

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-50542

Correction to the “Target” Drop Down List of the
Assessment Goals Detail Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Andrea Rodriguez, Phong Xiong
	Reviewed By	Rainier Dela Cruz

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/14/2021	1.0	Initial	Andrea Rodriguez, Phong Xiong
7/9/2021	1.1	Updates post build review for section 2.3	Phong Xiong
7/9/2021	1.2	Updates post build review for section 2.2. Section 2.1 removed.	Andrea Rodriguez
7/14/2021	1.3	Additional update for 2.1.3 based on additional feedback from build team.	Andrea Rodriguez
7/15/2021	1.4	Updates to section 1.1, 1.3, 1.4, 2, 2.1.2, 2.1.3, 2.2.2 post WTW committee meeting.	Andrea Rodriguez, Phong Xiong
7/29/2021	1.5	Updates to Figures 2.1.2.2, 2.1.2.3, and 2.1.2.6. Updates to Sections 1.1.4.4, 1.3.2, 1.3.3, 1.3.5, 1.3.6, 2.1.3.2.a.ii, 2.1.3.2.a.iii, 2.1.3.2.a.v, and 2.1.3.2.a.vi to add additional Target values for CFET and GA/GR ES.	Andrea Rodriguez
8/12/2021	1.6	Design Clarification to section 2.2.3 changing the variable population for template repository to No.	Phong Xiong

Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions	6
2	Recommendations.....	6
2.1	Assessment Goals Detail Page	6
2.1.1	Overview	6
2.1.2	Assessment Goals Detail Mockup	Error! Bookmark not defined.
2.1.3	Description of Changes	10
2.1.4	Page Location	13
2.1.5	Security Updates.....	13
2.1.6	Page Mapping.....	13
2.1.7	Page Usage/Data Volume Impacts	13
2.2	Updates to ABP 1608 Form	14
2.2.1	Overview	14
2.2.2	Form Verbiage	14
2.2.3	Form Variable Population	15
2.2.4	Form Generation Conditions	22
3	Supporting Documents	23
4	Requirements.....	24
4.1	Project Requirements.....	24

1 OVERVIEW

The Assessment Goals Detail page allows a user to enter data on a program participant's activities and services needed to reach an employment goal. This SCR will update the 'Target' drop-down field on the Assessment Goals Detail page to include more options aligned with the participant's program(s). Form ABP 1608 will also be updated to include the new options for the GROW program.

1.1 Current Design

Currently, the options on the 'Target' drop-down on the Assessment Goals Detail page do not include all available activities and services. The 'Target' drop-down has only Domestic Violence, ESL, GED, High School Diploma (HSD), Job Services, Math, Mental Health, Reading and Vocational Training as options. These values are utilized by the Cal-Learn, CalFresh Employment and Training (CFET), GA/GR Employment Services, GROW, Refugee Employment Services (REP), and Welfare-to-Work (WTW) programs.

1.2 Requests

Update the 'Target' drop-down field so that a user can add all recommended activities determined by the Vocational Assessors in CalSAWS. The following activities will be added to the 'Target' drop-down: Expungement, Community Service, Job Skills Training, Subsidized Employment, Post-Time Limited (PTL), Family Stabilization, Family Reunification, Substance Use Disorder, Learning Disability.

Update form ABP 1608 so that a user can add all recommended activities for the GROW program. Add the following activities to the form: Expungement, Job Skills Training, Subsidized Employment, Post-Time Limited (PTL), Family Reunification, Substance Use Disorder, Learning Disability.

1.3 Overview of Recommendations

1. Add the following values to the 'Target' drop-down field on the Assessment Goals Detail page for the Cal-Learn program.
 - a. Community Service
 - b. Expungement
 - c. Family Reunification
 - d. Family Stabilization
 - e. Job Skills Training
 - f. Learning Disability
 - g. Post-Time Limited (PTL)
 - h. Subsidized Employment
 - i. Substance Use Disorder
 - j. Unsubsidized Employment

2. Add the following values to the 'Target' drop-down field on the Assessment Goals Detail page for the CFET program.
 - a. Community Service
 - b. Education
 - c. Expungement
 - d. Job Retention
 - e. Job Skills Training
 - f. Learning Disability
 - g. Self-Employment Training
 - h. Subsidized Employment
 - i. Substance Use Disorder
 - j. Unsubsidized Employment
 - k. Work Experience
 - l. Workfare
3. Add the following values to the 'Target' drop-down field on the Assessment Goals Detail page for the GA/GR Employment Services program.
 - a. Community Service
 - b. Expungement
 - c. E&T Assessment
 - d. Job Skills Training
 - e. Learning Disability
 - f. Post-Time Limited (PTL)
 - g. Subsidized Employment
 - h. Substance Use Disorder
 - i. Supervised Job Search
 - j. Unsubsidized Employment
 - k. Work Experience
4. Add the following values to the 'Target' drop-down field on the Assessment Goals Detail page for the GROW program.
 - a. Expungement
 - b. Family Reunification
 - c. Job Skills Training
 - d. Learning Disability
 - e. Post-Time Limited (PTL)
 - f. Subsidized Employment
 - g. Substance Use Disorder
5. Add the following values to the 'Target' drop-down field on the Assessment Goals Detail page for the REP program.
 - a. Community Service
 - b. Expungement
 - c. Family Reunification
 - d. Family Stabilization
 - e. Job Skills Training
 - f. Learning Disability
 - g. Subsidized Employment
 - h. Substance Use Disorder

6. Add the following values to the 'Target' drop-down field on the Assessment Goals Detail page for the WTW program.
 - a. Community Service
 - b. Expungement
 - c. Family Reunification
 - d. Family Stabilization
 - e. Job Skills Training
 - f. Learning Disability
 - g. Subsidized Employment
 - h. Substance Use Disorder
 - i. Supervised Job Search
 - j. Unsubsidized Employment
 - k. Work Experience
7. Update ABP 1608 form to add additional values listed above for the GROW program.

1.4 Assumptions

1. Existing functionalities will remain unchanged unless called out as part of the design document.
2. The GA/GR Employment Services program will be added as part of the 21.07 release.
3. The GROW and REP programs are Los Angeles County programs.
4. The ABP 1608 is a form used by the GROW program only and will only be updated with the new values that are described in section 2.1.3.

2 RECOMMENDATIONS

The Assessment Goals Detail page will be updated to include a new field for the program type. The existing 'Target' field on the Assessment Goals Detail page will be updated to include additional activity options from the Cal-Learn, CFET, GA/GR Employment Services, GROW, REP, and WTW programs. Form ABP 1608 will also be updated to include the new options for the GROW program.

2.1 Assessment Goals Detail Page

2.1.1 Overview

The Assessment Goals Detail page allows the user to log employment goal activity information. Currently, the 'Target' drop-down on the Assessment Goals Detail page has only Domestic Violence, ESL, GED, High School Diploma (HSD), Job Services, Math, Mental Health, Reading and Vocational Training as options. A 'Program Type' field will be added to the Assessment Goals Detail page. The 'Target' drop-down field will be updated to include additional values based on the 'Program Type' value.

2.1.2 Assessment Goals Detail Mockup

Assessment Goals Detail

* - Indicates required fields

Save and Return

Cancel

Name:

DOE, JANE 35F

Assessment Date: *

Type: *

Program Type: *

Primary Goal:

OES Code: *

Select

Title:

Target	Order	Hrs/week	Weeks	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add
Community Service				
Domestic Violence				
ESL				
Expungement				
Family Reunification				
Family Stabilization				
GED				
High School Diploma (HSD)				
Job Services				
Job Skills Training				
Learning Disability				
Math				
Mental Health				
Post-Time Limited (PTL)				
Reading				
Subsidized Employment				
Substance Use Disorder				
Unsubsidized Employment				
Vocational Training				

Figure 2.1.2.1 – Assessment Goals Detail page with ‘Target’ menu options when the ‘Program Type’ is equal to Cal-Learn.

Assessment Goals Detail

* - Indicates required fields

Save and Return

Cancel

Name:

DOE, JANE 35F

Assessment Date: *

Type: *

Program Type: *

Primary Goal:

OES Code: *

Select

Title:

Target	Order	Hrs/week	Weeks	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add
Community Service				
Domestic Violence				
Education				
ESL				
Expungement				
GED				
High School Diploma (HSD)				
Job Retention				
Job Services				
Job Skills Training				
Learning Disability				
Math				
Mental Health				
Reading				
Self-Employment Training				
Subsidized Employment				
Substance Use Disorder				
Unsubsidized Employment				
Vocational Training				
Work Experience				
Workfare				

Figure 2.1.2.2 – Assessment Goals Detail page with ‘Target’ menu options when the ‘Program Type’ is equal to CFET.

Assessment Goals Detail

*- Indicates required fields

Save and Return

Cancel

Name:

DOE, JANE 35F

Assessment Date: *

Type: *

- Select -

Program Type: *

GA/GR Employment Services

Primary Goal:

OES Code: *

Select

Title:

Target	Order	Hrs/week	Weeks	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add
Community Service				
Domestic Violence				
ESL				
Expungement				
E&T Assessment				
GED				
High School Diploma (HSD)				
Job Services				
Job Skills Training				
Learning Disability				
Math				
Mental Health				
Post-Time Limited (PTL)				
Reading				
Subsidized Employment				
Substance Use Disorder				
Supervised Job Search				
Unsubsidized Employment				
Vocational Training				
Work Experience				

Figure 2.1.2.3 – Assessment Goals Detail page with ‘Target’ menu options when the ‘Program Type’ is equal to GA/GR Employment Services.

Assessment Goals Detail

*- Indicates required fields

Save and Return

Cancel

Name:

DOE, JANE 35F

Assessment Date: *

Type: *

- Select -

Program Type: *

GROW

Primary Goal:

OES Code: *

Select

Title:

Target	Order	Hrs/week	Weeks	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add
Domestic Violence				
ESL				
Expungement				
Family Reunification				
GED				
High School Diploma (HSD)				
Job Services				
Job Skills Training				
Learning Disability				
Math				
Mental Health				
Post-Time Limited (PTL)				
Reading				
Subsidized Employment				
Substance Use Disorder				
Vocational Training				

Figure 2.1.2.4 – Assessment Goals Detail page with ‘Target’ menu options when the ‘Program Type’ is equal to GROW.

Assessment Goals Detail

* - Indicates required fields

Save and Return

Cancel

Name:

DOE, JANE 35F

Assessment Date: *

Type: *

- Select -

Program Type: *

REP

Primary Goal:

OES Code: *

Select

Title:

Target	Order	Hrs/week	Weeks	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add
Community Service				
Domestic Violence				
ESL				
Expungement				
Family Reunification				
Family Stabilization				
GED				
High School Diploma (HSD)				
Job Services				
Job Skills Training				
Learning Disability				
Math				
Mental Health				
Reading				
Subsidized Employment				
Substance Use Disorder				
Vocational Training				

Figure 2.1.2.5 – Assessment Goals Detail page with ‘Target’ menu options when the ‘Program Type’ is equal to REP.

Assessment Goals Detail

* - Indicates required fields

Save and Return

Cancel

Name:

DOE, JANE 35F

Assessment Date: *

06/28/2021

Type: *

Full

Program Type: *

Welfare to Work

Primary Goal:

OES Code: *

11-0000

Select

Title:

Management Occupations
\$59.52

Target	Order	Hrs/week	Weeks	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add
Community Service				
Domestic Violence				
ESL				
Expungement				
Family Reunification				
Family Stabilization				
GED				
High School Diploma (HSD)				
Job Services				
Job Skills Training				
Learning Disability				
Math				
Mental Health				
Reading				
Subsidized Employment				
Substance Use Disorder				
Supervised Job Search				
Unsubsidized Employment				
Vocational Training				
Work Experience				

Figure 2.1.2.6 – Assessment Goals Detail page with ‘Target’ menu options when the ‘Program Type’ is equal to WTW and set to ‘Read-Only’.

Assessment Goals Detail

*- Indicates required fields

Save and Return

Cancel

- **Program Type** - The Program Type must align with the Target values added.

Name: DOE, JANE 35F Assessment Date: * 06/28/2021 Type: * Partial Program Type: * GROW

Primary Goal:

OES Code: * Select

Title:

<input type="checkbox"/>	Target	Order	Hrs/week	Weeks	
<input type="checkbox"/>	Community Service	1	5	5	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add
Remove					

Figure 2.1.2.7 – Assessment Goals Detail Page Save Validation

2.1.3 Description of Changes

1. Add a new required field titled 'Program Type' to the Assessment Goals Detail page, as shown on Figure 2.1.2.1 to 2.1.2.7.
 - a. The field will be located to the right of the 'Type' field above the 'Primary Goal' section.
 - b. The value displayed on the 'Program Type' field will be dependent on whether an Activity record is created through the Customer Activity Detail page.
 - i. For an Activity linked to an Assessment Result Detail, the 'Program Type' field will auto populate with the program value selected on the associated Customer Activity Detail page.
 1. The 'Program Type' field will be 'Read-Only', as shown on Figure 2.1.2.6.
 2. When the program is updated on the Customer Activity Detail page, the 'Program Type' field on the Assessment Goals Detail page will also be updated.
 - ii. If an Activity is not linked, the 'Program Type' field will be a drop-down displaying a list of employment services programs linked to the case.
 1. Only the following employment services programs linked to the case will be listed: Cal-Learn, CFET, GA/GR Employment Services, GROW, REP, and Welfare to Work.
 - a. The programs will be listed in alphabetical order.
 2. The field will be editable in 'Create' mode and 'Edit' mode.

3. For existing Assessment Goals records, the 'Program Type' field on the Assessment Goals Detail page will default to 'Select'.
2. Add additional values to the 'Target' drop-down field in alphabetical order.
 - a. Values listed will be determined by the 'Program Type' field.
 - i. If the 'Program Type' is Cal-Learn, add the values below in alphabetical order to the drop-down in addition to the current values (as shown in Figure 2.1.2.1):
 1. Community Service
 2. Expungement
 3. Family Reunification
 4. Family Stabilization
 5. Job Skills Training
 6. Learning Disability
 7. Post-Time Limited (PTL)
 8. Subsidized Employment
 9. Substance Use Disorder
 10. Unsubsidized Employment
 - ii. If the 'Program Type' is CFET, add the values below in alphabetical order to the drop-down in addition to the current values (as shown in Figure 2.1.2.2):
 1. Community Service
 2. Education
 3. Expungement
 4. Job Retention
 5. Job Skills Training
 6. Learning Disability
 7. Self-Employment Training
 8. Subsidized Employment
 9. Substance Use Disorder
 10. Unsubsidized Employment
 11. Work Experience
 12. Workfare

- iii. If the 'Program Type' is GA/GR Employment Services, add the values below in alphabetical order to the drop-down in addition to the current values (as shown in Figure 2.1.2.3):
 - 1. Community Service
 - 2. Expungement
 - 3. E&T Assessment
 - 4. Job Skills Training
 - 5. Learning Disability
 - 6. Post-Time Limited (PTL)
 - 7. Subsidized Employment
 - 8. Substance Use Disorder
 - 9. Supervised Job Search
 - 10. Unsubsidized Employment
 - 11. Work Experience
- iv. If the 'Program Type' is GROW, add the values below in alphabetical order to the drop-down in addition to the current values (as shown in Figure 2.1.2.4):
 - 1. Expungement
 - 2. Family Reunification
 - 3. Job Skills Training
 - 4. Learning Disability
 - 5. Post-Time Limited (PTL)
 - 6. Subsidized Employment
 - 7. Substance Use Disorder
- v. If the 'Program Type' is REP, add the values below in alphabetical order to the drop-down in addition to the current values (as shown in Figure 2.1.2.5):
 - 1. Community Service
 - 2. Expungement
 - 3. Family Reunification
 - 4. Family Stabilization
 - 5. Job Skills Training
 - 6. Learning Disability
 - 7. Subsidized Employment
 - 8. Substance Use Disorder

- vi. If the 'Program Type' is Welfare to Work, add the values below in alphabetical order to the drop-down in addition to the current values (as shown in Figure 2.1.2.6):
 1. Community Service
 2. Expungement
 3. Family Reunification
 4. Family Stabilization
 5. Job Skills Training
 6. Learning Disability
 7. Subsidized Employment
 8. Substance Use Disorder
 9. Supervised Job Search
 10. Unsubsidized Employment
 11. Work Experience
- b. When the 'Program Type' is selected, the values available on the 'Target' drop down will update.
3. Add a validation to verify that the 'Target' values added and the 'Program Type' selected are aligned.
 - a. The validation will display when the 'Save and Return' button is clicked and the value in the 'Program Type' field does not align with the values entered in the 'Target' field(s).
 - b. The validation will display the following message, "Program Type - The Program Type must align with the Target values added." as shown in Fig 2.1.2.7.

Note: The changes to the Assessment Goals Detail page will also apply when this page is accessed via the collaborator flow by clicking the 'Add Assessment Goals' or 'Add LD Assessment Goals' buttons.

2.1.4 Page Location

- **Global: Employment Services**
- **Local: Case Summary**
- **Task: Assessment Result**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping to reflect the changes being made to the Assessment Goals Detail page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Updates to ABP 1608 Form

2.2.1 Overview

The ABP 1608 form is used to determine a vocational assessment and employment plan. It informs the participant about the assessment and employment plan, detailing its voluntary nature and rules.

State Form: Non-state form.

Current Programs: GROW

Current Attached Form(s): None

Current Forms Category: Forms

Current Template Repository Visibility: LA County

Existing Languages: English and Spanish

2.2.2 Form Verbiage

This effort is to add the additional values (activity/service types) from section 2.2.3 to the ABP 1608 form. The new values from section 2.2.3 are the following:

- Expungement
- Family Reunification
- Job Skills Training
- Learning Disability
- Post-Time Limited (PTL)
- Subsidized Employment
- Substance Use Disorder

The service type “Work Experience” and its respective Primary and Secondary Goal variables are removed.

Form Mockups/Examples: See supporting document #1

Update Form XDP

Existing ABP 1608:

Services Needed to Obtain Employment Goal						
Type of services	Primary Goal			Secondary Goal		
	Order	Hr/Wk	Weeks	Order	Hr/Wk	Weeks
1. Vocational Training						
2. Job Services						
3. Work Experience						
4. Mental Health						
5. Domestic Violence						
6. Basic Education						
GED						
HSD						
ESL						
MATH						
READING						

Updated ABP 1608:

Services Needed to Obtain Employment Goal						
Type of services	Primary Goal			Secondary Goal		
	Order	Hr/Wk	Weeks	Order	Hr/Wk	Weeks
1. Vocational Training						
2. Job Services						
3. Mental Health						
4. Domestic Violence						
5. Basic Education						
GED						
HSD						
ESL						
MATH						
READING						
6. Expungement						
7. Family Reunification						
8. Job Skills Training						
9. Learning Disability						
10. Post-Time Limited						
11. Subsidized Employment						
12. Substance Use Disorder						

2.2.3 Form Variable Population

The existing variable population logic for the ABP 1608 are not updated with this SCR. This effort is to add additional variables. These new variables follow the existing population logic.

Variable Name	Population	Formatting	Editable*/Field Type	Template Repository Population	Populates with Form Generation
1. ORDER_EXP_1	<p>Populates with order of participant activity. For activity type – “Expungement”</p> <p><i>ORDR_NUM from PERS_ASSESSTARGET table.</i></p> <p>Ex: “3”</p>	Arial Font Size 10	Y/Number	N	Y
2. HRWK_EXP_1	<p>Populates with the number of hours required per week for the participant to do the activity. For activity type – “Expungement”</p> <p><i>HRS_PER_WEEK from PERS_ASSESSTARGET table.</i></p> <p>Ex: “3”</p>	Arial Font Size 10	Y/Number	N	Y
3. WEEKS_EXP_1	<p>Populates with the number of weeks required for</p>	Arial Font Size 10	Y/Number	N	Y

	<p>the participant to do the activity. For activity type – “Expungement”</p> <p><i>NUM_OF_WEEKS from PERS_ASSESSES_TARGET table.</i></p> <p>Ex: “3”</p>				
4. ORDER_EXP_2	<p>Populates with order of participant activity. For activity type – “Expungement”</p> <p><i>ORDR_NUM from PERS_ASSESSES_TARGET table.</i></p> <p>Ex: “3”</p>	Arial Font Size 10	Y/Number	N	Y
5. HRWK_EXP_2	<p>Populates with the number of hours required per week for the participant to do the activity. For activity type – “Expungement”</p>	Arial Font Size 10	Y/Number	N	Y

	<p><i>HRS_PER_WEEK from PERS_ASSESSTARGET table.</i></p> <p>Ex: "3"</p>				
6. WEEKS_EXP_2	<p>Populates with the number of weeks required for the participant to do the activity.</p> <p>For activity type – "Expungement"</p> <p><i>NUM_OF_WEEKS from PERS_ASSESSTARGET table.</i></p> <p>Ex: "3"</p>	Arial Font Size 10	Y/Number	N	Y
7. ORDER_FMR_1	For activity type – "Family Reunification"	Arial Font Size 10	Y/Number	N	Y
8. HRWK_FMR_1	For activity type – "Family Reunification"	Arial Font Size 10	Y/Number	N	Y
9. WEEKS_FMR_1	For activity type – "Family Reunification"	Arial Font Size 10	Y/Number	N	Y

10. ORDER_FM RE_2	For activity type – “Family Reunificatio n”	Arial Font Size 10	Y/Number	N	Y
11. HRWK_FMR E_2	For activity type – “Family Reunificatio n”	Arial Font Size 10	Y/Number	N	Y
12. WEEKS_FMR E_2	For activity type – “Family Reunificatio n”	Arial Font Size 10	Y/Number	N	Y
13. ORDER_JST_ 1	For activity type – “Job Skills Training”	Arial Font Size 10	Y/Number	N	Y
14. HRWK_JST_1	For activity type – “Job Skills Training”	Arial Font Size 10	Y/Number	N	Y
15. WEEKS_JST_ 1	For activity type – “Job Skills Training”	Arial Font Size 10	Y/Number	N	Y
16. ORDER_JST_ 2	For activity type – “Job Skills Training”	Arial Font Size 10	Y/Number	N	Y
17. HRWK_JST_2	For activity type – “Job Skills Training”	Arial Font Size 10	Y/Number	N	Y
18. WEEKS_JST_ 2	For activity type – “Job Skills Training”	Arial Font Size 10	Y/Number	N	Y
19. ORDER_LD_ 1	For activity type – “Learning Disability”	Arial Font Size 10	Y/Number	N	Y
20. HRWK_LD_1	For activity type –	Arial Font Size 10	Y/Number	N	Y

	"Learning Disability"				
21. WEEKS_LD_1	For activity type – "Learning Disability"	Arial Font Size 10	Y/Number	N	Y
22. ORDER_LD_2	For activity type – "Learning Disability"	Arial Font Size 10	Y/Number	N	Y
23. HRWK_LD_2	For activity type – "Learning Disability"	Arial Font Size 10	Y/Number	N	Y
24. WEEKS_LD_2	For activity type – "Learning Disability"	Arial Font Size 10	Y/Number	N	Y
25. ORDER_PTL_1	For activity type – "Post-Time Limited"	Arial Font Size 10	Y/Number	N	Y
26. HRWK_PTL_1	For activity type – "Post-Time Limited"	Arial Font Size 10	Y/Number	N	Y
27. WEEKS_PTL_1	For activity type – "Post-Time Limited"	Arial Font Size 10	Y/Number	N	Y
28. ORDER_PTL_2	For activity type – "Post-Time Limited"	Arial Font Size 10	Y/Number	N	Y
29. HRWK_PTL_2	For activity type – "Post-Time Limited"	Arial Font Size 10	Y/Number	N	Y
30. WEEKS_PTL_2	For activity type – "Post-Time Limited"	Arial Font Size 10	Y/Number	N	Y

31. ORDER_SUB EMP_1	For activity type – “Subsidized Employment”	Arial Font Size 10	Y/Number	N	Y
32. HRWK_SUBE MP_1	For activity type – “Subsidized Employment”	Arial Font Size 10	Y/Number	N	Y
33. WEEKS_SUB EMP_1	For activity type – “Subsidized Employment”	Arial Font Size 10	Y/Number	N	Y
34. ORDER_SUB EMP_2	For activity type – “Subsidized Employment”	Arial Font Size 10	Y/Number	N	Y
35. HRWK_SUBE MP_2	For activity type – “Subsidized Employment”	Arial Font Size 10	Y/Number	N	Y
36. WEEKS_SUB EMP_2	For activity type – “Subsidized Employment”	Arial Font Size 10	Y/Number	N	Y
37. ORDER_SUD _1	For activity type – “Substance Use Disorder”	Arial Font Size 10	Y/Number	N	Y
38. HRWK_SUD_ 1	For activity type – “Substance Use Disorder”	Arial Font Size 10	Y/Number	N	Y
39. WEEKS_SUD _1	For activity type – “Substance Use Disorder”	Arial Font Size 10	Y/Number	N	Y

40. ORDER_SUD_2	For activity type – “Substance Use Disorder”	Arial Font Size 10	Y/Number	N	Y
41. HRWK_SUD_2	For activity type – “Substance Use Disorder”	Arial Font Size 10	Y/Number	N	Y
42. WEEKS_SUD_2	For activity type – “Substance Use Disorder”	Arial Font Size 10	Y/Number	N	Y

Note: Variables 7 – 42 follows the same logic as variables 1 – 6 for their respective activity type.

