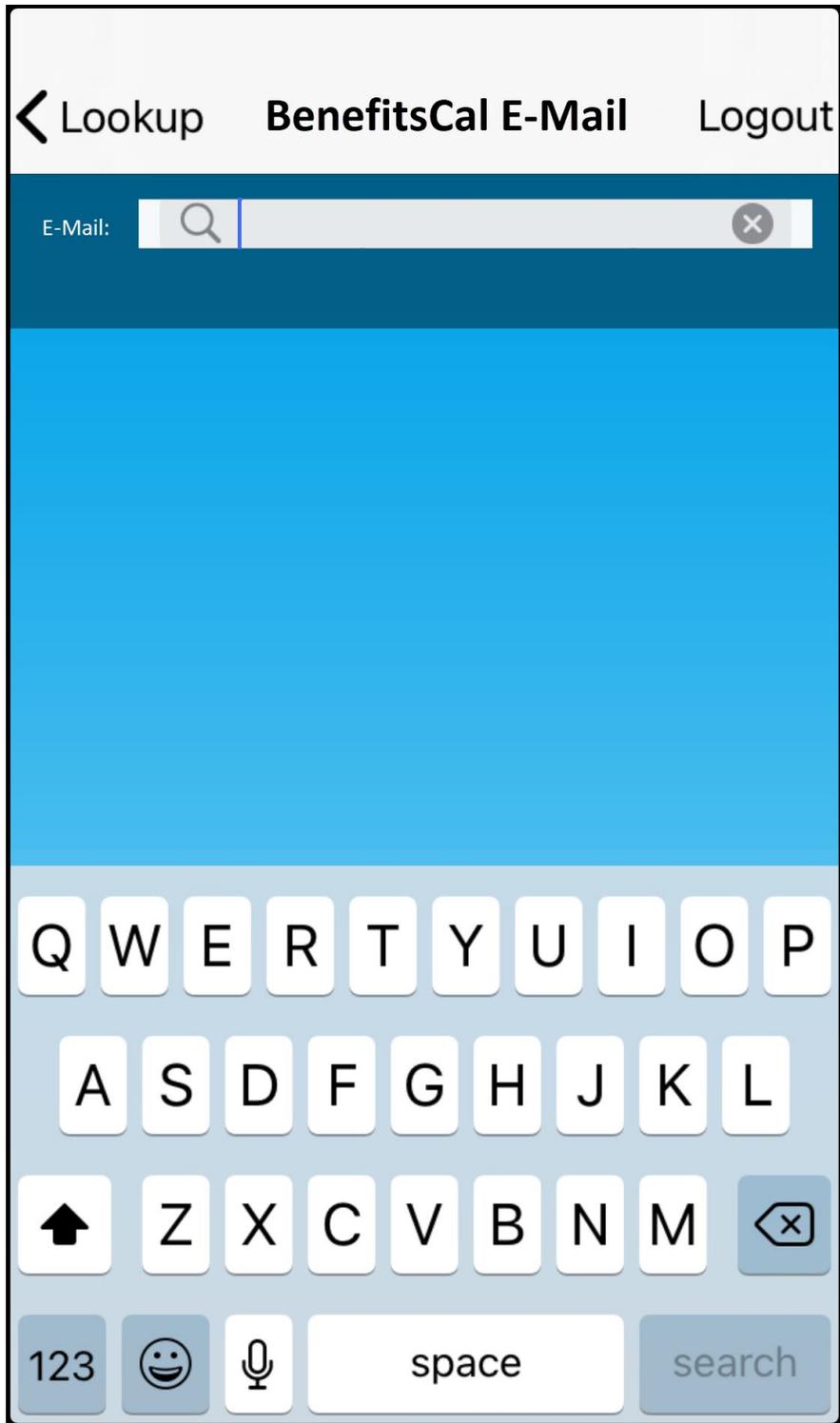


Figure 2.2.4 – BenefitsCal E-Mail Name screen

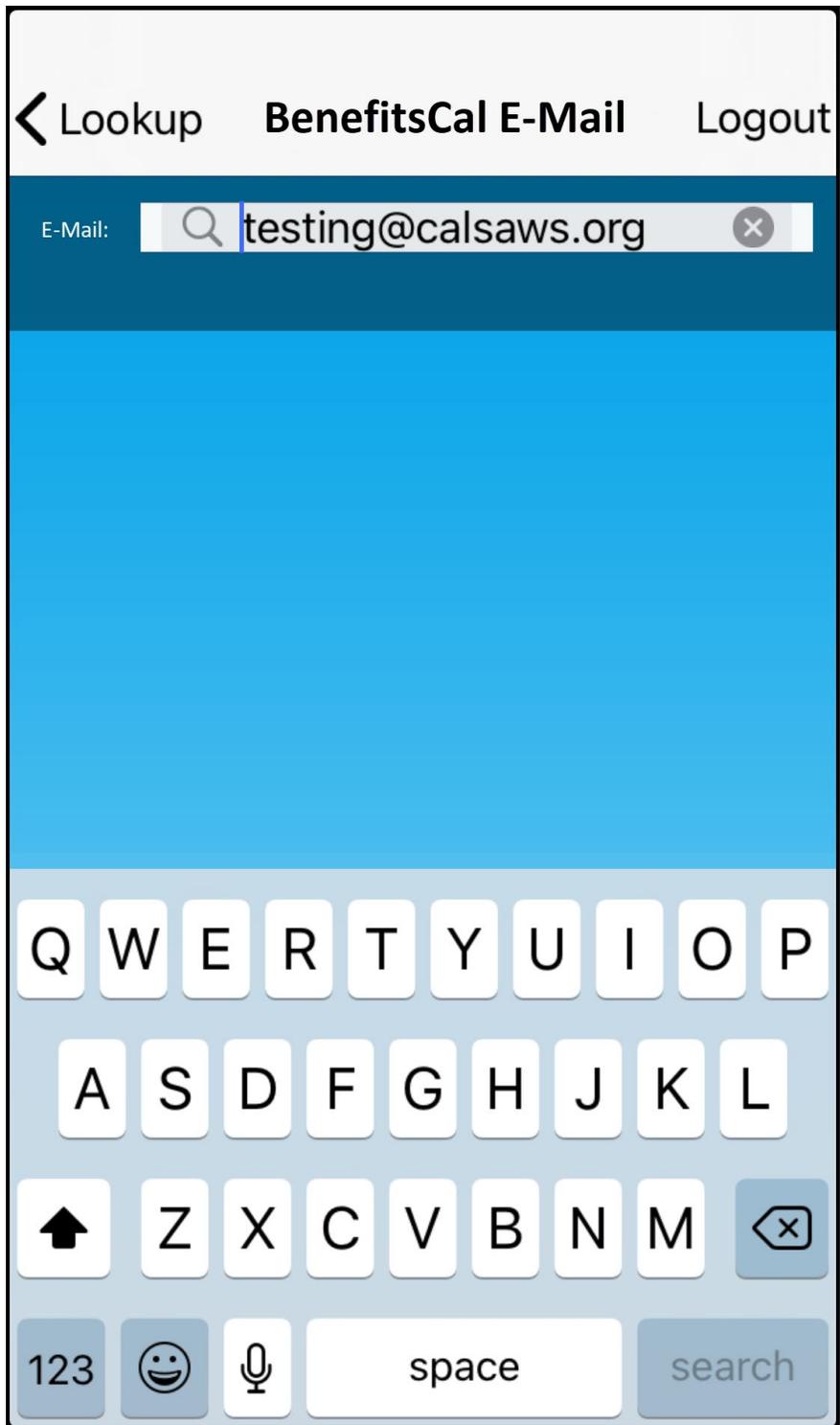


Figure 2.2.5 – BenefitsCal E-Mail screen

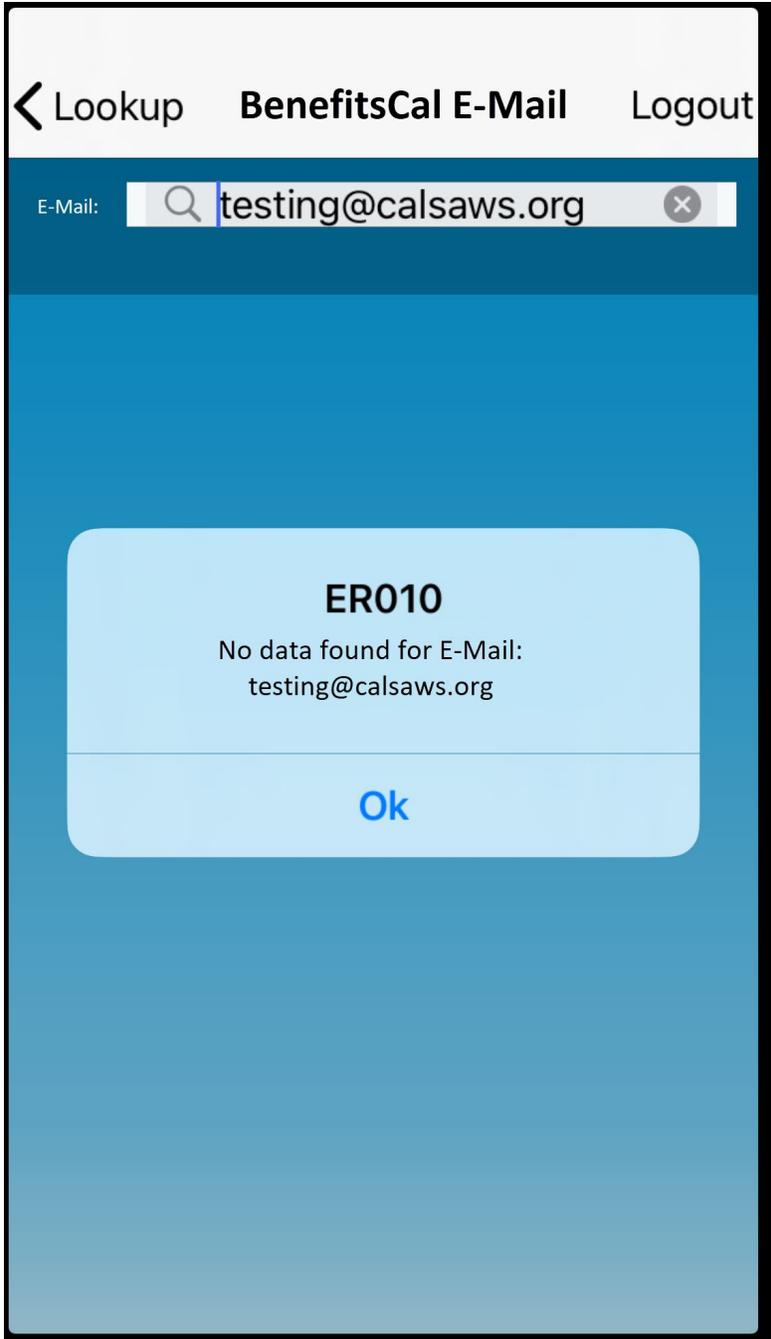


Figure 2.2.6 – BenefitsCal E-Mail screen with error

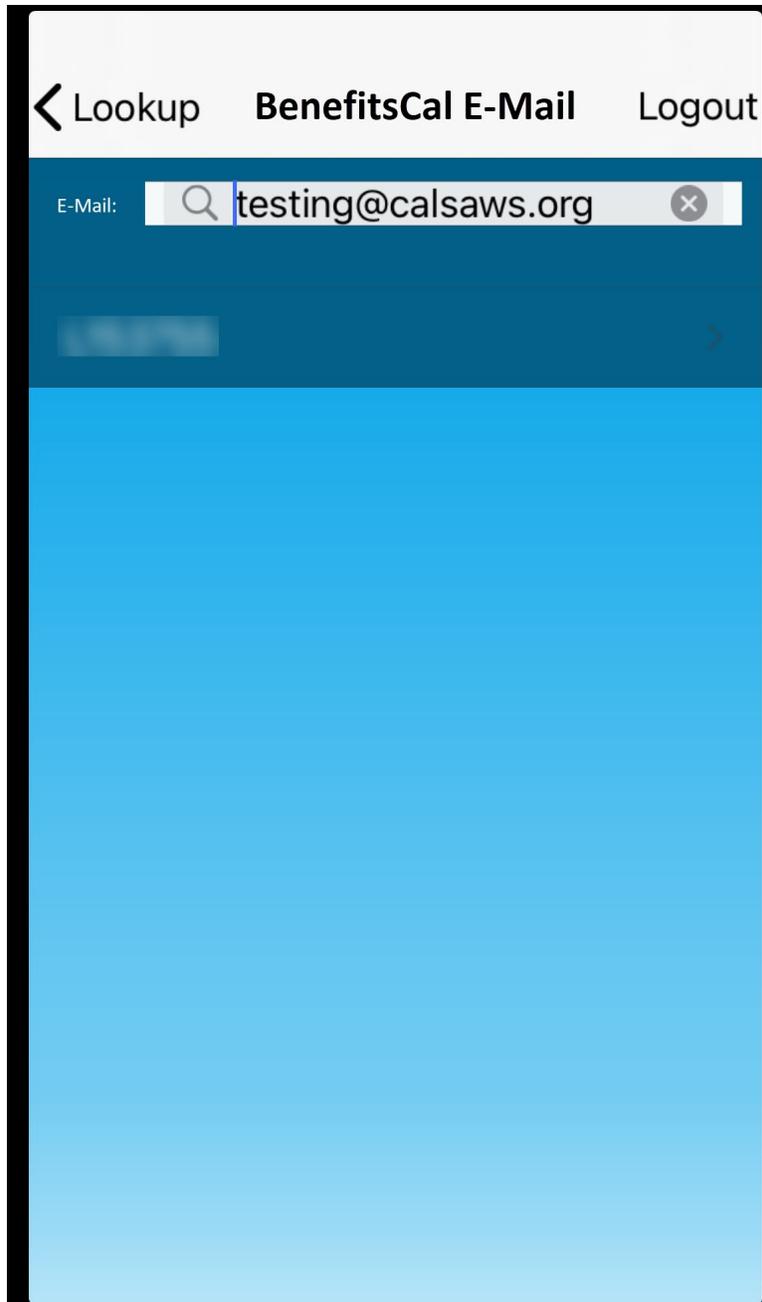


Figure 2.2.7 – BenefitsCal E-Mail screen

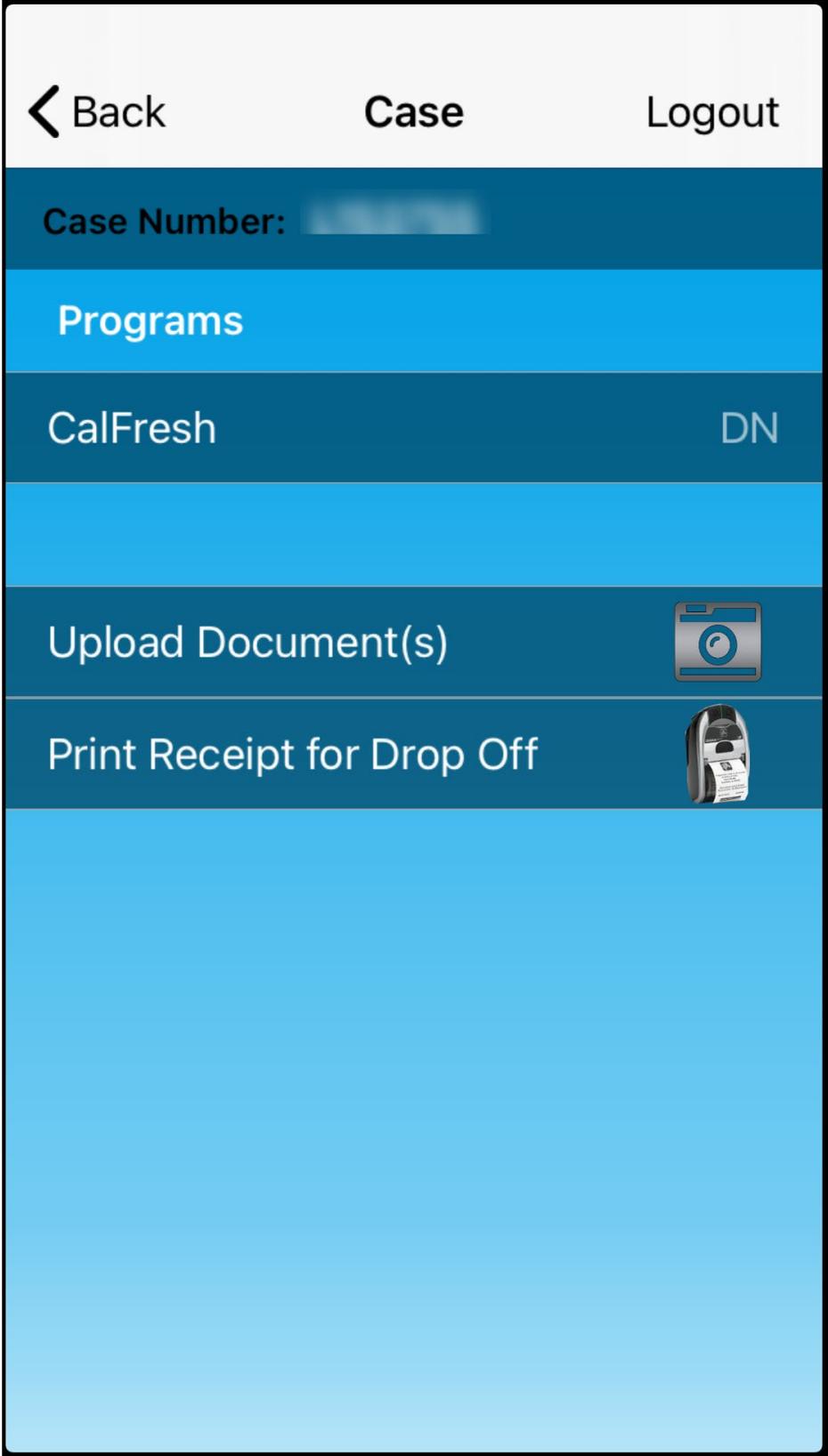


Figure 2.2.8 – Case screen (reference only)

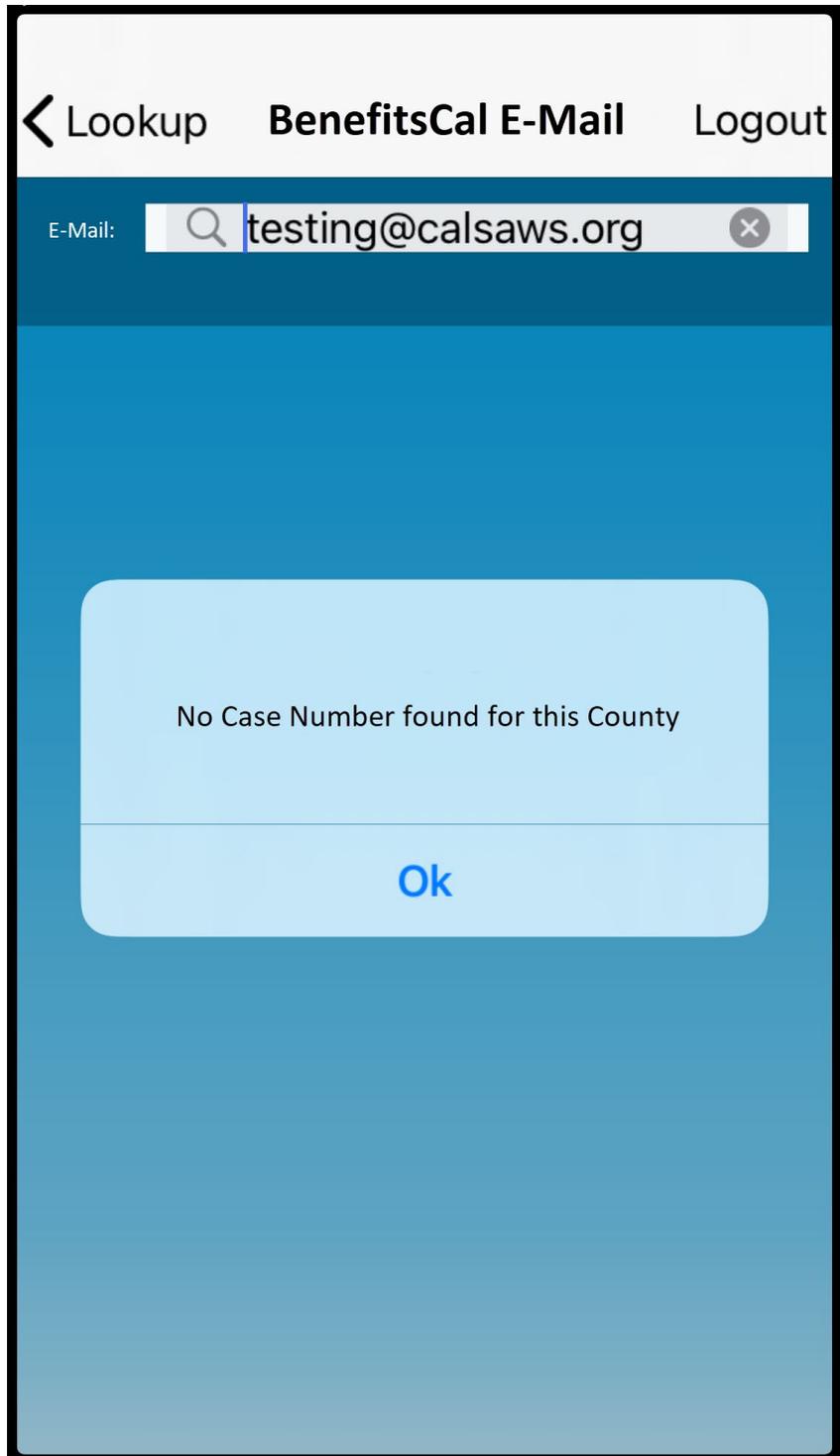


Figure 2.2.9 – BenefitsCal E-Mail screen no cases found for the selected County

 Case Purpose of Visit Logout

Individual:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special
Circumstances:

Check In



Figure 2.2.11 – Individual Type field non-mandatory

← Check In **Add Individual** Logout

First Name*:

Last Name*:

Middle Initial:

Suffix:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special Circumstances:

Check In

Figure 2.2.12 – Add Individual Screen

[← Case](#) **Purpose of Visit** [Logout](#)

Individual:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special Circumstances:

[Done](#)

Immediate Need
Expedite Services
Homeless Situation

Figure 2.2.13 – Purpose of Visit Screen

[← Case](#) **Purpose of Visit** [Logout](#)

Individual:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special Circumstances:

[Done](#)

Agency Partners
Apply for Benefits
Appointment
Cashier/Repayment
Collections

Figure 2.2.14 – Purpose of Visit Screen



Figure 2.2.15 – CaISAWS Lobby Check-In Icon for Apple device

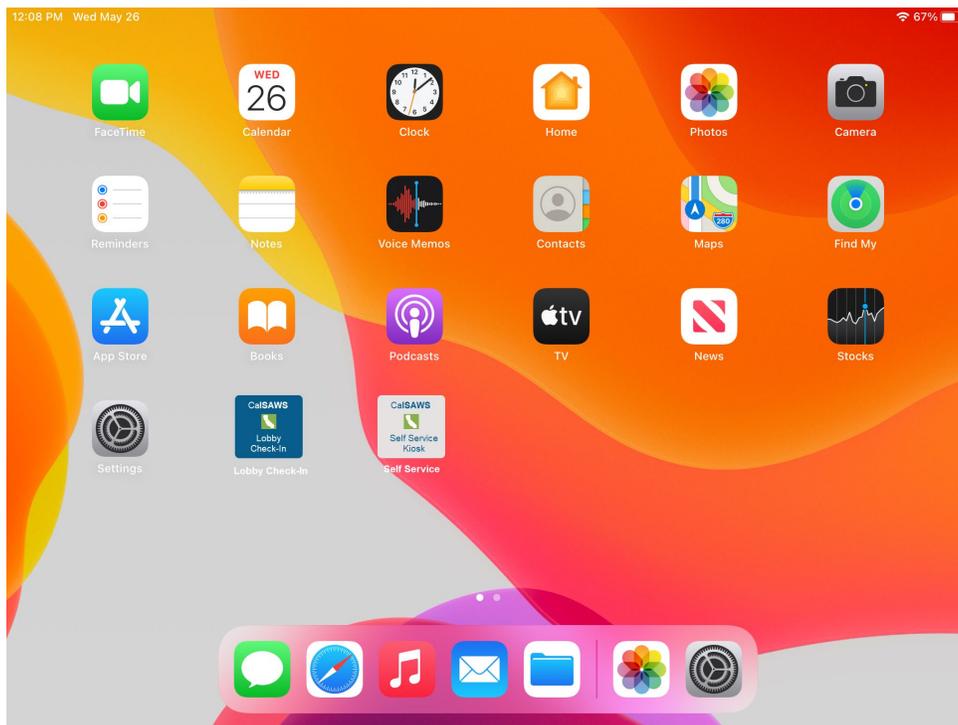


Figure 2.2.16 – Lobby Check-In Icon for Apple device

2.2.3 Description of Changes

1. Remove the YBN Appt Number field from the Appointments screen as shown on Figure 2.2.1.
 - a. Update the Appointments screen on the CaISAWS Lobby Check-In application to remove the field titled 'YBN Appt Number:'
2. Update the Lookup screen on the CaISAWS Lobby Check-In application as shown on Figure 2.2.2
 - i. Remove the field titled 'YBN User Name'
 1. This option is currently only available if the worker that is logged in to the CaISAWS Lobby Check-In

application is associated to an office located in Los Angeles County.

- ii. Remove the field titled 'IVR/CustomerID'.
 - iii. Add a field to the Lookup screen titled 'BenefitsCal E-Mail'.
 1. New field will be located below the field titled 'CIN'.
 2. Choosing the 'BenefitsCal E-Mail field will take the worker to the screen titled 'BenefitsCal E-Mail' as shown on Figure 2.2.3 (please reference #3 below for more details on the BenefitsCal E-Mail screen).
3. Create a new screen titled 'BenefitsCal E-Mail as shown on Figure 2.2.3.
- a. The BenefitsCal User Name screen will be accessible through Lookup screen by clicking the 'BenefitsCal E-Mail' field (reference Figure 2.2.2).
 - b. BenefitsCal E-Mail field will have an editable text field titled 'E-Mail:'.
 - i. Editable text field will have a magnifying glass icon and the text 'BenefitsCal E-Mail' in the background.
 1. Both the Magnifying glass icon and BenefitsCal E-Mail text will be in Gray.
 - ii. Editable text field will not have a limit on the amount of characters that can be inputted on the field.
 - iii. Clicking on the editable text field will bring up the keyboard as shown on Figure 2.2.4 and Figure 2.2.5
 - c. Clicking the 'Search' button on the keyboard will invoke the newly created webservices (reference Section 2.3 and 2.4 for more details on the web services) that will search Forgerock for the inputted BenefitsCal E-Mail information.

Note: For BenefitsCal E-mail that's found in Forgerock, the corresponding GUID will be provided. The GUID will then be used to search in CalSAWS for a of all the Case Numbers along with the County information.

- i. The CalSAWS Lobby Check-In application will refresh and display the list of cases that belongs to the County that is being accessed by the CalSAWS Lobby Check-In application as shown on Figure 2.2.7.
 1. Example: For CalSAWS Lobby Check-In application that is accessed for an office located in Riverside County, only cases that is link to Riverside County will be displayed. Even if the BenefitsCal E-Mail is link to other cases that belong to other counties such as such as Los Angeles.

