CalSAWS

California Statewide Automated Welfare System

Design Document

CA-57452

ACWDL 17-32: Updates to Failure to Respond NOAs

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Tiffany Huckaby
	Reviewed By	Sreekanth Kalvoju, Geetha Ramalingam

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/28/2019	1.0	Original Draft	Jamie Ng
4/15/2021	1.1	Reviewed and Updated Design	Tiffany Huckaby
4/21/2021	1.2	Updated per Analyst Feedback	Tiffany Huckaby
5/26/2021	1.3	Updated per Committee Feedback	Tiffany Huckaby
7/22/2021	1.4	Added Clarifications for Build/ST	Tiffany Huckaby

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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.
8. The existing MC 355 NOAs logic will still suppress Failure to Respond NOAs after this update. This logic will not change with this effort.
9. The Failed to Complete Redetermination Verification will still be suppressed when generating a Failure to Respond NOA. This logic will not change with this effort.

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: <LIST_OF_PERSONS>	Arial Font Size 10

*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>	When the Action Fragment is generating for: - 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 Example Population: "John Doe Jane Doe"	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	Arial Font Size 10

DESCRIPTION	TEXT	FORMATTING*
	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 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 following to see if you can still get Medi-Cal: • 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. Please call us, visit your county social services office, or return your completed and signed renewal form to give us this information.	Arial Font Size 10
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.

Note: The ABD MC RE Packet has not been generated in CalSAWS and will only be applicable for C-IV migrated cases.

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 Obsoleted 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	Your Medi-Cal will end because: 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:	No Change.
Dynamic	• 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	• 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	• 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	• Your current residence address	**Remove**, this formerly generated for Mixed MC RE Packet and will

DESCRIPTION	EXISTING TEXT	UPDATE
	• 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.	be replaced by new non-MAGI and MAGI Fragments from Recommendations 2.2 and 2.3.
Dynamic	• 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 discontinue 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 Obsoleted 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	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	This update will produce the updated NOAs regarding Failure to Respond for based off of Renewal Forms.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201756

NOMI Interview Due Date to be 30 days from application date

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/23/20	1.0	Initial Creation	Imran Bashir
09/03/20	2.0	Modified assumptions as per comments from Committee meeting notes.	Imran Bashir
05/13/2021	3.0	Content Revision- Add batch updates in Section 2.4	Sowmya Coppisetty
06/24/2021	4.0	Updated the example to have the correct dates.	Rainier Dela Cruz
8/12/2021	5.0	Updated 2.4 counties impacted	Sowmya Coppisetty

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1. OVERVIEW

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

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

Examples:

When 30th day fall on the weekday

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

When 30th day fall on the weekend

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

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

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

1.1. Current Design

The 'interview due by date' on the CF 386 CalFresh 'Notice of Missed Interview' (NOMI) form is 9 working days from the missed appointment date.
The CalFresh Denial batch for the NOA DFA 377.1A CalFresh Denial NOA currently runs during the weekends.

1.2. Request

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

1.3. Recommendation

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

1.4. Assumption

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

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

2. RECOMMENDATIONS

2.1. Notice of missed interview Form CF 386 for intake

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

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

State Form: CF 386 (2/14)
Current Programs: CalFresh and cases with a CalFresh segment
Current Forms Category: Form
Form Mockups/Examples: See Supporting Documents #1, 2.
Existing Languages:
> Armenian
> Cambodian
> Chinese
> English
> Farsi
> Korean
> Russian
> Spanish
> Tagalog
> Vietnamese

2.1.2. Description of Change

2.1.2.1. Updates to Form Variable Population
Change the population of interview date from 9 days to 30 days.

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

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

2.2. Notice of Missed Interview Form CF 386 for recertification

2.2.1. Overview

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

2.2.2. Description of Change

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

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

2.3. Denial NOA DFA 377.1A

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

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

2.4. Update Batch job PB00E472

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

2.4.2. Description of Change
1. Update the conditions of the batch job PB00E472 ~~PB00E472~~ to calculate the batch run date ~~and the NOMI generation date~~ to be 30 days from the application date to align with the conditions of batch job PB00R533 that generates a CalFresh denial NOA DFA 377.1A.
The updated conditions for the job will be as follows-

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

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

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

2.4.3. Execution Frequency

Daily- Monday to Friday

2.4.4 Key Scheduling Dependencies

Schedule this batch job to run before PB00R533

2.4.4. Counties Impacted

	County Name
02	Alpine
06	Colusa
08	Del-Norte
11	Glenn
13	Imperial
14	Inyo
15	Kern
17	Lake
18	Lassen
19	Los Angeles
21	Marin
22	Mariposa
24	Merced
25	Modoc
26	Mono
27	Monterey
28	Napa
29	Nevada
32	Plumas
33	Riverside
35	San Benito
36	San Bernardino
39	San Joaquin
45	Shasta
50	Stanislaus
53	Trinity
55	Tuolumne
58	Yuba

2.4.5. Data Volume/Performance

No Change

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2.4.6. Failure Procedure/Operational Instructions

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

3. SUPPORTING DOCUMENTS

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

4. REQUIREMENTS

5.12.4 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.1	The LRS shall produce the NOA in a timely manner, in accordance with Turner waiver requirements, containing the following: a. Case and applicant/participant identifying information and address;	1) Update the 'interview due by date' on the CF 386 CalFresh 'Notice of Missed Interview (NOMI)' form to 30 calendar days from the

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b. The proposed action(s) being taken by the COUNTY department; c. The effective date of the proposed action(s); d. The reason(s) for the proposed action(s); e. Time periods covered, including retroactive periods; f. Turner format requirements as appropriate; g. The complete federal, State, or COUNTY manual section(s), including subsection(s) supporting the proposed action(s); h. The budget calculations/computations by program, including gross income test and net income test; i. The overpayment/underpayment and/or over issuance/under-issuance amount and/or calculations; j. The worker s name, file number, addressee, mailing address, sending Local Office Site s address, telephone number, email address, and hours of availability; k. Instructions regarding the filing of an appeal and appeals-specific contact information; l. Date and time of notification; m. Variable individual/case LRS Data including the name(s) of individual(s) affected by the authorized action, income reporting threshold amounts, and time on aid information; n. Freeform text based on County-specified user that was added to clarify the NOA, unless prohibited by federal and State regulations and COUNTY policies.; and o. Collection calculation and amount, if applicable.	application date for missed CalFresh intake interview appointments. 2) Use the end of the current certification period as the 'interview due by date' for missed CalFresh recertification interview appointments, even when the certification end date falls on a weekend or a holiday. 3) Update the CalFresh Denial batch schedule for the NOA DFA 377.1A to not run on a weekend or holiday. 4) Update the conditions of the batch job PB00E472 to calculate the batch run date and the NOMI generation date to be 30 days from the application date.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-206708

Update Application Detail to Support View Mode

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Andrea Rodriguez
	Reviewed By	Long Nguyen, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/14/2021	1.0	Initial	Andrea Rodriguez
7/13/2021	1.1	Updates post build review for section 2.1.3.1.a. and 2.2.3.1.a.	Andrea Rodriguez
8/13/2021	2.1	Content Revision 1 Removed Section 2.3.3.1.a.i and added note to not display Change Reason field in Application Detail page in View Mode. Figures 2.3.1 and 2.3.2 are updated to reflect the changes.	Andrea Rodriguez

Table of Contents

1 OVERVIEW

The Application Detail page allows the user to access historical information for an application. Currently, users need to have the proper security right to access this page since this page is only available in 'Edit' mode. This SCR will create a 'View' mode for the Application Detail page, thereby allowing users without editing rights to be able to access the page information.