2.2.4 Form Generation Conditions

1. Form Generation

The ABP 1608 can only be generated from the Template Repository and one of the two following online pages via a Generate Form button:

- Assessment Result Detail page
- Class Performance Detail page

Note: There are no form generation updates with this SCR. The generation conditions listed are current functionality.

4. Form Print/Mailing Options

The information in this section is not updated with this SCR. This is current functionality.

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

Mailing Options:

Mail-To (Recipient): Applicant

Mailed From (Return): Sending Office

Mail-back-to Address: N/A

Outgoing Envelop Type: Standard Mail

Return Envelop Type: N/A

Additional Options:

Special Paper Stock: N/A

Enclosures: None

Electronic Signature:

Electronic Signature (IVR/Text): N/A

Check to Sign: N/A

Post to Self Service Portal: No

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	Forms	ABP 1608 Form Mockup	ABP_1608_EN.pdf ABP_1608_SP.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.28.2.8	<p>The LRS shall support GAIN work participation program component(s), including:</p> <ul style="list-style-type: none"> a. Appraisal; b. Earned income; c. Self-initiated program; d. Orientation job club; e. Job search; f. Vocational and career assessment; g. Vocational training; h. Basic education; i. Work experience; j. Post-employment services; k. Community service; l. Paid work experience; m. Post time limit; n. Domestic violence services; o. Family preservation program; p. Family reunification program; q. Clinical assessment; r. Mental health services; s. Substance abuse services; t. Learning disability; u. Expungement; and v. Refugee employment program. 	<p>The Assessment Result Goals pages are used by service workers to document program participant goals. The listed activity values will now be displayed under the Target menu of the Assessment Goals page:</p> <ul style="list-style-type: none"> g. Vocational Training k. Community Service m. Post-Time Limited (PTL) p. Family Reunification s. Substance Use Disorder t. Learning Disability u. Expungement
2.28.2.9	<p>The LRS shall support GROW work participation program component(s), including:</p> <ul style="list-style-type: none"> a. Orientation; b. Working component(s); c. Self-initiated program; d. Short term training; 	<p>The Assessment Result Goals pages are used by GROW service workers to document program participant goals. The listed activity values will now be displayed under the Target menu of the Assessment Goals page:</p> <ul style="list-style-type: none"> g. Job Skills Training

	<ul style="list-style-type: none"> e. Rapid employment and promotion; f. Early job search; g. Job skills preparation class; h. Fastrak; i. Office occupations; j. Non-custodial parent; k. Youth; l. One-stop; m. Vocational assessment; n. Education/training; o. Intensive case management; p. Post employment services; q. Domestic violence services; r. Clinical assessment; s. Mental health services; t. Substance abuse services; u. Expungement; v. Public defender; and w. Homeless court clearance. 	<ul style="list-style-type: none"> t. Substance Use Disorder u. Expungement
2.18.3.3	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; 	<p>Updating the ABP 1608 form to include new values from the Target Drop down menu on the Assessment Result Goals page.</p>

	<ul style="list-style-type: none"> 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. 	
--	--	--



California Statewide Automated Welfare System

Design Document

CA-213410

Add Validation to Employment Services
Activities

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Farhat Ulain
	Reviewed By	Matthew Lower

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/01/2021	1.0	Initial Revision	Farhat Ulain

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 CalSAWS Home Page	5
	2.1.1 Overview	5
	2.1.2 CalSAWS Home Page Mockup	5
	2.1.3 Description of Change.....	5
	2.1.4 Page Locations.....	6
	2.1.5 Security Updates.....	6
	2.1.6 Page Mapping.....	6
	2.1.7 Page Usage/Data Volume Impacts	6
3	Supporting documents	6
4	REQUIREMENTS	6

1 OVERVIEW

In CalSAWS, GROW (GW), Cal-Learn (CL), CalFRESH Employment & Training (CFET), Welfare to Work (WTW), Refugee Employment Program (REP) and GA/GR Employment Services (GA/GR ES) programs provide employment and training services to help employable customers obtain jobs and eliminate the need of welfare benefits. While participating in these programs customers get assigned to Employment Services Activities/Trainings to accomplish their employment related goals.

1.1 Current Design

In the CalSAWS system, user can assign Employment Services Activities to the customer when there is no worker assigned to the program.

1.2 Requests

Prevent Employment Services Activities from being assigned or edited when there is no worker assigned to the program.

1.3 Overview of Recommendations

Add a validation to Employment Services Activities from being assigned to the customer when there is no worker assigned for GW, CL, CFET, WTW, REP and GA/GR ES programs.

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.

2 RECOMMENDATIONS

2.1 Customer Activity Detail Page

2.1.1 Overview

Add a validation to Employment Services Activities from being assigned or edited to the customer when there is no worker assigned for GW, CL, CFET, WTW, REP and GA/GR ES programs.

2.1.2 Customer Activity Detail Page Mockup

The screenshot displays the CalSAWS interface for the 'Customer Activity Detail' page. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The sidebar on the left lists various navigation options, with 'Customer Activities' currently selected. The main content area shows a form for an 'Appraisal' activity. A red error message is displayed, indicating that the activity cannot be assigned because no worker is assigned to the GROW program. The form fields include Name, Type, Number, Address, Category, Program Type, Review Date, and Verification Date.

Activity Detail		
Type:	Number:	Category:
Appraisal	OAP - GG1104	Appraisal/Assessment
Provider:	Address:	Program Type: *
GG1104	12727 NORWALK BLVD NORWALK, CA 90650	GROW
Review Date:	Verification Date:	
06/01/2021		

Figure 2.1.2-1 – Customer Activity Detail Mockup

2.1.3 Description of Change

1. Add a validation to the Employment Services Activities from being assigned or edited to the customer when there is no worker assigned for GW, CL, CFET, WTW, REP and GA/GR ES programs. A validation will be displayed:
"[Activity] cannot be assigned/updated. A worker needs to be assigned to the [Program]."
 - a. Orientation and Job Skills Assessment activities will continue to be assigned or edited with/without the worker assigned in the program.

Note: Validation message will be applied to Employment Services Activities that are assigned to the customer, before this SCR is implemented.

2.1.4 Page Locations

Global: Employment Services

Local: Activities

Task: Customer Activities

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.5	The LRS shall provide field-level and cross-field validation upon completion of data entry by User and immediately display appropriate corrective instructions for the related field.	A validation message will be added to prevent Employment Services Activities from being assigned or edited to the customer when there is no worker assigned to the program.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-220040

ACL 20-145, 20-126 Eliminate ESAP SAR 7
Requirement, Update ESAP NOAs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Paul Galloway, Rainier Dela Cruz, Philip McGinty, Vallari Bathala, Avinda Bandaranayake, Sidhant Garg, Phong Xiong, Tiffany Huckaby, Connor Gorry
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2021-03-01	.01	Initial Draft	Paul Galloway
2021-07-26	.02	Fiscal updates for Overpayment Adjustment and Skip Issuance logic	Sidhant Garg
2021-08-03	.03	Updated assumptions in response to CW/CF Committee comments	Paul Galloway
2021-08-10	.04	Updated from Region 6 comments	Tiffany Huckaby/ Connor Gorry/ Paul Galloway

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	6
1.3	Overview of Recommendations.....	6
1.4	Assumptions	7
2	Recommendations.....	9
2.1	Eligibility: Add New Reporting Type for ESAP	9
2.2	Eligibility: Set ESAP reporting type to “No Report”	11
2.3	Eligibility: ESAP Changes for PACF and Ineligible Persons.....	12
2.4	Eligibility: CTCR's for Batch EDBC processing	13
2.5	Online: Case Summary	14
2.6	Online: CalFresh Detail.....	15
2.7	Fiscal: Overpayment Adjustment Logic	16
2.8	Fiscal: Issuance Batch	17
2.9	Batch: Recertification Appointments Batch jobs PB19C902 and PB19C909	18
2.10	Batch: API Update for New Reporting Type.....	19
2.11	Corr.: CF Notice of Change: Semi-Annual Reporting Eliminated (CF 34).....	20
2.12	Corr.: CF Notice of Expiration of Certification for Households with Only Elderly and/or Disabled Members (CF 377.2B).....	23
2.13	Corr.: CF Notice of Expiration of Certification for Households with Only Elderly and/or Disabled Members (CF 377.2C).....	24
2.14	Corr.: ESAP CF Recertification Packet for Los Angeles County	25
2.15	Corr.: ESAP CF Recertification Packet for Migration Counties	28
2.16	Corr.: Update SAR 2 Batch Job	32
2.17	Corr.: Add ESAP CF RE Packet Batch Job for Los Angeles County	34
2.18	Corr.: Add ESAP CF RE Packet Batch Job for the Migration Counties.....	36
2.19	Corr.: Update Migration Counties CF RE Packet Batch Job.....	38
2.20	Corr.: Update CF 377.2 Batch Job	39
2.21	Corr.: Update CF 377.2B Batch Job	40
2.22	Corr.: Update CF 377.2C Batch Job	42
2.23	Automated Regression Test.....	43
3	Supporting Documents	44
4	Requirements.....	44
4.1	Project Requirements.....	44

This page intentionally left blank

1 OVERVIEW

California's Elderly Simplified Application Project (ESAP) Demonstration Project was implemented in 2017 through All County Letter (ACL) 17-34, 17-53, and 17-53E to improve CalFresh (CF) access among the State's population of older adults and people with disabilities with low-income. It waived the recertification interview requirement, reduced client-provided verifications, and extended the certification period to 36 months. It did not eliminate the periodic reporting requirement for ESAP households.

ESAP policies have been updated by ACL 20-145 and clarified by Consortium Request for Policy Clarification (CRPC) #2107 and #2242.

ACL 20-145 states that requiring ESAP households to complete a SAR 7 report is an unnecessary burden on them and the CWD. Starting March 1, 2022, ESAP households will no longer have to complete a SAR 7 at the 12th and 24th month of their 36-month certification period. They will still be required to report gross monthly income over the Income Reporting Threshold (IRT), so they will receive a SAR 2 at the 12th and 24th month to remind them of this requirement. While they are ESAP, they are not required to complete a recertification interview.

ACL 20-145 removes the requirement that only Non-Assistance CalFresh (NACF) households are eligible to ESAP. Public Assistance CalFresh (PACF) households can now convert to ESAP if all household members are elderly and/or disabled (E/D) with no earned income. CDSS confirmed in CRPC 2242:

"FNS did not impose any requirements that the HH be classified as NACF, nor did it prohibit participation in the ESAP for households that participate in other public assistance programs."

An updated response to CRPC 2107 on 9/8/2020 clarified that all members of the household (eligible and ineligible) must meet ESAP requirements for the household to be ESAP eligible. It states:

"ESAP eligibility is strictly for households that contain only elderly and/or disabled members with no earned income.... the household may only be eligible for ESAP if the household that contains an ineligible household member such as a non-citizen can declare that the entire household are elderly and/or disabled with no earned income."

1.1 Current Design

An ESAP household in CalSAWS is a NACF household where all members aided in the CF program are elderly and/or disabled with no earned Income. Currently CF ESAP households:

- have a 36-month certification period,
- have a reporting type of Semi-Annual Reporting Annually (SARA),
- submit SAR 7's in the 12th and 24th months of the recertification period.
- have a recertification appointment scheduled for them at the time the RE packet is generated:
 - Los Angeles County automatically schedules an appointment via batch job when the RE packet is generated.

- C-IV Counties schedule appointments manually when the packet is generated.

1.2 Requests

- Remove the SAR 7 reporting requirement from CalSAWS for ESAP households effective March 1, 2022.
- Inform all ESAP households they will no longer be required to submit SAR7 reports by sending them a one-time notification form - CF 34 CalFresh Notice of Change: Semi-Annual Reporting Eliminated.
- Update the existing ESAP forms CF 377.2B and CF 377.2C to the latest versions.
- Send the SAR2 form to ESAP households at the 12th and 24th month of their recertification period to remind them of the requirement to report mid-period income changes that exceed the IRT.
- Stop auto-scheduling RE interviews and sending appointment letters for ESAP households (LA County only).
- Include the CF 377.2B in the RE Packet for ESAP households.
- Update the definition of an ESAP household to include PACF households, and to require all household members (including ineligible ones) to be E/D with no earned income.

1.3 Overview of Recommendations

1. Add a new reporting type "Semi-Annual Reporting – No Report" (SARN) to CalSAWS for CF ESAP households.
2. Update EDBC to set the reporting type to SARN when the benefit month is March 2022 or later, the Meets ESAP Criteria is 'Yes', and the Recertification Period is greater than 24 months long. (See Assumption #1)
3. Add new Batch Run Reasons for running Batch EDBC to set CF ESAP households to the new reporting type.
4. Update EDBC logic for setting the Meets ESAP Criteria indicator to:
 - a. Require all persons in the household, even if they are ineligible, to be E/D with no earned income.
 - b. Remove the requirement that the household be NACF.
5. Hide the SAR Due Month field on the Case Summary CF program block and CF Detail page when the reporting type is SARN.
6. Add new "CalFresh Notice of Change: Semi-Annual Reporting Eliminated" CF 34 (12/20) to CalSAWS.
7. Update "CalFresh Notice of Expiration of Certification for Households with Only Elderly and/or Disabled Members" CF 377.2B (12/20) per ACL 20-126.
8. Update "CalFresh Notice of Expiration of Certification for Households with Only Elderly and/or Disabled Members" CF 377.2C (12/20) per ACL 20-145.
9. Update CalSAWS to not auto-schedule an RE interview and not send an RE appointment letter for ESAP households (LA County only).
10. Create two new ESAP CF RE Packets (one for Los Angeles County, one for the Migration Counties) that do not include the CF 29 and do include CF 377.2B.

11. Update the SAR 2 batch job to send it to ESAP households at the 12th and 24th months of their recertification period in addition to the current batch job functionality.
12. Create the ESAP CF RE Packet batch job for Los Angeles County and Migration Counties. This job will generate the same journal entry for packet generation as the existing jobs.
13. Update the CF 377.2 batch job to not send the form to ESAP households.
14. Update the CF 377.2B batch job to send the form when a case has a CW and CF program with the same redetermination/recertification due month and the CF program is ESAP.
15. Update the CF 377.2C batch job to send the form if the previous reporting type was SARN and the current reporting type is not SARN.
16. Update the Overpayment Adjustment and Skip Issuance logic to consider the new SARN reporting type.

1.4 Assumptions

1. The ESAP indicator is set on CF households with each EDBC run (since CA-54952/CIV-12413 in 2018). It indicates if the household is ESAP-eligible for the benefit month. Per CRPC 2242, full ESAP status is only conferred on a household at application or recertification. The new SARN reporting type will only be granted to ESAP households at application/recertification, or in the middle of a recert period if the household has already had ESAP status conferred on it which EDBC determines by the length of the recert period.
2. Once ESAP households are set to the new reporting type, no other change is needed to stop generating SAR 7's for them since that logic is driven by the reporting type and this new type will not generate a SAR 7.
3. No change is needed to the SAR 7 discontinuance job because it looks for past due SAR 7 packets in Issued/Sent status and no new packets will be generated to ESAP households.
4. This change will not affect the generation of the SAR 7 for any other program on the case besides the CF ESAP Household.
5. This change will not affect the scheduling of RE appointments for other programs on the same case as the ESAP HH.
6. SCR CA-230192 will run batch EDBC for all CF ESAP households to set the new reporting type for the benefit month of 3/2022. Batch EDBC skips cases where the most recent EDBC is Manual or overridden. Workers will need to work the Batch Skip report to set the new reporting type on these cases or they will continue to receive SAR 7 packets in the future and could be discontinued for failure to complete it.
7. SCR CA-221837 will generate and send the new "CalFresh Notice of Change: Semi-Annual Reporting Eliminated (CF 34)" to all ESAP households.
8. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
9. Only Los Angeles County has automatic scheduling of RE interview appointments, so the batch update to turn off appointment scheduling for ESAP RE interviews does not affect former C-IV counties.

10. SCR CA-216551 (*DDID 2150 – Migrate CalWIN County Batch Jobs: Batch RE Appointment Scheduling for CW/CF*) is also targeted for Release 22.01. It will exclude ESAP households from auto-scheduling of RE Appointments, but it will schedule RE appointments for the CW program on a CW/CF combo case when the RE for both CW and the ESAP CF programs are due in the same month.
11. SCR CA-224050 (*Update the RE Date Report to Include Additional Information*) in release 21.07 added an ESAP indicator to the CW and CF Details sheet of the RE Date Report to remind workers to schedule an appointment if needed since ACL 20-145 says an appointment should be scheduled if the person will be denied.
12. The existing SAR 2 functionality will not be changed by this SCR. The SAR 2 will be updated to the latest state version and to generate using EDBC logic with CA-219921. Updates to the SAR 2 Batch Job with this SCR will only involve send the Form for ESAP Households on the 12th and 24th months.
13. SAR 2 and other Forms generated via Run EDBC will be updated with the 'Print Preview' functionality with CA-223587.
14. This SCR is not making changes to the CalWORKs (CW) program.
15. This SCR is not changing the existing functionality when an ESAP HH no longer meets ESAP requirements and becomes a SAR reporting HH.

2 RECOMMENDATIONS

2.1 Eligibility: Add New Reporting Type for ESAP

2.1.1 Overview

Add a new reporting type "Semi-Annual Reporting - No Report" (SARN) for CF ESAP programs. This type will indicate that the households are still categorized as semi-annual reporting (SAR) households, but they are not required to complete a SAR 7.

2.1.2 Description of Changes

1. Add a new Reporting Type Code to Code Table 542, as follows:

Field	Value
CATGRY_ID	542
SHORT_DECODE_NAME	Semi-Annual Reporting - No Report
LONG_DECODE_NAME	Semi-Annual Reporting - No Report
CODE_DESCR	SN
ORDER_BY_NUM	0
BEG_DATE*	01/01/2022
END_DATE	12/31/9999
CW	N
DV	N
FC	N
FS	Y
IN	N
KG	N
MC	N
RC	N
EICT	
Periodic Report Frequency	
NB	

Field	Value
DC	N

**Note: EDBC will not set this reporting type on any households prior to the benefit month 3/2022.*

2.1.3 Programs Impacted

CF

2.2 Eligibility: Set ESAP reporting type to “No Report”

2.2.1 Overview

Update CF EDBC logic to set the reporting type to SARN on all CF ESAP households starting with the 3/2022 benefit month. CF households with this reporting type will not receive SAR 7 reports. This will not change existing Recertification dates for these households.

2.2.2 Description of Changes

1. Set the reporting type to SARN when the following are all true:
 - a. The program is CalFresh.
 - b. The 'Meets ESAP Criteria' indicator is Yes.
 - c. The Redetermination period is greater than 24 months, or it is the start of a new Application/Recertification period.
 - d. The benefit month is March 2022 or later.

2.2.3 Programs Impacted

CF

2.2.4 Performance Impacts

No EDBC performance impacts anticipated.

2.3 Eligibility: ESAP Changes for PACF and Ineligible Persons

2.3.1 Overview

EDBC identifies ESAP-eligible households during each CF EDBC run. Currently in CalSAWS, the “Meets ESAP Criteria” indicator is only set to Yes when both the following are true:

- the household is on Non-Assistance CalFresh (NACF) and is not aided on any other Public Assistance program; and,
- all the aided members of the CF household meet the ESAP requirement of being elderly and/or disabled (E/D) with no earned income.

This SCR is removing the requirement that a household must be NACF and is adding a new requirement that all members of the household must be ESAP eligible for the household to meet ESAP criteria.

Example 1: Under current logic, a household with only elderly and/or disabled members who have no earned income and are receiving CW and CF would have Meets ESAP Criteria set to No. With this change, household can meet ESAP criteria even while they are receiving CW.

Example 2: Under current logic, a CF household with 1 eligible member who is 65 years old and has no income and 1 ineligible non-citizen who has opted out and has no income but is not E/D can have Meets ESAP Criteria set to Yes because we only consider the eligible member. With this change, the household would no longer meet ESAP criteria because now all the members of the household must be E/D with no earned income.

2.3.2 Description of Changes

1. Remove the requirement that a CF household must be NACF when EDBC determines if the household Meets ESAP Criteria.
2. Update the logic that currently requires only Active or Pending Members in the CF household to be E/D with no earned income to now require all Active or Pending persons *regardless of their role* to be E/D with no earned income in order to meet ESAP criteria.

2.3.3 Programs Impacted

CF

2.3.4 Performance Impacts

No EDBC performance impacts anticipated.

2.4 Eligibility: CTCR's for Batch EDBC processing

2.4.1 Overview

Insert new Batch Run Reasons to be used in the Batch EDBC run.

2.4.2 Description of Change

1. Insert a new entry in CT744 (EDBC Run Reason Code):

Field	Value
CATGRY_ID	744
CODE_NUM_IDENTIF	E7
SHORT_DECODE_NAME	End SAR 7 reporting on ESAP
LONG_DECODE_NAME	End SAR 7 reporting on ESAP
CODE_DESCR	
ORDER_BY_NUM	0
BEG_DATE*	1/1/1900
END_DATE	12/31/9999
REFER_TABLE_1_DESCR – REFER_TABLE_17_DESCR	N

2. Insert a new entry in CT942 (Batch Eligibility Sweep Codes):

Field	Value
CATGRY_ID	942
CODE_NUM_IDENTIF	E7
SHORT_DECODE_NAME	End SAR 7 reporting on ESAP
LONG_DECODE_NAME	End SAR 7 reporting on ESAP
CODE_DESCR	
ORDER_BY_NUM	0
BEG_DATE*	1/1/1900
END_DATE	12/31/9999

2.5 Online: Case Summary

2.5.1 Overview

When the 'Reporting Type' is SARN, the CalFresh section within the Case Summary page will not display the 'SAR Due Month' field.

2.5.2 Case Summary Mockup

▼ CalFresh			
Worker:	Vicky Blair	Primary Applicant/Recipient:	ASHBY, DONALD 50F
Worker ID:	19DP34602M	Language:	English
Program Status:	Active	Phone Number:	(909)426-5351
RE Due Month:	02/2022 Re-Evaluate	Email:	johndoe@calsaws.org
Reporting Type:	Semi-Annual Reporting - No Report	Payee:	ASHBY, DONALD 50F
Reporting Type Reason:	Elderly/Disabled	Application Date:	05/20/2019
Aid Code:	09 - CalFresh		
Meets ESAP Criteria:	Yes		

Figure 2.1.1 – Case Summary Mockup

2.5.3 Description of Changes

1. Do not display the 'SAR Due Month' field in the CalFresh section on the Case Summary page when the 'Reporting Type' is the new SARN type (CT542 Code SN).

2.5.4 Page Location

- **Global:** Case Info, Eligibility, Empl. Services, Child Care
- **Local:** Case Summary
- **Task:** Case Summary

2.5.5 Security Updates

No security updates.

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

No performance impacts.

2.6 Online: CalFresh Detail

2.6.1 Overview

When the 'Reporting Type' is SARN, the CalFresh Detail page will not display the 'SAR Due Month' field.