- a. Clicking on the Case number will take the worker to the Case Screen as shown on Figure 2.2.8).
 - ii. The CalSAWS Lobby Check-In application will display the following error message as shown on Figure 2.2.9.
 - 1. 'No Case Number found for this County'
 - 2. Error message will display when none of the Case Numbers that are link to the BenefitsCal E-Mail belong to the County that is being accessed by the CalSAWS Lobby Check-In application.
 - iii. For BenefitsCal E-Mail that's not found in ForgeRock display the following error message (as reference on Figure 2.2.6):
 - 1. 'ER010 No data found for E-Mail: 'XXXX''
 - a. 'XXXX' will be the BenefitsCal E-Mail that was inputted.
 - d. Clicking on the 'Lookup' field located on the top left side of the screen will take the worker back to the Lookup Screen.
 - e. Clicking on the 'Logout' field located on the top right side of the screen will direct logout the worker and take the worker back to the Main Login screen.
 - i. This will follow existing functionality anytime a worker click on the 'Logout' field through out the application.
- 4. Update all 'Visit Purpose' field on the 'Purpose of Visit screen to be editable.
 - a. Update the value available to be selected in the 'Visit Purpose' field on the 'Purpose of Visit' screen.
 - i. Add the following values as referenced on the Visit Purpose Tab on the CA-217869 Updates to Lobby App values.docx
 - ii. Remove the following values as referenced on the Values to be removed tab on the CA-217869 Updates to Lobby App values.docx
 - iii. Values will be listed in alphabetical order.
- 5. Update the 'Visit Purpose' field on the 'Add Individual' Screen to be editable as shown on shown on Figure 2.2.12.
 - a. Clicking on the Text field for the 'Visit Purpose' field will bring up the scroll box with a list of values available to be selected. Please reference the Visit Purpose Tab on the CA-217869 Updates to Lobby App values.docx for available list.
 - i. Values will be listed in alphabetical order.
- 6. Update the Individual Type field to no longer be mandatory.
 - a. The '*' symbol will be removed from the 'Individual Type' field as shown on Figure 2.2.11 and Figure 2.2.12.
 - b. Update to the Individual Type field apply for all the screens throughout the application
 - i. Add Individual screen
 - ii. Purpose of Visit screen

- c. Add the following values as referenced on the Individual Type Tab on the CA-217869 Updates to Lobby App values.docx
 - d. Remove the following values as referenced on the Values to be removed tab on the CA-217869 Updates to Lobby App values.docx
 - e. Values to be listed in alphabetical order.
7. Add a new editable text field titled 'Emergency Requests':
- a. 'Emergency Requests' field will not be a mandatory field.
 - b. Clicking on the Text field will bring up a list that the worker can scroll through as shown on Figure 2.2.13
 - i. The values to be displayed will be:
 - 1. Immediate Need
 - 2. Expedite Services
 - 3. Homeless Situation
 - ii. Clicking on 'Done' will input the value selected on the text field.
 - c. Value selected on this field will translate to the Emergency Requests field on the Reception Log page in CalSAWS.
Note: Reception Log record will be associated with a red exclamation mark icon on the Initial Time field. This is an existing functionality in Reception Log.
 - d. Emergency Requests field will display on the following screens:
 - i. Purpose of Visit screen
 - 1. New field 'Emergency Requests' will be located below the 'Individual Type' field as shown on Figure 2.2.11 and Figure 2.2.13
 - ii. Add Individual screen
 - 1. New field 'Emergency Requests' will be located below the 'Individual Type' field as shown on Figure 2.2.12.
8. Remove the field titled 'Drop In Purpose' from the Purpose of Visit.
9. Update the 'DPSS Lobby' icon and title for the Lobby Check-In application that display on the Apple device.
- a. The DPSS Lobby icon will be updated to the image as reference on Figure 2.2.14 and Figure 2.2.15.
 - i. Icon will have a blue background and have CalSAWS written on top, Lobby Check-In at the bottom both in white color along with an image in the middle of California in white with green background.
 - b. The DPSS Lobby icon will be renamed from 'DPSS Lobby' to 'Lobby Check-In' as referenced on Figure 2.2.15.