1.1 Current Design

The Application Detail page can only be accessed in 'Edit' mode currently. In order for users to access this page, they will need the appropriate security rights.

1.2 Requests

Update the Application Detail page to support a 'View' mode. Include a link to the 'View' mode of the Application Detail page on the Program Detail page and Program Person Detail page.

1.3 Overview of Recommendations

1. Create a view for the Application Detail page to be seen with 'View' rights.
2. Create a new security right that will allow the user to see the Application Detail page with 'View' rights.
3. Update the Program Detail page with the option to access the Application Detail page in 'View' mode.
4. Update the Program Person Detail page with the option to access the Application Detail page in 'View' mode.

1.4 Assumptions

1. Existing functionalities will remain unchanged unless called out as part of the design document.

2 RECOMMENDATIONS

A 'View' mode of the Application Detail page will be created, along with a new security right that will allow the user to see the Application Detail page with 'View' rights. The Program Detail page and the Program Person Detail page will be updated to allow the user to access the Application Detail page in 'View' mode.

2.1 Program Detail Page

2.1.1 Overview

The Program Detail page contains the program's information for an associated case and program participant/beneficiary. From this page, the user can access the Application Detail page in 'Edit' mode only, and this requires editing security rights. The Program Detail page does not provide a way to access the Application Detail page in 'View' mode. This SCR will update the Program Detail page with the ability for the user to access the Application Detail page in 'View' mode.

2.1.2 Program Detail Mockup

CalWORKs Detail

✳ - Indicates required fields   [View History] [Save and Return] [Cancel]

Date: ✳

[07/01/2021   📅] [View Date]

Program Information		
Status: ✳	Status Reason:	Source: ✳
Active		In Person
Application Date: ✳	RE Begin Month:	RE Due Month: ✳
01/29/2020 [Edit]	02/2021	[01/2022 📅]
Reporting Type:	SAR Due Month:	
Semi-Annual Reporting	07/2021	

Automatically Reassign When Activated:
[No ▾]

Figure 2.1.1 – Program Detail Page for CalWORKs in 'Edit' mode (for users with 'ApplicationDetailEdit' security right)

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CalWORKs Detail

*- Indicates required fields

| View History | Issuance Method | Edit | Close |

Date: *
08/01/2021

Program Information

Status: *	**Status Reason:**	**Source:** *
Active		In Person
Application Date: *	**RE Begin Month:**	**RE Due Month:** *
01/29/2020	02/2021	01/2022
Reporting Type:	**SAR Due Month:**	
Semi-Annual Reporting	07/2021	

Automatically Reassign When Activated:
No

Figure 2.1.2 – Program Detail Page for CalWORKs in 'View' mode (for users with 'ApplicationDetailEdit' security right)

CalWORKs Detail

*- Indicates required fields

| View History | Issuance Method | Close |

Date: *
08/01/2021

Program Information

Status: *	**Status Reason:**	**Source:** *
Active		In Person
Application Date: *	**RE Begin Month:**	**RE Due Month:** *
01/29/2020	02/2021	01/2022
Reporting Type:	**SAR Due Month:**	
Semi-Annual Reporting	07/2021	

Automatically Reassign When Activated:
No

Figure 2.1.3 – Program Detail Page for CalWORKs in 'View' mode (for users with only 'ApplicationDetailView' security rights and not 'ApplicationDetailEdit' rights)

CalWORKs Detail

✱- Indicates required fields

[View History] [Issuance Method] [Close]

Date: ✱
08/01/2021

Program Information		
Status: ✱	**Status Reason:**	**Source:** ✱
Active		In Person
Application Date: ✱	**RE Begin Month:**	**RE Due Month:** ✱
01/29/2020	02/2021	01/2022
Reporting Type:	**SAR Due Month:**	
Semi-Annual Reporting	07/2021	
Automatically Reassign When Activated:		
No		

Figure 2.1.4 – Program Detail Page for CalWORKs (for users without 'ApplicationDetailView' or 'ApplicationDetailEdit' security rights)

2.1.3 Description of Changes

1. Update the 'Application Date' field under the Program Information section to display as a hyperlink, as shown in Figures 2.2.1 to 2.2.3.
    a. Clicking on the hyperlink will direct the user to the Application Detail page in 'View' mode for the specific 'Application Date' value that is displayed on the Program Detail page.
    b. The hyperlink will be protected by 'ApplicationDetailView' right.

    Note: The application date hyperlink will display for each program on the Program Detail page where the 'Application Date' field is applicable.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Case Summary**

2.1.5 Security Updates

Note: 'Program Edit' and 'Program View' are existing security groups.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ApplicationDetailView	View program application information.	Application Detail View, Program Edit, Program View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Application Detail View	View program application information.	View Only
Program Edit	Edit information to programs.	Regional Call Center Supervisor, Regional Call Center Staff, Eligibility Supervisor, Eligibility Staff, Child Care Supervisor, Child Care Staff
Program View	View program information.	CA State All County Access, Executive, Hearings Staff, Hearings Supervisor, Help Desk Staff, Oversight Agency Staff, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, Special Investigations Staff, Special, Investigations Supervisor, View Only

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Program Person Detail Page

2.2.1 Overview

The Program Person Detail page allows the user to access, edit or add program participant/beneficiary information for a program on a case. The user can access the Application Detail page in 'Edit' mode only from the Program Person Detail page. This requires the user to have editing rights on the Application Detail page. This SCR will update the Program Person Detail page to provide a way for the user to also access the Application Detail page in 'View' mode without 'Edit' security rights.