2.6.2 CalFresh Detail Mockup

CalFresh Detail

*- Indicates required fields

[View History](#) [Issuance Method](#) [Edit](#) [Close](#)

Date: *
05/01/2021

Program Information		
Status: * Active	Status Reason:	Source: * CMIPS II
Application Date: * 05/20/2019	RE Begin Month: 06/2019	RE Due Month: * 02/2022
SSI/SSP Reversal Month:		
Reporting Type: Semi-Annual Reporting - No Report	Reporting Type Reason: Elderly/Disabled	
Public Assistance Indicator: Y		
Automatically Reassign When Activated: No		

Figure 2.1.1 – CalFresh Detail Mockup

2.6.3 Description of Changes

1. Do not display the 'SAR Due Month' field on the CalFresh Detail page when the 'Reporting Type' is the new SARN type (CT542 Code SN).

- **Global:** Case Info, Eligibility, Empl. Services, Child Care
- **Local:** Case Summary
- **Task:** Case Summary

2.6.4 Security Updates

No security updates.

2.6.5 Page Mapping

N/A

2.6.6 Page Usage/Data Volume Impacts

No performance impacts.

2.7 Fiscal: Overpayment Adjustment Logic

2.7.1 Overview

Overpayment Adjustment logic is used to calculate the Benefit Reduction amount which is then displayed on the EDBC Summary page for a benefit month. This enhancement is to update the Overpayment Adjustment logic to consider the new SARN reporting type.

2.7.2 Description of Change

1. Update the Benefit Reduction logic to treat programs with the new SARN reporting type the same as SAR/SARA reporting types.
2. Update the Benefit Reduction logic for determining the Overpayment Adjustment Amount of a future Benefit Month as follows:
 - a. If there is a change in Reporting Type in the Reporting Period and the EDBC Benefit Month is not the first month of the Reporting Period, the Overpayment Adjustment Amount will be set to the Benefit Reduction Amount from the latest Accepted and Saved EDBC from the prior Reporting Period.
 - b. If there is a change in Reporting Type in the Reporting Period and the EDBC Benefit Month is the first month of the Reporting Period, the Overpayment Adjustment Amount will be set based on the Cause Code Percentage for the associated Recovery Account.
 - c. If there is no change in Reporting Type in the Reporting Period, the Overpayment Adjustment Amount will be set based on the Cause Code Percentage of the associated Recovery Account for which the Recoupment occurred from the latest Accepted and Saved EDBC from the period begin month if one exists.

2.7.3 Security Updates

No security updates.

2.7.4 Page Mapping

N/A

2.7.5 Page Usage/Data Volume Impacts

No performance impacts.

2.8 Fiscal: Issuance Batch

2.8.1 Overview

Issuance Batch is responsible for creating an Issuance record for each authorization that is subject to be paid on a Monthly/Nightly basis. This enhancement is to update the skip issuance logic to consider the new SARN reporting Type.

2.8.2 Description of Change

1. Update the skip issuance logic to account for the new SARN reporting type. The skip issuance logic will check for a completed RE at every 36th for the Recertification (RE) Due Month of a SARN reporting type program.
2. Update the Skip issuance Grace Period logic to check for Reporting Type changes from SARN to SAR 7. The Skip Issuance Grace Period will be from the month the change occurred through the next SAR Due Month or RE Due Month, whichever is first.
3. Update the Skip Issuance Grace Period logic to give grace period for SARN reporting type until the RE due date which will be once every 36 months for the SARN reporting type.

NOTE: This is to ensure no benefits are skipped due to periodic reporting skip reasons.

2.8.3 Execution Frequency

No Change.

2.8.4 Key Scheduling Dependencies

No Change.

2.8.5 Counties Impacted

All CalSAWS Counties

2.8.6 Data Volume/Performance

No Change.

2.8.7 Failure Procedure/Operational Instructions

No Change.

2.9 Batch: Recertification Appointments Batch jobs PB19C902 and PB19C909

2.9.1 Overview

Batch job PB19C902 attempts to schedule an appointment. If successful, the job will also send the RE packet and create a journal for the case.

If PB19C902 is not successful, batch job PB19C909 picks up the cases the next day and creates appointments. For successfully created appointments, an RE packet is generated, and a journal is logged. For unsuccessful appointments, a task is generated for workers to manually create the appointment and send the RE packet.

Update the Recertification Appointments Batch jobs to exclude CF ESAP Households.

2.9.2 Description of Change

Update the Recertification Appointments Batch jobs when processing upcoming recertifications so that this job will no longer schedule appointments or send out RE packets when all the following are true:

- a. The Program is CalFresh and there is no other program with an RE due in the same month (i.e., this update applies to CF only cases, not CW/CF cases, etc.).
- b. The Program is Active.
- c. Meets ESAP Criteria is 'Yes'.
- d. The current reporting type is SARN (CT 542 Code SN).

(Note: For ESAP households getting skipped due to this change, the RE Packet without an appointment will still be sent out. See below:

[Correspondence: Add ESAP CF RE Packet Batch Job for L.A. County](#))

2.9.3 Execution Frequency

Monthly.

2.9.4 Key Scheduling Dependencies

None.

2.9.5 Counties Impacted

Los Angeles County.

2.9.6 Data Volume/Performance

Batch job PB19C902 processes approximately 40,000 records

Batch job PB19C909 processes approximately 50,000 records

2.9.7 Failure Procedure/Operational Instructions

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

2.10 Batch: API Update for New Reporting Type

2.10.1 Overview

Create a new version of the program API (v2) with business logic to determine and return the SAR Due Date based on program reporting type.

2.10.2 Description of Change

1. Update the program API to return the SAR Due Date based on the reporting type of the program as follows:
 - a. If reporting type is "Semi-Annual Reporting" (CT542 Code MS):
 - i. Subtract 6 months from the RE Due Date. If that returns a date in the past, there is no SAR Due Date.
 - ii. If the result from the previous step is in the future, keep subtracting 6 months from it until the result is no longer in the future. The SAR Due Date will be the last result that was in the future.
 - b. If reporting type is "Semi-Annual Reporting Annually" (CT542 Code SA):
 - i. Subtract 12 months from the RE Due Date. If that returns a date in the past, there is no SAR Due Date.
 - ii. If the result from the previous step is in the future, keep subtracting 12 months from it until the result is no longer in the future. The SAR Due Date will be the last result that was in the future.
 - c. Reporting type is "Semi-Annual Reporting - No Report" (CT542 Code SN - *new value added by this SCR*):
 - i. There is no SAR due date.

2.11 Corr.: CF Notice of Change: Semi-Annual Reporting Eliminated (CF 34)

2.11.1 Overview

The CF 34 is used to inform ESAP households they will no longer be required to complete a Semi-Annual Report (SAR 7) form. The form currently does not exist in CalSAWS. Add the CF 34 to the Template Repository.

State Form: CF 34 (12/20)

Programs: CalFresh

Attached Forms: NA Back 9

Forms Category: Form

Template Repository Visibility: All Counties

Languages:

English, Spanish, Arabic, Armenian, Cambodian, Cantonese, Farsi, Hmong, Lao, Mandarin, Other Chinese Language, Russian, Tagalog/Filipino, Vietnamese

2.11.2 Description of Change

1. Create the CF 34 Form XDP.

Form Header: Standard CalSAWS Header (Header 1)

Form Footer: Standard CalSAWS Footer (Footer 1)

Form Title: CalFresh Notice of Change: Semi-Annual Reporting Eliminated

Form Number: CF 34

Include NA Back 9: Yes

Imaging Form Name: CF Notice of Change: SAR Eliminated

Imaging Document Type: Notification/NOA

Form Mockups/Examples: See Supporting Documents #1

2. Add the following variable population:
 - a. Use the existing form header population logic to populate the header fields.
 - b. Use the existing NA Back 9 population logic to populate the Legal Aid and Hearing addresses.
3. Add an entry in the Batch Sweep Codes Table (CT 942) for the CF 34. This will be used as part of the one-time mass mailer being implemented by SCR **CA-221837**.

4. Add the following barcodes to the form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

5. Add the form to Template Repository. The required document parameters are: Case Number, Customer Name, Program, Language. If you'd like, or we can split it up however works well

Figure 2.6.1 – Document Parameters Page

6. Add the following print options and mailing requirements:

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

Mailing Options	Option for CF 34
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	CalFresh Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	N/A

Additional Options	Option for CF 34
Special Paper Stock	N/A
Enclosures	No
CW/CF Electronic Signature (IVR/Text)	No
Check to Sign	No
Post to Self Service Portal	Yes

2.12 Corr.: CF Notice of Expiration of Certification for Households with Only Elderly and/or Disabled Members (CF 377.2B)

2.12.1 Overview

The current version of the CF 377.2B in CalSAWS is 06/17. Update the form to the 12/20 version.

State Form: CF 377.2B

Current Programs: CalFresh

Current Attached Form(s): NA Back 9

Current Forms Category: Forms

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

2.12.2 Description of Change

1. Update the CF 377.2B to the 12/20 version.

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

Form Mockups/Examples: See Supporting Documents #2

2.13 Corr.: CF Notice of Expiration of Certification for Households with Only Elderly and/or Disabled Members (CF 377.2C)

2.13.1 Overview

The current version of the CF 377.2C in CalSAWS is 03/18. Update the form to the 12/20 version.

State Form: CF 377.2C

Current Programs: CalFresh

Current Attached Form(s): NA Back 9

Current Forms Category: Forms

Existing Languages: English, Spanish, Cantonese (Chinese), Mandarin (Chinese), Other Chinese Language, Russian

2.13.2 Description of Change

1. Update the CF 377.2C to the 12/20 version.

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

Form Mockups/Examples: See Supporting Documents #3

2.14 Corr.: ESAP CF Recertification Packet for Los Angeles County

2.14.1 Overview

The current CalFresh Recertification Packet includes the CF 29 (CalFresh Recertification Appointment Letter). The recertification interview requirement is waived for ESAP households. Therefore, the CF 29 should be removed from the packet. Create a new ESAP CF RE Packet for Los Angeles County for NACF and PACF households that does not include the CF 29, but includes the CF 377.2B.

State Form: N/A

Programs: CalFresh

Attached Forms: N/A

Forms Category: Application

Template Repository Visibility: Los Angeles County

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

2.14.2 Description of Change

1. Create the ESAP CF RE Packet XDP. The packet contains the following forms in the following order:

Form
CF 377.2B
Cover Letter

Note: The ESAP CF RE Packet will follow the current process of 'pre-stuffed' RE Packets, with only the Cover Letter and CF 377.2B being generated out of CalSAWS. The remainder of the forms will be pre-stuffed at the print center.

Form Header: N/A – has a coversheet

Form Title: ESAP CalFresh Recertification Packet

Form Number: ESAP CF RE Packet

Include NA Back 9: N

Imaging Form Name: ESAP CF Recertification Packet

Imaging Document Type: Customer Reporting

Form Mockups/Examples: See Supporting Documents #4

2. Add the packet to Template Repository. The packet has the following required form inputs:
 - a. Case Number

- b. Customer Name
- c. Program
- d. RE Month
- e. Language

Figure 2.3.2.1 – Document Parameter Page

- f. Add validation on the Document Parameters page to prevent the generation of the packet from Template Repository when a ESAP CF RE Packet in any status except 'Not Applicable' for the same RE Month exists. The validation message will state: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'
- 3. Add population logic for the packet. The packet will use the existing population logic for the cover letter and the CF 377.2B to populate the form in the packet.
- 4. Add the following form control for the packet:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

- 5. Add the following print options for the packet:

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

6. Add the following mailing options for the packet:

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	CalFresh Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Full Size Flat Mail
Return Envelope Type	BRM
Special Paper Stock	N/A
Enclosures	N/A
Electronic Signature	Yes
Check to Sign	No
Post to SSP	Yes

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

Field to Populate	Population for RE Packet
Type	CF
Submit Month - when generated from Template Repository	RE Month from Document Parameters page
Submit Month - when generated through Batch	Current CalFresh Program RE Due Date
Program	CF
Status	Customer Reporting Tracking Status
Status Date	Date of the latest Status Date

2.15 Corr.: ESAP CF Recertification Packet for Migration Counties

2.15.1 Overview

Create a new ESAP CF RE Packet for the Migration Counties that does not include the CF 29, but includes the CF 377.2B.

State Form: N/A

Programs: CalFresh

Attached Forms: N/A

Forms Category: Application

Template Repository Visibility: Migration Counties

Languages: English, Spanish

2.15.2 Description of Change

1. Create the ESAP CF RE Packet XDP. The packet contains the following forms in the following order:

Form
Coversheet
CF 377.2B
CF 37
EBT 2216
NA 1273
PUB13
PUB 275
PUB 388
VRC

Form Header: N/A – has a coversheet

Form Title: ESAP CalFresh Recertification Packet

Form Number: ESAP CF RE Packet

Include NA Back 9: N

Imaging Form Name: ESAP CF Recertification Packet

Imaging Document Type: Customer Reporting

Form Mockups/Examples: See Supporting Documents #5

2. Add the packet to Template Repository. The packet has the following required form inputs:
 - a. Case Number
 - b. Customer Name
 - c. Program
 - d. RE Month
 - e. Language

Figure 2.3.2.1 – Document Parameter Page

- f. Add validation on the Document Parameters page to prevent the generation of the packet from Template Repository when a ESAP CF RE Packet in any status except 'Not Applicable' for the same RE Month exists. The validation message will state: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'
3. Add population logic for the packet. The packet will use the existing population logic for the cover letter and the CF 377.2B to populate the form in the packet.
4. Add the following form control for the packet:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

5. Add the following print options for the packet:

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

6. Add the following mailing options for the packet:

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	CalFresh Worker's Office/District Office Address
Mail-back-to Address	BRM address
Outgoing Envelope Type	6"x9" Flat Mail Envelope
Return Envelope Type	BRM
Special Paper Stock	N/A
Enclosures	N/A
Electronic Signature	Yes
Check to Sign	No
Post to SSP	Yes

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

Field to Populate	Population for RE Packet
Type	CF
Submit Month - when generated from Template Repository	RE Month from Document Parameters page
Submit Month - when generated through Batch	Current CalFresh Program RE Due Date
Program	CF
Status	Customer Reporting Tracking Status
Status Date	Date of the latest Status Date

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

Field to Populate	Population for RE Packet
Case Id	The case associated to the CF RE Packet
Type	Document
Short Description	ESAP CF RE Packet
Long Description	<p>The following forms were included for the {redeterDate} RE: CF Coversheet with BRM and NVRA, CF 377.2B, CF 37, EBT 2216, NA 1273, PUB 13, PUB 275, PUB 388 and VRC.</p> <p>Note: The <redeterDate> will be populated with the RE Due Month. If the packet is generated through Template Repository, it will be populated with the date entered in the 'RE Month' field. If the packet is generated through batch, it will be populated with the current RE Due Month of the program.</p>
Created by	Batch or User
Updated by	Batch or User

2.16 Corr.: Update SAR 2 Batch Job

2.16.1 Overview

Currently, the SAR 2 batch job sends out the SAR 2 (Reporting Changes for Cash Aid and CalFresh) when the IRT is established or changes. For ESAP households, the SAR 2 is required to be sent out on the 12th and 24th months of their recertification period. Update the SAR 2 batch job (PB00R539) to send out the SAR 2 to the ESAP household (whether NACF or PACF) on the 12th and 24th month of their recertification period.

Note: As part of SCR **CA-219921**, the SAR 2 will generate via EDBC and be sent when the IRT is established, changes, or at recertification for SAR and SARA households. With this change, this batch job will only send out the SAR 2 to ESAP households. The CalFresh column will be always be populated with the CF Income, HH Size, and IRT Limit Amount for ESAP Households; If the case is PACF and also has Active CalWORKs or Refugee Cash Assistance Program (see Recommendation 2.3), the CW Income, AU Size, and IRT Limit Amount will also be populated in the CalWORKs column.

2.16.2 Description of Change

1. Update the SAR 2 batch job to send out the SAR 2 when all the following conditions are met:
 - a. The program is CalFresh.
 - b. The program is Active.
 - c. The Meets ESAP Criteria is set to 'Yes'.
Technical Note: The ESAP indicator is stored in the program detail table and this will need to check if the ESAP indicator is 'Yes' on the most recent program detail record.
 - d. The current reporting type is 'Semi-Annual Reporting - No Report'.
 - e. The batch date falls on the 1st day of 12th or 24th month of the CalFresh recertification period.

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

Field to Populate	Population for SAR 2
Case Id	The case Id associated to the current CalFresh program.
Program Id	The program Id of the current CalFresh program.
Person Id	The primary applicant of the current CalFresh program.
Type Code	FR
Sub Type Code	250

Field to Populate	Population for SAR 2
Effective Date	Batch Month

2.16.3 Execution Frequency

Monthly.

2.16.4 Key Scheduling Dependencies

No change.

2.16.5 Counties Impacted

All counties.

2.16.6 Data Volume/Performance

An estimated 3,000 additional records will be processed by the batch job as the result of the inclusion of the ESAP households.

2.16.7 Failure Procedure/Operational Instructions

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

2.17 Corr.: Add ESAP CF RE Packet Batch Job for Los Angeles County

2.17.1 Overview

Create a new batch job to send out the ESAP CF RE Packet for Los Angeles County. The packet will be sent out to ESAP households a month prior to the RE due month.

2.17.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions below. The effective month reference below is the month following the batch date.

- a. The program is CalFresh.
- b. The status of the program is Active.
- c. The Meets ESAP Criteria is set to 'Yes'.

Technical Note: The ESAP indicator is stored in the program detail table and this will need to check if the ESAP indicator is 'Yes' on the most recent program detail record.

- d. The current reporting type is 'Semi-Annual Reporting - No Report'.
- e. The RE due month of the CalFresh program is the same month as the effective month and the completion date is not set.
- f. There does not exist an active CW program on the same case with the same RE due month and the completion date is not set.
- g. There does not exist a record in the system transaction table for an ESAP CF RE Packet for the same effective month for the program.
- h. There does not exist a generated ESAP CF RE Packet for the same effective month.

Note: The GAGR/CF ESAP households will receive the ESAP CF RE Packet.

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

Field to Populate	Population for RE Packet
Case Id	The case Id associated to the current CalFresh program.
Program Id	The program Id of the current CalFresh program.
Person Id	The primary applicant of the current CalFresh program.
Type Code	FR

Field to Populate	Population for RE Packet
Sub Type Code	TBD (ESAP CF RE Packet for Los Angeles County)
Effective Date	Batch Month

2.17.3 Execution Frequency

The batch job will run monthly, same day as the CF RE Packet for Los Angeles County.

2.17.4 Key Scheduling Dependencies

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

2.17.5 Counties Impacted

Los Angeles County.

2.17.6 Data Volume/Performance

An estimated 3,000 records will be processed monthly by the batch job.

2.17.7 Failure Procedure/Operational Instructions

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

2.18 Corr.: Add ESAP CF RE Packet Batch Job for the Migration Counties

2.18.1 Overview

Create a new batch job to send out the ESAP CF RE Packet for the Migration Counties. The packet will be sent out to ESAP households a month prior to the RE due month.

2.18.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions below. The effective month reference below is the month following the batch date.
 - a. The program is CalFresh.
 - b. The status of the program is Active.
 - c. The Meets ESAP Criteria is set to 'Yes'.
Technical Note: The ESAP indicator is stored in the program detail table and this will need to check if the ESAP indicator is 'Yes' on the most recent program detail record.
 - d. The current reporting type is 'Semi-Annual Reporting - No Report'.
 - e. The RE due month of the CalFresh program is the same month as the effective month and the completion date is not set.
 - f. There does not exist an active CW program on the same case with the same RE due month and the completion date is not set.
 - g. There does not exist a record in the system transaction table for an ESAP CF RE Packet for the same effective month for the program.
 - h. There does not exist a generated ESAP CF RE Packet for the same effective month.

Note: The GAGR/CF ESAP households will receive the ESAP CF RE Packet.

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

Field to Populate	Population for RE Packet
Case Id	The case Id associated to the current CalFresh program.
Program Id	The program Id of the current CalFresh program.
Person Id	The primary applicant of the current CalFresh program.
Type Code	FR

Field to Populate	Population for RE Packet
Sub Type Code	TBD (ESAP CF RE Packet for the Migration Counties)
Effective Date	Batch Month

2.18.3 Execution Frequency

The batch job will run monthly, same day as the CF RE Packet for the Migration Counties.

2.18.4 Key Scheduling Dependencies

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

2.18.5 Counties Impacted

Migration Counties.

2.18.6 Data Volume/Performance

An estimated 3,000 records will be processed monthly by the batch job.

2.18.7 Failure Procedure/Operational Instructions

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

2.19 Corr.: Update Migration Counties CF RE Packet Batch Job

2.19.1 Overview

Currently, the CalFresh Recertification Packet batch job (PB00R543) for the Migration Counties sends out the CF RE Packet a month prior to the RE due date. Update the batch logic to not send out the packet if the CF program is ESAP.

2.19.2 Description of Change

1. Update the batch logic to add the following conditions below to not send out the CF RE Packet to ESAP households:
 - a. The Meets ESAP Criteria is set to 'No'.
Technical Note: The ESAP indicator is stored in the program detail table and this will need to check if the ESAP indicator is 'No' on the most recent program detail record.
 - a. The current reporting type is not 'Semi-Annual Reporting - No Report'.

2.19.3 Execution Frequency

No change.

2.19.4 Key Scheduling Dependencies

No change.

2.19.5 Counties Impacted

Migration Counties.

2.19.6 Data Volume/Performance

No change.

2.19.7 Failure Procedure/Operational Instructions

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

2.20 Corr.: Update CF 377.2 Batch Job

2.20.1 Overview

The CF 377.2 batch job (PB00R509) sends CF 377.2 (CalFresh Notice of Expiration of Certification) to active CF programs that do not have a 36-month recertification period a month prior to the due date of the recertification. Update the batch logic to check for the ESAP indicator and the reporting type 'Semi-Annual Reporting - No Report'.

2.20.2 Description of Change

1. Update the batch logic to find cases that meet all the following conditions below. The effective month reference below is the month following the batch date.
 - a. The program is CalFresh.
 - b. The status of the program is Active.
 - c. The Meets ESAP Criteria is set to 'No'.
Technical Note: The ESAP indicator is stored in the program detail table and this will need to check if the ESAP indicator is 'No' on the most recent program detail record.
 - d. The current reporting type is not 'Semi-Annual Reporting - No Report'.
 - e. The RE due month of the CalFresh program is the same month as the effective month and the completion date is not set.
 - f. There does not exist a record in the system transaction table for the CF 377.2 for the same effective month for the program.

2.20.3 Execution Frequency

No change.

2.20.4 Key Scheduling Dependencies

No change.

2.20.5 Counties Impacted

All counties.

2.20.6 Data Volume/Performance

No change.

2.20.7 Failure Procedure/Operational Instructions

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

2.21 Corr.: Update CF 377.2B Batch Job

2.21.1 Overview

The CF 377.2B batch job (PB00R1995) sends out the form to ESAP households a month prior to the due date of the recertification. The CF 377.2B form is part of the new RE packet that is sent out to ESAP households. Update the batch job to send out the CF 377.2B when the CalFresh program is ESAP and there is an active CalWORKs program with the same recertification due month as the CalFresh program.

Note: In the scenario where a case has a CW and CF program with the same redetermination/recertification due month and the CF program is ESAP, the household will receive the CW/CF RE Packet and the CF 377.2B.

2.21.2 Description of Change

1. Update the batch logic to find cases that meets all the following conditions below. The effective month reference below is the month following the batch date.
 - a. The program is CalFresh.
 - b. The status of the program is Active.
 - c. The Meets ESAP Criteria is set to 'Yes'.

Technical Note: The ESAP indicator is stored in the program detail table and this will need to check if the ESAP indicator is 'Yes' on the most recent program detail record.
 - d. The current reporting type is 'Semi-Annual Reporting - No Report'.
 - e. The RE due month of the CalFresh program is the same month as the effective month and the completion date is not set.
 - f. There exists an active CalWORKs program on the same case with the same RE due month as the CalFresh program and the completion date is not set.
 - g. There does not exist a record in the system transaction table for the CF 377.2B for the same effective month for the CalFresh program.
2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values:

Field to Populate	Population for RE Packet
Case Id	The case Id associated to the current CalFresh program.
Program Id	The program Id of the current CalFresh program.
Person Id	The primary applicant of the current CalFresh program.

Field to Populate	Population for RE Packet
Type Code	FR
Sub Type Code	2B
Effective Date	Batch Month

2.21.3 Execution Frequency

No change.

2.21.4 Key Scheduling Dependencies

No change.

2.21.5 Counties Impacted

All counties.