2.2.4 Page Location

N/A

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 CalSAWS Lobby Check-In Application web service

2.3.1 Overview

The Lobby Check-In application will be updated to allow County workers to look up an individual using their BenefitsCal E-Mail. As part of this SCR a new webservice will be created in order to support this new functionality.

2.3.2 Description of Change

1. Create new REST web service that will be invoke when a user search for an individual Case information using their BenefitsCal E-Mail.
 - a. Web service will send the BenefitsCal E-Mail in the Request and return the GUID information that are link to the BenefitsCal E-Mail in the Response.
 - i. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER010 No data found for E-Mail: XXXX'.
 1. XXXX will be the BenefitsCal E-Mail that was inputted.

Note: A new REST web service will be created that will send the GUID information (GUID will be provided by Forgerock if one does exist) in the request and will receive the Case Number and County information back in the response. This web service will be used by both the CalSAWS Lobby Check-In application and the CalSAWS Self Service Kiosk application. Please See point number 12 from Section 2.4.2 for more details.

2. Update the following existing webservices to send Emergency Request information as part of the Request.
 - a. <https://HOSTNAME/lobby-service/lobbycheckin/checkin>
 - b. <https://HOSTNAME/lobby-service/lobbycheckin/checkinLobbyTraffic>
 - c. <https://HOSTNAME/lobby-service/lobbycheckin/selfService/checkin>

3. Update the existing web service to no longer have have the 'Individual' parameter in the request to be mandatory.
 - a. <https://HOSTNAME/lobby-service/lobbycheckin/checkin>
 - b. <https://HOSTNAME/lobby-service/lobbycheckin/checkInLobbyTraffic>
 - c. <https://HOSTNAME/lobby-service/lobbycheckin/selfService/checkIn>

2.3.3 Execution Frequency

N/A

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

N/A

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

N/A

2.3.8 Failure Procedure/Operational Instructions

N/A

2.4 CalSAWS Self Service Kiosk Application web services

2.4.1 Overview

The current web services for the CalSAWS Self Service Kiosk application currently reside in the YBN application. As part of this SCR, these web services will be updated to REST web services along with creating new web services in order to allow participants to Log In using their BenefitsCal User name.

2.4.2 Description of Change

1. Port over the 'ebtAccountBalance' web service to the Lobby Springboot App.

- a. Web service will send Case Number, County Code and EBT Account Type. The web service will return the EBT Details (EBT balance and balance indicator) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER008: Invalid Case Number for this county'.
2. Port over the 'ebtAccountHistory' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, County Code, EBT Account Type, Search Type, Date, and FNS. The web service will return the EBT Transaction Details (Details for the past 7 days) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER008: Invalid Case Number for this county'.
3. Port over the 'caseInfo' web service to the Lobby Springboot App.
 - a. Web service will send Case Number and County Code. The web service will return the customer data (case detail – Cash issuance, program information, amount, method, date, warrant number, warrant date, available date) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER999 Something is not right here, please contact a lobby worker'.
4. Port over the 'caseAuthRequest' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, County Code, Date of Birth, Zip Code, Social Security Number (Last 4 Digits) EBT Number, and Medi Cal BIC Card Number to authenticate the user and logging the person to the CalSAWS Self Service Kiosk Check-In App. The web service will return Case Number and Program Code in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when an Invalid Paramater is provided. Error will display the following message: 'ER029: Unable to authenticate due to invalid input'.
 - iii. Web service will return a 204 Non Content when the request parameter don't have a minimum of 2 parameters sent. Error will display the following message: 'ER019: Must have minimum 2 answered questions'.

5. Port over the 'caseIndividuals' web service to the Lobby Springboot App.
 - a. Web service will send Case Number and County Code. The web service will return the Case Number, CIN, First Name, Last Name, Middle Initial, Last 4 SSN, DOB, Gender, Program statuses (Program code, program status and worker ID number), Special Need Flag and Case Confidential Flag in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
6. Port over the 'caseProgramParticipants?caseNumber=<CaseNumber>' web service to the Lobby Springboot App.
 - a. Web service will send Case Number and County Code. The web service will return the Case Number, CIN, First Name, Middle Initial, Last Name, Last 4 SSN, DOB, Gender, Participant Program List (program code, program status, workerid number, first name, last name, special need flag) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data found for the case. Error will display the following message: 'ER008: Invalid Case Number for this county'.
7. Port over the 'isVerificationUploadAllowedService' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, County Code, CIN, Document Type and Program Type. The web service will return either a 'true' response when verification upload is allowed in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
8. Port over the 'verificationUploadService' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, County Code, CIN, Document Type, Program Code, Upload Source, and the ImageStringFields'. The web service will return an 'OK' status in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
9. Port over the 'appointments' web service to the Lobby Springboot App.
 - a. Web service will send 'Office Number, County Code, and Case number. The web service will return the appointment detail (appointment type, begin time, end time, begin date, name, case number, special need flag) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data found for the search parameter. Error will display the

following message: 'ER007: No data found for Search Parameter.

- iii. Web service will return a 204 No Content when no appointments are found in the office. Error will display the following message: 'ER030: No Appointments Found in this Office'.
10. Port over the 'signout' web service to the Lobby Springboot App.
- a. Web service will send the session id and the web service will return a 200 'OK' status in the response.
11. Create new REST web service that will be invoke when a user log in to the CalSAWS Self Service Kiosk Check-In application using their BenefitsCal E-Mail and Password.
- a. Web service will send the BenefitsCal E-Mail and Password in the Request and returns the GUID information that are link to the enefitsCal E-Mail in the Response.
 - i. Web service will return a 204 No Content when no BenefitsCal E-Mail and Password are found. Error will display the following message: 'ER005: BenefitsCal E-mail/Password not valid.
 - ii. Web service will return a 401 Unauthorized when Forgerock is not able to authenticate the BenefitsCal E-Mail and Password after 5 tries. Error will display the following message: Sorry, but it looks like your account is locked. Please visit BenefitsCal.org to unlock it.

Note: A new REST web service will be created that will send the GUID information (GUID will be provided by Forgerock if one does exist) in the request and will receive the Case Number and County information back in the response. This web service will be used by both the CalSAWS Lobby Check-In application and the CalSAWS Self Service Kiosk application. Please See point number 12 from Section 2.4.2 for more details.

12. Create new REST web service that will be invoke when a GUID is provided by Forgerock application.
- a. Web service will send the GUID information in the Request and returns the list of Case Numbers and the County Code in the response to either the CalSAWS Lobby Check-In application or the CalSAWS Self Service Kiosk application.

Note: County Code information that will be sent as part of the Request for the above webservices will automatically be set to '19' (for Los Angeles). This parameter will be updated in the future as part of the same effort that will expand the CalSAWS Self Service Kiosk to support all 58 Counties (CA-229814).

2.4.3 Execution Frequency

[Indicate if this is daily/weekly/monthly etc.... in addition to the day that they batch job should run if not daily.]

2.4.4 Key Scheduling Dependencies

[Provide any of the predecessors and/or successors for this job.]

2.4.5 Counties Impacted

[Indicate if all counties or the specific counties that are impacted by this Change.]

2.4.6 Data Volume/Performance

[Provide the anticipated number of records created/processed and the impact on performance.]

2.4.7 Interface Partner

[Document who the interface is with and include any assumptions, constraints, and details. For example, what days will they process files, if there is a return interface what is the turnaround.]

2.4.8 Failure Procedure/Operational Instructions

[Document the process for handling interface failures.]

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|---------------------------------|--|
| 1.0 | Online | Lobby Application values update | CA-217869 Updates to Lobby App values.xlsx |
| | | | |

4 REQUIREMENTS

4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|-----------|---|---|
| DDID 1778 | <p>Original: The CONTRACTOR shall expand the Los Angeles County's iOS solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties.</p> <p>Revised: The CONTRACTOR shall expand the Los Angeles County's iOS CalSAWS Self Service Kiosk Check-in solution to support all 58 Counties, remove all dependency from the YBN application and to communicate to the Hyland Imaging Solution.</p> | <p>The CalSAWS Self Service Kiosk Check-In Application will be updated to no longer be county specific and to communicate to the new Hyland Imaging Solution. Secondly, all dependency to YBN application will be removed from both the CalSAWS Self Service Kiosk Check-In application and the Lobby Check-In Application. Secondly, both the CalSAWS Self Service Kiosk Check</p> |
| | | |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-220407

DDID 1631 Modify Pending Caseload Report to
Include the 4 GA GR Solutions addressing all 58
counties

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

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------|-------------------------|---|------------------------|
| 4/22/2021 | 1.0 | Initial Document | Remi Lassiter |
| 06/15/2021 | 1.1 | Update to the report screenshot to match the latest analytics version. Update to assumption one. | Esequiel Herrera-Ortiz |
| 06/22/2021 | 1.2 | Updated the report screenshots to match the latest analytics version. | Remi Lassiter |
| | | | |
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Table of Contents

| | | |
|---|--|----|
| 1 | Overview | 4 |
| | 1.1 Current Design..... | 4 |
| | 1.2 Requests..... | 4 |
| | 1.3 Overview of Recommendations..... | 4 |
| | 1.4 Assumptions | 5 |
| 2 | Recommendations..... | 6 |
| | 2.1 Pending Caseload Report..... | 6 |
| | 2.1.1 Overview | 6 |
| | 2.1.2 Pending Caseload Report Mockup | 6 |
| | 2.1.3 Description of Change | 7 |
| | 2.1.4 Report Location | 8 |
| | 2.1.5 Counties Impacted | 8 |
| | 2.1.6 Security Updates..... | 8 |
| | 2.1.7 Report Usage/Performance | 9 |
| 3 | Supporting Documents | 9 |
| 4 | Requirements..... | 10 |
| | 4.1 Project Requirements..... | 10 |
| | 4.2 Migration Requirements..... | 10 |
| 5 | Migration Impacts | 12 |
| 6 | Appendix..... | 13 |

1 OVERVIEW

The Pending Caseload Report is an on-request report that provides information on the number of English speaking and Non-English speaking applications received, as well as those that were Pending, Denied and Approved during the period.

This SCR seeks to modify the Pending Caseload Report to include the 58 county General Assistance/General Relief programs.

1.1 Current Design

The report currently includes data from the following program types:

- Adoptions AAP (AA)
- Child Care (CC)
- CalFresh (CF)
- Cal-Learn (CL)
- CAPI (CP)
- CFET (CT)
- CalWORKs (CW)
- Diversion (DV)
- Foster Care (FC)
- Homeless – Perm (HP)
- Homeless – Temp (HT)
- Immediate Need (IN)
- Kin-Gap (KG)
- RCA (RC)
- Medi-Cal (MC)
- Welfare to Work (WT)

The report does not currently include any General Assistance/General Relief programs.

1.2 Requests

1. Modify the existing "CalSAWS Pending Caseload Report" to include the below programs to address 58 county GA/GR programs.
 - a. GA/GR Managed
 - b. GA/GR Non-Managed
 - c. GA/GR Automated EDBC/CC
 - d. GA/GR LA County

1.3 Overview of Recommendations

1. Update the base population of the report to include GA/GR programs.
2. Update the Program filter on the Report Filters sheet to include a value for GA/GR.
3. Update 'Division' to 'Department' on the Report Filters sheet.
4. Update the Summary2 widget on the Summary sheet to include a row for GA/GR.

1.4 Assumptions

1. The Pending Caseload Report was soft launched in Qlik in March 2021 as a part of Release G. The screenshots provided in this SCR can differ from the final replatformed version of the report as it is still under development. This will not impact this SCR as this SCR is only updating the logic and not the report template.
2. It is expected that this report will be compatible with CalWIN data upon its migration to CalSAWS.
3. Updates will not need to be made to this report to account for counties that switch GA/GR program type.

2 RECOMMENDATIONS

2.1 Pending Caseload Report

2.1.1 Overview

Modify the Pending Caseload Report to include GA/GR programs.

2.1.2 Pending Caseload Report Mockup

CalSAWS Report Filters

Data as of: 05/11/2021

General Office Unit Worker

County * Los Angeles

Region

- Countywide
- Region 1
- Region 2
- Region 3
- Region 4
- Region 5
- Region 6
- Region 7
- Region 8

District

- 002 - Glendale
- 003 - Pasadena
- 004 - El Monte
- 005 - Belvedere
- 006 - Cudahy
- 007 - South Special
- 008 - Southwest Special
- 009 - Wilshire Special
- 010 - East Valley
- 011 - East Valley
- 012 - Exposition Park
- 013 - Metro Family
- 014 - Civic Center
- 015 - Metro East
- 016 - Child Medi-Cal Enroll. Project

Department

- Administrative Services
- DCFS
- DPSS
- Eligibility Services
- Employment Services
- Family Services
- Social Services

Program *

- Disaster CalFresh
- Diversion
- Food Distribution
- Foster Care
- General Assistance (Managed)
- General Assistance (Non-Managed)
- General Assistance/General Relief
- General Assistance/General Relief (GR)
- GROW
- Homeless
- Homeless - Perm
- Homeless - Tempo
- IHSS/CMIPS II
- Immediate Need

Begin Date * Select date

End Date * Select date

Reset Generate Results

Figure 2.1.1 – Pending Caseload Report Mockup – Report Filters Sheet

CalSAWS Pending Caseload Report

Return to Selections Summary

Data Extracted Daily as of: 06/15/2021

County: Los Angeles

User: userid

Worker

Totals

| Worker ID | Total Pending | Total Denied | Total Approved | Net Total Approved |
|-----------|---------------|--------------|----------------|--------------------|
| Totals | 0 | 0 | 0 | 0 |

Pending Caseload Report

| Worker ID | Case Number | Progr... | App Date | Entry Date | Pendi... | Denied | Appro... | PR_La... | App Type | Type Reason | Pended Days | Elapsed Days | Qlik ID |
|-----------|-------------|----------|----------|------------|----------|--------|----------|----------|----------|-------------|-------------|--------------|---------|
| - | - | - | - | - | - | - | - | - | - | - | - | - | - |

Figure 2.1.2 – Pending Caseload Report Mockup – Detail Sheet

Figure 2.1.3 – Pending Caseload Report Mockup – Summary Sheet

*Note please refer to the Supporting Documents section more screenshots of the report.