2.2.2 Program Person Detail Mockup

CalWORKs Person Detail

✳- Indicates required fields   [Edit] [Reissue BIC] [Close]

Recipient Information

Name: ✳
DOE, JANE 35F

Application Detail

Application Date: ✳	Beginning Date Of Aid: ✳	Cash-based Medi-Cal BDA:
01/29/2020	03/01/2020	03/01/2020

[Edit] [Reissue BIC] [Close]

Figure 2.2.1 – Program Person Detail Page for CalWORKs in 'View' mode (for users with 'ApplicationDetailEdit' security right)

CalWORKs Person Detail

*- Indicates required fields   [Save and Return] [Cancel]

Recipient Information

Name: *
DOE, JANE 35F

Application Detail

Application Date: *	Beginning Date Of Aid: *	Cash-based Medi-Cal BDA:
01/29/2020	03/01/2020	03/01/2020

[Edit]

[Save and Return] [Cancel]

Figure 2.2.2 – Program Person Detail Page for CalWORKs in 'Edit' mode (for users with 'ApplicationDetailEdit' security right)

CalWORKs Person Detail

*- Indicates required fields   [Reissue BIC] [Close]

Recipient Information

Name: *
DOE, JANE 35F

Application Detail

Application Date: *	Beginning Date Of Aid: *	Cash-based Medi-Cal BDA:
01/29/2020	03/01/2020	03/01/2020

[Reissue BIC] [Close]

Figure 2.2.3 – Program Person Detail Page for CalWORKs in 'View' mode (for users with 'ApplicationDetailView' only security right)

CalWORKs Person Detail

✳ - Indicates required fields

[Reissue BIC] [Close]

Recipient Information

Name: ✳
DOE, JANE 35F

Application Detail

| Application Date: ✳ | Beginning Date Of Aid: ✳ | Cash-based Medi-Cal BDA: |
| 01/29/2020 | 03/01/2020 | 03/01/2020 |

[Reissue BIC] [Close]

Figure 2.2.3 – Program Person Detail Page for CalWORKs in 'View' mode (for users without 'ApplicationDetailView' or 'ApplicationDetailEdit' security right)

2.2.3 Description of Changes

1. Under the Application Detail section, make the date value of the 'Application Date' field a hyperlink.
   a. Clicking on the hyperlink will direct the user to the Application Detail page in 'View' mode for the specific 'Application Date' value that is displayed on the Program Person Detail page.
   b. The hyperlink will be protected by the 'ApplicationDetailView' right.

   Note: The hyperlink will display for each program on the Program Person Detail page where applicable.

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Case Summary**

2.2.5 Security Updates

Note: 'Program Edit' and 'Program View' are existing security groups.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ApplicationDetailView	View program application information.	Application Detail View, Program Edit, Program View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Application Detail View	View program application information.	View Only
Program Edit	Edit information to programs.	Regional Call Center Supervisor, Regional Call Center Staff, Eligibility Supervisor, Eligibility Staff, Child Care Supervisor, Child Care Staff
Program View	View program information.	CA State All County Access, Executive, Hearings Staff, Hearings Supervisor, Help Desk Staff, Oversight Agency Staff, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, Special Investigations Staff, Special Investigations Supervisor, View Only

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Application Detail Page

2.3.1 Overview

The Application Detail page allows the user to access historical information for a program application. Currently, only an 'Edit' mode version of the Application Detail page exists which requires editing security rights. A 'View' mode Application Detail page that includes the option to view the participant's program applications will be created, along with a security right to view the page.

2.3.2 Application Detail Mockup

Application Detail

*- Indicates required fields   Edit   Close

Program Type:	View Application:
CalWORKs	App #3 - 08/10/2010 ⌄ View

Program Application Information

App #:	Source: *	Application Date: *
3	In Person	08/10/2010

Inter-County Transfer:

No

Person Information

Name	DOB	Application Date ✳	Beginning Date of Aid ✳	Cash-based Medi-Cal BDA
JOHN DOE	10/03/1985	08/10/2010	08/10/2010	
JANE DOE	05/04/2006	08/10/2010	08/10/2010	

Edit   Close

Figure 2.3.1 – Application Detail Page in View Mode (for users with 'ApplicationDetailEdit' security right)

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Application Detail

* - Indicates required fields   Close

Program Type: **View Application:**
CalWORKs   App #3 - 08/10/2010 ☑   View

Program Application Information

App #:   Source: *   Application Date: *
3   In Person   08/10/2010

Inter-County Transfer:
No

Person Information

Name	DOB	Application Date ✿	Beginning Date of Aid ✿	Cash-based Medi-Cal BDA
JOHN DOE	10/03/1985	08/10/2010	08/10/2010	
JANE DOE	05/04/2006	08/10/2010	08/10/2010	

Close

Figure 2.3.2 – Application Detail Page in View Mode (for users without 'ApplicationDetailEdit' security right)

2.3.3 Description of Changes

1. Create a 'View' mode for the Application Detail page.
   a. All fields, except for the 'View Application' field, will be set to view only.
      i. The 'Change Reason' field will display the latest value on this field for the current application.
      ii. The 'View Application' drop-down field will list all available applications to view.
      iii. Clicking the 'View' button will refresh the page and display the corresponding program application information in view mode.
   b. A 'Close' button will display on the top right and bottom right of the sections, as shown in Figure 2.3.1 - 2.3.2.
      i. Clicking the 'Close' button will take the user to the prior page, which will either be the Program Detail page or the Program Person Detail page.
   c. If the user also has 'ApplicationDetailEdit' rights, an 'Edit' button will also display to the left of the 'Close' buttons, as shown in Figure 2.3.1
      i. The 'Edit' button will take the user to the Application Detail page in edit mode.

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2.3.4 Page Location
- **Global: Case Information**
- **Local: Case Summary**
- **Task: Case Summary**

2.3.5 Security Updates
Note: 'ApplicationDetailEdit' is an existing security right and 'Program Edit' is an existing security group.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ApplicationDetailEdit	Edit information to programs.	Program Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Program Edit	Edit information to programs.	Regional Call Center Supervisor, Regional Call Center Staff, Eligibility Supervisor, Eligibility Staff, Child Care Supervisor, Child Care Staff

2.3.6 Page Mapping
N/A

2.3.7 Page Usage/Data Volume Impacts
N/A

2.4   Automated Regression Test

2.4.1   Overview

Create new automated regression test scripts and/or modify existing scripts to provide coverage of the new Application Detail page view mode functionality.

2.4.2   Description of Changes

1. Create or modify existing regression test scripts to cover the following scenarios:
   a. Navigating to the Application Detail page in view mode from the Program Detail page in edit mode.
   b. Navigating to the Application Detail page in view mode from the Program Detail page in view mode.
   c. Navigating to the Application Detail page in view mode from the Program Person Detail page in edit mode.
   d. Navigating to the Application Detail page in view mode from the Program Person Detail page in view mode.
   e. Navigating to the Application Detail page in edit mode from the Application Detail page in view mode.
   f. Returning to the Program Detail page from the Application Detail page in view mode via the Close button.
   g. Returning to the Program Person Detail page from the Application Detail page in view mode via the Close button.
   h. Refreshing the Application Detail page in view mode to display the details of a different application than the one originally displayed on page load, and subsequently returning to the Program Detail page via the Close button.
   i. Refreshing the Application Detail page in view mode to display the details of a different application than the one originally displayed on page load, and subsequently returning to the Program Person Detail page via the Close button.

   For each scenario above: Verify that the Application Detail page displays the appropriate details based on the view date.

   Note: Each of the above scenarios will be executed as a user with both view and edit security rights for all pages. Security specific testing is not in scope.