2.21.6 Data Volume/Performance

No change.

2.21.7 Failure Procedure/Operational Instructions

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

2.22 Corr.: Update CF 377.2C Batch Job

2.22.1 Overview

The CF 377.2C batch job (PB00R1996) sends out the form to households that have switch from ESAP to non-ESAP a month prior to the due date of the recertification. The batch logic currently checks that the ESAP indicator is set to 'No' and the recertification period is 36 months. The condition needs to be updated to take into account the recertification period for ESAP can be less than 36 months.

2.22.2 Description of Change

1. Update the batch logic to find cases that meet all the following conditions below. The effective month reference below is the month following the batch date.
 - a. The program is CalFresh.
 - b. The status of the program is Active.
 - c. The Meets ESAP Criteria is set to 'No'.
Technical Note: *The ESAP indicator is stored in the program detail table and this will need to check if the ESAP indicator is 'No' on the most recent program detail record.*
 - d. The reporting type switched during the current recertification period from 'Semi-Annual Reporting - No Report' to no longer be 'Semi-Annual Reporting - No Report'.
 - e. The RE due month of the CalFresh program is the same month as the effective month and the completion date is not set.
 - f. There does not exist a record in the system transaction table for the CF 377.2C for the same effective month for the program.

2.22.3 Execution Frequency

No change.

2.22.4 Key Scheduling Dependencies

No change.

2.22.5 Counties Impacted

All counties.

2.22.6 Data Volume/Performance

No change.

2.22.7 Failure Procedure/Operational Instructions

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

2.23 Automated Regression Test

2.23.1 Overview

Update the existing CalFresh ESAP automated regression test scripts to verify the new Reporting Type value where applicable. Create new (or update existing) scripts to verify the new Reporting Type determination during CalFresh EDBC, and the lack of SAR Due Date population in the Program API response.

2.23.2 Description of Change

1. Update existing CalFresh ESAP scripts to verify the new 'Semi-Annual Reporting – No Report' Reporting Type where applicable.
Note: Only scripts that are actively included in the Regression Test Suite at the time of implementation will be considered for these updates. The SSI/SSP Cash-Out scripts that were previously disabled will not be re-enabled or updated as part of this effort.
2. Create new (or update existing) scripts to verify the new Reporting Type of 'Semi-Annual Reporting – No Report' is determined via EDBC and is visible on the Case Summary and CalFresh Detail pages, and that the SAR Due Month is not displayed on the CalFresh Detail page, in the following scenarios:
 - a. CalFresh household with no earned income, only elderly and/or disabled members, one or more of whom is also receiving CalWORKs
 - b. CalFresh household with no earned income, only elderly and/or disabled members, one or more of whom is also receiving Refugee Cash Assistance (RCA)
3. Create new (or update existing) scripts to verify the ESAP indicator is set to 'No' and the new Reporting Type is not determined via EDBC in the following scenario:
 - a. CalFresh household with no earned income, one or more elderly and/or disabled members, and one or more non-elderly/disabled ineligible non-citizens in a non-member role
4. Create new Program API scripts to verify the SAR Due Date is not populated in the success response for a CalFresh program with a Reporting Type of 'Semi-Annual Reporting – No Report'.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CF 34 Mockup	CF34_EN.pdf CF34_SP.pdf
2	Client Correspondence	CF 377.2B Mockup	CF377_2B_EN.pdf CF377_2B_SP.pdf
3	Client Correspondence	CF 377.2C Mockup	CF377_2C_EN.pdf CF377_2C_SP.pdf CF377_2C_RU.pdf
4	Client Correspondence	ESAP CF RE Packet for Los Angeles County	ESAP_CF_RE_PACKET_LA_EN.pdf ESAP_CF_RE_PACKET_LA_SP.pdf
5	Client Correspondence	ESAP CF RE Packet for Migration Counties	ESAP_CF_RE_PACKET_MIG_EN.pdf ESAP_CF_RE_PACKET_MIG_SP.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.13	The LRS shall determine the effective date of change for all eligibility related changes for all individuals for all applicable programs.	New ESAP requirements will be applied by EDBC logic as of the effective date of the policy.



California Statewide Automated Welfare System

Design Document

SCR CA-220108 CIV-108000 – ACIN I-XX-21 - FFY
2022 CalFresh COLA; ACL 21-87 Update
CalWORKs (CW) MAP for 2021-2022

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/09/2021	1.0	Initial Draft	Tom Lazio
08/18/2021	2.0	Updated Section 5 Outreach per BAs request	Tom Lazio

Table of Contents

1	Overview	5
1.1	Current Design	5
1.2	Requests	5
1.3	Overview of Recommendations	6
	Assumptions	6
2	Recommendations	6
2.1	Eligibility Updates	7
2.1.1	CalFresh Maximum Allotments	7
2.1.2	CalFresh Minimum Allotments	7
2.1.3	CalFresh Standard Deduction	8
2.1.4	CalFresh Maximum Shelter Deduction	8
2.1.5	CalFresh Maximum Asset Limits	8
2.1.6	CalFresh Utility Allowances	9
2.1.7	CalFresh Homeless Household Shelter Deduction	9
2.1.8	CalFresh Net Monthly Income Eligibility Standards	9
2.1.9	CalFresh Gross Monthly Income Eligibility Standards	10
2.1.10	CalWORKs Tier 1 IRT Update	10
2.1.11	CalWORKs Tier 2 IRT Update	11
2.1.12	CalWORKs MAP Update	11
2.1.13	Programs Impacted	12
2.1.14	Performance Impacts	12
2.2	Update CF COLA NOA logic	13
2.2.1	Overview	13
2.2.2	Description of Change	13
2.3	Update CW COLA NOA logic	13
2.3.1	Overview	13
2.3.2	Form/NOA Verbiage	14
2.3.3	Form/NOA Variable Population:	16
2.3.4	Form/NOA Generation Conditions	16
3	Supporting Documents	16
4	Requirements	17
4.1	Project Requirements	17
5	Outreach	17

5.1 Lists – CIV Only17

1 OVERVIEW

This document identifies required changes to CalSAWS and C-IV related to the CalFresh (CF) Cost of Living Adjustments (COLA) for Federal Fiscal Year (FFY) 2022 for the period of October 1, 2021 through September 30, 2022 as informed by the All County Information Notice **-XX-21**, and United States Department of Agriculture, Food and Nutrition Service SNAP COLA Memo FY 2022.

1.1 Current Design

1. The maximum CF allotments and other program limits were last adjusted for FFY 2021 in C-IV under CIV-106258, and in CalSAWS under CA-213273. C-IV and CalSAWS use the FFY 2020-2021 CF amounts for the following values:
 - a. CalFresh Standard Utility Allowance
 - b. CalFresh Limited Utility Allowance
 - c. CalFresh Telephone Utility Allowance
 - d. CalFresh Maximum Allotment
 - e. CalFresh Minimum Allotment
 - f. CalFresh Standard Deduction
 - g. CalFresh Maximum Shelter Deduction
 - h. CalFresh Net Monthly Income Level
 - i. CalFresh Gross Monthly Income Level
 - j. CalFresh Aged Property Limit
 - k. CalFresh Non-Aged Property Limit
 - l. CalFresh Homeless Shelter Deduction
 - m. 165% FPL
 - n. 200% FPL
2. The CW Income Reporting Threshold (IRT) Tier 1 and Tier 2 levels are at the 2020/2021 amounts updated by SCRs CA-213273/ CIV-106258.
3. The CW MAP amount are at the October 2019 amounts updated by SCRs CA-206231/CIV-103092.

1.2 Requests

1. Effective October 1, 2021, benefits for all active CalFresh and TCF programs must be calculated and issued based on the COLA for FFY 2022 as set forth in the following sections.
2. Update the CW Income Reporting Threshold (IRT) levels to the 2021/2022 amount.
3. Update the CW Maximum Aid Payment (MAP) amounts to the October 2021 amounts.
4. Update the CW COLA NOA verbiage to the most recent version.
5. C-IV Only: Generate list of ARC cases impacted by CW MAP increase.

1.3 Overview of Recommendations

1. Update CalSAWS and C-IV code tables with the new CF COLA values for FFY 2022 and end date records from the previous year as of September 30, 2021.
2. Update CalSAWS and C-IV code tables with the new CW IRT value for 2021-2022 year effective October 1st 2021 and end date record from the previous year as of September 30, 2021.
3. Update CalSAWS and C-IV code tables with the new Maximum Aid Payment (MAP) values effective October 1st 2021.
4. Update the NOA logic to generate the CF COLA NOA and CW COLA NOA for 10/2021 COLA.
5. C-IV Only: Generate list of ARC cases impacted by CW MAP increase.

Assumptions

1. Batch EDBC will be run on CF (including TCF) programs, and any active Nutrition Benefit (NB) programs on the same case as the active CF program to issue benefits for the new CF COLA values under separate SCR's CIV- 108001 and CA-220109.
2. Tables in this document give values for Household Sizes up to 10 persons to align with the lookup column layout in CT351. The Household Size of "2" in this document applies to both the CT351 column for "2 Persons" and for "2 Adults."
3. This SCR will update the existing CF COLA NOA fragment logic (see Section 2.4). Per existing CalSAWS logic, other program changes unrelated to the COLA may generate a related NOA instead of the CF COLA NOA.
4. Counties are responsible for providing access to the information in the CF 11 (ENG/SP) CalFresh Mass Change Notice.
5. SB 380 Child Maximum Aid Payment is automatically calculated based on the updated CW MAP values.
6. CalSAWS Only: The following announcement will be posted to YBN by Consortium staff from 8/21/2021 to 10/01/2021.
 - o CalWORKs grant increase begins 10/1/2021. Click <here> to read more.**NOTE:** <here> will be a hyperlink that will open the TEMP 2250.
7. C-IV Only: An announcement regarding the CalWORKs grant increase will not be posted to C4Y as C4Y will be inactive before the grant increase comes into effect.
8. TEMP 2250 will be mass mailed with the SCR's CA-231935 and CIV-109285.

2 RECOMMENDATIONS

Insert new values into the code tables as specified below using an effective date from 10/01/2021 to high date. The existing high-dated values will be end-dated effective September 30, 2021.

2.1 Eligibility Updates

2.1.1 CalFresh Maximum Allotments

The following table lists the new CF Maximum Allotments for all households for FFY 2022. These values are stored in CT351, Code 45.

Household Size	Maximum Aid Payment
1	\$ 250
2	\$ 459
3	\$ 658
4	\$ 835
5	\$ 992
6	\$ 1,190
7	\$1,316
8	\$1,504
9	\$ 1,692
10	\$1,880
Each additional person	\$ 188

2.1.2 CalFresh Minimum Allotments

The CF Minimum Allotment increased to \$20. This value is stored in CT 335, Code MA.

2.1.3 CalFresh Standard Deduction

The following table lists the new CF Standard Deductions for FFY 2021. These values are stored in CT351, Code 48.

Household Size	Standard Deductions
1	\$177
2	\$177
3	\$177
4	\$184
5	\$215
6	\$246
7	\$246
8	\$246
9	\$246
10	\$246
Each additional person	\$0*

** all households of six or more get a \$246 deduction with no additional amount added as the household size increases.*

2.1.4 CalFresh Maximum Shelter Deduction

The CF Maximum Shelter Deduction for households without elderly or disabled members increased from \$586 to \$597. This value is stored in CT335, Code 50.

Note: The CF Maximum Shelter Deduction does not apply to elderly or disabled households; the full amount of any excess shelter will be deducted. However, this value will still appear in the EDBC Summary.

2.1.5 CalFresh Maximum Asset Limits

CF Maximum Asset Limits will be updated with the following:

- The limit for households with at least one member who is age 60 or older or is disabled increased from \$3,500 to \$3,750. This value is stored in CT 335, Code 85.
- For all other households, the limit increased from \$2,250 to \$2,500. This value is stored in CT 335, Code 86.

2.1.6 CalFresh Utility Allowances

The following table lists the new Utility Allowances for CF for FFY 2022. These values are stored in CT335. The code for each item is identified in the table.

Utility Allowance Type	Code	Old Value	New Value
Standard Utility Allowance (SUA)	49	\$438	\$ 487
Limited Utility Allowance (LUA)	34	\$139	\$ 144
Telephone Utility Allowance (TUA)	33	\$18	\$19

2.1.7 CalFresh Homeless Household Shelter Deduction

The CF Homeless Household Shelter Deduction will increase in FFY 2022 from \$156.74 to \$159.73. This value is stored in CT335, Code 48.

2.1.8 CalFresh Net Monthly Income Eligibility Standards

The following table lists the new CF Net Monthly Income Eligibility Standards (100% FPL) for FFY 2022. These values are stored in CT351, Code 46.

Household Size	Net Monthly Income Level (100% FPL)
1	\$1,074
2	\$1,452
3	\$ 1,830
4	\$ 2,209
5	\$ 2,587
6	\$2,965
7	\$ 3,344
8	\$ 3,722
9	\$4,101
10	\$4,480
Each additional person	\$ 379

2.1.9 CalFresh Gross Monthly Income Eligibility Standards

The following table lists the new CF gross Monthly Income Eligibility Standards for FFY 2022. These values are stored in CT351. The code for each item is in the table.

Household Size	IRT for SAR (130% FPL) Code 47	Elderly/Disabled (165% FPL) Code 58	MCE/BBCE (200% FPL) Code 60
1	\$1,396	\$1,771	\$2,148
2	\$ 1,888	\$ 2,396	\$2,904
3	\$ 2,379	\$ 3,020	\$3,660
4	\$ 2,871	\$ 3,644	\$4,418
5	\$ 3,363	\$ 4,268	\$5,174
6	\$3,855	\$4,893	\$5,930
7	\$ 4,347	\$ 5,517	\$6,688
8	\$ 4,839	\$ 6,141	\$7,444
9	\$ 5,331	\$ 6,766	\$8,202
10	\$5,823	\$7,391	\$8,960
Each additional member	\$ 492	\$625	\$758

2.1.10 CalWORKs Tier 1 IRT Update

Apply a CTCR in each system to update the 100% FPL for a household of 3 as used by the system for CW and RCA Tier 1 IRT (Code Table 335, code AK) effective 10/01/2021 to high date. The existing high-dated value will be end-dated 9/30/2021.

In CalSAWS: the new amount will be \$1,830 (the system calculates 55% of this value as \$1,007 per the ACL).

In C-IV: the new amount will be \$1,831 (the system calculates 55% of this value as \$ per the ACL due to rounding differences from CalSAWS).

2.1.11 CalWORKs Tier 2 IRT Update

The following table lists the new CW and RCA Tier2 IRT values. These values are stored in CT351. These values are effective 10/01/2021, the current high dated values will be end dated to 9/30/2021.

Household Size	CW Tier2 IRT (130% FPL) Code 49
0	\$1,396
1	\$ 1,396
2	\$ 1,888
3	\$ 2,379
4	\$ 2,871
5	\$3,363
6	\$ 3,855
7	\$ 4,347
8	\$ 4,839
9	\$5,331
10	\$5,823
Each additional member	\$492

2.1.12 CalWORKs MAP Update

The following tables list the new CW and RCA MAP values. These values are stored in CT351. These values are effective 10/01/2021, the current high dated values will be end dated to 9/30/2021.

Region 1

Assistance Unit Size	Maximum Aid Payment Exempt Code 12	Maximum Aid Payment Non-Exempt Code 10
1	\$ 638	\$ 579
2	\$ 819	\$ 733
3	\$ 1,035	\$ 925
4	\$ 1,244	\$ 1,116

Assistance Unit Size	Maximum Aid Payment Exempt Code 12	Maximum Aid Payment Non-Exempt Code 10
5	\$ 1,458	\$ 1,308
6	\$ 1,673	\$ 1,499
7	\$ 1,887	\$ 1,691
8	\$ 2,104	\$ 1,883
9	\$ 2,316	\$ 2,074
10 or more	\$ 2,534	\$ 2,266

Region 2

Assistance Unit Size	Maximum Aid Payment Exempt Code 13	Maximum Aid Payment Non-Exempt Code 11
1	\$ 607	\$ 548
2	\$ 778	\$ 696
3	\$ 984	\$ 878
4	\$ 1,181	\$ 1,060
5	\$ 1,386	\$ 1,243
6	\$ 1,590	\$ 1,425
7	\$ 1,792	\$ 1,607
8	\$ 1,999	\$ 1,789
9	\$ 2,200	\$ 1,971
10 or more	\$ 2,407	\$ 2,152

2.1.13 Programs Impacted

CW, RCA, CF

2.1.14 Performance Impacts

None.

2.2 Update CF COLA NOA logic

2.2.1 Overview

The existing English and Spanish fragment logic will be updated in C-IV and CalSAWS for the CalFresh COLA to be generated by this change.

2.2.2 Description of Change

Update the existing COLA fragment logic for RSN_COLA_CHANGE(Fragment ID: 1028 C-IV) and CF_CH_NEW_COLA_BENEFIT_AMT (Fragment ID: 7480 CalSAWS) to generate for the EDBC benefit month/year of 10/2021.

CalSAWS Existing Fragment (English):

"Your change in CalFresh benefits is due to the CalFresh Cost of Living Adjustment that is effective <BenefitMonth>. This is due to federal and state regulations."

CalSAWS Existing Fragment (Spanish):

"Su cambio en los beneficios de CalFresh se debe al ajuste del costo de vida de CalFresh que es efectivo el <BenefitMonth>. Esto se debe a las regulaciones federales y estatales."

C-IV Existing Fragment (English):

"Your change in CalFresh benefits are due to the annual CalFresh Cost of Living Adjustment that is effective <BenefitMonth>. This is due to Federal and State regulations."

C-IV Existing Fragment (Spanish):

"Su cambio en los beneficios de CalFresh se debe al ajuste anual del costo de vida de CalFresh que es efectivo el <BenefitMonth>. Esto se debe a las regulaciones federales y estatales."

2.3 Update CW COLA NOA logic

2.3.1 Overview

The existing English and Spanish fragment verbiage and logic will be updated in C-IV and CalSAWS for the CalWORKS COLA to be generated by this change.

Reason Fragment Name and ID: RSN_MAP_INCREASE_OCT_2019(C-IV Fragment ID: 550) and CW_CH_COLA_A881(CalSAWS Fragment ID: 7459)

Known County NOA: Derived from TM44-315L

Current NOA Template: TEMPLATE_SINGLE_BUDGET (C-IV Fragment ID: 373)
CW_NOA_TEMPLATE (CalSAWS Fragment ID: 3026)

Current Program(s): CalWORKs and RCA

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

Existing Languages: English and Spanish

2.3.2 Form/NOA Verbiage

Update CW COLA Reason Fragment XDP

Update the existing English and Spanish COLA fragment for RSN_MAP_INCREASE_OCT_2019 (C-IV) and CW_CH_COLA_A881 (CalSAWS) to the updated verbiage provided below.

CalSAWS:

Existing Fragment (English):

"State Law has changed. The maximum aid payment has gone up.

If you think there is a mistake in the amount of your cash aid, or if you have problems other than with the new law you can ask for a state hearing. The back of this notice tells you how.

Your new cash aid amount is figured on this page."

Updated Fragment (English):

"State Law has changed. The maximum aid payment has gone up by 5.3 percent.

If you think there is a mistake in the amount of your cash aid, or if you have problems other than with the new law you can ask for a state hearing. The back of this notice tells you how."

Existing Fragment (Spanish):

"La Ley Estatal ha cambiado. El pago máximo de asistencia ha aumentado.

Si usted cree que hay un error en la cantidad de su asistencia monetaria o si tiene problemas, aparte de con la nueva ley, puede pedir una audiencia estatal. Al reverso de este aviso se le explica cómo hacerlo.

La cantidad nueva de su asistencia monetaria es calculada en esta página."

Updated Fragment (Spanish)

“La Ley Estatal ha cambiado. El pago máximo de asistencia ha aumentado un 5.3 por ciento.

Si usted cree que hay un error en la cantidad de su asistencia monetaria, o si tiene problemas aparte de con la nueva ley, puede pedir una audiencia estatal. Al reverso de este aviso se le explica cómo hacerlo.”

C-IV:

Existing Fragment (English):

“State Law has changed. The maximum aid payment has gone up.

If you think there is a mistake in the amount of your cash aid, or if you have problems other than with the new law you can ask for a state hearing. The back of this notice tells you how.

Your new cash aid amount is figured on this page.

The county will tell you if your IRT has changed.”

Updated Fragment (English):

“State Law has changed. The maximum aid payment has gone up by 5.3 percent.

If you think there is a mistake in the amount of your cash aid, or if you have problems other than with the new law you can ask for a state hearing. The back of this notice tells you how.

Your new cash aid amount is figured on this page.

The county will tell you if your IRT has changed.”

Existing Fragment (Spanish):

“La Ley Estatal ha cambiado. El pago máximo de asistencia ha aumentado.

Si usted cree que hay un error en la cantidad de su asistencia monetaria o si tiene problemas, aparte de con la nueva ley, puede pedir una audiencia estatal. Al reverso de este aviso se le explica cómo hacerlo.

La cantidad nueva de su asistencia monetaria es calculada en esta página.

El Condado le informará si la cantidad máxima de ingresos para su hogar (IRT) ha cambiado.”

Updated Fragment (Spanish):

“La Ley Estatal ha cambiado. El pago máximo de asistencia ha aumentado un 5.3 por ciento.

Si usted cree que hay un error en la cantidad de su asistencia monetaria, o si tiene problemas aparte de con la nueva ley, puede pedir una audiencia estatal. Al reverso de este aviso se le explica cómo hacerlo.

La cantidad nueva de su asistencia monetaria es calculada en esta página.

El Condado le informará si la cantidad máxima de ingresos para su hogar (IRT) ha cambiado."

2.3.3 Form/NOA Variable Population:

1. Update Regulations for CW COLA Reason

The CW COLA reason has new associated Regulations. The following Regulations will be added when the CW COLA Reason is generated on a NOA:

English Regulations: MPP 44-315, AB 135 (Chapter 85, Statutes of 2021)

CalSAWS Only: Spanish Regulations: MPP 44-315, AB 135 (Capítulo 85, Estatutos del 2021)

2.3.4 Form/NOA Generation Conditions

Update CW COLA reason fragment Generation:

Update the CW COLA fragment logic for RSN_MAP_INCREASE_OCT_2019(C-IV) and CW_CH_COLA_A881 (CalSAWS) to generate for the EDBC benefit month/year of 10/2021.

New NOA Template: No

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: No

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.21	The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes.	This SCR updates the CF COLA values for eligibility determination and benefit calculation FFY 2022.

5 OUTREACH

5.1 Lists – CIV Only

List of active ARC cases as of 10/01/2021 where ARC participant case includes a CW portion (i.e. aid codes 2S, 2T or 2U). An increase in the CalWORKs MAP could potentially change the portion of the ARC amount coming from CalWORKs funds.

Note: Counties will need to run manual EDBC for the ARC program. An increase in the CalWORKs MAP could potentially change the portion of the ARC amount coming from CalWORKs funds.

List Name: ARC Cases Where Participant Has Aid Codes That Include CW Portion for October 2021.

List Criteria:

- ARC case active as of 10/01/2021
- ARC Case Aid Code is 2S, 2T or 2U

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s): Aid Code

Frequency: One-time

The list will be posted to the following locations:

System	Path
C-IV	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CIV-108000

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-221357

Update Batch to flip ICT status to "manually complete" for additional scenarios

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sowmya Coppisetty
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/22/2021	1.0	Initial Version	Sowmya Coppisetty

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Update ICT jobs 'PB00C100' - Flip ICT status to "Manually Complete" and 'PB00E151' - "Process ICT Disposition Records"	5
	2.1.1 Overview	5
	2.1.2 Description of Change.....	5
	2.1.3 Execution Frequency.....	5
	2.1.4 Key Scheduling Dependencies	6
	2.1.5 Counties Impacted	6
	2.1.6 Data Volume/Performance.....	6
	2.1.7 Failure Procedure/Operational Instructions.....	6
3	Requirements.....	6
	3.1 Project Requirements.....	6

1 OVERVIEW

1.1 Current Design

Currently, Batch job 'PB00C100' automatically updates the ICT records that are currently "In Progress" to "Manually Complete" in the sending County when all the programs associated to ICT are discontinued with a reason of "Inter County Transfer"

And Batch job 'PB00E151' stores any new Disposition records received in the E-ICT inbound file and updates the ICT status to "Complete".