2.1.3 Description of Change

1. Update the base population of the report to include data from the following programs:

| Program | Code Value | Program Code |
|-------------------------|--|--------------|
| GA/GR LA County | General Assistance/General Relief | GA |
| GA/GR Managed | General Assistance (Managed) | GM |
| GA/GR Non-Managed | General Assistance (Non-Managed) | GN |
| GA/GR Automated EDBC/CC | General Assistance/General Relief (GR) | GR |

Note: the code value is what will be displayed for the program column of the Detail Sheet.

2. Update the Program filter on the Report Filters sheet to include a value for "General Assistance/General Relief". Selecting this value will filter the report by applications for the following program types:

| Program | Program Code |
|-----------------|--------------|
| GA/GR LA County | GA |

| | |
|-------------------------|----|
| GA/GR Managed | GM |
| GA/GR Non-Managed | GN |
| GA/GR Automated EDBC/CC | GR |

Note: Although the report is picking up four distinct program codes for the various General Assistance/General Relief programs, the report will group the counts of these four program codes into one line item in the report displaying as “**General Assistance/General Relief**”.

3. Update 'Division' to 'Department' on the Report Filters sheet.
4. Update the Summary2 widget on the Summary sheet to include a row for “General Assistance/General Relief”. This row will count applications for the following program types:

| Program | Program Code |
|-------------------------|--------------|
| GA/GR LA County | GA |
| GA/GR Managed | GM |
| GA/GR Non-Managed | GN |
| GA/GR Automated EDBC/CC | GR |

Note: Although the report is picking up four distinct program codes for the various General Assistance/General Relief programs, the report will group the counts of these four program codes into one line item in the report displaying as “**General Assistance/General Relief**”.

2.1.4 Report Location

- **Global:** Reports
- **Local:** On-Request
- **Task:** Case Activity

2.1.5 Counties Impacted

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

2.1.6 Security Updates

N/A

2.1.7 Report Usage/Performance

The changes introduced by this SCR will have negligible impact on the report's performance.

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|--|--|
| 1 | Reports | Pending Caseload Report – Report Filters |  Pending Caseload Report Mockup - Repr |
| 2 | Reports | Pending Caseload Report – Detail Sheet |  Pending Caseload Report Mockup - Deta |
| 2 | Reports | Pending Caseload Report – Summary Sheet |  Pending Caseload Report Mockup - Sum |

4 REQUIREMENTS

4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|----------|---|--|
| 2.24.4.5 | The LRS shall include the ability to request and format selected LRS Data using parameter-driven ad hoc reporting capabilities. | This SCR updates the Pending Caseload Report to allow users to request and format GA/GR caseload data using parameter-driven ad hoc reporting. |

4.2 Migration Requirements

| DDID # | REQUIREMENT TEXT | Contractor Assumptions | How Requirement Met |
|--------|---|--|---|
| 1631 | <p>The CONTRACTOR shall set aside an allowance of nine thousand hours (9,000) to create new reports or update existing reports as part of Migration for the 58 Counties. These reports will be defined during the migration design effort.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As requirements for the new reports are identified, they will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the</p> | <p>- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>- For the revised or new reporting requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build</p> | This SCR updates the Pending Caseload Report to include the 58 county GA/GR programs. |

| | | | |
|--|--------------------------------------|-----------------------------|--|
| | County Change Control Board process. | and System Test milestones. | |
|--|--------------------------------------|-----------------------------|--|

5 MIGRATION IMPACTS

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

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-221563

EICT Updates for additional EHIT elements

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---------|---------------------------|---|
| | Prepared By | Jennifer Muna; Connor O'Donnell; Gerald Limbrick |
| | Reviewed By | Carlos Zepeda, Balakumar Murthy, William Baretzky, Michael Wu, Alexia England, Sivagami Nachiyappan, Himanshu Jain, Long Nguyen, Dana Petersen, Matthew Lower |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|----------|------------------|---|--|
| 5/3/2021 | 1.0 | Initial version | Jennifer Muna; Connor O'Donnell; Gerald Limbrick |
| 6/1/2021 | 2.0 | - Updated batch requirements for 'Sanctions' data element Regression test - Added Automated Regression test requirements | Jennifer Muna, William Baretzky |
| | | | |
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| | | | |
| | | | |
| | | | |

Table of Contents

| | | |
|-------|--|----|
| 1 | Overview | 5 |
| 1.1 | Current Design..... | 5 |
| 1.2 | Requests..... | 5 |
| 1.3 | Overview of Recommendations..... | 5 |
| 1.4 | Assumptions | 6 |
| 2 | Recommendations..... | 6 |
| 2.1 | ICT Detail..... | 6 |
| 2.1.1 | Overview | 6 |
| 2.1.2 | ICT Detail Mockups..... | 7 |
| 2.1.3 | Description of Changes | 7 |
| 2.1.4 | Page Location | 8 |
| 2.1.5 | Security Updates..... | 8 |
| 2.1.6 | Page Mapping..... | 8 |
| 2.1.7 | Page Usage/Data Volume Impacts | 8 |
| 2.2 | ICT External Person Detail | 8 |
| 2.2.1 | Overview | 8 |
| 2.2.2 | ICT External Person Detail Mockup..... | 9 |
| 2.2.3 | Description of Changes | 10 |
| 2.2.4 | Page Location | 11 |
| 2.2.5 | Security Updates..... | 11 |
| 2.2.6 | Page Mapping..... | 11 |
| 2.2.7 | Page Usage/Data Volume Impacts | 11 |
| 2.3 | Modify the EICT Inbound and Outbound Interface | 12 |
| 2.3.1 | Overview | 12 |
| 2.3.2 | Description of Change..... | 12 |
| 2.3.3 | Execution Frequency..... | 14 |
| 2.3.4 | Key Scheduling Dependencies | 14 |
| 2.3.5 | Counties Impacted | 14 |
| 2.3.6 | Data Volume/Performance..... | 14 |
| 2.3.7 | Failure Procedure/Operational Instructions..... | 14 |
| 2.4 | Batch Regression Test for Inbound and Outbound Interface | 14 |
| 2.4.1 | Overview | 14 |

| | | |
|-------|--------------------------------|----|
| 2.4.2 | Description of Change..... | 14 |
| 2.5 | Automated Regression Test..... | 15 |
| 2.5.1 | Overview | 15 |
| 2.5.2 | Description of Change..... | 15 |
| 3 | Requirements..... | 15 |
| 3.1 | Project Requirements..... | 15 |

1 OVERVIEW

The Electronic Inter County Transfer interface (EICT) allows county workers to electronically transmit an Inter County Transfer (ICT) of a case and its clients from one county to another regardless of which consortium the participant resides. CA-208889 was implemented to update the EICT interface and ICT External Person Detail page. The updates included new data elements to support new ABAWD policy and EHIT schema changes.

This SCR outlines the updates necessary, to the EICT interface, ICT Detail page, and ICT External Person Detail page, to include additional EHIT data elements and modify existing ICT data elements for ongoing determination of programs.

1.1 Current Design

The E-ICT interface transmits case information between CalSAWS, C-IV, and CalWIN counties. The case information is displayed in the ICT Detail and ICT External Person Detail page. CA-208889 did not include additional EHIT data elements required when transmitting case information.

On the ICT Detail page, the link to access the ICT External Person Detail page does not display for an Internal (within the same consortium) ICT. Currently in C-IV, the name hyperlink displays for an Internal ICT; C-IV County workers are used to accessing this link to see Person level information.

1.2 Requests

- Update the EICT interface to support the additional EHIT data elements.
- Update the ICT External Person Detail page to display the new EHIT data elements.
- Update the ICT Detail page to show the link for an Internal ICT when other existing requirements are met.

1.3 Overview of Recommendations

1. Reposition the 'Sending Comments' on the ICT Detail page.
2. Add a place on the ICT Detail page for the workers to add comments when canceling an ICT.
3. In CalSAWS, on the ICT Detail page, the link to access the ICT External Person Detail page, does not display for an Internal (within the same consortium) ICT. In C-IV, the link does show for an Internal ICT. C-IV County workers are used to accessing this link to see Person level information. Update the ICT Detail page to show the link for an Internal ICT when other existing requirements are met. Note that L.A. County is the only Internal County until other counties migrate to CalSAWS.
4. On the ICT External Person Detail page, add a Sanctions block to hold person level sanction information.
5. On the ICT External Person Detail page, add a field to hold the 'DHS Case Number'.

6. Update the Outbound and Inbound ICT interface to send and receive the additional EHIT data elements.
7. Map 'CIU' - Chronically Truant to Sanction reason codes.
8. Update the database table mapping for data elements 'HaveOrOfferedOtherHealthProg'.

1.4 Assumptions

1. CA-221329 will implement clean up on the MAGI Detail page and the ICT External Person Detail page. The duplicate 'Was in Foster Care' field will be removed from the Non-MAGI Referral block and will only display on the Individual Demographics block.

2 RECOMMENDATIONS

2.1 ICT Detail

2.1.1 Overview

Reposition the 'Sending Comments' on the ICT Detail page.

Add a place on the ICT Detail page for the workers to add comments when canceling an ICT.

Update the ICT Detail page to show the link for an Internal ICT when other existing requirements are met. Note that L.A. County is the only Internal County until other counties migrate to CalSAWS.

2.1.2 ICT Detail Mockups

ICT Detail

*- Indicates required fields

View Documents

Incomplete ICT

Cancel ICT

Close

Receiving County Information

ICT ID:

1936I400E73

County: *

San Bernardino

Case Number:

Sending County Information

Initiated Date:

01/12/2021

County:

Los Angeles

Case Number:

[I400E73](#)

Notification Date: *

01/12/2021

Sending Comments

Cancel Comments

Figure 2.1.2.1 - ICT Detail (Cancel Comments)

▼ All People Associated with the ICT

| Name | DOB | SSN | CIN | Requested | Known to System |
|--------------------------------|------------|-------------|-----------|-----------|-----------------|
| Test, Test 38E | 01/01/1983 | 123-45-6784 | 443593233 | No | Yes |

Figure 2.1.2.2 - Link to ICT External Person Detail page

2.1.3 Description of Changes

1. Move the Sending Comments block directly below the Sending County Information block.
2. Add a Cancel Comments block below the Sending Comments block
 - a. Insert a text input field into the Cancel Comments block. This field will contain comments that are saved upon the cancellation of the associated ICT

- b. Show this block only when an ICT has been canceled or when the 'Cancel ICT' button is showing
 - i. Show as static text for a canceled ICT
 - ii. Show as editable when the 'Cancel ICT' button is showing
 - c. Limit text entry to 256 characters
 3. Update the 'Name' column in the 'All People Associated with the ICT' table: Show the ICT External Person Detail page link for a CalSAWS Internal ICT when other existing requirements are met. Note that L.A. County is the only Internal County until other counties migrate to CalSAWS.

2.1.4 Page Location

- **Global: Case Info**
- **Local: E-Tools**
- **Task: Incoming ICT > click the ICT ID link**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping with new and updated fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 ICT External Person Detail

2.2.1 Overview

On the ICT External Person Detail page change the page title from "ICT External Person Detail" to "ICT Person Detail".

On the ICT External Person Detail page, add a Sanctions block to hold person level sanction information.

On the ICT External Person Detail page, add a 'DHS Case Number' field and an 'Immigration Eligibility' field to the ACA Information block.

On the ICT External Person Detail page, add a 'Third Party Liability' field to the 'Other Health Care' block and update the page logic to display all fields from the newest data structures.

2.2.2 ICT External Person Detail Mockup

ICT Person Detail

Close

Figure 2.2.2.1 - ICT External Person Detail (Page Name Change)

| Sanctions | | | | | |
|-----------|-----------------------|-------------------------------------|----------|------------|----------|
| Program | Type | Reason and Instance | Duration | Begin Date | End Date |
| CalWORKs | Child/Medical Support | Child/Medical Support Non Co-op - 0 | Month | 04/01/2021 | |

Figure 2.2.2.2 - ICT External Person Detail (Sanction)

ACA Information

Primary Contact:
Yes

CalHEERS Person Begin Date: **Person Death Date:**

Case Person Begin Date: **Case Person End Date:**

DHS Case Number: 2019042113624RU **Immigration Eligibility:**
Pending withholding with Empl.Auth., or under 14yo and pending for 180 days

| Applying for Health Coverage | Begin Date | End Date |
|------------------------------|------------|----------|
| | | |

Figure 2.2.2.3- ICT External Person Detail (ACA Information)

| Other Health Care | | |
|--|--|--|
| Enrolled: | Current or Offered Health Program: | |
| Employer Sponsored Insurance Premium: | ESI Premium Frequency: | Offered ESI: No |
| Minimum Standard Value: | Expected Changes To Current Coverage: | Term Date Of Current Or Offered Coverage: |
| Received Medicare Benefits: | Employer Name: | |
| Free Medicare Part A: | Affordability Standards: No | Third Party Liability: Yes |

Figure 2.2.2.4– ICT External Person Detail (Other Health Care)

2.2.3 Description of Changes

1. Change the title of the page from "ICT External Person Detail" to "ICT Person Detail".
2. Add a collapsible Sanctions block below the Time Limits block and above the SFIS block.
 - a. Add a sub-table to the Sanctions block, populate the table from the Person's sanction information received from the eICT interface; add the following column headers:
 - i. Program: Format this field as shown on the Eligibility Non-Compliance List page
 - ii. Type: Format this field as shown on the Eligibility Non-Compliance List page
 - iii. Reason and Instance: Format this field as shown on the Eligibility Non-Compliance List page
 - iv. Duration: Format this field as {Duration_Amount} + " " + {Duration_Unit} e.g. "95 Day" or "0 Month"
 - v. Begin Date: Format this field as shown on the Eligibility Non-Compliance List page
 - vi. End Date: Format this field as shown on the Eligibility Non-Compliance List page
 - b. Default this block as collapsed if no sanctions information exists
3. Add a 'DHS Case Number' field to the ACA Information block: This field will hold the newest DHS Case Number regardless of status, as shown on the VLP Case History page.
4. Add an 'Immigration Eligibility' field to the ACA Information block: This field will hold the decoded Immigration Eligibility value received on the DER (Determination of Eligibility Response), as shown on the MAGI Determination Detail page.
5. Update the 'Other Health Care' block of fields:
 - a. Add a 'Third Party Liability' field: Format this field as shown on the MAGI Person Detail page

- b. Update all fields to retrieve and display from the newest data structures received from CalHEERS, i.e., the CH_OHC_TYPE table
6. Update the 'Projected Annual Amount' field to show the amount as shown on the Magi Person Detail page.