2. Create new regression test scripts to cover the following scenarios:
   a. Navigate to the Select Security Group page for a worker without the 'Application Detail View' security group. Verify that this security group is available for selection, and that the Group Description matches the details listed above.

b. Navigate to the Security Rights List page for each of the following security groups. Verify that the 'ApplicationDetailView' right is displayed.
   i. Application Detail View
   ii. Program Edit
   iii. Program View
c. Navigate to the Security Rights List page for the following security group. Verify that the 'ApplicationDetailEdit' right is displayed.
   i. Program Edit
d. Navigate to the Security Groups List page for the following security role. Verify that the 'Application Detail View' group is displayed.
   i. View Only
e. Navigate to the Security Groups List page for each of the following security roles. Verify that the 'Program Edit' group is displayed.
   i. Child Care Staff
   ii. Child Care Supervisor
   iii. Eligibility Staff
   iv. Eligibility Supervisor
f. Navigate to the Security Groups List page for each of the following security roles. Verify that the 'Program View' group is displayed.
   i. Executive
   ii. Hearings Staff
   iii. Hearings Supervisor
   iv. Help Desk Staff
   v. Oversight Agency Staff
   vi. Quality Assurance Staff
   vii. Quality Assurance Supervisor
   viii. Quality Control Staff
   ix. Quality Control Supervisor
   x. Special Investigations Staff
   xi. Special Investigations Supervisor
   xii. View Only

3   SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1.0	Online	Security Matrix	CA-206708 Security Matrix.xls

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.2.10	The LRS online portion of the LRS Application Software shall make use of hyperlinks in order to save time for the User and to take the User directly to the Web page holding additional information. For example, if a case summary Web page indicates income, there shall be a hyperlink that takes the User to an income detail Web page directly, without the need for the User to take the time to search the LRS Application Software for the appropriate Web page.	A hyperlink will be added to view the Application Detail page from the Program Detail page and the Program Person Detail page.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208191

Changes to the Designation and Responsibilities
of the Medi-Cal Authorized Representative

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell
	Reviewed By	Matt Lower

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/18/2021	1.0	Initial Draft	Connor O'Donnell
08/04/2021	2.0	Content Revision – Add 'Authority' field to Effective Dating Confirmation List page	Connor O'Donnell

Table of Contents

1 OVERVIEW

1.1 Current Design

The Authorized Representative Detail page captures information regarding the assigned Authorized Representative and/or Additional Correspondent.

1.2 Requests

Applicants and beneficiaries for insurance affordability programs have increased options for choosing roles and responsibilities of the individual or organization they designate as their authorized representative. Counties must accept and use the information completed by the applicant or beneficiary to designate an authorized representative listed on the existing paper Single Streamlined Application (SSApp), on-line SSApp, Statewide Automated Welfare System (SAWS) 2 Plus, MC 306 form, MC 382 form, or another form or written designation.

1.3 Overview of Recommendations

1. Add a tooltip to the Program Column of the Authorized Representative List page when the value is 'Medi-Cal'.
2. Add an 'Additional Contact' table to the Authorized Representative Detail page.
3. Add an 'Authority' field to the Authorized Representative Program Detail page.
4. Add an 'Authority' field to the Effective Dating Confirmation List page when saving an Authorized Representative record for a Medi-Cal program.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Authorized Representative List

2.1.1 Overview

The Authorized Representative List page provides links to the Authorized Representative Detail page for all Authorized Representatives associated to a given case. In order to make Authority information more readily available when the Program is 'Medi-Cal', a hover tooltip will be added to provide the Authority details.

2.1.2 Authorized Representative List Mockup

Figure 2.1.1 – Authorized Representative List Mockup

2.1.3 Description of Changes

1. Add a tooltip to the result in the Program column when the result is 'Medi-Cal'.
    a. The tooltip will display the value of the 'Authority' field from the Authorized Representative Program Detail page.
        Note: This tooltip will appear and show whatever value the Authority field holds for the record, whether it is blank, 'Limited', or 'Full'

2.1.4 Page Location

- **Global: Case Info**

- **Local: Case Summary**
- **Task: Authorized Representative**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping with the new field.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Authorized Representative Detail

2.2.1 Overview

The Authorized Representative Detail page provides a variety of information on a given Authorized Representative attached to a case. In order to be able to store multiple contacts when in the context of a Resource, a table containing the contact's name, phone number, phone type, and email address will be added to replace the 'Contact Name' field.

2.2.2 Authorized Representative Detail Mockup

Resource: CHARLIE IN	Resource ID: 901472081

Use Resource Address:
Yes ▼

Address Information ✳

Type	Address	Begin Date	End Date
Mailing	740 TUBMAN RD SANTA ANA, CA 92705-3818		
Physical	15 TALL PINE ROAD BELLFLOWER, CA 90706-7050		

Contact Information

Resource Contact Information

E-mail Address:

Phone Number	Phone Type
(914)854-8555 ext.	Main

☐	Additional Contact Name	Phone Number		Phone Type	Email Address	
☐	John Smith	(123)456-7890	ext.	Main	john.smith@gmail.com	
☐	Jane Smith	(111)222-3333	ext.	Main	jane.smith@gmail.com	
	[ ]	[ ]	ext. [ ]	[▼]	[ ]	Add

Remove

Figure 2.1.1 – Authorized Representative Detail Mockup

2.2.3 Description of Changes

1. Remove the 'Contact Name' field.
2. Change the header of the 'Contact Information' table to 'Resource Contact Information' when in the context of a Resource.
3. Add a new table with the header 'Contact Information' when in the context of a Resource
4. Move the 'Resource Contact Information' table inside the 'Contact Information' table when in the context of a Resource
5. Add a new sub-table to the 'Contact Information' table below the 'Resource Contact Information' table when in the context of a Resource. This table will be able to contain multiple contacts, with the ability to add new ones via a button and ability to remove old ones via a combination of checkboxes and a remove button. The table will contain the following column headers.
   a. Additional Contact Name – This field will store the name of the contact. This field will have a max length of 60 characters.
   b. Phone Number – This field will store the phone number of the additional contact.
   c. Ext. – This field will hold the extension of the phone number.
   d. Phone Type - This field will hold the phone type of the additional contact. The following options will be available:
      i. Cell
      ii. Fax
      iii. Home
      iv. Message
      v. Main
      vi. TDD
      vii. Toll Free
      viii. Work
   e. Email Address – This field will hold the email address of the additional contact. This field will have a max length of 50 characters

2.2.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Authorized Representative**

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 Authorized Representative Program Detail

2.3.1 Overview

Update the Authorized Representative Program Detail page to include an indicator showing whether the Medi-Cal Authority is 'Full' or 'Limited'.