1.2 Requests

1. Update the batch job 'PB00C100' to only consider the discontinued program status reason of the program blocks associated to the ICT case when updating the ICT status to "Manually Complete"
2. Update the batch job 'PB00C100' to consider the program person program discontinued status reason "for Medi-Cal program when the program discontinued status reason is "No Eligible Mem".
3. Update the batch job 'PB00E151' to update the ICT status when the disposition is received after the ICT status is flipped to "Manually Complete".

1.3 Overview of Recommendations

1. Update the batch job 'PB00C100' to only consider the program status reason of "Inter County Transfer" for the Medi-Cal and CalFresh program blocks associated to the ICT when there exist multiple program blocks of Medi-Cal or CalFresh program (applicable to C-IV Migration Counties) in the same case.
2. Update the batch job 'PB00C100' to also consider the program person program discontinued status reason of "Inter County Transfer" for Medi-Cal program only if the program discontinued status reason is "No Eligible Mem"
3. Update the batch job 'PB00E151' to update the ICT status to "Complete" if a disposition is received after the ICT status is flipped to "Manually Complete".

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Update ICT jobs 'PB00C100'- Flip ICT status to "Manually Complete" and 'PB00E151' - "Process ICT Disposition Records"

2.1.1 Overview

1. Update the batch job 'PB00C100' to take into consideration the below conditions when determining the program status and status reason of the Medi-Cal and CalFresh program associated to the ICT case to update the status from "In Progress" to "Manually Complete"
 - For the Medi-Cal program, consider the status of the program that is associated with the ICT when there are multiple Medi-Cal program blocks in the case.
 - For the CalFresh Program, not to consider the program status and status reason of the C-IV legacy Transitional CalFresh program block if it exists in the same case as the CalFresh program associated to the ICT.
 - For the Medi-Cal program, consider the program person discontinued status reason of 'Inter-County Transfer' for the Medi-Cal program if the program discontinued status reason is 'No Eligible Mem'.
2. Currently batch job 'PB00E151' processes the ICT disposition records received in the E-ICT inbound file and updates the ICT status to "Complete". With this SCR, add a new condition to also update the status when a disposition is received after the ICT status is flipped to "Manually Complete"

2.1.2 Description of Change

1. Update the batch job 'PB00C100' driving query to include the below conditions for the Medi-Cal and CalFresh programs
 - To consider only the discontinued Medi-Cal and CalFresh program blocks with the discontinuance date of greater than or equal to the ICT record sent date.
 - To consider the program person discontinued status reason of 'Inter-County Transfer' for the Medi-Cal program if the program discontinued status reason is 'No Eligible Mem'.
2. Add a new condition to the batch job 'PB00E151' to also update the ICT status to "Complete" if a new disposition is received for the transferred-out case after the ICT status is flipped to "Manually Complete".

2.1.3 Execution Frequency

Daily

2.1.4 Key Scheduling Dependencies

No Change

2.1.5 Counties Impacted

All Counties

2.1.6 Data Volume/Performance

No Change

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.).

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.2	The LRS shall trigger automated requests for LRS Data exchange of information with other systems, based on information captured during the application registration, application evaluation, intake, case maintenance, and referral processes.	Modify the ICT jobs 'PB00C100' and 'PB00E151' to update the status of the ICT to Manually Complete and Complete correctly.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-223932

DDID 34

Task Mgt Task Export Reports

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/10/2021	1.0	Initial Revision	Rakan Ali

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	5
2	Recommendations.....	6
2.1	My Tasks Page	6
2.1.1	Overview	6
2.1.2	My Tasks Page Mockup.....	6
2.1.3	Description of Changes	6
2.1.4	Page Location	7
2.1.5	Security Updates.....	7
2.1.6	Page Mapping.....	7
2.1.7	Page Usage/Data Volume Impacts	7
2.2	Task Search Page	8
2.2.1	Overview	8
2.2.2	Task Search Page Mockup	8
2.2.3	Description of Changes	8
2.2.4	Page Location	9
2.2.5	Security Updates.....	9
2.2.6	Page Mapping.....	9
2.2.7	Page Usage/Data Volume Impacts	9
2.3	Task Reassignment Results List Page	9
2.3.1	Overview	9
2.3.2	Task Reassignment Results List Page Mockup	10
2.3.3	Description of Changes	10
2.3.4	Page Location	10
2.3.5	Security Updates.....	10
2.3.6	Page Mapping.....	11
2.3.7	Page Usage/Data Volume Impacts	11
2.4	Task Search Export Report	11
2.4.1	Overview	11
2.4.2	Task Search Export Mockup.....	11

2.4.3	Description of Change	11
2.4.4	Report Location	13
2.4.5	Counties Impacted	13
2.4.6	Security Updates.....	13
2.4.7	Report Usage/Performance	13
2.5	Task Reassignment Results Export Report	13
2.5.1	Overview	13
2.5.2	Task Reassignment Results Export Mockup	14
2.5.3	Description of Change	14
2.5.4	Report Location	16
2.5.5	Counties Impacted	16
2.5.6	Security Updates.....	16
2.5.7	Report Usage/Performance	16
3	Supporting Documents	16
4	Requirements	18
4.1	Migration Requirements.....	18
5	Migration Impacts	20
6	Outreach.....	21
7	Appendix.....	22

1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to include export capabilities on a subset of the Task related pages.

1.1 Current Design

Task Management functionality within the Tasks pop up window that is accessible through the Tasks link in the Utilities navigation bar contains Task search capabilities that paginate the search results.

The Task Reassignment functionality will store the results of each Task Reassignment instruction; however, the pages do not allow visualization of the reassigned Tasks.

1.2 Requests

Introduce export functionality to a set of Task Management pages allowing a user to extract results into a spreadsheet format.

1.3 Overview of Recommendations

1. Add Export icons to the following pages:
 - a. My Tasks
 - b. Task Search
 - c. Task Reassignment Results List

1.4 Assumptions

1. CA-214928 for DDID 34 has been implemented to introduce the Task Reassignment Results List Pages in CalSAWS.
2. CA-214929 for DDID 655 has been implemented to introduce the My Tasks and Task Search Pages in CalSAWS.
3. The formatting of the exported report is subject to the processing of the technical solution. For example, formatting such as column widths and text wrap may appear slightly different from the included mockups depending on the data included within the exported report. Once a report has been exported, a User may use native Excel functionality to adjust as needed.
4. Online search pages that return paginated results will extract all paginated rows, via the export icon, into a single export report template.
5. An export report is confined by the restrictions of Microsoft Excel. An xlsx export worksheet will have no more than 1,048,576 rows of data. This limit far exceeds the amount of data that can be retrieved through the online page search criteria.

2 RECOMMENDATIONS

This section will outline recommendations to introduce export functionality to a set of Task Management components in the CalSAWS System.

2.1 My Tasks Page

2.1.1 Overview

The My Tasks page displays information for Assigned/In Process Tasks that are associated to the logged in Worker within the CalSAWS System.

2.1.2 My Tasks Page Mockup

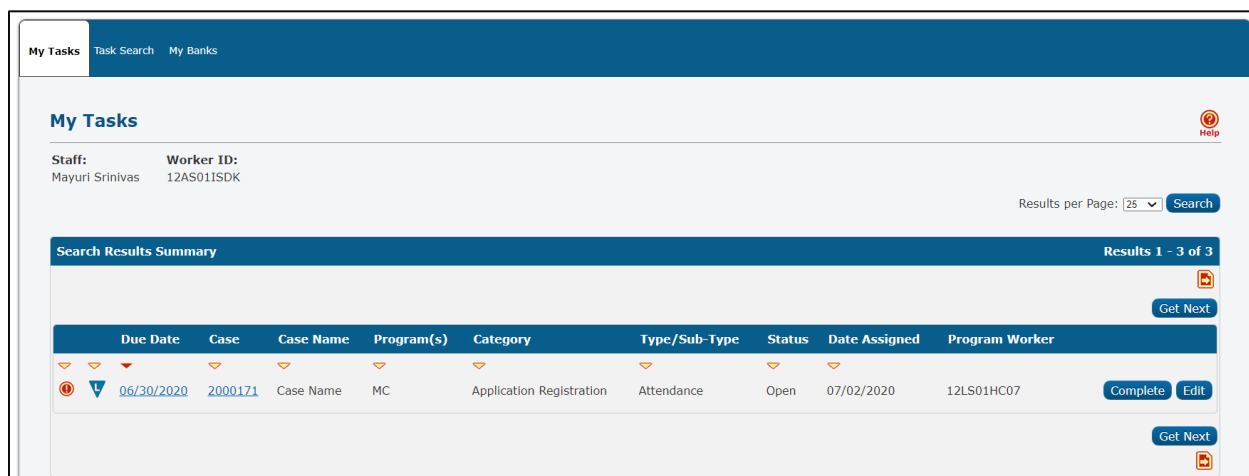


Figure 2.1.2.1 – My Tasks Page Mockup

2.1.3 Description of Changes

1. Add an Export icon to the My Tasks page (See Figure 2.1.2.1 for icon placement).

- a. Export Icon – The Export icon generates a Task Search Export Report with the Tasks listed in the My Tasks page. The following graphical icon indicates the Export Icon:



- b. The Export icon will open a Report in a spreadsheet format that contains information for Tasks displayed in the My Tasks page without the need for pagination. The icon will only appear when there are 1 or more Tasks displayed in the Search Results and the User's security profile contains the "MyTasksView" security right.

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A – No updates to security.

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

There are no expected page usage/data volume impacts.

2.2 Task Search Page

2.2.1 Overview

The Task Search page allows the User to search and manage Tasks that have been created within the CalSAWS System.

2.2.2 Task Search Page Mockup

Task Search

* - Indicates required fields

▼ Refine Your Search

Search

Case Number: 2000171 **Select**

Worker ID: 12AS01ISDK **Select**

Status: Assigned ▼

Priority: ▼

Due Date

From:

Program:

Bank ID: **Select**

Category:

Newly Assigned:

To:

Office Name: **Select**

Type:

Unit ID: 00

Sub-Type:

▼ **Advanced Search**

Assign Date

From:

To:

Completed/Voiced/Expired Date

From:

To:

Results per Page: 100 **Search**

Search Results Summary Results 1 - 3 of 3

Add Task

	Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	
<input type="checkbox"/>	06/30/2020	2000171	Case Name	MC	Application Registration	Attendance	Open	12AS01ISDK		Complete Edit

Action: * Assign to Me ▼ **Add Task**

Remove Bank Assignment: No ▼ **Submit**

Figure 2.2.2.1 – Task Search Page with Export Icon Mockup

2.2.3 Description of Changes

1. Add an Export icon to the Task Search page.
 - a. Export Icon – The Export icon generates a Tasks Search Export Report with the Tasks listed in the Task Search page. The icon will

display if the user's security profile contains the "TaskSearchView" security right. The following graphical icon indicates the Export Icon:



- i.
- b. The Export icon will open a Report in a spreadsheet format that contains information for Tasks displayed in the Task Search page without the need for pagination. The icon will only appear when there are 1 or more Tasks displayed in the Search Results and the User's security profile contains the "TaskSearchView" security right.

2.2.4 Page Location

N/A

2.2.5 Security Updates

N/A – No updates to security.

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

There are no expected page usage/data volume impacts.

2.3 Task Reassignment Results List Page

2.3.1 Overview

This page lists the Task Reassignment Results for an instance of a Task Reassignment instruction. The User can view Task Reassignment results and details of the Task Reassignment instructions for each run.

2.3.2 Task Reassignment Results List Page Mockup

Task Reassignment Results List

Close

▼ Refine Your Search

Search

Run Begin Date:

Tasks Reassigned Min:

Run Result:

Run End Date:

Tasks Reassigned Max:

Results per Page: 25 Search

Search Results Summary


Results 1 - 25 of 52

1 2 3 Next

Run Date	Run Result	Run Result Detail	Tasks Reassigned	Reclaimed On	Tasks Reclaimed
08/01/2019	Processed		5		
07/31/2019	Processed		5		
07/30/2019	Not Processed	Task Source(s) Do Not Have Task Assignments	0		
07/29/2019	Processed		3		
07/26/2019	Processed		11		

Figure 2.3.2.1 – Task Reassignment Results List Page Export Icon Mockup

2.3.3 Description of Changes

1. Add an Export icon to the Task Reassignment Results List page.
 - a. The Task Reassignment Results Export Report will include information for Tasks that have been processed through a Task Reassignment instruction. The report includes Task details including previous and new assignment information. The icon will display for each result on the Task Reassignment Results List page when the Tasks Reassigned column is greater than 0 and the user's security profile contains the "TaskReassignmentView".
 - b. The following graphical icon indicates the Export Icon: .

2.3.4 Page Location

N/A

2.3.5 Security Updates

N/A – No updates to security.

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

There are no expected page usage/data volume impacts.

2.4 Task Search Export Report

2.4.1 Overview

The Task Search Export report can be accessed from the My Tasks and/or the Task Search page within the Task Pop-Up window. This section will describe the specifics of the report.

2.4.2 Task Search Export Mockup

General Information	
Report: Task Search Export	
County: Humboldt	
Run Date: 07/15/2021 08:30 AM	

Figure 2.4.2.1 – Task Search Export - General Information Sheet Mockup

Case Number	Case Name	Program	Due Date	Category	Type	Sub-Type	Status	Priority	Expedited	Worker Assigned	Bank Assigned	Date Created	Worker Assigned Date	Completing/Voiding Worker	Date Voided	Date Completed	Long Description
2000171	Case Name	MC	08/01/2021	Application Registration	First Pend		Completed	Medium	Y	12L5001300		07/01/2021	08/01/2021			08/01/2021	
2000172	Case Name	MC	08/02/2021	Application Registration	Report		Completed	Medium	N	12L5001300		07/02/2021	08/02/2021			08/02/2021	
2000173	Case Name	MC	08/03/2021	Application Registration	Second Pend		Completed	Medium	N	12L5001300		07/03/2021	08/03/2021			08/03/2021	
2000174	Case Name	MC	08/04/2021	Application Registration	Vital Stats		Completed	Medium	N	12L5001300		07/04/2021	08/04/2021			08/04/2021	
2000175	Case Name	MC	08/05/2021	Application Registration	Application		Completed	Medium	Y	12L5001300	12L501AE0TBK	07/05/2021	08/05/2021	12L5001300		08/05/2021	
2000176	Case Name	MC	08/06/2021	Application Registration	Report	IEVS Report	Completed	Medium	Y	12L5001300		07/06/2021	08/06/2021			08/06/2021	
2000177	Case Name	MC	08/07/2021	Application Registration	First Pend		Completed	Medium	N	12L5001300	12L501AE0TBK	07/07/2021	08/07/2021	12L5001300		08/07/2021	
2000178	Case Name	MC	08/08/2021	Application Registration	Verification Received		Completed	Medium	Y	12L5001300	12L501AE0TBK	07/08/2021	08/08/2021	12L5001300		08/08/2021	
2000179	Case Name	MC	08/09/2021	Application Registration	Application		Completed	Medium	N	12L5001300		07/09/2021	08/09/2021			08/09/2021	
2000180	Case Name	MC	08/10/2021	Application Registration	Vital Stats		Completed	Medium	Y	12L5001300		07/10/2021	08/10/2021			08/10/2021	
2000181	Case Name	MC	08/11/2021	Application Registration	Second Pend		Completed	Medium	Y	12L5001300		07/11/2021	08/11/2021			08/11/2021	
2000182	Case Name	MC	08/12/2021	Application Registration	Report		Completed	Medium	N	12L5001300		07/12/2021	08/12/2021			08/12/2021	
2000193	Case Name	MC	08/13/2021	Application Registration	Verification Received		Completed	Medium	N	12L5001300		07/13/2021	08/13/2021			08/13/2021	

Figure 2.4.2.2 – Task Search Export – Exported Data Sheet Mockup

2.4.3 Description of Change

1. Add a Task Search Export Report to the CalSAWS System that will allow exporting of data from the Task Search and/or My Tasks page. The Tasks displayed on this report will replicate the search criteria that was used to retrieve Tasks as viewed on the online page(s). Reference the Supporting Documents section for example report templates which include the report layout and column placement.

- a. General Information Sheet

This sheet will contain general information informing the User parameters that were used to generate the Report. This sheet will include a single table with a single column titled "General Information" that will include the following rows:

- i. Report Name formatted as "Report: Task Search Export".

- ii. The county name formatted as "County: <County Name>". For example, "County: Humboldt".
- iii. The date and time the export was generated formatted as "Run Date: <mm/dd/yyyy hh:mm AM/PM>". For example, "Run Date: 07/15/2021 08:30 AM"

b. Exported Data Sheet

This sheet will contain the specific Task data exported from the online page with the following columns:

Column Name	Description
Case Number	The Case Number associated to the Task.
Case Name	The Case Name of the Case associated to the Task.
Program	The Program associated to the Task.
Due Date	The Due Date of the Task formatted as MM/DD/YYYY.
Category	The Category of the Task Type of the Task.
Type	The Task Type associated to the Task.
Sub-Type	The Task Sub-Type associated to the Task. This column will be blank if no Sub-Type exists.
Status	The Status of the Task.
Priority	The Priority of the Task.
Expedited	This column will populate with a "Y" if the Task Expedited attribute is "Yes", otherwise the column will populate with "N".
Worker Assigned	The Worker assigned to the Task. This column will be blank if no assigned Worker exists.
Bank Assigned	If available, the Bank the Task is assigned to. This column will be blank if the Task is not associated to a Bank.
Date Created	The date the Task was created formatted as MM/DD/YYYY.

Column Name	Description
Worker Assigned Date	The date a Worker was assigned to the Task formatted as MM/DD/YYYY. This column will be blank if a Worker is not assigned.
Completing/Voiding Worker	If the Status is Completed or Void, this column is the Worker who completed or voided the Task.
Date Voided	If the Task Status is Void, this column displays the date the Task was voided formatted as MM/DD/YYYY.
Date Completed	If the Task Status is Completed, this column displays the date the Task was completed formatted as MM/DD/YYYY.
Long Description	The Long Description attribute of the Task.

2.4.4 Report Location

Navigate to Tasks > Task Search/My Tasks > and then click the Export Icon that displays when there are Tasks in the Search Results Summary.

2.4.5 Counties Impacted

All CalSAWS counties are impacted.

2.4.6 Security Updates

N/A – No updates to security.

2.4.7 Report Usage/Performance

There are no expected page report usage/performance impacts.

2.5 Task Reassignment Results Export Report

2.5.1 Overview

The Task Reassignment Results Export Report contains information for Tasks reassigned through a Task Reassignment instruction. The report includes Task details along with the previous and new assignment information.

2.5.2 Task Reassignment Results Export Mockup

General Information	
Report: Task Reassignment Results Export	
County: Humboldt	
Run Date: 07/15/2021 08:30 AM	
Task Reassignment Title: ES/1 20/mo MTWThF	
Reassignment Date: 07/16/2021	
Reclaim Date:	

Figure 2.5.2.1 – Task Reassignment Results - General Information Sheet Mockup

Case Num	Case Name	Program	Date Date	Category	Type	Sub-Type	Status	Priority	Previously Assigned Worker	Newly Assigned Worker	Previously Assigned Task	Newly Assigned Task	Reclaimed	Date Created	Worker Assigned Date	Long Description
0271728	Case Name	CF	08/15/2021	Application Registration	SAR 7		Assigned	High		12LS01AE0TBK	12LS01MG0QBK			07/27/2021	08/01/2021	SAR 7 Received 08/01/2021 SAR 7 submit month August Customer note regarding delay in return of form Award letter from SSA for Robin dated 01/01/2021 Imaged in Barcode mode/Indexed Set Task
0271729	Case Name	CF	08/15/2021	Application Registration	SAR 7		Assigned	High		12LS01AE0TBK	12LS01MG0QBK			07/28/2021	08/02/2021	SAR 7 received for the report month of June. Additional document received include the following: - NA 1273 Imaged in barcode mode. Logged in as recd. Indexed

Figure 2.5.2.1 – Task Reassignment Results – Task Reassignment Sheet Mockup

2.5.3 Description of Change

1. Add a Task Reassignment Results Export Report that will allow exporting of data from the Task Reassignment Results List page for a particular Task Reassignment execution. Reference the Supporting Documents section for example report templates which include the report layout and column placement.
 - a. General Information Sheet

This sheet will contain general information informing the User parameters that were used to generate the Report. This sheet will include a single table with a single column titled "General Information" that will include the following rows:

 - i. Report Name formatted as "Report: <Report Name>". For example, "Report: Task Reassignment Results Export".
 - ii. The county name formatted as "County: <County Name>". For example, "County: Humboldt".
 - iii. The date and time the export was generated formatted as "Run Date: <mm/dd/yyyy hh:mm AM/PM>". For example, "Run Date: 07/15/2021 08:30 AM".
 - iv. The Task Reassignment Title formatted as "Task Reassignment Title: <Task Reassignment Title>". For example, "Task Reassignment Title: Main Reassignment".
 - v. The Reassignment Date formatted as "Reassignment Date: <mm/dd/yyyy>". For example, "Reassignment Date: 07/16/2021".
 - vi. If the Task Reassignment reclaimed any Tasks, this attribute will display the Reclaimed On date formatted as "Reclaim Date: <mm/dd/yyyy>". For example, "Reclaim Date: 07/20/2021".

b. Exported Data Sheet19

Column Name	Description
Case Number	The Case Number associated to the Task.
Case Name	The Case Name of the Case associated to the Task.
Program	The Program associated to the Task.
Due Date	The Due Date of the Task formatted as MM/DD/YYYY.
Category	The Category of the Task Type of the Task.
Type	The Task Type associated with the Task.
Sub-Type	The Task Sub-Type associated to the Task. This column will be blank if no Sub-Type exists.
Status	The Status of the Task.
Priority	The Priority of the Task.
Previously Assigned Worker	The previously assigned Worker of the Task. This column will be blank if no Previously Assigned Worker exists.
Newly Assigned Worker	The newly assigned Worker of the Task. This column will be blank if the Task was not reassigned to a worker.
Previously Assigned Bank	The previously assigned Bank of the Task. This column will be blank if no Previously Assigned Bank exists.
Newly Assigned Bank	The newly assigned Bank of the Task. This column will be blank if the Task was not reassigned to a bank.
Reclaimed	If the Task Reassignment Instruction reclaimed the Task, this column will populate with an "X," otherwise it will be blank.
Date Created	The date the Task was created formatted as MM/DD/YYYY.

Column Name	Description
Worker Assigned Date	The date a Worker was assigned to the Task formatted as MM/DD/YYYY. This column will be blank if a Worker is not assigned.
Long Description	The Long Description attribute of the Task.

2.5.4 Report Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Tasks > Task Reassignment > Click on a hyperlink of the desired result displayed in the Task Reassignment Search page to navigate to the Task Reassignment Detail page > Click the View Results button which will display if the Task Reassignment instruction has run at least once > Click on Export Icon.

2.5.5 Counties Impacted

All CalSAWS counties are impacted.



2.5.6 Security Updates

N/A – No updates to security.

2.5.7 Report Usage/Performance

There are no expected page report usage/performance impacts

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Task Search Export Report Mockup	 Task%20Export%20Mockup.xlsx
2	Reports	Task Reassignment Results Export Report Mockup	 Task%20Reassignm ent%20Mockup%20.

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
655	The CONTRACTOR shall migrate the Task icon link on the Utilities Navigation Bar to provide access to the My Task and Task Search pages.	None	This design incorporates the Task Search Export Report into the Task Pop Up pages.
34	<p>The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows:</p> <ol style="list-style-type: none">1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base2) Create a common task management data model3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution)4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing methodologies	<ul style="list-style-type: none">- CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV.- CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks.- OBIEE Task Dashboard will be migrated over to new tool prior to Task Management implementation.	This design incorporates the Task Reassignment Results Export Report into the Task Pop Up pages.

	<p>6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker</p> <p>7) Update the LRS Task Management Dashboard (OBIEE) to account for the system modifications being made as part of migration</p>		
--	---	--	--

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-228209

Task Mgt - CSC Task Closure from Task Pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Justin Dobbs, Rakan Ali
	Reviewed By	Logan Pratt

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/22/2021	1.0	Initial Revision	Justin Dobbs

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Task Closure Salesforce Integration	5
	2.1.1 Overview	5
	2.1.2 Description of Changes	5
3	Supporting Documents	6
4	Requirements.....	7
	4.1 Migration Requirements.....	7
5	Migration Impacts	8
6	Outreach.....	9
7	Appendix.....	10

1 OVERVIEW

1.1 Current Design

Currently, the Worklist and Task Pop-Up pages are communicating with the County Call Center Solution (Lagan) to close associated call center tickets when Tasks are completed.