2.2.4 Page Location

- **Global: Case Info**
- **Local: E-Tools**
- **Task: Incoming ICT > click the ICT ID link**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update page mapping with new and updated fields.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Modify the EICT Inbound and Outbound Interface

2.3.1 Overview

The Inbound and Outbound E-ICT interface is a nightly batch job that processes Inter-County file transfers from one county to another without impacting a recipient's benefits. The E-ICT interface will be updated to support the following EHIT data elements that were not included in EICT phase III (CA-208889 | CIV-104321):

- Comments entered when an ICT is Cancelled.
- Indicator for if a person is involved in a third-party lawsuit due to injury or accident.
- DHS Case Number for a Verification of Lawful Presence case.
- Immigration Eligibility Value used to determine MAGI Medi-Cal eligibility.

2.3.2 Description of Change

1. Update the EICT Outbound and Inbound Interface to do the following:
 - a. Accept, store, and send Cancel comments when an ICT is Cancelled. Cancel comments will use existing character set as used for Sending Comments.

| Data Item # | XSD Node | Data Item Name | Tag Name | Format | Length | Description |
|-------------|---------------|-----------------|----------------|--------|--------|--|
| 4 | Cancellations | Cancel Comments | CancelComments | String | 256 | Comments on the Case being Cancelled to help the receiving county workers. Free Form text which will be entered by worker. |

- b. Accept, store, and send the value for data element 'ThirdPartyLiabilityInd'.

This element is received in the Determination Eligibility Response (DER) from CalHEERS. However, CalSAWS will not send the 'ThirdPartyLiabilityInd' in the Eligibility Determination Request (EDR) to CalHEERS.

| Data Item # | XSD Node | Data Item Name | Tag Name | Format | Length | Description |
|-------------|------------------------|-------------------------|------------------------|--------|--------|---|
| 40.4 | Person > Person Occurs | ThirdPartyLiability Ind | ThirdPartyLiabilityInd | String | 1 | Indicates that the person is involved in a third-party lawsuit because of an injury or accident |

- c. Accept, store, and send the most recent open DHS Case Number, or the most recently closed DHS Case Number if all are closed.

Note: There can only be one open DHS Case Number per person at a time, but a person may have multiple DHS Case Numbers, and all can be closed.

| Data Item # | XSD Node | Data Item Name | Tag Name | Format | Length | Description |
|-------------|---|----------------|---------------|--------|--------|--|
| 283.1 | Program Person > Program Person Occurs > Exchange Eligibilities | DHSCaseNumber | DHSCaseNumber | String | 15 | Unique Case verification number assigned by DHS to a VLP query |

- d. Accept, store, and send value for data element 'ImmigrationEligibilityValue'. Data element value derived from CT10519.

This element is received in the Determination Eligibility Response (DER) from CalHEERS and shown on the MAGI Determination Detail page. CalSAWS does not send the 'ImmigrationEligibilityValue' in the Eligibility Determination Request (EDR) to CalHEERS.

| Data Item # | XSD Node | Data Item Name | Tag Name | Format | Length | Description |
|-------------|---|-------------------------------|-----------------------------|--------|--------|---|
| 283.2 | Program Person > Program Person Occurs > Exchange Eligibilities | Immigration Eligibility Value | ImmigrationEligibilityValue | String | 2 | The immigration value used to determine eligibility for MAGI Medi-Cal |

2. Update database table mapping to store and retrieve value for data element 'HaveOrOfferedOtherHealthProg' from the CH_OHC_TYPE table.
3. Map Sanction Reason Code Type 'CIU' to the following Noncompliance Reason codes (CT365):
 - a. Cash – Chronic Truant
 - b. WTW – Chronic Truant

2.3.3 Execution Frequency

No changes. EICT Outbound and Inbound interface runs daily during System business days (Monday – Saturday) excluding Sunday and Holidays.

2.3.4 Key Scheduling Dependencies

No changes.

2.3.5 Counties Impacted

All counties

2.3.6 Data Volume/Performance

No change

2.3.7 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...)

2.4 Batch Regression Test for Inbound and Outbound Interface

2.4.1 Overview

CalSAWS EICT Inbound and Outbound interface has existing logic to process and send 'Sanctions' data element information. CalSAWS will be able to display a participant's Sanctions information in the Sanctions block on the ICT Person Detail page (See section 2.3.2). This section outlines the necessary Batch regression testing efforts to send and receive the 'Sanctions' data elements through the EICT interface.

2.4.2 Description of Change

1. Perform Regression test for both Inbound and Outbound eICT interface to process the 'Sanctions' data elements through the interface. Below are the elements associated to the Sanctions node:
 - a. Program – Program for which the Sanction is applied
 - b. Type – Type of Sanction
 - c. Reason – Reason for Sanction
 - d. Occurrence – Number of times sanctioned

- e. Duration – Time of duration
- f. StartDate – Sanction start date
- a. EndDate – Sanction end date

2.5 Automated Regression Test

2.5.1 Overview

Update existing automated regression test scripts and mappings to account for the page layout changes.

Note: No new scripts will be developed to verify the new data elements at this time.

2.5.2 Description of Change

Update the existing test scripts and data field mappings to account for the HTML structure/layout changes to the ICT Detail and ICT Person Detail pages.

Note: The expected impact is 2 mapping files and less than 17 automated scripts.

3 REQUIREMENTS

3.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|-----------|---|---|
| 2.20.1.18 | The LRS shall include in the design methods where interfaces to the LRS are simple to make additions, deletions, and modifications for the import and export of data. | Add the new fields to the ICT online pages and new elements to the EICT Interface file. |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-224097

Enhancements to CF 18

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

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------|-------------------------|--------------------------------------|------------------------|
| 02/22/2021 | 1.0 | Initial Version | Esequiel Herrera-Ortiz |
| 06/03/2021 | 1.1 | Updated design per consortium input. | Esequiel Herrera-Ortiz |
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Table of Contents

| | | |
|---|---|----|
| 1 | Overview | 4 |
| | 1.1 Current Design..... | 5 |
| | 1.2 Requests..... | 6 |
| | 1.3 Overview of Recommendations..... | 6 |
| | 1.4 Assumptions | 7 |
| 2 | Recommendations..... | 8 |
| | 2.1 CF 18..... | 8 |
| | 2.1.1 Overview | 8 |
| | 2.1.2 CF 18 Mockup..... | 8 |
| | 2.1.3 Description of Change..... | 10 |
| | 2.1.4 Report Location | 26 |
| | 2.1.5 Counties Impacted | 26 |
| | 2.1.6 Security Updates..... | 27 |
| | 2.1.7 Report Usage/Performance | 27 |
| 3 | Supporting Documents | 28 |
| 4 | Requirements..... | 29 |
| | 4.1 Project Requirements..... | 29 |
| | 4.2 Migration Requirements..... | 29 |
| 5 | Migration Impacts | 30 |
| 6 | Outreach..... | 31 |
| 7 | Appendix..... | 32 |
| | 7.1 Churn Measurement 1 Customer Report Selection | 32 |
| | 7.2 CF 18 Schedule and Cohort Month Examples..... | 33 |
| | 7.3 Examples for Line 20:..... | 34 |

1 OVERVIEW

The CF 18 is a monthly scheduled report which counties submit to the California Department of Social Services (CDSS). The purpose of this report is to identify outcomes and trends for CalFresh/California Food Assistance Program (CFAP) caseload “churn”. Caseload churn occurs when an eligible household unexpectedly loses CalFresh benefits, usually because of missed reporting requirements, only to re-enroll shortly thereafter. This report looks at these outcomes as they relate to the two key reporting events for CalFresh cases: the SAR-7 and the Redetermination/Recertification/Reapplication (RRR). Outcomes are measured in three measures:

Note that each measurement is based on an independent reporting month. We refer to this as the Cohort Month for the measurement. Please see Appendix 7.2 for more information.

Churn Measurement 1:

Reports the share of CalFresh/CFAP households who are due to submit a SAR 7/ RRR during the cohort month for eligibility re-determination. The measurement then goes into whether the household experienced an interruption in benefits and for those that had an interruption of benefit whether the household returned to the program within four full calendar months.

Cohort Month = Submission Month – 5 full Calendar Months

Churn Measurement 2:

Reports the share of CalFresh/CFAP households who submit a program application and is processed during the Cohort Month. The measurement then goes into whether the households was active in the 4 months prior to the cohort month, whether the household had a SAR 7/ RRR scheduled for submission within those 4 months prior to the cohort month and the resulting status of the processed application.

Cohort Month = Submission Month – 1 Month.

Average Days to Process (ADP):

Reports the average days to process of all the CalFresh applications which were ‘Approved’ during the cohort month. The counts are split between those applications which were processed with expedited service and those processed with non-expedited service.

Cohort Month = Submission Month – 1 Month

The report was implemented with **CA-201836 CIV-100878 Implement CalFresh Churn Monthly Caseload Report (CF 18)** in the 21.01 release. Since then, code analysis was done as well as additional clarification has been provided by CDSS which needs to be incorporated to more accurately report CalFresh churn information.

1.1 Current Design

Churn Measurement 1

1. The report is dropping legitimate cases due to excluding SAR 7s and RRRs whose latest status is set to 'Not Applicable'. A customer report's status can be set to 'Not Applicable' after having been set to 'Complete – EDBC Accepted' status and the RE due month advanced.
2. When determining if a SAR 7 or RRR is Timely, Untimely or Late the report is only looking at the latest customer report status of 'Received'. A customer report can be completed without having a 'Received' status in CalSAWS.
3. When evaluating for RRRs the report checks that the program has an RE with a due month equal to the Data Cohort Month. This can cause legitimate records to be dropped. For example, when a worker manually generates an RRR or SAR 7, they can manually select the due date. The packet will not be associated to a Redetermination record which can be found on the Program Re-Evaluation History section of the CalFresh History page.
4. Logic was added to the report to perform a real-time calculation for the SAR Due Month. This is erroneous calculations because the due month is stored on the customer report as a due date.
5. Duplicates are being reported due to cases having multiple customer reports which are due in the cohort month.
6. The report logic is considering a SAR 7 or RRR processed if the associated customer report packet has a status of 'Complete – EDBC Accepted'. This is an unnecessary check as the associated EDBC record can be evaluated instead.
7. Lines 9-16 include duplicates when a case has multiple new program applications.
8. Lines 3, 5 and 8 did not include a condition to exclude households which submitted a new application, and the application was approved or denied following the cohort month. This is needed to avoid duplicates with Lines 9-16 and meet the definition of untimely and late provided in ACL 17-118E.

Churn Measurement #2

1. The report is dropping legitimate cases due to excluding SAR 7 and RRRs whose latest status is set to 'Not Applicable'. A customer report's status can be set to 'Not Applicable' after having been set to 'Complete – EDBC Accepted' status and the RE due month advanced.

2. Duplicates are being reported due to households having multiple customer reports processed in a single month.
3. Duplicates are being reported due to households having multiple program applications processed in a single month.
4. Logic was added to the report to perform a real-time calculation for the SAR Due Month. This is erroneous calculations because the due month is stored on the customer report as a due month.
5. When evaluating for RRRs the report checks that the program has a RE with a due month equal to the Data Cohort Month. For example, when a worker manually generates an RRR or SAR 7, they can manually select the due date. The packet will not be associated to a Redetermination record which can be found on the Program Re-Evaluation History section of the CalFresh History page.

1.2 Requests

Update the CF 18 to incorporate clarification provided by CDSS to more accurately report CalFresh churn information.

1.3 Overview of Recommendations

Churn Measurement 1

1. Update the report logic to associate only a single Customer Report per household for the given cohort month.
2. Update the report logic to define the SAR 7 or RRR's Received Date as the earliest date the SAR 7 or RRR was 'Received', 'Reviewed- Ready to Run EDBC' or 'Complete- EDBC Accepted' which is not preceded by an 'Incomplete' status or immediately follows the latest incomplete status. The 'Customer Report - Received' date column on the detail sheet will reflect this change.
3. Remove the requirement that an RRR must have an associated Redetermination record.
4. Update the report logic to no longer do a real time calculation for the SAR 7 due month.
5. Update the report logic to look at the EDBC record rather than the customer report status of 'Complete- EDBC Accepted' when determining if a SAR 7 or RRR is processed. The 'Customer Report – Completed Date' column on the detail sheet will be renamed to 'Completed Date' and will reflect the new completion date.
6. Update the report logic for households which did not renew to only look at the latest program application which was disposed.

Churn Measurement 2

1. Update the logic to associate only a single Customer Report per household for the reporting period.
2. Update report logic to no longer do a real time calculation for the SAR 7 due month.
3. Update report logic to only look at latest program application that was processed for a household in cohort month.

1.4 Assumptions

1. Average Days to Process (ADP) is reporting accurately and does not require any modification.
2. When evaluating for CF type statuses which signify the customer report has been received, any status preceded by an Incomplete is ignored. The assumption is that additional information is required from the client and cannot be processed as is.
3. Line 23 has the same conditions as Line 20 with the exception that Line 20 includes the condition that a household must have a restoration of aid waiver which established eligibility. Since a household can only be reported once on lines 17, 18, and 19-28 then all households which meet these conditions will be report on Line 23 and Line 20 will be reporting a 0.

2 RECOMMENDATIONS

2.1 CF 18

2.1.1 Overview

The following section describes the updates to the CF 18's Churn Measurement 1 and Churn Measurement 2 to improve the reporting of CalFresh churn.