2.3.2 Authorized Representative Program Detail Mockup

Figure 2.1.1 – Authorized Representative Program Detail Mockup – View Mode

Authorized Representative Program Detail

* - Indicates required fields

[Save and Return] [Cancel]

Name:	**Program:**
CHARLIE IN	Medi-Cal
Additional Correspondence Recipient: *	**LTC MC RE Packet Recipient: ***
Yes ∨	Yes ∨
Authority: *	
Full ∨	
Begin Date: *	**End Date:**
04/13/2021	

Additional Information:

[text area]

[Save and Return] [Cancel]

Figure 2.1.2 – Authorized Representative Program Detail Mockup – Edit Mode

2.3.3   Description of Changes

1. Add an 'Authority' field located below the 'Additional Correspondence Recipient' field and above the 'Begin Date' field. This field will have the value of 'Full' when the Authority is 'Full and 'Limited when the 'Authority is 'Limited'. This field will only appear when the 'Program' field has the value of 'Medi-Cal'. This field will only be editable in Create mode and Edit mode.

2.3.4   Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Authorized Representative**

2.3.5   Security Updates

N/A

2.3.6   Page Mapping

Update page mapping with the new field.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Effective Dating Confirmation List

2.4.1 Overview

The Effective Dating Confirmation List page appears when the effective dates of existing records need to be altered to account for new records being entered. Due to changes to the Authorized Representative Program Detail page an additional field of 'Authority' needs to be added to the Effective Dating Confirmation List page.

2.4.2 Effective Dating Confirmation List Mockup

Effective Dating Confirmation List

This is the record you have added or updated:

Name	Additional Correspondence Recipient	LTC MC RE Packet Recipient	Authority	Begin Date	End Date
BOWNE, JUNIE 25M	No		Full	08/04/2021	

The system will make corrections to your additions/updates:

The system will adjust the effective dates of this record:

Name	Additional Correspondence Recipient	LTC MC RE Packet Recipient	Authority	Begin Date	End Date
BOWNE, JUNIE 25M	No		Full	08/01/2021	08/03/2021

Click Save to continue or Cancel to undo this action.   Save   Cancel

Figure 2.4.1 – Effective Dating Confirmation List Mockup

2.4.3 Description of Changes

1. Add an 'Authority' field to the Effective Dating Confirmation List page when saving an authorized representative record for a Medi-Cal program. This field will have the same values as the Authority field from the Authorized Representative Program Detail page (Full, Limited) as seen in Section 2.3.3.

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2.4.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Authorized Representative**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update page mapping with the new field.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5   Contact Name Data Change

2.5.1   Overview

The Contact Name field currently only holds a single value, the name itself. With the changes in section 2.2 this name field will be replaced with a table holding a name, phone number, phone number extension, and email address. In order to align existing values with this new table current 'Contact Name' values will be remapped to the 'Additional Contact Name' field in the new child table.

2.5.2   Description of Change

1. Update the Authorized Representative Data Model to support multiple contacts for a resource. Update the existing contacts information to respect the updated data model.

Note: The currently existing value in the 'Contact Name' field will be mapped to the Additional Contact Name column in the first record of the new Contact Name table regardless of what data is contained in the existing 'Contact Name' field.

2.5.3   Estimated Number of Records Impacted

10000

3   REQUIREMENTS

3.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4 OUTREACH

4.1 Lists

Generate a list of all cases that have a "Contact Name" a field that appears on the Authorized Representative Detail page when in the context of a Resource.

List Name: CA-208191 List of Cases where the Contact Name field from the Authorized Representative Detail page is populated.
List Criteria: Cases that have the Contact Name field populated on the Authorized Representative Detail page where the Authorized Representative type is 'Resource'.
Standard Columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s): Resource, Contact Name
Frequency: One-time

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CA-208191

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208599 | DDID 1967

Batch Scheduling Updates for C-IV Conversion

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Jennifer Muna
	Reviewed By	Amy Gill, Dana Petersen

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/16/2021	1.0	Initial version	Jennifer Muna
5/18/2021	2.0	Added the following: • Schedule Batch jobs PB00E906 and PB00E907 for the C-IV Migration counties based on CRFI responses • Requirements to update PB00E183 and PB00E1302 to run for County 19 only	Jennifer Muna
5/20/2021	3.0	• Removed 'CA-207141: DDID 2190 – eICT (use assumption #2 include batch job PB00E151)' from Fiscal List • Added requirements to disable PB00E444 batch job from CalSAWS Scheduler	Jennifer Muna
6/15/2021	4.0	Design clarification to remove CA-207302: DDID 1527 from Correspondence list and added to the Batch list. Supporting Document 'All other Batch Jobs' was updated to include batch job PB00E472 and 'Correspondence Batch Jobs' was updated by removing PB00E472 from batch list	Jennifer Muna
07/07/2021	5.0	Added the following for content revision #1: • Assumption #7 that CA-208599 will implement BSCRs for the associated batch jobs in the DDIDs • Assumption #8 that CA-231504 will implement BPCRs for the associated batch jobs in the DDIDs • Requirements to turn off the PB19R136 batch job • Moved requirements for	Rainier Dela Cruz, Jennifer Muna

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		PB00E104 & PB00E105 to Section 2.1.2 • BPCR updates for PB00R1903 & PB00R1915 to run for C-IV counties based on CRFI responses • Removed PB00E104 & PB00E105 from Supporting Document 'Correspondence Batch Jobs' and Added to 'All Other Batch Jobs' Supporting Document • San Benito Positive Pay Writer and FTP (PO35F107/PO35F147) and removed County 28 from Daily DD writer and FTP job (POXXF201/POXXF241) in Supporting Document 'Fiscal Batch Jobs'.	
8/18/2021	6.0	• Added Assumption #9 and removed CA-207203 (POXXE424) requirements. Event Streaming enabled for MEDS AP18 transactions. • Updated Supporting Document 'All Other Batch Jobs' by removing POXXE424	Jennifer Muna

Table of Contents

1   OVERVIEW

1.1   Current Design

Various CalSAWS Migration SCRs include functionality to turn on/turn off Batch jobs for the 57 Migration Counties.

1.2   Requests

Update Batch scheduling for the C-IV Migration Counties to schedule the various Batch jobs for the appropriate counties. Batch jobs from the following SCRs will be scheduled for the C-IV Migration Counties starting 09/27/2021:

Fiscal:

1. CA-207344: DDID 1360 – Add Direct Deposit Functionality to CalSAWS for C-IV Migration Counties
2. CA-217791: DDID 1967 – Update RDB With Direct Deposit Data Collection
3. CA-207157: DDID 2128 – Add Tax Intercept Functionality to CalSAWS
4. CA-207266: DDID 1652 – Enable Recovery Account Activation Batch Job for all 58 Counties
5. CA-207139: DDID 2194 – Add Positive Pay Interface to CalSAWS for C-IV Migration Counties
6. CA-207493: DDID 87 – Add Batch Automation for WTW Supportive Services Overpayments
7. CA-214353: DDID 374 – Update C-IV 1099 Interface to Process EDBC Authorized Issuances
8. CA-216568: DDID 1787 and 1789 – Migrate C-IV County Specific Batch jobs Phase 5

Batch:

1. CA-207235: DDID 1859 – CMSP
2. CA-207494: DDID 85 – Update Batch that removes WTW Program Worker at Sanction status to be configurable
3. CA-207374: DDID 1110 – Update Negative Action Batch jobs to be configurable
4. CA-207363: DDID 1236 – Update the Non-MAGI RE Discontinuance Batch Job to run for all 58 Counties
5. CA-207329: DDID 1395 – IEVS Batch Assignment
6. CA-200404: DDID 1967 – Update the E2Lite Interface/WPR Sample Process to Handle Late Case Submissions
7. CA-208568: DDID 1967 – Modify WTW Batch job related to Sanctions for all 58
8. CA-212490: DDID 1395 – IEVS Batch Assignment for CalWIN
9. CA-207476: DDID 266 – Update No Change SAR 7 functionality to be configurable
10. CA-207232: DDID 1964,1955 – MEDS

11. ~~CA-207203: DDID 2073 – Add functionality to allow a user to request IEVS and SAVE at any time~~
12. CA-207438: DDID 571 Migrate C-IV WDTIP Jobs
13. CA-215679: DDID 2376 FDS: GA GR Overpayment Suspension/Termination Batch Changes
14. CA-207148: DDID 2143 – Batch Job to Discontinue Special Care Increment Payment
15. CA-222369: Update Batch jobs for Foster Care program when NMD turns 21
16. CA-207302: DDID 1527 - CalFresh Denial Due to Missed Interview
17. CA-213659: DDID 1787, 1789 Migrate the C-IV County Specific Batch Jobs Phase 4

Correspondence:
1. CA-216057: DDID 1039 - Update Enclosure Approval functionality
2. CA-201968: DDID 1967 - Add WTW Activity Attendance and Progress Forms
3. CA-207399: DDID 1039 - Migrate C-IV RE Packets for CW and CF
4. CA-214198: DDID 1967 - Update State Form Batch jobs to run for all Counties
5. CA-207364: DDID 1235 - Update Medi-Cal RE Reminder Notice Batch Job to be configurable
6. CA-211757: DDID 1967 – Update Batch Configuration for CW 2186A CalWORKs Time Limit Exemption Request (12/12)
7. CA-50988: Automation of the Medi-Cal Request for Information Form MC 355
8. CA-215095: DDID 2630 FDS: Non State Forms – Update PA 2492
9. CA-215153: DDID 2659 FDS: Non State Forms – Update MATURES 1
10. CA-215155: DDID 2660 FDS: Non State Forms – Update MATURES 2

Disable batch jobs that are running between C-IV and CalSAWS which transfer eICT data between the two systems:
1. CA-207141 DDID 2190 – Stop batch jobs POC4E100, POC4E140, PIC4E100 and PIC4E160

Modify jobs from C-IV schedule that were updated since implementation DDID 1787:
1. CIV-107956: Turn off Colusa County e2Lite job.

1.3 Overview of Recommendations

1. The batch jobs from the aforementioned DDIDs will be added to the CalSAWS Batch Scheduler for the specified C-IV Migration Counties starting 9/27/2021.

1.4 Assumptions

1. Scheduling for CMSP Discontinuance Sweep (PB00E147) in DDID 1859 will be addressed in CA-214453.
2. CRFI responses for DDID 85 implementation to remove WTW program worker with Sanction status will be addressed in CA-48348.

3. CRFI responses for DDID 2630 to automatically generate CSF 162 form for IEVS PVS abstracts will be addressed in CA-226343.
4. CRFI responses for CAPI Discontinuance batch job in DDID 1110 will be addressed in CA-207145.
5. CRFI responses for MC Former Foster Youth (FFY) Discontinuance batch job in DDID 1110 will be addressed in CA-227766.
6. Batch scheduling for CalWIN Migration Counties will occur with the following SCRs for each conversion wave: CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, CA-208605.
7. This SCR will only address Batch Schedule Requests for the aforementioned DDID's.
8. All batch property updates (BPCR) will be addressed in CA-231504, including any BPCR mentioned in this SCR that require updates based on county opt-in/ opt-out elections.
9. CA-227192 decommissioned the MEDS AP18 Transaction batch jobs and enabled Event Streaming implementation for MEDS AP18 in CalSAWS.

2 RECOMMENDATIONS

2.1 Schedule Batch Jobs to run for the C-IV Migration Counties

2.1.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for the C-IV Migration Counties.

2.1.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Schedule the batch jobs to run for the C-IV Migration Counties who opted-in to the functionality:
   a. Refer to Supporting Document 1 'All Other Batch Jobs' for a detailed list of batch jobs.
   b. There are a few existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out decisions.
2. ~~Create a BPCR to insert batch job data and properties for POXXE424 – AP18 IEVS/SAVE Request Writer. Create a BSCR to schedule POXXE424 to run for all C-IV Migration counties. Refer to Supporting Document 1 'All Other Batch Jobs' for C-IV Scheduling details.~~
3. Disable the following eICT batch jobs from running between C-IV and CalSAWS:
   a. POC4E100 – Outbound eICT Writer (C-IV)
   b. POC4E140 – Outbound eICT FTP (C-IV)

     c. PIC4E100 – Inbound eICT Reader (C-IV)
     d. PIC4E160 – Inbound eICT FTP (C-IV)
4. Create BPCR to add C-IV Migration counties, who opted-in (Refer to Supporting Document 1 'All Other Batch Jobs' for list of county opt-in), in the county code list batch property for the following batch jobs:
     a. PB00E906 – Foster Care EDBC Sweep (Prorate NMD turned 21)
     b. PB00E907 – Foster Care EDBC Sweep (Discontinue NMD turned 21)
     c. Create BSCR to schedule the jobs mentioned above for specific C-IV Migration counties. Refer to Supporting Document 1 'All Other Batch Jobs' for C-IV Scheduling details.
5. Update the following batch jobs to run for County 19 only:
     a. PB00E183 – CAPI Discontinuance Sweep
     b. PB00E1302 – MC Former Foster Youth (FFY) Discontinuance Sweep
6. Disable PB00E444 – EDBC Sweep Controlled Form PA 2494, from running in CalSAWS Scheduler. The PA 2494 was a Los Angeles County only controlled form that was replaced by the CW 63, which is not a controlled form.
7. Disable PB19R136 – New Office Address Notification, from running in the CalSAWS Scheduler. The batch job sends a notification via email to the project staff when a new office address has been added to the system or a current office has been updated by the county. The project staff will research to see if there are impacts to BRM. Los Angeles county has a specific BRM logic in CalSAWS and this job is not needed.
8. Create a BPCR to update the following batch jobs to add all C-IV Migration counties in the county code list batch property:
     a. PB00E104 – MC 355 Cleanup
     b. PB00E105 – MC 355 Automatic Task Due Sweep

2.1.3 Execution Frequency

Refer to Supporting Document 1 'All Other Batch Jobs' for batch job frequency.

2.1.4 Key Scheduling Dependencies

Refer to Supporting Document 1 'All Other Batch Jobs' for key scheduling dependencies.

2.1.5 Counties Impacted

C-IV Migration Counties

2.1.6 Data Volume/Performance

N/A

2.1.7 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.)