1.2 Requests

Update the Worklist and Task Pop-Up pages to communicate with Salesforce to close associated call center tickets when Tasks associated to Los Angeles County are completed.

1.3 Overview of Recommendations

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

1.4 Assumptions

1. This design is limited to Los Angeles County only.
2. The communication between CalSAWS and the Salesforce solution will occur via an API service provided by Salesforce. This communication is dependent on the Salesforce API being available.
3. Existing Tasks in the previous call center solution will be migrated into the Salesforce solution with the same csc ticket attributes.
4. This design will not process historical transactions. This functionality only applies to Task completion actions that occur after release.
5. This design impacts real time processes. There is no impact to Batch processes.

2 RECOMMENDATIONS

2.1 Task Closure Salesforce Integration

2.1.1 Overview

Several Task Management pages allow users to complete Tasks and send a message to the call center solution to close any associated call center tickets. This section includes recommendations to modify these pages to send the Task completion message to the Salesforce solution to close any associated tickets.

2.1.2 Description of Changes

1. Update the following Task Management pages to invoke a new interface call to communicate with the Salesforce solution when a Task that is associated to a call center ticket is Completed:
 - a. Worklist
 - b. Worklist – Task Detail
 - c. Worklist PR / RE
 - d. Task Pop-Up – My Tasks
 - e. Task Pop-Up – Task Search
 - f. Task Pop-Up – Task Detail

This communication with the Salesforce solution at Task completion will only be triggered for Los Angeles county. The interface call will not trigger when a Task associated to a call center ticket becomes Void or Expired.

Technical:

- a. To facilitate the communication between the CalSAWS System and the Salesforce solution, implement logic to authenticate with Salesforce at Task Completion.
- b. Update the CSC Task Closure interface from a SOAP web service to a queue based RESTful API.
- c. Attributes which are sent through the interface will not be modified. These attributes are the position id of the worker who has completed the Task, the CSC Ticket Number and CSC Ticket ID.
- d. In the event a communication attempt with Salesforce is not successful, processing will attempt to resend the message at most 5 times with a 60 minute wait between each attempt. If all attempts are unsuccessful, a transaction will be logged into the TASK_ERR_DETL table with an ERR_CODE value of '05' indicating "Other Error". An error message will also be logged as part of this transaction.
- e. Deactivate the PI19C433 batch process.

3 SUPPORTING DOCUMENTS

N/A.

4 REQUIREMENTS

4.1 Migration Requirements

N/A

5 MIGRATION IMPACTS

N/A.

6 OUTREACH

N/A.

7 APPENDIX

N/A.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-228360

Enhancements to FC, KG and AAP

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/14/2021	1.0	Initial Version	Jimmy Tu
7/23/2021	1.1	Updated as per R6 Comments	Jimmy Tu

Table of Contents

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

[OBJ]

1 OVERVIEW

1.1 Current Design

The AAP/FC/KG Issuance is created for the Payee effective for the same benefit month on the Program Administrative Role Detail page.

The Previous Potential Benefit calculation for AAP considers the Resource, Program and Benefit Month.

The AAP/FC Skip Issuance for "Child Placement Does Not Match Placement/Payee on Authorization Record" compares the payee on the program administrative role detail page with the Resource from EDBC the authorization record. If the Resources do not match, the issuance will be skipped.

1.2 Requests

The AAP functionality in CalSAWS needs to be updated so the checks for the Resource are consistent throughout several functional areas.

1.3 Overview of Recommendations

1. Update the issuance creation process to set the Payee of an AAP/FC/KG issuance to the Resource on the EDBC authorization record.
2. Update the Skip Issuance Logic for "Child Placement Does Not Match Placement/Payee on Authorization Record" to compare the Resource on an AAP/FC EDBC with the Resource from the Child Placement for the same effective month. If the Resources do not match, the issuance will be skipped.
3. Modify the Skip Issuance Logic to validate the skip reason of "Child Placement Does Not Match Placement/Payee on Authorization Record" for KG to compare the resource on the KG EDBC Authorization record with the resource on the Kin-GAP Summary.
4. Data change the fiscal transact map to create scenarios for KG all 58 counties for the skip issuance reason of "Child Placement Does Not Match Placement/Payee on Authorization Record".

1.4 Assumptions

1. The new updates that we are making will become effective immediately and if the resource on the EDBC does not match the resource on the AAP/FC Child Placement, these EDBC authorizations will be skipped and will be displayed on the Skip Issuance report.
2. With implementation of SCR CA-224704, the system will no longer allow users to change the payee on the program Administrative Role Detail page.
3. Any subsequent AAP/FC/KG issuances created via EDBC authorizations will have the payee information populated from the EDBC authorization record.
4. This change will be applicable for all 58 counties.

2 RECOMMENDATIONS

2.1 Issuance Batch

2.1.1 Overview

This batch creates every issuance that is paid on a nightly or monthly basis.

2.1.2 Description of Change

1. Update logic to the issuance batch to set the Payee of an AAP/FC/KG issuance to the Resource on the EDBC authorization record.
2. Update the Skip Issuance Logic for "Child Placement Does Not Match Placement/Payee on Authorization Record" to compare the Resource on an AAP/FC EDBC Authorization Record with the Resource from the Child Placement for the same effective month. If the Resources do not match, the issuance will be skipped.
 - a. For regular EDBC (online and batch), the Resource from the EDBC budget(s) will be compared to the Child Placement(s) for the same effective period. If there are no matching Resources, the issuance will be skipped.
 - b. For manual EDBC, the Resource from the EDBC will be compared to the Child Placement(s) for the same benefit month. If there are no matching Resources, the issuance will be skipped.
3. Modify the Skip Issuance Logic to validate the skip reason of "Child Placement Does Not Match Placement/Payee on Authorization Record" for KG to compare the resource on the KG EDBC Authorization record with the resource on the Kin-GAP Summary.

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

No Change.

2.1.6 Data Volume/Performance

No Change.

2.1.7 Failure Procedure/Operational Instructions

No Change.

2.2 Data Change Request

2.2.1 Overview

This data change request is to add the skip reason of "Child Placement Does Not Match Placement/Payee on Authorization Record" for KG.

2.2.2 Description of Change

1. Data change the fiscal transact map to create scenarios for KG all 58 counties for the skip issuance reason of "Child Placement Does Not Match Placement/Payee on Authorization Record".

2.2.3 Estimated Number of Records Impacted/Performance

58 Records.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.1.15.d	15. The LRS shall provide for the update of LRS Data elements through the following methods, subject to normal edit checks, including: d. Batch interface with other systems (according to COUNTY-specified criteria).	This requirement is met by updating the batch job to align with current functionality required for the system.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

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

6 OUTREACH

None.

7 APPENDIX

None.



California Statewide Automated Welfare System

Design Document

CA-228376 | CIV-108992

ACL 21-65: Pandemic Emergency Assistance
Fund (PEAF) Payments

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Sarah Cox, Fred Gains, Caroline Bui

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/20/2021	1.0	Initial Revision	Duke Vang

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
	1.5 Additional Considerations/Impacts.....	6
2	Recommendations.....	7
	2.1 CalWORKs Special Needs Data Change Request.....	7
	2.1.1 Overview	7
	2.1.2 Description of Change.....	7
	2.1.3 Estimated Number of Records Impacted/Performance.....	9
	2.2 C4Yourself Announcement	10
	2.2.1 Description of Change.....	10
	2.3 TEMP 513 Form	11
	2.3.1 Overview	11
	2.3.2 Description of Change.....	11
	2.4 Issuance Data Change	13
	2.4.1 Overview	13
	2.4.2 Description of Change.....	14
	2.4.3 Estimated Number of Records Impacted/Performance.....	14
3	Supporting Documents	16
4	Requirements.....	17
	4.1 Project Requirements.....	17
5	Outreach.....	18
	5.1 Lists.....	18

1 OVERVIEW

1.1 Current Design

A CalWORKs (CW) Special Needs Supportive Service Payment can be issued to Customers for the following needs:

- Emergency Clothing Allowance
- Labor and Material Cost
- Moving and/or Storage Cost
- Household Necessity
- Assistance Animal
- Hotel/Interim/Temp Housing

1.2 Requests

On March 11, 2021, the President signed the American Rescue Plan Act of 2021 into law. Now Public Law 117-2, it establishes the Pandemic Emergency Assistance Fund (PEAF) in section 403(c) of the Social Security Act (the Act).

1.3 Overview of Recommendations

1. A data change request (DCR) will create a Need, Service Arrangement, and Payment Request to issue a \$640 Pandemic Emergency Assistance Fund (PEAF) payment for all CW households in Active Status for the July 2021 Service Month.
2. Add an announcement to C4Y.
3. Create a mass mailer for CW households who will be receiving a \$640 PEAFF payment.
4. Data change all \$640 PEAFF payments to be a Customer Non-Benefit.
5. Rebalance the Time Limit Aid Summary for cases that received a \$640 PEAFF Payment.
6. Generate a list of cases that were authorized to received the \$640 PEAFF payment.

1.4 Assumptions

1. The \$640 PEAFF payments will still be subjected to all CW skip issuance checks except for periodic reporting (SAR 7). If a \$640 PEAFF payment skips due to redetermination, the Worker will need to Rush the payment.
2. Existing Pay Codes and Fund Codes will be used for the \$640 PEAFF payment. Counties will need to manually adjust their State and Fiscal reports to account for these payments (refer to the Outreach section).
3. The \$640 PEAFF payment will be claimed based on the existing payment request claiming rules for CW Special Needs.
4. The \$640 PEAFF payment will be issued based on the CW programs payment preference (Warrant, EBT, Direct Deposit).
5. The \$640 PEAFF payment will potentially show on the following fiscal reports based on the issuance method:

- a. Cash EBT Production Reconciliation Report
 - b. Claim Grand Total Detail
 - c. Claim Grand Total Summary
 - d. Direct Deposit Production Reconciliation Report
 - e. DPSS Daily Unprocessed SWR Payment Report
 - f. Integrated Payroll Benefit Issuance Detail Claiming Report
 - g. Integrated Payroll Benefit Issuance Detail Claiming Report by Case
 - h. Integrated Payroll Summary Report
 - i. Issuance Exception Report
 - j. Monthly Assistance Auto Payroll Report
 - k. Month End Authorization Report
 - l. Skipped Issuance Report
 - m. Supplemental Benefit Issuance Direct Deposit Register
 - n. Supplemental Benefit Issuance EBT Register
 - o. Supplemental Benefit Issuance Warrant Register
 - p. San Bernardino Warrant Production Reconciliation Report
 - q. Warrant Production Reconciliation Report
 - r. JVW Daily Details Report
 - s. JVW Month-End Details Report
 - t. Daily Journal Voucher Warrant Report
 - u. Rush Benefit Issuance Warrant Register
 - v. Rush Warrant Delivery Confirmation Report
6. Any \$640 PEAf payment that skip will be captured on the Skip Issuance Report.
 7. Only CW households that are in an Active program status at the time the \$640 PEAf payments are processed will receive a payment. This population will include \$0 grant CW households and will exclude ineligible CW households.
 8. Los Angeles County will approve the message for the YBN announcement. The Consortium Production Operations Team will be responsible for posting the YBN announcement.
 9. The \$640 PEAf payment will be scheduled to run on July 10th, 2021.
 10. The \$640 PEAf payments will be updated to be a Customer Non-Benefit issuance and will NOT count towards the Customer's Unreimbursed Assistance Pool (UAP) or Time Limit Aid Summary. Any PEAf Payments created after the data change due to skipped issuance will need to be manually tracked and adjusted until the follow up SCR (CA-230632 | CIV-109171) is implemented to update the remaining PEAf issuances to be a Customer Non-Benefit issuance.
 11. California Department of Social Services (CDSS) will be publishing a ACWDL to inform counties that the \$640 PEAf payment is technically not a CW benefit.
 12. If the \$640 PEAf Payment is skipped by the Issuance Batch, workers will have the ability to Disapprove the payment request from the Payment Request Detail page. The Amount and Issuance Method can be edited on Disapproved Payment Requests.
 13. CW Aid Code 4P - CW Family Reunification-All Families, 4R - CW Family Reunification-Two Parent and 4N – Extended CalWORKs for NMD will not be included in the CW population for the \$640 PEAf payment.
 14. The \$640 PEAf payment will not impact unearned income for the CalFresh, Transitional CalFresh, or Nutrition Benefit programs.
 15. The PEAf Mass Mailer notices will be in English and Spanish.

16. The final policy on the PEAFF payments may not be published until after July 10th, 2021. A separate SCR will be logged to address any discrepancies (if applicable) if there are discrepancies between the final published policy and this design.

1.5 Additional Considerations/Impacts

1. The \$640 PEAFF payments will ONLY be distinguishable from regular CalWORKs Special Needs payments based on the issuance category of Customer Non-Benefit (lists will be provided).
2. If funds cannot be advanced, the county will need to plan for the cost of the \$640 PEAFF payments to be issued and later reimbursed.
3. The System cannot stop users from using the Replace/Reissue functionality on the PEAFF payments.
4. The System cannot stop users from utilizing the \$640 PEAFF payments as a Repayment towards a Recovery Account.
5. The System cannot stop users from establishing overpayments or the EBT Vendor from expunging unused benefits for the \$640 PEAFF payments.
6. The \$640 PEAFF payments will be adjusted each time the CalWORKs aid code changes.
7. If \$640 PEAFF payment is skipped during issuance batch, the worker has up to 6 months to address the skip. The \$640 PEAFF payment may still be issued up to 6 months after July 10th, 2021.
8. Any \$640 PEAFF payments that were not updated to a Customer Non-Benefit issuance due to skipped issuance will need to be tracked and adjusted manually.

2 RECOMMENDATIONS

2.1 CalWORKs Special Needs Data Change Request

2.1.1 Overview

A Customer Need, Service Arrangement, and Payment Request will be created for all Active CW Program within certain Aid Codes to issue a \$640 PEA payment under a Special Needs payment request.

Note: The \$640 PEA payments will initially be created as Supplement Benefit issuances. The issuances will be data changed to be a Customer Non-Benefit issuance after the payments have been claimed and reported.

2.1.2 Description of Change

1. Create a DCR to do the following:
 - a. Identify all CW programs in an Active status in the 7/2021 benefit month as of the System Date (anticipated to be 7/10/2021) with one of the following Aid Codes:
 - i. 30
 - ii. 32
 - iii. 33
 - iv. 35
 - v. 3E
 - vi. 3F
 - vii. 3G
 - viii. 3H
 - ix. 3L
 - x. 3M
 - xi. 3P
 - xii. 3R
 - xiii. 3U
 - xiv. 3W
 - xv. K1
 - xvi. R1
 - b. For each program from step 2.1.2.1.a:
 - i. Create a Customer Needs record with the following details:
 1. Begin Date: "07/01/2021"
 2. End Date: "07/31/2021"
 3. Category: "Special Needs"
 4. Type: "Moving and/or Storage Cost"
 5. Status: "Met"
 6. Status Reason: "Service Arrangement Created"

- ii. Create a Service Arrangement record with the following details:
 1. Arrangement Period From: "07/01/2021"
 2. Arrangement Period To: "07/31/2021"
 3. Program Type: "CalWORKs"
 4. Aid Code: The current CW program's Aid Code during the July 2021 benefit/service month
 5. Voucher: No
 6. Payee: The current CW program's Payee during the July 2021 benefit/service month
 - a. If more than one Payee exists for the month, the latest assigned Regular Payee will be chosen
 7. Service Type Description: "\$640 Pandemic Emergency Assistance Fund Payment"
 8. Total: 640
 9. Status: "Approved"
 10. Status Reason: "Eligible for Services"
 11. Status Date: "System Date"
 12. Comments: "One Time \$640 Pandemic Emergency Assistance Fund Payment"
- iii. Create a Payment Request with the following details:
 1. Requested Amount: 640
 2. Advanced: "No" (CalSAWS Only)
 3. Status: "Approved"
 4. Service Month: "07/2021"
 5. Issuance Method:
 - a. Los Angeles County: CW Program's Payment Preference
 - b. C-IV Counties: EBT if CW Program's Payment Preference is EBT, else Warrant

Note: C-IV Counties cannot issue Payment Request issuances as Direct Deposit
 6. Pay Code:
 - a. Los Angeles County: "Emergency Assistance"
 - b. C-IV Counties: blank

Note: The Fund Code/Accounting Strings will be based on the CW Aid Code
 7. Received Date: System Date
 8. Delivery Method: "Mail"
 9. Immediacy: "Routine"
 10. Comments: "One Time \$640 Pandemic Emergency Assistance Fund Payment"

2. Create a journal entry for each payment request created from recommendation 2.1.2.1. The journal will contain the following verbiage:
 - a. Filter Type: All
 - b. Journal Type: Narrative
 - c. Short Description: \$640 Pandemic Emergency Assistance Fund authorization created on 07/10/2021
 - d. Long Description: Payment Request [payment request Id] was created and authorized to issue a \$640 Pandemic Emergency Assistance Fund payment.

2.1.3 Estimated Number of Records Impacted/Performance

Anticipated CW household population by County

Alpine County: 0
Amador: 120
Butte: 1,688
Calaveras: 243
Colusa: 97
Del Norte: 422
El Dorado: 582
Glenn: 248
Humboldt: 1,015
Imperial: 3,204
Inyo: 43
Kern: 14,455
Kings: 2,103
Lake: 633
Lassen: 310
Los Angeles: 99,139
Madera: 2,300
Marin: 630
Mariposa: 148
Mendocino: 588
Merced: 4,976
Modoc: 114
Mono: 18
Monterey: 2,429
Napa: 276

Nevada: 350
Plumas: 112
Riverside: 14,840
San Benito: 298
San Bernardino: 26,047
San Joaquin: 8,127
Shasta: 1,373
Sierra: 14
Siskiyou: 435
Stanislaus: 5,762
Sutter: 1,023
Tehama: 675
Trinity: 100
Tuolumne: 229
Yuba: 1,201

2.2 C4Yourself Announcement

2.2.1 Description of Change

Update the C4Yourself Website to display the following language under the Announcement section. Language will be available in both English and Spanish (for all other threshold languages the English version will display). Message will display from 7/10/2021 to 8/31/2021.

English:

The Pandemic Emergency Assistance Fund (PEAF) issuance will be a one-time payment of \$640 to CalWORKs households that are active as of July 10, 2021. This payment is subject to hearing rights. For more information, [click here](#).

Spanish:

La emisión del Pandemic Emergency Assistance Fund (PEAF) será un pago único de \$640 a los hogares de CalWORKs que están activos a partir del 10 de julio de 2021. Este pago está sujeto a derechos de audiencia. Para obtener más información, haga [clic aquí](#).

Link:

<https://cdss.ca.gov/inforesources/cdss-programs/calworks/pandemic-emergency-assistance-fund>

Note: A similar announcement will be posted on YBN by Consortium staff.

2.3 TEMP 513 Form

2.3.1 Overview

The TEMP 513 form is sent to inform CalWORKs households they will receive a one-time \$640 payment from the Pandemic Emergency Assistance Fund. Add the TEMP 513 form to CalSAWS and C-IV and send it out through batch to the CalWORKs households who received the PEA payment.

State Form: TEMP 513

Program: CalWORKs

Attached Form(s): N/A

Forms Category: C-IV: Informing Notice

CalSAWS: Forms

Languages: English, Spanish

Template Repository Visibility: Not visible in Template Repository

2.3.2 Description of Change

1. Create the TEMP 513 form.

Form Header: N/A – Form has a coversheet.

Form Footer: Standard Footer

Form Title: Pandemic Emergency Assistance Fund Payment

Form Number: TEMP 513

Imaging Form Name: PEA Informing Notice

Imaging Document Type: Notification/NOA

Include NA Back 9: No

Form Mockup/Example: For CalSAWS, please refer to Supporting Documents #1. For C-IV, please refer to Supporting Documents #2.

2. Add population logic to populate the header information on the coversheet of the form.

3. The forms has the following barcode to the form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

4. The forms has the following print options:

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

5. Add the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	The CalWORKs Primary Applicant.
Mailed From (Return)	CalWORKs Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	N/A

6. The form has the following additional options:

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

7. TEMP 513 form title will be available in the following threshold languages (Spanish, Armenian, Cambodian, Korean, Lao, Russian, Tagalog, Vietnamese, Mandarin Chinese, Traditional Chinese, and Hmong) when posted to the Self Service Portal. Please refer to Supporting Documents #3.
8. Create a data change request (DCR) to find CalWORKs cases that have been authorized to receive a PEAFF payment. These are active CalWORKs programs that have a Customer Needs record with the begin date of 07/01/2021 and end date of 07/31/2021 with a category of "Special Needs" and type of "Moving and/or Storage Cost", an approved Service Arrangement created for the need with an arrangement period from 07/01/2021 to 07/31/2021, the program type is CalWORKs, the Service Type Description is "\$640 Pandemic Emergency Assistance Fund Payment" and a total of \$640, an approved Payment Request created for the Service Arrangement with service month of 07/2021 and a requested amount of \$640. Insert the

following values below in the system transaction table. Run the DCR on July 10th, 2021, after the payments are authorized.

Field to Populate	Population for Form
Case Id	The case Id associated to the current CW program.
Program Id	The program Id of the current CW program.
Person Id	The primary applicant of the current CW program.
Type Code	FR
Sub Type Code	The sub type code used for one-time mass mailer.
Effective Date	Batch Date

9. Conduct regression testing of the GEN 1365 (Notice of Language Services).
 - a. For C-IV, set the primary applicant's language to another language besides English or Spanish and set the 'Correspondence in English' indicator to 'No'. After running the form generation batch job, verify the GEN 1365 is included with the TEMP 513.
 - b. For CalSAWS, set the primary applicant's written language to another language besides English or Spanish, generate the form through batch and create a test bundle. Send the test bundle to the print center and verify the GEN 1365 is inserted in the same envelope as the TEMP 513.

2.4 Issuance Data Change

2.4.1 Overview

The \$640 PEAFF Payments will be updated to be Customer Non-Benefit Issuances after they have been claimed and reported.

All cases that received a PEAFF issuance in July 2021 will have their Time Limit Aid Summary rebalanced to reflect a new balance without the PEAFF issuance.

2.4.2 Description of Change

1. Update the Issuance Category of all \$640 PEAFF issuances to Customer Non-Benefit. This data change will be scheduled to run on 7/14/2021.

Note: Any \$640 PEAFF issuance created AFTER this data change will not be updated to a Customer Non-Benefit. These payments will be categorized as Supplemental Benefits and will count towards the Customer's UAP and Time Limit Aid Summary. These payments will need to be manually tracked and adjusted until the follow up SCR (CA-230632 | CIV-109171) is implemented to update the remaining PEAFF issuances to be a Customer Non-Benefit issuance.

2. Manually insert the cases that received a PEAFF issuance in July 2021 into the Time Limit Aid Balancer transaction table on 7/14/2021. These cases will be rebalanced to reflect a balance without the PEAFF issuances.