2.1.2 CF 18 Mockup

| STATE OF CALIFORNIA HEALTH AND HUMAN SERVICES AGENCY | | CALIFORNIA DEPARTMENT OF SOCIAL SERVICES DATA SYSTEMS AND SURVEY DESIGN BUREAU | |
|--|---------|---|-------------|
| CalFresh Churn Monthly Caseload Report CF 18 | | | |
| DOWNLOAD REPORT FORM FROM: https://www.cdss.ca.gov/inforesources/Research-and-Data/Report-Form-and-Instructions | | | |
| EMAIL US FOR QUESTIONS ABOUT THE FORM OR INSTRUCTIONS: | | | |
| EMAIL US FOR TECHNICAL SUPPORT QUESTIONS: | | | |
| COUNTY NAME | VERSION | SUBMISSION MONTH | REPORT YEAR |
| Butte | | October | 2019 |
| <i>Churn Measurement #1: The share of CalFresh/California Food Assistance Program (CFAP) households who are due to have their eligibility re-determined in a given month who experience an interruption in benefits, but return to the program within four full calendar months following the Data Cohort Month.</i> | | | |
| All SAR 7s & RRRs | | SAR 7 | RRR |
| 1. The total number of CalFresh and CFAP households scheduled for SAR 7 & RRR submission within the Data Cohort Month | | 1 13 | 2 8 |
| Timely SAR 7s & RRRs | | SAR 7 | RRR |
| 2. The total number of timely SAR 7s & RRRs received from households within the Data Cohort Month that were disposed and subsequently deemed eligible | | 3 2 | 4 2 |
| 3. The total number of timely SAR 7s & RRRs received from households within the Data Cohort Month that were | | 5 | 6 |
| Late SAR 7s & RRRs | | SAR 7 | RRR |
| 6. The total number of late SAR 7s & RRRs received from households within the First Month Following Data Cohort Month that were disposed and deemed eligible and experienced either no loss or loss of benefits | | 11 2 | 12 0 |
| a. The total number of late SAR 7s & RRRs received from households within the First Month Following Data Cohort Month that were disposed, deemed eligible and experienced no loss of benefits. | | 13 1 | 14 0 |
| b. The total number of late SAR 7s & RRRs received from households within the First Month Following Data Cohort Month that were disposed, deemed eligible and experienced a loss of benefits. (This includes prorated applications) | | 15 1 | 16 0 |
| 7. The average number of days where benefits were lost due to late SAR 7 & RRR submission and the household experienced a loss of benefits within the First Month Following Data Cohort Month | | 17 18 | 18 0 |
| 8. The total number of late SAR 7s & RRRs received from households within the First Month Following Data Cohort Month that were disposed and subsequently deemed ineligible | | 19 0 | 20 1 |
| SAR 7s & RRRs Not Renewed | | SAR 7 | RRR |
| 9. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the First Month Following Data Cohort Month were disposed and subsequently deemed eligible for benefits | | 21 1 | 22 0 |
| 10. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the First Month Following Data Cohort Month were disposed and subsequently deemed ineligible (include withdrawals) for benefits | | 23 1 | 24 0 |
| 11. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Second Month Following Data Cohort Month were disposed and subsequently deemed eligible for benefits | | 25 0 | 26 1 |
| 12. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Second Month Following Data Cohort Month were disposed and subsequently deemed ineligible (include withdrawals) for benefits | | 27 1 | 28 0 |
| 13. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Third Month Following Data Cohort Month were disposed and subsequently deemed eligible for benefits | | 29 0 | 30 1 |
| 14. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Third Month Following Data Cohort Month were disposed and subsequently deemed ineligible (include withdrawals) for benefits | | 31 1 | 32 0 |
| 15. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Fourth Month Following Data Cohort Month were disposed and subsequently deemed eligible for benefits | | 33 1 | 34 0 |
| 16. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Fourth Month Following Data Cohort Month were disposed and subsequently deemed ineligible (include withdrawals) for benefits | | 35 0 | 36 0 |

| Churn Measurement #2: The share of applications from households that participated CalFresh/CFAP in the recent past. | | | |
|---|-----------|--------------|----------------|
| All CalFresh applications disposed of during the Data Cohort Month | | | |
| 17. The total number of CalFresh and CFAP applications disposed of during the Data Cohort Month | 37 | 17 | |
| 18. The total number of CalFresh and CFAP applications disposed of during the Data Cohort Month from a household who participated in CalFresh/CFAP within the prior four full calendar months | 38 | 16 | |
| Total applications from households with a recent (Within the Prior Four Full Calendar Months) SAR 7 or RRR | | | |
| | | SAR 7 | RRR |
| 19. The total number of CalFresh and CFAP applications disposed of during the Data Cohort Month from a household who had a SAR 7 or RRR due within the prior four full calendar months | 39 | 8 | 7 |
| Denied Applications with recent SAR7 or RRR-related restoration | | | |
| | | SAR 7 | RRR |
| 20. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was restored in the First month Prior to Data Cohort Month | 41 | 0 | 1 |
| Applications with recent SAR 7 or RRR correlated discontinuation (First Month Prior to Data Cohort Month) | | | |
| | | SAR 7 | RRR |
| 21. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the First Month Prior to Data Cohort Month | 43 | 1 | 0 |
| 22. The total number of approved CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the First Month Prior to Data Cohort Month | 45 | 1 | 1 |
| Applications with recent SAR 7 or RRR correlated discontinuation (Second Month Prior to Data Cohort Month) | | | |
| | | SAR 7 | RRR |
| 23. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Second Month Prior to Data Cohort Month | 47 | 1 | 1 |
| 24. The total number of approved CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Second Month Prior to Data Cohort Month | 49 | 0 | 1 |
| Applications with recent SAR 7 or RRR correlated discontinuation (Third Month Prior to Data Cohort Month) | | | |
| | | SAR 7 | RRR |
| 25. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Third Month Prior to Data Cohort Month | 51 | 2 | 0 |
| 26. The total number of approved CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Third Month Prior to Data Cohort Month | 53 | 0 | 1 |
| Applications with recent SAR 7 or RRR correlated discontinuation (Fourth Month Prior to Data Cohort Month) | | | |
| | | SAR 7 | RRR |
| 27. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Fourth Month Prior to Data Cohort Month | 55 | 1 | 1 |
| 28. The total number of approved CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Fourth Month Prior to Data Cohort Month | 57 | 2 | 1 |
| Average Days to Process (ADP) | | | |
| Initial Applications with Expedited Service | | | |
| 29. The average number of days to approval of initial CalFresh and CFAP applications with expedited service from the date of application or date of discovery, if applicable | 59 | | 4 |
| 30. The total number of initial applications with expedited service approved within one to three days | 60 | | 1 |
| 31. The total number of initial applications with expedited service approved within four to seven days | 61 | | 1 |
| 32. The total number of initial applications with expedited service approved after seven days | 62 | | 1 |
| Initial Applications with Non-Expedited Service | | | |
| 33. The average number of days to approval of initial CalFresh and CFAP applications with non-expedited service from the date of application | 63 | | 9 |
| 34. The total number of initial applications with non-expedited service approved within one to seven days | 64 | | 1 |
| 35. The total number of initial applications with non-expedited service approved within eight to fifteen days | 65 | | 1 |
| 36. The total number of initial applications with non-expedited service approved within sixteen to twenty-two days | 66 | | 1 |
| 37. The total number of initial applications with non-expedited service approved within twenty-three to thirty days | 67 | | 0 |
| 38. The total number of initial applications with non-expedited service approved over thirty days | 68 | | 0 |
| COMMENTS | | | |
| General Comments | | | |
| Revised Report Explanation (Complete if Revised is selected. If initial is selected this box remains blank) | | | |
| | | | |
| CONTACT PERSON | TELEPHONE | EXTENSION | |
| JOB TITLE/CLASSIFICATION | E-MAIL | | |
| | | | |
| SUPERVISOR | TELEPHONE | EXTENSION | |
| JOB TITLE/CLASSIFICATION | E-MAIL | | |
| | | | |
| | | | DATE SUBMITTED |
| | | | |

2.1.3 Description of Change

1. **Churn Measurement 1 Base Population:** Redefine the base population for Churn Measurement 1 as follows:

- Program is CalFresh

| Code-18 | Short Name |
|---------|------------|
| FS | CalFresh |

- Program Status is one of the following as of the first day of the Data Cohort Month.

| Code-72 | Short Name |
|---------|------------|
| AC | Active |
| IN | Ineligible |

Note: Program status historic information is evaluated to determine what the status was as of the first day of the Data Cohort Month.

- The CalFresh program has a SAR 7 or RRR with a Due Month equal to the Data Cohort Month. The following table defines Customer Reports as a SAR 7 or RRR:

| Code-329 | Short Name | Reporting Category |
|----------|-----------------|--------------------|
| S7 | SAR 7 | SAR 7 |
| CF | CF RE Packet | RRR |
| CWF | CW/CF RE Packet | RRR |

*Note a SAR 7 and CW/CF RE Packets can relate to the CalWORKs and CalFresh program. This report only evaluates the CalFresh portion of the customer report and ignores the CalWORKs portion.

- The SAR 7 or RRR was generated or sent:

| Code - 258 | Short Name |
|------------|------------|
| GE | Generated |

| | |
|----|------|
| SE | Sent |
|----|------|

Note: In CalSAWS a packet can be sent without having a generated status. For this reason, the generated or sent status is evaluated to determine the household was scheduled for SAR/RRR submission during the cohort month.

- The base population consists of distinct households. If a single household has multiple SAR 7(s) or RRR(s) due in the cohort month then the following logic is applied:
 - An RRR takes precedence over a SAR 7.
 - If two packets of the same reporting type (multiple SAR 7s or multiple RRRs) exist, then the packet with the earliest status of 'Received', 'Reviewed- Ready to Run EDBC' or 'Complete- EDBC Accepted' which is not preceded by an 'Incomplete' status or immediately follows the latest incomplete status will be used.

| Code - 258 | CF RE Packet |
|------------|-----------------------------|
| RE | Received |
| RR | Reviewed- Ready to Run EDBC |
| CE | Complete- EDBC Accepted |

Note: An incomplete status signifies the packet is missing information and cannot be processed as is.

- The earliest customer report CREATED_ON date will be used to account for any remaining duplicates.
Note the CREATED_ON date is not displayed on the online page. This is data stored only in the database which signifies when the record was created in the database.

Please see Appendix 7.1 For examples.

2. Churn Measurement #1 – State Report - Line-Item Definitions:

The State form provides several Line items. The following table defines the criteria that is applied to the base population to determine which line to report an entry.

Note

- The Customer Report received date is the earliest date a customer report was 'Received', 'Reviewed- Ready to Run EDBC' or 'Complete- EDBC Accepted' that is not preceded by an 'Incomplete' status or immediately follows the latest incomplete status.
- Most lines are split into a SAR 7 and an RRR field.

- The base population is distinct so a household should only be reported as a SAR 7 or an RRR.

| Churn Measurement #1: The share of CalFresh/California Food Assistance Program (CFAP) households who are due to have their eligibility re-determined in a given month who experience an interruption in benefits, but return to the program within four full calendar months following the Data Cohort Month. | |
|--|--|
| All SAR 7s & RRRs | |
| Line 1. The total number of CalFresh and CFAP households scheduled for SAR 7 & RRR submission within the Data Cohort Month | |
| SAR 7 – From the base population <ul style="list-style-type: none"> • Total number of households scheduled to submit a SAR 7. | RRR - From the base population <ul style="list-style-type: none"> • Total number of households scheduled to submit an RRR. |
| Timely SAR 7s & RRRs | |
| Line 2. The total number of timely SAR 7s & RRRs received from households within the Data Cohort Month that were disposed and subsequently deemed eligible | |
| SAR 7 – From the base population <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The SAR 7 received date is on or before the 10th day of the Data Cohort Month. • The latest EDBC that was ran in the reporting period to complete the SAR 7 established an ‘Active’ or ‘Ineligible’ program status effective for the month immediately following the Data Cohort Month. • The EDBC is not prorated. Prorated determinations signify a count on Line 6b. | RRR - From the base population. <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The RRR received date is on or before the 15th day of the Data Cohort Month. • The latest EDBC that was ran in the reporting period to complete the RRR established an ‘Active’ or ‘Ineligible’ program status effective for the month immediately following the Data Cohort Month. • The EDBC is not prorated. Prorated determinations signify a count on Line 6b. |
| Line 3. The total number of timely SAR 7s & RRRs received from households within the Data Cohort Month that were disposed and subsequently deemed ineligible | |
| SAR 7 – From the base population <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The SAR 7 received date is on or before the 10th day of the Data Cohort Month. • The latest EDBC that was ran in the reporting period to complete the | RRR - From the base population. <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The RRR received date is on or before the 15th day of the Data Cohort Month. • The latest EDBC that was ran in the reporting period to complete the |

| | |
|---|---|
| <p>SAR 7 established a 'Denied' or 'Discontinued' program status effective for the month immediately following the Data Cohort Month.</p> <ul style="list-style-type: none"> • The EDBC is not prorated. Prorated determinations signify a count on Line 6b. • A program application was not created and processed in the months following the Data Cohort Month during the reporting period that was disposed. | <p>RRR established a 'Denied' or 'Discontinued' program status effective for the month immediately following the Data Cohort Month.</p> <ul style="list-style-type: none"> • The EDBC is not prorated. Prorated determinations signify a count on Line 6b. • A program application was not created and processed in the months following the Data Cohort Month during the reporting period that was disposed. |
|---|---|

Untimely SAR 7s & RRRs

Line 4. The total number of untimely SAR 7s & RRRs received from households within the Data Cohort Month that were disposed and subsequently deemed eligible with no loss of benefits.

| | |
|---|---|
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The SAR 7 received date is between the 11th day and the last day of the Data Cohort Month (inclusive). • The latest EDBC that was ran in the reporting period to complete the SAR 7 established an 'Active' or 'Ineligible' program status effective for the month immediately following the Data Cohort Month. • The EDBC is not prorated. Prorated determinations signify a count on Line 6b. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The RRR received date is between the 16th day and the last day of the Data Cohort Month (inclusive). • The latest EDBC that was ran in the reporting period to complete the RRR established an 'Active' or 'Ineligible' program status effective for the month immediately following the Data Cohort Month. • The EDBC is not prorated. Prorated determinations signify a count on Line 6b. |
|---|---|

Line 5. The total number of untimely SAR 7s & RRRs received from households within the Data Cohort Month that were disposed and subsequently deemed ineligible.

| | |
|--|---|
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The SAR 7 received date is between the 11th day and the last day of the Data Cohort Month (inclusive). • The latest EDBC that was ran in the reporting period to complete the SAR 7 established a 'Denied' or | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The RRR received date is between the 16th day and the last day of the Data Cohort Month (inclusive). • The latest EDBC that was ran in the reporting period to complete the RRR established a 'Denied' or 'Discontinued' program status |
|--|---|

| | |
|--|--|
| <p>'Discontinued' program status effective for the month immediately following the Data Cohort Month.</p> <ul style="list-style-type: none"> The EDBC is not prorated. Prorated determinations signify a count on Line 6b. A program application was not created and processed in the months following the Data Cohort Month during the reporting period. | <p>effective for the month immediately following the Data Cohort Month.</p> <ul style="list-style-type: none"> The EDBC is not prorated. Prorated determinations signify a count on Line 6b. A program application was not created and processed in the months following the Data Cohort Month during the reporting period. |
| <p>Late SAR 7s & RRRs</p> | |
| <p>Line 6. The total number of late SAR 7s & RRRs received from households within the First Month Following Data Cohort Month that were disposed and deemed eligible and experienced either no loss or loss of benefits.</p> <ul style="list-style-type: none"> This line is the sum of Lines 6a and 6b. Reference the specific criteria of each line below. | |
| <p>Line 6a. The total number of late SAR7s & RRRs received from households within the First Month Following Data Cohort Month that were disposed, deemed eligible and experienced no loss of benefits.</p> | |
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> The household is scheduled to submit a SAR 7. The SAR 7 received date is within the first month following the Data Cohort Month. The latest EDBC that was ran in the reporting period to complete the SAR 7 established an 'Active' or 'Ineligible' program status effective for the month immediately following the Data Cohort Month. The EDBC is not prorated. Prorated determinations signify a count on Line 6b. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> The household is scheduled to submit an RRR. The RRR received date is within the first month following the Data Cohort Month. The latest EDBC that was ran in the reporting period to complete the RRR established an 'Active' or 'Ineligible' program status effective for the month immediately following the Data Cohort Month. The EDBC is not prorated. Prorated determinations signify a count on Line 6b. |
| <p>Line 6b. The total number of late SAR7s & RRRs received from households within the First Month Following Data Cohort Month that were disposed, deemed eligible and experienced a loss of benefits. (This includes prorated applications)</p> | |
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> The household is scheduled to submit a SAR 7. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> The household is scheduled to submit an RRR. The RRR received date is within the first month following the Data Cohort Month. |

| | |
|---|--|
| <ul style="list-style-type: none"> • The SAR 7 received date is within the first month following the Data Cohort Month. • The latest EDBC that was ran in the reporting period to complete the SAR 7 established an 'Active' or 'Ineligible' program status effective for the month immediately following the Data Cohort Month. • The EDBC is prorated. | <ul style="list-style-type: none"> • The latest EDBC that was ran in the reporting period to complete the RRR established an 'Active' or 'Ineligible' program status effective for the month immediately following the Data Cohort Month. • The EDBC is prorated. |
|---|--|

Line 7. The average number of days where benefits were lost due to late SAR 7 & RRR submission and the household experienced a loss of benefits within the First Month Following Data Cohort Month.