2.2 Fiscal jobs to run for the C-IV Migration Counties

2.2.1 Overview

This section outlines the updates necessary to include the Fiscal batch jobs in the CalSAWS Batch Scheduler for the C-IV Migration Counties.

2.2.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Schedule the batch jobs to run for the C-IV Migration Counties who opted-in to the functionality:
   a. Refer to Supporting Document 2 'Fiscal Batch Jobs' for a detailed list of batch jobs.
   b. There are a few existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out decisions.

2.2.3 Execution Frequency

Refer to Supporting Document 2 'Fiscal Batch Jobs' for execution frequency.

2.2.4 Key Scheduling Dependencies

Refer to Supporting Document 2 'Fiscal Batch Jobs' for key scheduling dependencies.

2.2.5 Counties Impacted

C-IV Migration Counties

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

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

2.3 Correspondence Jobs to run for the C-IV Migration Counties

2.3.1 Overview

This section outlines the updates necessary to include the Client Correspondence batch jobs in the CalSAWS Batch Scheduler for the C-IV Migration Counties.

2.3.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Schedule the batch jobs to run for the C-IV Migration Counties:
   a. Refer to Supporting Document 3 'Correspondence Batch Jobs'.
2. Update PB00C898 - NA 840, NA 845 Set, WTW 4 to run for County 19 (Los Angeles County) only.
3. Create a BPCR to update the PB00R1987 – MC 355 Reminder Sweep to add all C-IV Migration counties in the county code list batch property.
4. Create BPCR to update the following batch jobs to run for the C-IV Migration counties based on the CRFI responses received. Refer to Supporting Document 3 'Correspondence Batch Jobs':
   a. PB00R1903 – CSF 145
   b. PB00R1915 – CSF 146

2.3.3 Execution Frequency

Refer to Supporting Document 3 'Correspondence Batch Jobs' for execution frequency details.

2.3.4 Key Scheduling Dependencies

Refer to Supporting Document 3 'Correspondence Batch Jobs' for scheduling dependencies.

2.3.5 Counties Impacted

C-IV Migration Counties

2.3.6 Data Volume/Performance

N/A

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.)

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch/Interfaces	List of all other batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	All Other Batch Jobs.xlsx
2	Batch/Interfaces	List of Fiscal batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	Fiscal Batch Jobs.xlsx
3	Batch/Interfaces	List of Correspondence batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	Correspondence Batch Jobs.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. 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. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Batch Scheduling updates are implemented for the C-IV Migration Counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213759

Update Child Support Interface to send correct
Begin Date

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sowmya Coppisetty
	Reviewed By	Amy Gill, Dana Petersen

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/16/2021	1.0	Initial Design	Sowmya Coppisetty
8/06/2021	1.1	Add new requirement	Sowmya Coppisetty

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1   OVERVIEW

CalSAWS determines eligibility before sending any of the members in the CCSAS Outbound file. Fields related to eligibility include Eligibility Status, Aid Code, Eligibility Effective Begin Date, Beginning Date of Aid, Date of Authorization, Aid Discontinuance Date and Aid Discontinuance Reason and this includes the IV-A member identifier number that identifies the legal guardian or Absent parent .

This SCR will update the CCSAS Outbound interface logic to set the Beginning Date of Aid and IV-A member identifier appropriately .

1.1   Current Design

Currently, when the eligibility status of the Absent Parent, Custodial Parent, Dependent Person (the child), and Other Persons associated to the Child Support Referral is updated, the Beginning Date of Aid data element in the outbound file is populated with the aid code begin date (i.e., first date being active without a break in aid) associated to the program.

And , when the custodial parent in an ARC/FC program is a resource the IV-A Member identifier number data element is populated with the absent parent id that corresponds to an absent parent in the program.

1.2   Requests

1. Update the CCSAS Outbound interface to set the Beginning Date of Aid data element when there is a change in the eligibility status appropriately.
2. Update the CCAS Outbound interface logic to set the IV-A member identifier value for the FC/ARC and Kin-GAP program .
3. Update the CCSAS inbound interface logic to process the IV-A member identifier data element value received in the CCSAS inbound file for FC/ARC and Kin-Gap program.

1.3   Overview of Recommendations

1. Update the CCSAS Outbound interface logic of populating the Beginning Date of Aid when there is a change in the eligibility status with the effective date of when the person's status/role has changed.
2. Update the CCSAS Outbound interface logic of populating the IV-A member identifier for FC(ARC) and Kin-Gap program when a resource is listed as the Custodial Parent.
3. Update CCSAS inbound interface logic to accept and process the value of organization id received in the 'IVA_MEMBER_IDENTIFIER' data for FC/ARC and Kin-GAP program.

1.4   Assumptions

None

2   RECOMMENDATIONS

2.1   CCSAS Outbound Interface Update

2.1.1   Overview

Update the CCSAS Outbound Interface logic of populating the Beginning Date of Aid data element when there is a change in the person's eligibility status <mark>and the logic of populating the IV-A member identifier for FC(ARC) and Kin-Gap program</mark> .

2.1.2   Description of Change

1. Update the CCSAS Outbound Interface logic to populate the Beginning Date of Aid (BEGIN_DATE_OF_AID) data element when there is a change in eligibility status with the effective date of when the person's eligibility status has been updated.

    a. For existing referrals in which a person's eligibility status is updated from being an eligible member to an ineligible member, populate the Beginning Date of Aid with the effective date of when the person's eligibility status has changed.

       Example 1: A person is an Active Member on a CW program and becomes an Active UP (SSI) effective March 1, 2021. The CCSAS Outbound Interface will detect the status change on March 1, 2021 and send an update transaction to CCSAS with 03/01/2021 for the BEGIN_DATE_OF AID.

    b. For new referrals in which the person was not previously active, set the Beginning Date of Aid to be the effective date of when the child's eligibility status has been established.

       Example 2: A new CW application is processed on March 1, 2021 and the child is established at intake with a role code of FRI (Undocumented Child). The CCSAS Outbound Interface will send a new referral transaction to CCSAS with the child's member transaction contains 03/01/2021 as the BEGIN_DATE_OF_AID.

    c. For persons that transition from ineligible status to eligible, set the Beginning Date of Aid to the effective date of when the child's status was updated to eligible.

       Example 3: There exists a child with an Active FRI (Undocumented Child) status with Beginning Date of Aid of

11/1/2020. On 03/01/2021, the child's status is updated from Active FRI to Active Member. The CCSAS Outbound Interface will send an update transaction to CCSAS with 03/01/2021 as the BEGIN_DATE_OF_AID.

2. Update the logic of populating the Beginning Date of Aid (BEGIN_DATE_OF_AID) data element when the program status is updated to Discontinued as follows:

   a. For persons in the program with 'ineligible' eligibility status (i.e. SSI or Undocumented Child) being discontinued, populate the Beginning Date of Aid with effective date of when the person was identified as ineligible.