2.4.3 Estimated Number of Records Impacted/Performance

Anticipated Issuances by County

Alpine County: 0

Amador: 120

Butte: 1,688

Calaveras: 243

Colusa: 97

Del Norte: 422

El Dorado: 582

Glenn: 248

Humboldt: 1,015

Imperial: 3,204

Inyo: 43

Kern: 14,455

Kings: 2,103

Lake: 633

Lassen: 310

Los Angeles: 99,139

Madera: 2,300

Marin: 630

Mariposa: 148

Mendocino: 588

Merced: 4,976

Modoc: 114
Mono: 18
Monterey: 2,429
Napa: 276
Nevada: 350
Plumas: 112
Riverside: 14,840
San Benito: 298
San Bernardino: 26,047
San Joaquin: 8,127
Shasta: 1,373
Sierra: 14
Siskiyou: 435
Stanislaus: 5,762
Sutter: 1,023
Tehama: 675
Trinity: 100
Tuolumne: 229
Yuba: 1,201
Tuolumne County: 247
Yuba County: 1,243

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	TEMP 513 Mockup for CalSAWS	CALSAWS_TEMP_513_EN.pdf CALSAWS_TEMP_513_SP.pdf
2	Client Correspondence	TEMP 513 Mockup for C-IV	CIV_TEMP_513_EN.pdf CIV_TEMP_513_SP.pdf
3	Client Correspondence	TEMP 513 Form Title Translation	TEMP 513 Form Title Translations.docx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.1	<p>The LRS shall include the ability to issue and maintain the history of the following benefits:</p> <ul style="list-style-type: none">a. Monthly benefits issued on a recurring basis, on either a calendar month or fiscal (cyclical) period.b. Emergency issuances (e.g., Immediate Need, Expedited Services and Emergency Aid Requests);c. Diversion payments.d. Supplemental benefits.e. Recovery refunds.f. Special needs payments.g. Retroactive payments.h. Vendor and/or Service Provider payments.i. Tokens and cash bus passes.j. Non-traditional/alternative transportation (e.g., carpool, taxi vouchers, and parking fees);k. Vouchers/cash for special payments, ancillary payments and other services.l. Interim assistance payments.m. Transportation payments.n. Petty cash.o. Cal-Learn bonus.p. Cal-Learn graduation bonus.q. Vehicle repair program.r. Additional transportation expense payments.s. Ancillary payments; andt. Childcare payments.	<p>Data Change Request will create records to document a CW Special Needs Supportive Service Arrangement and Payment Request to issue the \$640 Pandemic Emergency Assistance Fund payment. A list will be provided to counties to manual track these payments for reporting and expenditure purposes.</p>

5 OUTREACH

5.1 Lists

List Name: CW Special Needs PEAFF Payments.xls

List Criteria: All payment request and issuances (if the issuance did not skip) created as part of the CW \$640 PEAFF payment.

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s):

- Payment Request Id
- Service Month
- Aid Code
- Issuance Method
- Issuance Control Number (Will be blank if issuance was skipped)
- Amount (from the Payment Request)
- Flag indicating opt-in for email
- Flag indicating opt-in for text
- Email address
- Phone number (Main, Cell, Home, and TDD in that order)
- Preferred written language
- CIN of Primary Applicant
- Date of birth of Primary Applicant
- First name of Primary Applicant
- Last name of Primary Applicant
- Mailing address 1
- Mailing address 2
- Mailing city
- Mailing state
- Mailing zip code

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-228376
C-IV	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CIV-108992



California Statewide Automated Welfare System

Design Document

CA-230294

Update LA County Emails for BenefitsCal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Michael Barillas
	Reviewed By	Dana Peterson

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/16/2021	1.0	Initial Design	Michael Barillas

Table of Contents

1	Overview	7
1.1	Current Design.....	7
1.2	Requests.....	7
1.3	Overview of Recommendations.....	7
1.4	Assumptions	7
2	Recommendations.....	9
2.1	Modify Customer SAR 7 Incomplete email Verbiage	9
2.1.1	Overview	9
2.1.2	Description of Change.....	9
2.1.3	Execution Frequency.....	10
2.1.4	Key Scheduling Dependencies	10
2.1.5	Counties Impacted	10
2.1.6	Data Volume/Performance	10
2.1.7	Failure Procedure/Operational Instructions.....	10
2.2	Modify Customer Report Not Received:SAR 7 Rescind/Restoration email Verbiage	10
2.2.1	Overview	10
2.2.2	Description of Change.....	10
2.2.3	Execution Frequency.....	11
2.2.4	Key Scheduling Dependencies	11
2.2.5	Counties Impacted	11
2.2.6	Data Volume/Performance	11
2.2.7	Failure Procedure/Operational Instructions.....	11
2.3	Modify Customer Report Processed email Verbiage.....	12
2.3.1	Overview	12
2.3.2	Description of Change.....	12
2.3.3	Execution Frequency.....	12
2.3.4	Key Scheduling Dependencies	12
2.3.5	Counties Impacted	13
2.3.6	Data Volume/Performance	13
2.3.7	Failure Procedure/Operational Instructions.....	13
2.4	Modify Customer SAR 7 Received email Verbiage.....	13

2.4.1	Overview	13
2.4.2	Description of Change	13
2.4.3	Execution Frequency.....	14
2.4.4	Key Scheduling Dependencies	14
2.4.5	Counties Impacted	14
2.4.6	Data Volume/Performance	14
2.4.7	Failure Procedure/Operational Instructions.....	14
2.5	Modify Customer SAR 7 Sent/Reminder email Verbiage.....	14
2.5.1	Overview	14
2.5.2	Description of Change	14
2.5.3	Execution Frequency.....	15
2.5.4	Key Scheduling Dependencies	15
2.5.5	Counties Impacted	15
2.5.6	Data Volume/Performance	15
2.5.7	Failure Procedure/Operational Instructions.....	15
2.6	Modify Customer SAR 7 Not Received email Verbiage.....	16
2.6.1	Overview	16
2.6.2	Description of Change	16
2.6.3	Execution Frequency.....	17
2.6.4	Key Scheduling Dependencies	17
2.6.5	Counties Impacted	17
2.6.6	Data Volume/Performance	17
2.6.7	Failure Procedure/Operational Instructions.....	17
2.7	Modify New Message from your GR Worker email Verbiage.....	17
2.7.1	Overview	17
2.7.2	Description of Change	17
2.7.3	Execution Frequency.....	18
2.7.4	Key Scheduling Dependencies	18
2.7.5	Counties Impacted	18
2.7.6	Data Volume/Performance	18
2.7.7	Failure Procedure/Operational Instructions.....	18
2.8	Modify New Message from your GROW Worker email verbiage.....	18
2.8.1	Overview	18
2.8.2	Description of Change	19
2.8.3	Execution Frequency.....	19

2.8.4	Key Scheduling Dependencies	19
2.8.5	Counties Impacted	19
2.8.6	Data Volume/Performance	19
2.8.7	Failure Procedure/Operational Instructions.....	19
2.9	Modify Account Notification Document Received Email	20
2.9.1	Overview	20
2.9.2	Description of Change.....	20
2.9.3	Execution Frequency.....	20
2.9.4	Key Scheduling Dependencies	20
2.9.5	Counties Impacted	21
2.9.6	Data Volume/Performance.....	21
2.9.7	Failure Procedure/Operational Instructions.....	21
2.10	Modify GR Non Compliance Alert email Verbiage	21
2.10.1	Overview	21
2.10.2	Description of Change.....	21
2.10.3	Execution Frequency.....	22
2.10.4	Key Scheduling Dependencies	22
2.10.5	Counties Impacted	22
2.10.6	Data Volume/Performance.....	22
2.10.7	Failure Procedure/Operational Instructions.....	22
2.11	Modify GROW Non Compliance Alert email	22
2.11.1	Overview	22
2.11.2	Description of Change.....	22
2.11.3	Execution Frequency.....	23
2.11.4	Key Scheduling Dependencies	23
2.11.5	Counties Impacted	23
2.11.6	Data Volume/Performance.....	23
2.11.7	Failure Procedure/Operational Instructions.....	23
2.12	Modify Employability Status Exemption End Date Verbiage	23
2.12.1	Overview	23
2.12.2	Description of Change.....	24
2.12.3	Execution Frequency.....	24
2.12.4	Key Scheduling Dependencies	24
2.12.5	Counties Impacted	24
2.12.6	Data Volume/Performance.....	24

	2.12.7 Failure Procedure/Operational Instructions.....	24
3	Requirements.....	25
	3.1 Project Requirements.....	25

1 OVERVIEW

Currently LA County has email messages that go out to participants containing verbiage that references or directs participants to the YourBenefitsNow (YBN) website. BenefitsCal is expected to replace YBN as of 21.11 so emails referencing YBN will need to be updated to reference BenefitsCal.

1.1 Current Design

LA County emails which reference YBN:

- Customer SAR 7 Incomplete
- Customer Report Not Received:SAR 7 Rescind/Restoration
- Customer Report Processed
- Customer SAR 7 Received
- Customer SAR 7 Sent/Reminder
- Customer SAR 7 Not Received
- New Message from your GR Worker
- New Message from your GROW Worker
- Account Notification: Document Received
- GR Non-Compliance Alert
- GROW Non-Compliance Alert
- Employability Status Exemption End Date

1.2 Requests

Modify LA County emails to replace YBN references with BenefitsCal.

1.3 Overview of Recommendations

1. Update the YBN references with BenefitsCal for the following Email Batch Jobs.
 - a. Customer SAR 7 Incomplete
 - b. Customer Report Not Received: SAR 7 Rescind/Restoration
 - c. Customer Report Processed
 - d. Customer SAR 7 Received
 - e. SAR 7 Sent/Reminder
 - f. Customer SAR 7 Not Received
 - g. New Message from your GR Worker
 - h. New Message from your GROW Worker
 - i. Account Notification: Document Received
 - j. GR Non-Compliance Alert
 - k. GROW Non-Compliance Alert
 - l. Employability Status Exemption End Date

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Modify Customer SAR 7 Incomplete email Verbiage

2.1.1 Overview

An email is sent to the participant when there is an incomplete SAR 7 Report with a submit month of the batch's run month.

Update the 'Customer SAR 7 Incomplete' verbiage.

2.1.2 Description of Change

1. Modify 'Customer SAR 7 Incomplete' PO19C1121 email's verbiage:

Current Email Body	<p>The Department of Public Social Services has received your SAR 7 and it is incomplete. A notice was mailed to you explaining why it was marked incomplete. If you do not turn in a complete SAR 7 by the first day of the next month, your benefits may stop.</p> <p>For more information about your case, you can log into your account at www.yourbenefits.laclrs.org or contact the Customer Service Center at (866) 613-3777.</p> <p>You are receiving this email notification because you registered online or by mail and chose to receive e-mail notifications. If you do not wish to receive future e-mail notifications, please log in and update your preferences at www.yourbenefits.laclrs.org.</p>
New Email Body	<p>Your SAR 7 was received incomplete. A notice was mailed to you explaining why it was considered incomplete. Your completed SAR 7 must be received by the first day of the following month or your benefits may stop. Please log into your BenefitsCal account and submit your corrected/completed SAR 7 and any verification document(s) at www.BenefitsCal.org or create a BenefitsCal account if you do not have one. If you have any questions, please contact your worker.</p> <p>This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.</p>

2.1.3 Execution Frequency

No Change

2.1.4 Key Scheduling Dependencies

No Change

2.1.5 Counties Impacted

Los Angeles County

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 Modify Customer Report Not Received:SAR 7 Rescind/Restoration email Verbiage

2.2.1 Overview

Sends an email to participants when a SAR 7 is discontinued by batch EDBC because of the SAR 7 was either incomplete or not received.

Modify the 'Customer Report Not Received:SAR 7 Rescind/Restoration' verbiage.

2.2.2 Description of Change

1. Modify 'Customer Report Not Received:SAR 7 Rescind/Restoration' PO19C1123 email verbiage:

Current Email Body	The Department of Public Social Services has not received your SAR 7. Your case has been discontinued, but may be eligible for restoration. Please turn in a completed SAR 7 as soon as possible but no later than the end of this month.
---------------------------	---

	<p>For more information about your case, you can log into your account at www.yourbenefits.laclrs.org or call the Customer Service Center at (866) 613-3777.</p> <p>You are receiving this email notification because you registered online or by mail and chose to receive e-mail notifications. If you do not wish to receive future e-mail notifications, please log in and update your preferences at www.yourbenefits.laclrs.org.</p>
New Email Body	<p>Your SAR 7 has not been received or was received incomplete. Your case has been discontinued but may be eligible for restoration. Please turn in a completed SAR 7 as soon as possible but no later than the end of this month. Please log into your BenefitsCal account and submit your corrected/completed SAR 7 and any verification document(s) at www.BenefitsCal.org or create a BenefitsCal account if you do not have one. If you have any questions please contact your worker.</p> <p>This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.</p>

2.2.3 Execution Frequency

No Change

2.2.4 Key Scheduling Dependencies

No Change

2.2.5 Counties Impacted

Los Angeles

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 Modify Customer Report Processed email Verbiage

2.3.1 Overview

Sends an email when a SAR 7 is Complete/EDBC Accepted.
Modify 'Customer Report Processed' verbiage.

2.3.2 Description of Change

1. Modify 'Customer Report Processed' PO19C1124 email's verbiage:

Current Email Body	<p>The Department of Public Social Services has received a SAR 7 from you and it has been processed.</p> <p>For more information about your case, you can log into your account at www.yourbenefits.laclrs.org or call the Customer Service Center at (866) 613-3777.</p> <p>You are receiving this email notification because you registered online or by mail and chose to receive e-mail notifications. If you do not wish to receive future e-mail notifications, please log in and update your preferences at www.yourbenefits.laclrs.org.</p>
New Email Body	<p>Your SAR 7 has been processed. For more information about your case please log into your BenefitsCal account at www.BenefitsCal.org or create a BenefitsCal account if you do not have one. If you have any questions, please contact your worker.</p> <p>This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.</p>

2.3.3 Execution Frequency

No Change

2.3.4 Key Scheduling Dependencies

No Change

2.3.5 Counties Impacted

Los Angeles County

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.)

2.4 Modify Customer SAR 7 Received email Verbiage

2.4.1 Overview

Sends an email when a SAR 7 is received.

Modify 'Customer SAR 7 Received' Verbiage.

2.4.2 Description of Change

1. Modify 'Customer SAR 7 Received' PO19C1119 email's verbiage:

Current Email Body	<p>"The Department of Public Social Services has received the SAR 7 you recently submitted and it is being processed. Once we've reviewed the SAR 7, you will be notified if additional information is needed prior to the end of the submit month.</p> <p>For more information about your case, you can log into your account at www.yourbenefits.laclrs.org or call (866) 613-3777.</p> <p>You are receiving this email notification because you registered online or by mail and chose to receive e-mail notifications. If you do not wish to receive future e-mail notifications, please log in and update your preferences at www.yourbenefits.laclrs.org."</p>
New Email Body	<p>Your SAR 7 is being processed. Once we've reviewed your SAR 7, you will be notified if additional information is needed prior to the end of the submit month. For more information about your case please log into your BenefitsCal account at www.BenefitsCal.org</p>

or create a BenefitsCal account if you do not have one. If you have any questions, please contact your worker.

This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.

2.4.3 Execution Frequency

No Change

2.4.4 Key Scheduling Dependencies

No Change

2.4.5 Counties Impacted

Los Angeles County

2.4.6 Data Volume/Performance

N/A

2.4.7 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.)

2.5 Modify Customer SAR 7 Sent/Reminder email Verbiage

2.5.1 Overview

Sends an email when a SAR 7 is sent and the submit month is coming up. Modify 'Customer SAR 7 Sent/Reminder' verbiage.

2.5.2 Description of Change

1. Modify 'Customer SAR 7 Sent/Reminder' PO19C1122 email's verbiage:

Current Email Body	<p>The Department of Public Social Services has mailed your SAR 7, which is due by the 5th of this month. You may also complete your SAR 7 online at www.yourbenefits.laclrs.org</p> <p>For questions, you can call the Customer Service Center at (866) 613-3777.</p> <p>You are receiving this email notification because you registered online or by mail and chose to receive e-mail notifications. If you do not wish to receive future e-mail notifications, please log in and update your preferences at www.yourbenefits.laclrs.org.</p>
New Email Body	<p>Your SAR 7 has been mailed to you and is due by the 5th of this month. Please log into your BenefitsCal account and submit your completed SAR 7 and any verification documents at www.BenefitsCal.org or create a BenefitsCal account if you do not have one. If you have any questions, please contact your worker.</p> <p>This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.</p>

2.5.3 Execution Frequency

No Change

2.5.4 Key Scheduling Dependencies

No Change

2.5.5 Counties Impacted

Los Angeles County

2.5.6 Data Volume/Performance

N/A

2.5.7 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.)

2.6 Modify Customer SAR 7 Not Received email Verbiage

2.6.1 Overview

Sends an email when a SAR 7 has not been received and is the submit month.

Modify 'Customer SAR 7 Not Received' verbiage.

2.6.2 Description of Change

1. Modify 'Customer SAR 7 Not Received' PO19C1120 email's verbiage:

Current Email Body	<p>The Department of Public Social Services has not received your SAR 7. Please complete the report as soon as possible. If you do not turn in a complete SAR7 by the first day of the next month. Your benefits may stop. You may complete your SAR 7 online at www.yourbenefits.laclrs.org</p> <p>For questions, you can call the Customer Service Center at (866) 613-3777.</p> <p>You are receiving this email notification because you registered online or by mail and chose to receive e-mail notifications. If you do not wish to receive future e-mail notifications, please log in and update your preferences at www.yourbenefits.laclrs.org.</p>
New Email Body	<p>Your SAR 7 has not been received. Please complete your SAR 7 as soon as possible. If you do not turn in a complete SAR7 by the first day of the next month, your benefits may stop. Please log into your BenefitsCal account and submit your completed SAR 7 and any verification document(s) at www.BenefitsCal.org or create a BenefitsCal account if you do not have one. If you have any questions, please contact your worker.</p> <p>This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.</p>

2.6.3 Execution Frequency

No Change

2.6.4 Key Scheduling Dependencies

No Change

2.6.5 Counties Impacted

Los Angeles County

2.6.6 Data Volume/Performance

N/A

2.6.7 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.)

2.7 Modify New Message from your GR Worker email Verbiage

2.7.1 Overview

Sends an email when a GR program is Active/Pending and a person is on the Employment Development Department (EDD) and non-compliant because either the person quit their job voluntary or Failed/Refused job training.

Modify 'New Message from your GR Worker' Verbiage.

2.7.2 Description of Change

1. Modify 'New Message from your GR Worker' PO19C1155 email's verbiage:

Current Email Body	<p>You have a message from your {program} worker. To see your DPSS message, log in to www.dpss.lacounty.gov, click on the Your Benefits NOW logo and select ""Message Board"" link.</p> <p>If you do not have a YBN account, you have the option to create one. Once created, follow the instructions above.</p>
---------------------------	---

New Email Body	<p>You have a message from your worker. Please log into your BenefitsCal account at www.BenefitsCal.org or create a BenefitsCal account if you do not have one to view your message. If you have any questions, please contact your worker.</p> <p>This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.</p>
-----------------------	--

2.7.3 Execution Frequency

No Change

2.7.4 Key Scheduling Dependencies

No Change

2.7.5 Counties Impacted

Los Angeles County

2.7.6 Data Volume/Performance

N/A

2.7.7 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.)

2.8 Modify New Message from your GROW Worker email verbiage

2.8.1 Overview

Sends an email when a person in GROW has a customer activity of 'No Show', 'Progress Report Overdue', 'Unsatisfactory Performance', or 'Drop Out'.

Modify 'New Message from your GROW Worker' verbiage.

2.8.2 Description of Change

1. Modify PO19C1156 email's verbiage:

Current Email Body	You have a message from your {program} worker. To see your DPSS message, log in to www.dpss.lacounty.gov , click on the Your Benefits NOW logo and select ""Message Board"" link. If you do not have a YBN account, you have the option to create one. Once created, follow the instructions above.
New Email Body	You have a message from your worker. Please log into your BenefitsCal account at www.BenefitsCal.org or create a BenefitsCal account if you do not have one to view your message. If you have any questions, please contact your worker. This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.

2.8.3 Execution Frequency

No Change

2.8.4 Key Scheduling Dependencies

No Change

2.8.5 Counties Impacted

Los Angeles County

2.8.6 Data Volume/Performance

N/A

2.8.7 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.)

2.9 Modify Account Notification Document Received Email

2.9.1 Overview

Sends an email when the system receives a document from an Active person, excluding SAR 7 documents.

Modify 'Account Notification Document Received' verbiage.

2.9.2 Description of Change

1. Modify 'Account Notification Document Received' PO19C1191 email's verbiage:

Current Email Body	The county has received the document you recently submitted. We are reviewing the document(s). You can log in to your account by accessing www.dpss.lacounty.gov and click the YBN button to get more information about your case, such as: View your monthly benefits and print Notices of Action; View messages from your worker (General Relief participants only); and check the status of the QR 7-LA and/or SAR7 report you submitted. For example, if the report is Complete, Not Received, or Incomplete. You are receiving this email notification because you registered online or by mail and chose to receive email notifications each time you submit a document to the County. If you do not wish to receive future email notifications each time a document is received, please log in and update your preferences at www.dpss.lacounty.gov .
New Email Body	<p>The document(s) you recently submitted have been received. Please log into your BenefitsCal account at www.BenefitsCal.org or create a BenefitsCal account if you do not have one to view your message. If you have any questions, please contact your worker.</p> <p>This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.</p>

2.9.3 Execution Frequency

No Change

2.9.4 Key Scheduling Dependencies

No Change

2.9.5 Counties Impacted

Los Angeles County

2.9.6 Data Volume/Performance

N/A

2.9.7 Failure Procedure/Operational Instructions

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

2.10 Modify GR Non Compliance Alert email Verbiage

2.10.1 Overview

Sends an email when a participant is in GR and non-compliant.
Modify 'GR Non Compliance Alert' verbiage.

2.10.2 Description of Change

1. Modify 'GR Non Compliance Alert' PO19C1188 email's verbiage:

Current Email Body	You have a message from your GR worker. To see your DPSS message, log in to www.dpss.lacounty.gov , click on the Your Benefits NOW logo and select "Message Board" link. If you do not have a YBN account, you have the option to create one. Once created, follow the instructions above.
New Email Body	<p>You have a message from your worker. Please log into your BenefitsCal account at www.BenefitsCal.org or create a BenefitsCal account if you do not have one to view your message. If you have any questions, please contact your worker.</p> <p>This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.</p>

2.10.3 Execution Frequency

No Change

2.10.4 Key Scheduling Dependencies

No Change

2.10.5 Counties Impacted

Los Angeles County

2.10.6 Data Volume/Performance

N/A

2.10.7 Failure Procedure/Operational Instructions

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

2.11 Modify GROW Non Compliance Alert email

2.11.1 Overview

Sends an email when a participant is in GROW and non-compliant.
Modify 'GROW Non Compliance Alert' verbiage.

2.11.2 Description of Change

1. Modify 'GROW Non Compliance Alert' PO19C1189 email's verbiage:

Current Email Body	You have a message from your GROW worker. To see your DPSS message, log in to www.dpss.lacounty.gov , click on the Your Benefits NOW logo and select "Message Board" link. If you do not have a YBN account, you have the option to create one. Once created, follow the instructions above.
New Email Body	You have a message from your worker. Please log into your BenefitsCal account at www.BenefitsCal.org or create a BenefitsCal account if you do not have one to view your message. If you have any questions, please contact your worker.

This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.

2.11.3 Execution Frequency

No Change

2.11.4 Key Scheduling Dependencies

No Change

2.11.5 Counties Impacted

Los Angeles County

2.11.6 Data Volume/Performance

N/A

2.11.7 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.)

2.12 Modify Employability Status Exemption End Date Verbiage

2.12.1 Overview

Sends an Email when a '10-Day Employability Status Change Notice form is generated (ABP 23A-MH, ABP 23A, ABP 23A-AU) for one of the following reasons:

- GA persons health assessment as 'Mental Health' with a result of Temporary NSA, Permanent NSA
- GA persons health assessment as 'Mental Health' with a result of Temporary Disability, Permanent Disability
- GA persons health assessment as 'Admin-U' with a result of DD/DDDD, Pending 1st Paycheck, Return to Residence, MSUDRP, Full Time Care, Rehab"

Modify 'Employability Status Exemption End Date' verbiage.

2.12.2 Description of Change

1. Modify 'Employability Status Exemption End Date' PO19C1199 email's verbiage:

Current Email Body	You have an important notice from the Department of Public Social Services. Please log in to Your Benefits Now (YBN) account or call us at (866)613-3777 for detailed information.
New Email Body	<p>You have received an important notice from your worker. Please log into your BenefitsCal account at www.BenefitsCal.org or create a BenefitsCal account if you do not have one to view your message. If you have any questions, please contact your worker.</p> <p>This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you no longer wish to receive e-mail notifications update your preferences through BenefitsCal.</p>

2.12.3 Execution Frequency

No Change

2.12.4 Key Scheduling Dependencies

No Change

2.12.5 Counties Impacted

Los Angeles County

2.12.6 Data Volume/Performance

N/A

2.12.7 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 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.17	The LRS shall set up alerts and send messages to other program specified users.	CalSAWS is updating the message sent to participants via email.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-230686

Adding Four BenefitsCal Report Links to
CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Susanna Martinez
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/15/2021	1.0	Initial Document	Susanna Martinez

Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions	4
2	Recommendations.....	5
2.1	Reports – Business Intelligence Report Search Page.....	5
2.1.1	Overview	5
2.1.2	Business Intelligence Report Search Page Mockup.....	5
2.1.3	Description of Changes	6
2.1.4	Page Location	7
2.1.5	Security Updates.....	7
3	Supporting Documents	8
4	Requirements.....	8
4.1	Project Requirements.....	8

1 OVERVIEW

BenefitsCal is a new website that will replace C4Yourself, YourBenefitsNow, and MyBenefitsCalWIN, to provide one unified experience for all Californians, everywhere. With the addition of BenefitsCal, the CalSAWS system will require a method of accessing new BenefitsCal dashboards and reports. This functionality will require a landing page to access the four BenefitsCal dashboard links to be added under the Business Intelligence Report Search page.