- For each program counted in Line 6b that experienced a loss in benefits, determine the length (in days) that a household lost benefits by calculating the difference of total days in the benefit month and the prorated days determined by the latest EDBC that was run to complete the SAR 7 or RRR.

For example: A household is due to submit a SAR 7 in February of 2019. The household does not return the SAR 7 and is Discontinued effective for March 1st. The household returns the SAR 7 late on March 8th and an EDBC is run to reestablish prorated benefits for the remaining 24 days in March. The number of days the household experienced a loss in benefits is:

$$\begin{aligned} \text{Days in March} - \text{Prorated days in March} &= \text{Days of benefits lost} \\ 31 - 24 &= 7 \text{ days.} \end{aligned}$$

- Round to the nearest whole number.
- To obtain the average, sum the total number of days together for every household counted in Line 6b and divide by the number of households counted in Line 6b.

Line 8. The total number of late SAR 7s & RRRs received from households within the First Month Following Data Cohort Month that were disposed and subsequently deemed ineligible.

| | |
|--|--|
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The SAR 7 received date is within the first month following the Data Cohort Month. • The latest EDBC that was ran in the reporting period to complete the SAR 7 established a 'Denied' or 'Discontinued' program status effective for the month immediately following the Data Cohort Month. • The EDBC is not prorated. Prorated determinations signify a count on Line 6b. • A program application was not created and processed in the months following the Data Cohort Month during the reporting period. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The RRR received date is within the first month following the Data Cohort Month. • The latest EDBC that was ran in the reporting period to complete the RRR established a 'Denied' or 'Discontinued' program status effective for the month immediately following the Data Cohort Month. • The EDBC is not prorated. Prorated determinations signify a count on Line 6b. • A program application was not created and processed in the months following the Data Cohort Month during the reporting period. |
|--|--|

SAR 7s & RRRs Not Renewed

Line 9. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the First Month Following Data Cohort Month were disposed and subsequently deemed eligible for benefits.

| | |
|--|--|
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The first program Application created during the report period has an application date within the first month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) • The program application is not an ICT. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The first program Application created during the report period has an application date within the first month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) • The program application is not an ICT. |
|--|--|

Line 10. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the First Month Following Data Cohort Month were disposed and subsequently deemed ineligible (include withdraws) for benefits.

| | |
|--|---|
| <p>SAR 7 – From the base population</p> | <p>RRR - From the base population.</p> |
|--|---|

| | |
|---|---|
| <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The first program Application created during the report period has an application date within the first month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ◦ Denied • The program application is not an ICT. | <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The first program Application created during the report period has an application date within the first month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ◦ Denied • The program application is not an ICT. |
| <p>Line 11. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Second Month Following Data Cohort Month were disposed and subsequently deemed eligible (include withdraws) for benefits.</p> | |
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The first program Application created in the reporting period after the break in aid has an application date within the second month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ◦ Approved ◦ Rescind Approved (Denial) • The program application is not an ICT. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The first program Application created during the report period has an application date within the second month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ◦ Approved ◦ Rescind Approved (Denial) • The program application is not an ICT. |
| <p>Line 12. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Second Month Following Data Cohort Month were disposed and subsequently deemed ineligible (include withdraws) for benefits.</p> | |
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The first program Application created during the report period has an application date within the second month following the Data Cohort Month. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The first program Application created during the report period has an application date within the second month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): |

| | |
|--|--|
| <ul style="list-style-type: none"> • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ◦ Denied • The program application is not an ICT. | <ul style="list-style-type: none"> ◦ Denied • The program application is not an ICT. |
| <p>Line 13. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Third Month Following Data Cohort Month were disposed and subsequently deemed eligible for benefits.</p> | |
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The first program Application created during the report period has an application date within the third month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ◦ Approved ◦ Rescind Approved (Denial) • The program application is not an ICT. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The first program Application created during the report period has an application date within the third month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ◦ Approved ◦ Rescind Approved (Denial) • The program application is not an ICT. |
| <p>Line 14. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Third Month Following Data Cohort Month were disposed and subsequently deemed ineligible (include withdraws) for benefits.</p> | |
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The first program Application created during the report period has an application date within the third month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ◦ Denied • The program application is not an ICT. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The first program Application created during the report period has an application date within the third month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ◦ Denied • The program application is not an ICT. |
| <p>Line 15. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Fourth Month Following Data Cohort Month were disposed and subsequently deemed eligible for benefits.</p> | |
| <p>SAR 7 – From the base population</p> | <p>RRR - From the base population</p> |

| | |
|---|---|
| <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The first program Application created during the report period has an application date within the fourth month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) • The program application is not an ICT. | <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The first program Application created during the report period has an application date within the fourth month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) • The program application is not an ICT. |
| <p>Line 16. The total number of SAR 7 & RRR households who do not renew in the Data Cohort Month, but submit a new application in the Fourth Month Following Data Cohort Month were disposed and subsequently deemed ineligible (include withdraws) for benefits.</p> | |
| <p>SAR 7 – From the base population</p> <ul style="list-style-type: none"> • The household is scheduled to submit a SAR 7. • The first program Application created during the report period has an application date within the fourth month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Denied • The program application is not an ICT. | <p>RRR - From the base population.</p> <ul style="list-style-type: none"> • The household is scheduled to submit an RRR. • The first program Application created during the report period has an application date within the fourth month following the Data Cohort Month. • The last status on the program application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Denied • The program application is not an ICT. |

3. **Churn Measurement 2 Base Population:** Redefine the base population for Churn Measurement 2 as follows:

- Program is CalFresh

| Code-18 | Short Name |
|---------|------------|
| FS | CalFresh |

- A CalFresh program application was disposed during the Data Cohort Month.

| Code-157 | Short Decode Name |
|----------|-----------------------------|
| AA | Approved |
| DE | Denied |
| AE | Approved Rescinded (Denied) |

The Approved Rescinded (Denial) must occur in the same month as the Denial. If the program application was Denied in the cohort month and Approved Rescinded (Denied) in a later month (any month following the cohort month) then the application will be reported as denied during the cohort month.

- The program application was created during or before the Data Cohort Month.
- The program application is not an ICT.
- The base population consist of only distinct households. If a household completed more than one application during the cohort month then the latest denial or approval disposed of during the cohort month will be selected.
- For those households that had a SAR 7 or RRR scheduled to be submitted within the fourth months immediately prior to the cohort month, the following logic will be applied if the household has multiple associated SAR 7(s) or RRR(s):
 1. An RRR takes precedence over a SAR 7.
 2. If two packets of the same reporting type (SAR 7 or RRR) exist, then the packet with the earliest status of 'Received', 'Reviewed- Ready to Run EDBC' or 'Complete- EDBC Accepted' which is not proceeded by an 'Incomplete' status or immediately follows the latest incomplete status will be used.

| Code - 258 | CF RE Packet |
|------------|-----------------------------|
| RE | Received |
| RR | Reviewed- Ready to Run EDBC |
| CE | Complete- EDBC Accepted |

Note: An incomplete status signifies the packet is missing information and cannot be processed as is.

3. The earliest customer report CREATED_ON date will be used to account for any remaining duplicates.
 Note the CREATED_ON date is not displayed on the online page. This is data stored only in the database which signifies when the record was created in the database.

Please see Appendix 7.1 For example.

4. Churn Measurement #2 – State Form - Line-Item Definitions:

The following logic will be applied to the base population of Churn Measurement 2 to determine which Line Item on the State report the household will be counted in.

| Churn Measurement #2: The share of applications from households that participated CalFresh/CFAP in the recent past. | |
|--|---|
| All CalFresh applications disposed of during the Data Cohort Month | |
| <p>Line 17. The total number of CalFresh and CFAP applications disposed of during the Data Cohort Month</p> <ul style="list-style-type: none"> A unique count of all households in the base population are included in this line. | |
| <p>Line 18. The total number of CalFresh and CFAP applications disposed of during the Data Cohort Month from a household who participated in CalFresh/CFAP within the prior four full calendar months</p> <ul style="list-style-type: none"> Of all the households in the base populations, the number of households that have an Active or Ineligible status for any of the four months immediately preceding the Data Cohort Month (Code-72). <ul style="list-style-type: none"> Active Ineligible <p>Note: Program status historic information will be evaluated to determine what the status was as of the first day of the Data Cohort Month.</p> | |
| Total applications from households with a recent (Within the Prior Four Full Calendar Months) SAR 7 or RRR | |
| <p>Line 19. The total number of CalFresh and CFAP applications disposed of during the Data Cohort Month from a household who had a SAR 7 or RRR due within the prior four full calendar months</p> | |
| <p>SAR 7</p> <ul style="list-style-type: none"> The count for line 19 is equal to the sum of Lines 20, 21, 22, 23, 24, 25, 26, 27 and 28 for the SAR 7 column. Reference the specific criteria for each line below. | <p>RRR</p> <ul style="list-style-type: none"> The count for line 19 is equal to the sum of Lines 20, 21, 22, 23, 24, 25, 26, 27 and 28 for the RRR column. Reference the specific criteria for each line below. |
| Denied Applications with recent SAR7 or RRR-related restoration | |

Line 20. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was restored in the First month Prior to Data Cohort Month

SAR 7 - From the **Line 19** population

- The program has a **SAR 7** with a Submit Month that is **two** months prior to the Data Cohort Month.
- The program was Discontinued effective for the first day of the month that is **one** month prior to the Data Cohort Month.
- The Program Application has a **Denial** event during the Data Cohort Month (Code 157)
 - **Denied**
- The program was restored under the restoration of aid waiver process during the month prior to the Data Cohort Month (Code 157).

- **Restoration of Aid Waiver Approved**

Note: The circumstances of having both a CF application and a pending restoration of aid waiver may be rare. This line will typically be equal to 0 as the unduplicated household count is rep. See Appendix 7.3 for examples.

RRR - From the **Line 19** population

- This field will always be 0 as Restoration of Aid Waiver is not applicable to an RRR.

Applications with recent SAR 7 or RRR correlated discontinuation (First Month Prior to Data Cohort Month)

Line 21. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the First Month Prior to Data Cohort Month

SAR 7 - From the **Line 19** population

- The program has a **SAR 7** with a Submit Month that is **one** month prior to the Data Cohort Month.
- The program was Discontinued effective for the first day **of the** Data Cohort Month.
- The **last** status on the Program Application during the reporting period is (Code 157):

RRR – From the **Line 19** population

- The program has an **RRR** with a Submit Month that is **one** month prior to the Data Cohort Month.
- The program was Discontinued effective for the first day **of the** Data Cohort Month.
- The last status on the Program Application during the reporting period is (Code 157):

| | |
|--|--|
| <ul style="list-style-type: none"> ○ Denied | <ul style="list-style-type: none"> ○ Denied |
| <p>Line 22. The total number of approved CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the First Month Prior to Data Cohort Month</p> | |
| <p>SAR 7 - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a SAR 7 with a Submit Month that is one month prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) | <p>RRR - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has an RRR with a Submit Month that is one month prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) |
| <p>Applications with recent SAR 7 or RRR correlated discontinuation (Second Month Prior to Data Cohort Month)</p> | |
| <p>Line 23. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Second Month Prior to Data Cohort Month</p> | |
| <p>SAR 7 - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a SAR 7 with a Submit Month that is two months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is one month prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Denied • The program was not restored under the restoration of aid waiver process during the month prior to the Data Cohort Month (Code 157). <ul style="list-style-type: none"> ○ Restoration of Aid Waiver Approved | <p>RRR - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a RRR with a Submit Month that is two months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is one month prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Denied |

| | |
|--|--|
| <p>Line 24. The total number of approved CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Second Month Prior to Data Cohort Month</p> | |
| <p>SAR 7 - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a SAR 7 with a Submit Month that is two months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is one month prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) | <p>RRR - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a RRR with a Submit Month that is two months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is one month prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) |
| <p>Applications with recent SAR 7 or RRR correlated discontinuation (Third Month Prior to Data Cohort Month)</p> | |
| <p>Line 25. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Third Month Prior to Data Cohort Month</p> | |
| <p>SAR 7 - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a SAR 7 with a Submit Month that is three months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is two months prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Denial | <p>RRR - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a RRR with a Submit Month that is three months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is two months prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Denial |
| <p>Line 26. The total number of approved CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Third Month Prior to Data Cohort Month</p> | |
| <p>SAR 7 - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a SAR 7 with a Submit Month that is three months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the | <p>RRR - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a RRR with a Submit Month that is three months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the |

| | |
|--|--|
| <p>month that is two months prior to the Data Cohort Month.</p> <ul style="list-style-type: none"> • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) | <p>month that is two months prior to the Data Cohort Month.</p> <ul style="list-style-type: none"> • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) |
| <p>Applications with recent SAR 7 or RRR correlated discontinuation (Fourth Month Prior to Data Cohort Month)</p> | |
| <p>Line 27. The total number of denied CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Fourth Month Prior to Data Cohort Month</p> | |
| <p>SAR 7 - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a SAR 7 with a Submit Month that is four months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is three months prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Denied | <p>RRR - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a RRR with a Submit Month that is four months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is three months prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Denied |
| <p>Line 28. The total number of approved CalFresh and CFAP applications disposed of during Data Cohort Month from a household who was required to submit a SAR 7 or RRR and whose case was closed/discontinued in the Fourth Month Prior to Data Cohort Month</p> | |
| <p>SAR 7 - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a SAR 7 with a Submit Month that is four months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is three months prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) | <p>RRR - From the Line 19 population</p> <ul style="list-style-type: none"> • The program has a RRR with a Submit Month that is four months prior to the Data Cohort Month. • The program was Discontinued effective for the first day of the month that is three months prior to the Data Cohort Month. • The last status on the Program Application during the reporting period is (Code 157): <ul style="list-style-type: none"> ○ Approved ○ Rescind Approved (Denial) |

5. Churn Measurement 1 – Detailed Worksheet:

The following logical changes will be made the existing detail sheet columns:

| Column Name | Column Description |
|---------------------------------|--|
| Customer Report – Received Date | <p>Update the column logic as follows: Displays the earliest event date for any of the following customer report status which is not proceeded by an 'Incomplete' status (Code 258) or immediately follows the latest incomplete status.</p> <ul style="list-style-type: none"> • Received • Reviewed- Ready to Run EDBC • Complete- EDBC Accepted <p>Format: MM/DD/YYYY</p> <p>Blank - This column will be blank if the customer report was never received, or the last status is Incomplete.</p> |
| Completed Date | <p>Update the column name to be 'Completed Date' previously named 'Customer Report Completed Date'.</p> <p>Update the column logic to display the latest EDBC run date for the EDBC that was ran in the reporting period to complete the SAR 7 or RRR.</p> <p>Format: MM/DD/YYYY</p> <p>Blank - This column will be blank if the EDBC record does not exist.</p> |

6. Churn Measurement 2 – Detailed Worksheet:

No column updates will be made to the Churn Measurement 2 – Detailed sheet.