   Example 4: There is an active CalWORKs program with a person of eligibility status of SSI with begin date of 01/01/2021, discontinued on 03/01/2021. The CCSAS outbound interface will send an update transaction on 03/01/2021 with BEGIN_DATE_OF AID as 01/01/2021 for the SSI person.

   b. For persons in the program with 'Eligible' eligibility status (Eligible/Optional Child) being discontinued, populate the Beginning Date of Aid with effective date of when the person was identified as eligible

   Example 5: There is an active CalWORKs program with a person with eligibility status as 'Optional Child' with begin date of 01/01/2021, discontinued on 03/01/2021. The CCSAS outbound interface will send an update transaction on 03/01/2021 with BEGIN_DATE_OF AID as 01/01/2021 for the Optional Child Person

3. Update the logic of populating the value for the IV-A member identifier data element 'IVA_MEMBER_IDENTIFIER' with the organization id (ORG_ID) of the resource for Foster Care program with an ARC aid code   and Kin-Gap program when a resource is listed as the custodial parent/payee as follows-

   a. Prefix the letter 'O' tin the beginning of the ORG_ID when populating the 'IVA_MEMBER_IDENTIFIER' data element

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All Counties.

2.1.6 Data Volume/Performance

No anticipated data volume or performance impacts.

2.1.7 Interface Partner

California Child Support Automation System (CCSAS)

2.1.8 Failure Procedure/Operational Instructions

No Change.

2.2 CCSAS Inbound Interface Update

2.2.1 Overview

Update CCSAS inbound interface logic to accept and process the value of organization id received in the 'IVA_MEMBER_IDENTIFIER' data for FC/ARC and Kin-GAP program.

2.2.2 Description of Change

- Update the CCSAS inbound reader interface to identify and validate the organization id value received with a prefix of 'O' in the IVA_MEMBER_IDENTIFIER' data element for FC/ARC and Kin GAP program when trying to retrieve the resource/custodial parent to process the inbound transaction

2.2.3 Execution Frequency

No Change.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

All Counties.

2.2.6 Data Volume/Performance

No anticipated data volume or performance impacts.

2.2.7 Interface Partner

California Child Support Automation System (CCSAS)

2.2.8 Failure Procedure/Operational Instructions

No Change.

3   REQUIREMENTS

3.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.5	The LRS shall automatically evaluate/process ED/BC accounting for the impact of change(s) on all assistance units on a case, on an individual, and on any or all companion cases that could potentially be affected by the change(s).	This SCR updates the logic of populating the Beginning date of aid data and IV-A member identifier element in the CCSAS Outbound Interface file.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215171

DDID 2670: Add BRM barcode on GEN 202 - Verification of Employment/Earnings (5/21) in English and Spanish languages

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Raj Devidi
	Reviewed By	Sreekanth Kalvoju

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
07/14/2021	0.3	Content Revision 1: Added BRM for all langs Changed Mail Priority	Maria Jensen
08/20/2021	0.4	Content Revision 2: Add BRM barcode to GEN 202 in English and Spanish languages. All the threshold implementation for GEN 202 form moved to CA-232524	Raj Devidi

Table of Contents

1 OVERVIEW

The 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 BRM barcode on the latest GEN 202 – Verification of Employment/Earnings (5/21) form to CalSAWS in English and Spanish languages.

The SCR CA-232524 will add GEN 202 – Verification of Employment/Earnings (5/21) form to CalSAWS in the remaining supported threshold languages. All the changes moved from SCR CA-215171 to SCR CA-232524.

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

1. Add BRM header and envelope to the latest GEN 202 – Verification of Employment/Earnings (5/21) form in English and Spanish languages. Update the mailing priority of the form to Priority 1.

1.3 Overview of Recommendations

1. Add BRM header and envelope to the latest GEN 202 – Verification of Employment/Earnings (5/21) form in English and Spanish languages. Update the mailing priority of the form to Priority 1.

1.4 Assumptions

1. The GEN 202 form will have as header the CalSAWS standard header on page 1 and BRM header on page 2.

2 RECOMMENDATIONS

2.1 Populate Centralized BRM Address on Form GEN 202 for all languages

2.1.1 Overview

1. This SCR will add BRM info to form GEN 202 for all languages.

   State Form: GEN 202 (5/21)
   Programs: All
   Attached Forms: None
   Forms Category: Forms
   Template Repository Visibility: All Counties
   Languages: English, Spanish.
   Form Header: CalSAWS Standard Header in Threshold Language on page 1, BRM Header in Threshold Language on page 2
   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. Change the mailing requirement for the form GEN 202:
   Return Envelope Type: Returned Pre-Paid Envelope(BRM)
   Mailing Priority: 01

2.1.2 Description of change

Populate Centralized BRM Address on GEN 202 Form for all languages with the following:Route the forms (listed in section 2.1.2) to the Expo Park location for the below listed District Offices for Los Angeles County.

Centralized office address for Expo Park:
DPSS – CSU EXPO PARK
3833 S VERMONT AVE
LOS ANGELES CA 90037-9920

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
1.	Belvedere	05
2.	Southwest Special	08
3.	West Valley	82
4.	East Valley	11
5.	Metro Special Office	70
6.	San Fernando Branch	32
7.	Metro Family	13
8.	Pasadena	03
9.	Wilshire Special Office	10
10.	Glendale	02
11.	Santa Clarita Branch	51
12.	Lancaster	34
13.	Lancaster General Relief Office	67

1. Route the forms (listed in section 2.1.2) to the San Gabriel/El Monte Centralized location for the below listed District Offices for Los Angeles County.
   Centralized office address for San Gabriel/El Monte:
   DPSS – CSU EL MONTE/SAN GABRIEL
   3400 AERO JET AVE
   EL MONTE CA 91731-9935

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
1.	Pomona	36
2.	Metro East	15
3.	Cudahy	06
4.	Compton	26
5.	Norwalk	40
6.	Southwest Family	83
7.	El Monte (San Gab. V. Serv. Center)	04

8.	San Gabriel Valley	20
9.	Lincoln Heights	66
10.	Child Medi-Cal Enroll. Project	16
11.	Management Information Evaluation	L6

2. Route the forms (listed in section 2.1.2) to the La Cienega Centralized location for the below listed District Offices for Los Angeles County.
Centralized office address for La Cienega:
DPSS – CSU LA CIENEGA
9800 S LA CIENEGA BLVD FL 11
INGLEWOOD CA 90301-9958

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

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

   Technical Note: CT15 REFER_TABLE_19_DESCR has the information of whether a County has a Centralized or Non-Centralized office.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	GEN 202 changes	GEN_202_English.pdf GEN_202_Spanish.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2670	The CONTRACTOR shall add State Form GEN 202 - Verification of Employment/Earning to the CalSAWS Software. 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.	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/created. Consortium staff will be modifying or creating FDDs.	Add BRM barcode with SCR CA-215171 on form GEN 202 - Verification of Employment/Earnings form. With SCR CA-232524, GEN 202 - Verification of Employment/Earnings will be added to the CalSAWS system in the 11 supported threshold languages.