1.1 Current Design

There is no location from where to access BenefitsCal dashboards in the CalSAWS system.

1.2 Requests

Add four BenefitsCal dashboard links to the CalSAWS system under a new BenefitsCal navigation option in the Business Intelligence Report Search page on the left sidebar.

1.3 Overview of Recommendations

1. Add four BenefitsCal links to the Business Intelligence Report Search Page under a BenefitsCal navigation option in the Business Intelligence Report Search page on the left sidebar.
2. Remove any existing links to YourBenefitsNow dashboards found on the Business Intelligence Search page.

1.4 Assumptions

1. There is a separate work effort to build the BenefitsCal dashboards and this SCR is dependent on that work effort to provide the final four urls to the dashboards.
2. These four dashboards will be available within the existing CalSAWS Qlik application environment.
3. Any additional or new BenefitsCal dashboard links will be added via a separate SCR to align with the correct production release schedule.
4. County Helpdesk will be responsible for adding users to the new BenefitsCal Consumer security group in order for users to have access.

2 RECOMMENDATIONS

2.1 Reports – Business Intelligence Report Search Page

2.1.1 Overview

Four BenefitsCal dashboard links will be added to the Business Intelligence Report Search page and will be made accessible under a BenefitsCal navigation option under the Business Intelligence section in the Business Intelligence Report Search page on the left sidebar. These four dashboard links will navigate users to the BenefitsCal dashboards located at the CalSAWS Qlik environment. Any existing links to YourBenefitsNow dashboards will be removed on the Business Intelligence Search page.

2.1.2 Business Intelligence Report Search Page Mockup

CalSAWS

Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles PROD

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Business Intelligence

Scorecards

DPSSSTATS

Reception Log

Statistical Summary Analysis

Real Time Task Management

Operations Reports

Child Welfare Programs STATS

Report Search

► Refine Your Search

Search Results Summary

25 of 42

Business Intelligence 1 2 Next

Title	Category
Application Processing	CalFresh
Application Processing	CalWORKS
Application Processing	General Relief
Application Processing	Medi-Cal
Application Processing	Your Benefits Now
Application Processing Timeliness	CalFresh
Application Processing Timeliness	Medi-Cal
Applications Received	CalFresh
Applications Received	CalWORKS
Applications Received	General Relief
Applications Received	Medi-Cal
Applications Received	Your Benefits Now
Approvals	SSI/SSP
Caseload Management	CalFresh
Caseload Management	CalWORKS

Figure 2.1.2.1 – Business Intelligence Report Search Page Current Design Mockup Without BenefitsCal Navigation Option

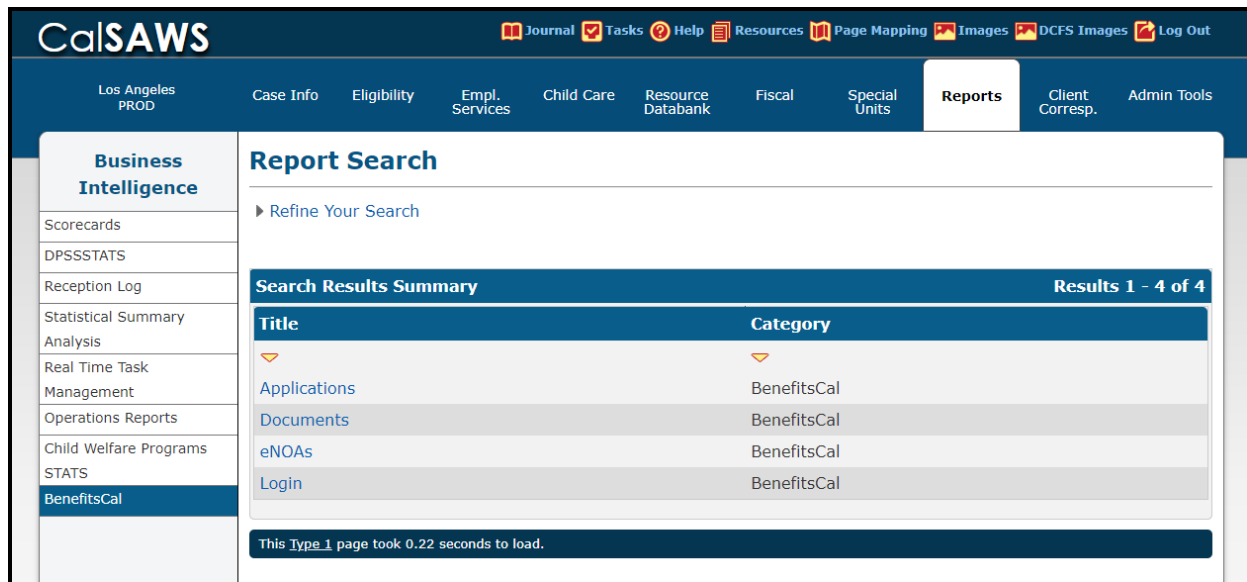


Figure 2.1.2.2 – Business Intelligence Report Search Page New Design Mockup With Example BenefitsCal Navigation Option and Dashboard Links

2.1.3 Description of Changes

1. Incorporate a new BenefitsCal navigation option under the local Business Intelligence navigation section
2. Under the BenefitsCal navigation option, add four links to the BenefitsCal dashboards that are accessible on the Business Intelligence Report Search page

Title	Category
Applications	BenefitsCal
Documents	BenefitsCal
eNOAs	BenefitsCal
Login	BenefitsCal

3. Remove any existing links to YourBenefitsNow dashboards on the Business Intelligence Search page.
 - a. The existing links to YourBenefitsNow dashboards are located under the DPSSSTATS navigation option in the Business Intelligence Search page on the left sidebar

Title	Category
Application Processing	Your Benefits Now
Applications Received	Your Benefits Now

2.1.4 Page Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: BenefitsCal**

2.1.5 Security Updates


1. Security Rights

Security Right	Right Description	Right to Group Mapping
BenefitsCalConsumer	Business Intelligence-Report Search	BenefitsCal Consumer

2. Security Groups

Security Group	Group Description	Group to Role Mapping
BenefitsCal Consumer	Gives the worker the ability to view BenefitsCal dashboards only.	<ul style="list-style-type: none"> • View Only • BenefitsCal Consumer Role

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security Matrix	Spreadsheet of the changes to security roles, groups, and rights.	 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.1.5	The LRS/CalSAWS shall allow COUNTY-specified Users the online ability to generate reports.	Implementing an additional section in the Business Intelligence Report Search page to allow users to generate reports.



California Statewide Automated Welfare System

Design Document

CA-230979 | CIV-109238

ACL 21-XX Update SNB/TNB Benefit Tables

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/29/2021	1.0	Initial Draft	T.Lazio

Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions	4
2	Recommendations.....	6
2.1	Eligibility Updates.....	6
2.1.1	SNB Benefit Amount Updates	6
2.1.2	TNB Benefit Amount Updates.....	7
2.1.3	Programs Impacted	7
2.1.4	Performance Impacts	7
3	Requirements.....	8
3.1	Project Requirements.....	8

1 OVERVIEW

This document identifies required changes to CalSAWS and C-IV related to the benefit tables for the Supplemental Nutrition Benefit (SNB) and Transitional Nutrition Benefit (TNB) programs effective October 1, 2021 as informed by the All County Letter (ACL) 21-XX.

1.1 Current Design

The SNB/TNB benefit issuance table values from ACL 19-15 were added in C-IV under CIV-101471, and in CalSAWS under CA-203103 in May 2019.

1.2 Requests

Per ACL 21-XX, SNB and TNB benefit table amounts are being increased for households impacted by the 2019 Expansion of CalFresh to Supplemental Security Income recipients. The new SNB and TNB benefit amounts will automatically increase effective the October 2021 benefit month.

1.3 Overview of Recommendations

1. Update SNB/TNB benefit issuance table values effective 10/01/2021 per ACL 21-XX.

1.4 Assumptions

1. Batch EDBC will be run on all active Nutrition Benefit (NB) programs under separate SCR's CIV-108001 and CA-220109.
2. Tables in this document give values for Household Sizes up to 12 persons to align with the lookup column layout in CT351. The Household Size of "2" in this document applies to both the CT351 column for "2 Persons" and for "2 Adults."
3. The current functionality triggers the following NOA reasons when the SNB/TNB benefit amount changes due to the benefit issuance table value updates.

SNB Reason Name: SNB_CH_FUNDING_CHANGE_N002 (CalSAWS, ID: 7547), RSN_SNB3A (C-IV, ID: 1349)

SNB Reason Verbiage:

Funding for the SNB Program changed.

Your household is receiving these benefits because:

- On June 1, 2019, your CalFresh household included at least one recipient of Supplemental Security Income and/or California State Supplementary Payment (SSI/SSP) benefits;
- Your CalFresh household continues to include at least one of the same SSI/SSP recipient(s); and
- Your CalFresh household's benefits were reduced when the SSI/SSP recipient(s) became eligible for CalFresh.

TNB Reason Name: TNB_CH_FUNDING_CHANGE_N102 (CalSAWS, ID: 7552),
RSN_TNB3A (C-IV, ID: 1354)

TNB Reason Verbiage:

Funding for the TNB Program changed.

Your household is receiving TNB Program benefits because:

- On June 1, 2019, your CalFresh household included at least one recipient of Supplemental Security Income and/or State Supplementary Payment (SSI/SSP) benefits;
- Your household became ineligible for CalFresh when the SSI/SSP recipient(s) was added to your household;
- Your household continues to include at least one of the same SSI/SSP recipient(s);
- The same individual continues to receive SSI/SSP benefits; and
- Your household is ineligible for CalFresh.

Note: SCR CA-203103 C-IV – 101471 implemented the functionality which triggers the NB Funding Change reason listed above.

2 RECOMMENDATIONS

Insert new values into the code tables as specified below using an effective date from 10/01/2021 to high date. The existing high-dated values will be end-dated effective September 30, 2021.

2.1 Eligibility Updates

2.1.1 SNB Benefit Amount Updates

The following table lists the new SNB benefit amounts effective 10/01/2021. These values are stored in CT351. The code for each item is in the table.

Household Size	SNB Benefits for 1 Previously Excluded SSI Recipient Code S1	SNB Benefits for 2 Previously Excluded SSI Recipients Code S2	SNB Benefits for 3 or more Previously Excluded SSI Recipients Code S3
1	\$124		
2	\$124	\$233	
3	\$166	\$233	\$287
4	\$192	\$259	\$287
5	\$211	\$284	\$321
6	\$235	\$302	\$354
7	\$259	\$319	\$387
8	\$254	\$350	\$425
9	\$238	\$370	\$439
10	\$212	\$390	\$453
11	\$194	\$395	\$475
12	\$148	\$395	\$493
Additional person	\$0	\$0	\$0

2.1.2 TNB Benefit Amount Updates

The following table lists the new TNB benefit amounts effective 10/01/2021. These values are stored in CT351. The code for each item is in the table.

Household Size	TNB Benefits for 1 Previously Excluded SSI Recipient Code T1	TNB Benefits for 2 Previously Excluded SSI Recipients Code T2	TNB Benefits for 3 or more Previously Excluded SSI Recipients Code T3
1	\$192		
2	\$192	\$192	
3	\$221	\$192	\$192
4	\$250	\$301	\$192
5	\$320	\$348	\$352
6	\$390	\$395	\$400
7	\$431	\$451	\$480
8	\$431	\$477	\$522
9	\$431	\$477	\$523
10	\$431	\$477	\$523
11	\$431	\$477	\$523
12	\$431	\$477	\$523
Additional person	\$0	\$0	\$0

2.1.3 Programs Impacted

NB

2.1.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.21	The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes.	This SCR updates the SNB/TNB benefit table values for eligibility determination and benefit calculation effective 10/2021.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-231501

Document Routing Rule Updates

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/28/2020	1.0	Version 1	Justin Dobbs

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Select Form Page	5
	2.1.1 Overview	5
	2.1.2 Select Form Page Reference Example	5
	2.1.3 Description of Changes	5
	2.1.4 Page Validations	6
	2.1.5 Page Location	6
	2.1.6 Security Updates.....	6
	2.1.7 Page Mapping.....	6
	2.2 Document Routing Rule Program Detail Page.....	6
	2.2.1 Overview	6
	2.2.2 Document Routing Rule Program Detail Page Mockup	7
	2.2.3 Description of Changes	7
	2.2.4 Page Validations	7
	2.2.5 Page Location	7
	2.2.6 Security Updates.....	7
	2.2.7 Page Mapping.....	7
3	Supporting Documents	8
4	Requirements.....	9
5	Migration Impacts	10
6	Outreach.....	11
7	Appendix.....	12

1 OVERVIEW

This design outlines enhancements to the Document Routing Rule functionality in the CalSAWS System.

1.1 Current Design

Counties which use the Hyland imaging solution can configure Document Routing Rules which allow configuration of Tasks to be created based on imaged documents. Document Routing Rule functionality was introduced with CA-214917 per DDIDs 2254, 2504 and 2245.

Only currently effective documents can be associated to Document Routing Rules.

Document Routing Rule program configuration options do not include the Nutrition Benefit program.

1.2 Requests

Modify the Document Routing Rule CalSAWS System functionality to incorporate legacy documents for the C-IV migration counties and include the Nutrition Benefit program in the configuration options.

1.3 Overview of Recommendations

1. Update the Document Routing Rule Select Forms page to allow searching of Legacy documents for the 39 C-IV migration counties.
2. Update the Document Routing Rule Program Detail page to include the Nutrition Benefit program.

1.4 Assumptions

1. There are no modifications required to the Document Routing Rule task creation processing logic.
2. Conversion of C-IV System documents concatenates "Legacy" to the end of the form number for converted C-IV System documents.

2 RECOMMENDATIONS

2.1 Select Form Page

2.1.1 Overview

This section describes updates to the Select Form page accessible from the Document Routing Rule Detail page.

2.1.2 Select Form Page Reference Example

The screenshot displays the 'Select Form' interface. At the top, there is a 'Cancel' button. Below it, a 'Refine Your Search' section contains a 'Document Type' dropdown menu and a 'Form' input field with the text 'TNB 4 Recert Packet: TN'. A 'Search' button is located to the right of the 'Form' field. Below the search filters, there is a 'Results per Page' dropdown set to '25' and another 'Search' button. The main content area is titled 'Search Results Summary' and shows 'Results 1 - 1 of 1'. A 'Select' button is located to the right of the results summary. Below this, there is a table with three columns: 'Document Type', 'Form Number', and 'Form Name'. The table contains one row with the following data: 'Customer Reporting' (with a checkbox), 'TNB 4 Recert Packet', and 'TNB 4 Recertification Packet'. A 'Select' button is located to the right of the table, and a 'Cancel' button is at the bottom right.

Document Type	Form Number	Form Name
<input type="checkbox"/> Customer Reporting	TNB 4 Recert Packet	TNB 4 Recertification Packet

Figure 2.1.2.1 – Select Form Page Example

2.1.3 Description of Changes

Documents from the C-IV System will be converted into the CalSAWS System with "Legacy" concatenated to the end of the document number. These document records are to preserve referential integrity of generated document data being converted from the C-IV System. These "Legacy" converted documents are not considered "active" ongoing in the CalSAWS System so they are not currently searchable on the Select Forms page for Document Routing Rules.

1. Modify the search logic of the Select Form page to also evaluate for converted "Legacy" documents for the 39 C-IV migration counties. The page logic will not include this evaluation if the logged in worker is associated to Los Angeles County or a CalWIN migration county. The auto complete functionality for the Form search field will also be

modified so that the auto complete options include the legacy documents for the C-IV migration counties.

2.1.4 Page Validations

N/A – No new validations

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Automated Actions > Document Routing. Click the “Add Document Routing Rule” button, or the Name hyperlink/Edit button for an existing Document Routing Rule. From the Document Routing Rule Detail page, click the “Add” button within the Additional Form(s) panel.

2.1.6 Security Updates

N/A – No updates to security

2.1.7 Page Mapping

N/A – No updates to page mapping

2.2 Document Routing Rule Program Detail Page

2.2.1 Overview

This section describes updates to the Document Routing Rule Program Detail page accessible from the Document Routing Rule Detail page.

2.2.2 Document Routing Rule Program Detail Page Mockup

Document Routing Rule Program Detail

* - Indicates required fields

Save And Return Cancel

Program Information

Program: *
Nutrition Benefit ▼

Distribution Type: *
Program Worker and/or Bank ▼

Bank:
▼

Program Status:
Active ▼

Program Worker:
Currently Assigned Worker ▼

Save And Return Cancel

Figure 2.2.2.1 – Document Routing Rule Program Detail Page Mockup

2.2.3 Description of Changes

1. Update the Program dropdown to include the “Nutrition Benefit” program option. This option will display between the “Medi-Cal” and “Welfare to Work” options.

2.2.4 Page Validations

N/A – No new validations

2.2.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Automated Actions > Document Routing. Click the “Add Document Routing Rule” button, or the Name hyperlink/Edit button for an existing Document Routing Rule. From the Document Routing Rule Detail page, click the “Add” button within the “Program(s)” panel which is inside the “Task Information” panel.

2.2.6 Security Updates

N/A – No updates to security

2.2.7 Page Mapping

N/A – No updates to page mapping

3 SUPPORTING DOCUMENTS

N/A.

4 REQUIREMENTS

N/A.

5 MIGRATION IMPACTS

N/A.

6 OUTREACH

N/A.

7 APPENDIX

N/A.



California Statewide Automated Welfare System

Design Document

CA-231504 | DDID 1967

Batch Property Updates for C-IV Conversion

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/29/2021	1.0	Initial version	Jennifer Muna
8/16/2021	2.0	Updated Supporting Document 'Fiscal Batch Jobs' by: <ul style="list-style-type: none"> Removing County 28 from Daily DD Writer and FTP (POXXF201/POXXF241) Adding Positive Pay Writer and FTP (PO35F107/PO35F147) for County 35 	Jennifer Muna
8/19/2021	3.0	<ul style="list-style-type: none"> Removed CA-207203: DDID 2073 from Batch list. Added Assumption #7 for Event Streaming enabled for MEDS AP19 transactions in CalSAWS. Updated Supporting Document 'All Other Batch Jobs' by removing POXXE424 	Jennifer Muna

Table of Contents

1	Overview	4
1.1	Current Design	4
1.2	Requests	4
1.3	Overview of Recommendations	4
1.4	Assumptions	5
2	Recommendations	6
2.1	Update Batch Properties and Schedule for the C-IV Migration Counties	6
2.1.1	Overview	6
2.1.2	Description of Change.....	6
2.1.3	Execution Frequency	6
2.1.4	Key Scheduling Dependencies.....	6
2.1.5	Counties Impacted	6
2.1.6	Data Volume/Performance.....	7
2.1.7	Failure Procedure/Operational Instructions	7
2.2	Fiscal jobs to run for the C-IV Migration Counties	7
2.2.1	Overview	7
2.2.2	Description of Change.....	7
2.2.3	Execution Frequency	7
2.2.4	Key Scheduling Dependencies.....	7
2.2.5	Counties Impacted	7
2.2.6	Data Volume/Performance.....	7
2.2.7	Failure Procedure/Operational Instructions	8
2.3	Correspondence Jobs to run for the C-IV Migration Counties	8
2.3.1	Overview	8
2.3.2	Description of Change.....	8
2.3.3	Execution Frequency	8
2.3.4	Key Scheduling Dependencies.....	8
2.3.5	Counties Impacted	8
2.3.6	Data Volume/Performance.....	8
2.3.7	Failure Procedure/Operational Instructions	8
3	Supporting Documents	9
4	Requirements	10
4.1	Migration Requirements.....	10

1 OVERVIEW

This SCR outlines the necessary batch property and/or scheduling updates to enable or disable batch jobs for the specific C-IV Migration Counties in the CalSAWS scheduler.

1.1 Current Design

There are various CalSAWS Migration SCRs to include functionality to turn on/turn off Batch jobs for the 57 Migration Counties. CA-208599 was created to track and implement batch scheduling updates necessary for Migration. Additional batch job properties updates are needed to ensure the batch jobs will run for the appropriate C-IV Migration Counties based on updated CRFI elections.

1.2 Requests

Update properties of batch jobs to run for specific C-IV Migration Counties upon migration based on received CRFI responses. This also includes any batch scheduling request updates that were not captured in CA-208599.

1.3 Overview of Recommendations

The batch jobs in the following DDIDs require batch property updates to run for appropriate C-IV Migration Counties starting 9/27/2021:

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-207438: DDID 571 Migrate C-IV WDTIP Jobs
12. CA-215679: DDID 2376 FDS: GA GR Overpayment Suspension/Termination Batch Changes
13. CA-207148: DDID 2143 – Batch Job to Discontinue Special Care Increment Payment
14. CA-222369: Update Batch jobs for Foster Care program when NMD turns 21
15. CA-207302: DDID 1527 - CalFresh Denial Due to Missed Interview
16. 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

1.4 Assumptions

1. CRFI responses for DDID 85 implementation to remove WTW program worker with Sanction status will be addressed in CA-48348.
2. CRFI responses for DDID 2630 to automatically generate CSF 162 form for IEVS PVS abstracts will be addressed in CA-226343.
3. CRFI responses for CAPI Discontinuance batch job in DDID 1110 will be addressed in CA-207145.
4. CRFI responses for MC Former Foster Youth (FFY) Discontinuance batch job in DDID 1110 will be addressed in CA-227766.

5. 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.
6. This SCR will address Batch Property Change Requests for the aforementioned DDIDs for based on received county opt in/ opt out elections from the C-IV Migration Counties. CA-208599 will address the Batch Scheduling changes.
7. CA-227192 decommissioned the MEDS AP18 Transaction batch jobs and enabled Event Streaming implementation for MEDS AP18 in CalSAWS.

2 RECOMMENDATIONS

2.1 Update Batch Properties and Schedule for the C-IV Migration Counties

2.1.1 Overview

This section outlines the updates necessary to implement batch job properties and scheduling updates for the C-IV Migration Counties.

2.1.2 Description of Change

1. Validate and/or update the 'countyCodeList' batch property of non-county specific jobs ('00') to run for the appropriate C-IV Migration counties based on county opt-in/opt-out decisions.
2. Validate and/or update batch job data/properties of county specific batch jobs to run for the appropriate C-IV Migration counties based on county opt-in/opt-out decisions.

Note: Refer to Supporting Document 1 'All Other Batch Jobs' for list of batch jobs.

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 and/or update the 'countyCodeList' batch property of non-county specific jobs ('00') to run for the appropriate C-IV Migration counties based on county opt-in/opt-out decisions.
2. Validate and/or update county specific batch jobs to run for the appropriate C-IV Migration counties based on county opt-in/opt-out decisions.

Note: Refer to Supporting Document 2 'Fiscal Batch Jobs' for a detailed list of batch jobs.

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 and/or update the 'countyCodeList' batch property of non-county specific jobs ('00') to run for the appropriate C-IV Migration counties based on county opt-in/opt-out decisions. Refer to Supporting Document 3 'Correspondence Batch Jobs' for a detailed list of batch jobs.

2.3.3 Execution Frequency

Refer to Supporting Document 3 'Correspondence Batch Jobs' for a detailed list of batch jobs.

2.3.4 Key Scheduling Dependencies

Refer to Supporting Document 3 'Correspondence Batch Jobs' for a detailed list of batch jobs

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	<p>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.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As 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.</p>	<p>Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>For the 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.</p>	<p>Batch Scheduling updates are implemented for the C-IV Migration Counties.</p>