2.1.4 Report Location

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

2.1.5 Counties Impacted

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

2.1.6 Security Updates

1. No updates will be made to the report's existing security.

2.1.7 Report Usage/Performance

The performance of this report on the system is not expected to change after the implementation of this SCR.

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|--------------|--|
| 1 | Reports | CF 18 Mockup |  CF 18 Mockup.xlsx |
| | | | |

4 REQUIREMENTS

4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|-----------|---|--|
| 2.24.1.11 | The LRS shall support all reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures, including statistical, operational, workload, and fiscal reports. | This SCR will introduce the CF 18 report which is a state mandated report. Automation of this report complies with the listed requirement. |
| | | |

4.2 Migration Requirements

| DDID # | REQUIREMENT TEXT | Contractor Assumptions | How Requirement Met |
|--------|------------------|------------------------|---------------------|
| | | | |
| | | | |

5 MIGRATION IMPACTS

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

6 OUTREACH

No outreach is required with this SCR.

7 APPENDIX

7.1 Churn Measurement 1 Customer Report Selection

Example #1 Case A000001 has 2 SAR 7s and an RRR due in the 04/2021 Cohort Month:

Case: A000001

1. Customer Report Type: CF RE Packet
Submit Month 04/2021
Program: CF
Status History:
Generated: 03/05/2021
Sent: 03/05/2021
2. Customer Report Type: SAR 7
Submit month: 04/2021
Program: CF
Status History:
Generated: 03/05/2021
Sent: 03/05/2021
3. Customer Report Type: SAR 7
Submit Month: 04/2021
Program: CF
Status History:
Generated: 03/26/2021
Sent: 03/07/2021
Received: 04/09/2021
Reviewed- Ready to Run EDBC: 04/09/2021
Complete – EDBC Accepted 04/09/2021

The CF RE Packet (RRR) will be selected because an RRR takes precedence over the SARs.

Example #2 Case has multiple SAR 7 packets due in the cohort month.

Case: A000001

1. Customer Report Type: CF RE Packet
Submit month: 04/2021
Program: CF
Status History:

Generated: 03/05/2021

Sent: 03/05/2021

Received: 04/08/2021

Incomplete: 04/08/2021

Received: 04/10/2021

2. Customer Report Type: CW/CF RE Packet

Submit Month: 04/2021

Program: CF

Status History:

Generated: 03/26/2021

Sent: 03/07/2021

Received: 04/09/2021

Reviewed- Ready to Run EDBC: 04/09/2021

Complete – EDBC Accepted 04/09/2021

Packet #2 is selected due to having the earliest received date. Packet #1 has a received date of 04/08/2021 but it was succeeded by an incomplete, therefore, the Received Date for Packet is 04/10/2021.

7.2 CF 18 Schedule and Cohort Month Examples

The charts below outline the CF 18 submission months and the corresponding Cohort Months and reporting periods for Churn Measurements #1 and #2.

Churn Measurement #1

| 1 | 2 | 3 | 4 | 5 | 6 |
|--------------------------|---|---|---|---|-------------------------|
| Data Cohort Month | 1st Month following Data Cohort Month | 2nd Month following Data Cohort Month | 3rd Month following Data Cohort Month | 4th Month following Data Cohort Month | Submission Month |
| September '20 | October '20 | November '20 | December '20 | January '21 | February 20, 2021 |
| October '20 | November '20 | December '20 | January '21 | February '21 | March 20, 2021 |
| November '20 | December '20 | January '21 | February '21 | March '21 | April 20, 2021 |
| December '20 | January '21 | February '21 | March '21 | April '21 | May 20, 2021 |
| January '21 | February '21 | March '21 | April '21 | May '21 | June 20, 2021 |
| February '21 | March '21 | April '21 | May '21 | June '21 | July 20, 2021 |
| March '21 | April '21 | May '21 | June '21 | July '21 | August 20, 2021 |
| April '21 | May '21 | June '21 | July '21 | August '21 | September 20, 2021 |
| May '21 | June '21 | July '21 | August '21 | September '21 | October 20, 2021 |
| June '21 | July '21 | August '21 | September '21 | October '21 | November 20, 2021 |
| July '21 | August '21 | September '21 | October '21 | November '21 | December 20, 2021 |
| August '21 | September '21 | October '21 | November '21 | December '21 | January 20, 2022 |

Churn Measurement #2

| 1 | 2 | 3 | 4 | 5 | 6 |
|--|--|--|--|--------------------------|-------------------------|
| 4th Month Prior to Data Cohort Month | 3rd Month Prior to Data Cohort Month | 2nd Month Prior to Data Cohort Month | 1st Month Prior to Data Cohort Month | Data Cohort Month | Submission Month |
| September '20 | October '20 | November '20 | December '20 | January '21 | February 20, 2021 |
| October '20 | November '20 | December '20 | January '21 | February '21 | March 20, 2021 |
| November '20 | December '20 | January '21 | February '21 | March '21 | April 20, 2021 |
| December '20 | January '21 | February '21 | March '21 | April '21 | May 20, 2021 |
| January '21 | February '21 | March '21 | April '21 | May '21 | June 20, 2021 |
| February '21 | March '21 | April '21 | May '21 | June '21 | July 20, 2021 |
| March '21 | April '21 | May '21 | June '21 | July '21 | August 20, 2021 |
| April '21 | May '21 | June '21 | July '21 | August '21 | September 20, 2021 |
| May '21 | June '21 | July '21 | August '21 | September '21 | October 20, 2021 |
| June '21 | July '21 | August '21 | September '21 | October '21 | November 20, 2021 |
| July '21 | August '21 | September '21 | October '21 | November '21 | December 20, 2021 |
| August '21 | September '21 | October '21 | November '21 | December '21 | January 20, 2022 |

7.3 Examples for Line 20:

| | | |
|---------|----------|------------------------------|
| January | February | March (Data Cohort Month) |
|---------|----------|------------------------------|

| | | |
|---|--|--|
| <ul style="list-style-type: none"> • The CalFresh Program is Active for January • The Customer Report is due by January 31 • The worker Discontinues the CalFresh program effective February one for missing SAR 7. • A CalFresh application is received after the Discontinuance but before or after the restoration of aid waiver was processed | <ul style="list-style-type: none"> • The CalFresh Program is Discontinued effective February 1st • The CalFresh Program is reinstated under the Restoration of Aid Waiver for February "May be prorated" | <ul style="list-style-type: none"> • The CalFresh program application received in February is Denied but not reported on line 20, as the household was approved under restoration of aid waiver is reported on line 23. |
| <ul style="list-style-type: none"> • The CalFresh Program is Active January 1st • The Customer Report is due by January 31st • The worker Discontinues the CalFresh program effective for February 1 for missing SAR 7. | <ul style="list-style-type: none"> • The CalFresh Program is Discontinued effective February 1st • A CalFresh application is received on or after February 1 • The CalFresh Program is reinstated under the Restoration of Aid Waiver for February. | <ul style="list-style-type: none"> • The CalFresh program application received in the prior month is disposed to be Denied but not reported on line 20, as benefits were approved under restoration of aid waiver and reported on line 23. |
| <ul style="list-style-type: none"> • The CalFresh Program is Active January • The Customer Report is due by January 31st • The worker Discontinues the CalFresh program effective February 1 for missing SAR 7. | <ul style="list-style-type: none"> • The CalFresh Program is Discontinued effective February 1st • The CalFresh Program is reinstated under the Restoration of Aid Waiver for February | <ul style="list-style-type: none"> • A CalFresh application is received and Denied in the cohort month is not reported on line 20 when benefits were approved under restoration of aid waiver and reported on line 23. |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-229140

DDID 1058 - Update Reports to remove System, County, or Agency references - Export Reports

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

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|------------|------------------|----------------------|----------------|
| 03/02/2021 | 1.0 | Initial Release | Greg Deogracia |
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Table of Contents

| | | |
|---|---|---|
| 1 | Overview | 4 |
| | 1.1 Current Design..... | 4 |
| | 1.2 Requests..... | 4 |
| | 1.3 Overview of Recommendations..... | 4 |
| | 1.4 Assumptions | 4 |
| 2 | Recommendations..... | 5 |
| | 2.1 Overview..... | 5 |
| | 2.2 Export Reports..... | 5 |
| | 2.2.1 Eligibility Workload Inventory Export Report Mockup | 5 |
| | 2.2.2 Monthly Productivity List Export Report Mockup | 6 |
| | 2.2.3 General Ledger Report Mockup | 6 |
| | 2.3 Description of Change | 7 |
| | 2.4 Report Locations | 7 |
| | 2.5 Counties Impacted..... | 7 |
| 3 | Supporting Documents | 8 |
| 4 | Requirements..... | 8 |
| | 4.1 Migration Requirements..... | 8 |
| 5 | Outreach..... | 9 |
| 6 | Appendix..... | 9 |

1 OVERVIEW

SCR CA-229140 was created to update and or remove any System, County, or Agency specific references/logos from Export Reports and update with the new CalSAWS logo.

These Export Reports currently have LRS system logos on their report template, which this SCR will update them to use the new CalSAWS logo.

1.1 Current Design

Current Export reports contain System, County, or Agency References:

- Eligibility Workload Inventory Export Report
- Monthly Productivity List Export Report
- General Ledger Report

1.2 Requests

The Contractor shall update and or remove any System, County, or Agency specific references/logos from Export Reports and update with the new CalSAWS logo.

1.3 Overview of Recommendations

1. Remove legacy system, county, or agency specific references/logos from the following Export Reports and update to CalSAWS logo:
 - Eligibility Workload Inventory Export Report
 - Monthly Productivity List Export Report
 - General Ledger Report

1.4 Assumptions

1. No Impact to other reports.
2. Only the Logo will be updated. No reporting logic updates are required.
3. The Export Reports listed in this SCR will be updated with its existing reports platform (i.e., BI Publisher).

2 RECOMMENDATIONS

2.1 Overview

Update system, county, or agency specific references logos from the Export Reports and replace with new CalSAWS logo:

- Eligibility Workload Inventory Export Report
- Monthly Productivity List Export Report
- General Ledger Report

2.2 Export Reports

2.2.1 Eligibility Workload Inventory Export Report Mockup

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

Figure 2.2.1 - Eligibility Workload Inventory Export Report Mockup

2.2.2 Monthly Productivity List Export Report Mockup

| CalSAWS Monthly Productivity List Export | | | | | | |
|--|-----------|------|--------------|--------|-------------|------------------|
| County: Los Angeles | | | | | | |
| Run Date: APR-20-2018 08:10 AM | | | | | | |
| Worker ID: | | | | | | |
| Unit ID: | | | | | | |
| | | | | | | Total Reports: 0 |
| Customer Report | | | | | | |
| Case Number | Case Name | Type | Submit Month | Status | Status Date | Program |

Figure 2.2.2 – Monthly Productivity List Export Report Mockup

2.2.3 General Ledger Report Mockup

| CalSAWS General Ledger Report | | | | | | | | | | | |
|-------------------------------|------------------|--------------|------------------|----------|----------|---------------|---------------|--------------------|--------------|------------------------|-----------------------|
| Los Angeles | | | | | | | | | | | |
| Run Date: JUN-03-21 11:02 AM | | | | | | | | | | | |
| As of Date: 06/03/2021 | | | | | | | | | | | |
| Case No. | | Child Name | | | | Child SSN | | | | | |
| | | | | | | | | | | | |
| Accrual Period | Transaction Date | Account Type | Transaction Type | Aid Type | Pay Code | WarrantNumber | Debit /Credit | Foster Care Offset | Trust Amount | Total Foster Care Paid | Running Trust Balance |
| | | | | | | | | | | | |

Figure 2.2.3 – General Ledger Report Mockup

2.3 Description of Change

Update the following Export Reports template to replace its existing LRS system logo with the new CalSAWS logo:

- Eligibility Workload Inventory Export Report
- Monthly Productivity List Export Report
- General Ledger Report

2.4 Report Locations

Global: Eligibility
Local: Workload Inventory
Task: Workload Inventory
Title: Eligibility Workload Inventory Export Report

Global: Eligibility
Local: Workload Inventory
Task: Monthly Productivity
Title: Monthly Productivity List Export Report

Global: Case Info
Local: Customer Schedule
Task: General Ledger
Title: General Ledger Report

2.5 Counties Impacted

No change to current county entitlement configuration.

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Location / Attachment |
|--------|-----------------|---|--|
| 1 | Reports | Eligibility Workload Inventory Export Report Mockup |  Eligibility Workload Inventory Export - M |
| 2 | Reports | Monthly Productivity List Export Report Mockup |  Monthly Productivity List Exp |
| 3 | Reports | General Ledger Report Mockup |  General Ledger Report - Mockup.xls |
| 4 | All | CalSAWS Logo |  |

4 REQUIREMENTS

4.1 Migration Requirements

| DDID # | REQUIREMENT TEXT | Contractor Assumptions | How Requirement Met |
|--------|--|--|--|
| 1058 | The CONTRACTOR shall update and or remove any System, County, or Agency specific references/logos from all Scheduled and On Request Reports. | - 374 reports will need to be modified to update or remove any System, County, or Agency specific references/logos. - The image of the Los Angeles County seal on reports will be updated with the new CalSAWS logo/seal as the reports are updated through the migration M&E releases. | - This SCR is updating existing reports as needed by the counties. |

| | | | |
|--|--|---|--|
| | | - Refer to inventory listing of the C-IV and LRS Reports as of July 2018. | |
|--|--|---|--|

5 OUTREACH

N/A

6 APPENDIX

N/A