CalSAWS

California Statewide Automated Welfare System

Design Document

CA-47600

Update CA1037 State Report Revise Line 8a Logic

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/14/2021	1.0	Initial Document	Remi Lassiter, Susanna Martinez

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1 OVERVIEW

The CA 1037 is the Cash Assistance Program for Immigrants (CAPI) Monthly Caseload Movement Statistical Report, which provides data on end of report month net movement of applications, number of individuals who are approved for CAPI, and the number of individuals who are receiving CAPI benefits as either Qualified Aliens, Non-qualified Aliens, Sponsored Aliens, or Limited Term Aliens. The purpose of this report is to assist the state in making budgetary and program policy decisions regarding the CAPI program.

Line 8a of the CA 1037 report counts programs that were discontinued due to receiving Federal SSI/SSP. The current logic does not capture all expected cases for Line 8a. This SCR seeks to update the logic of Line 8a to count programs that fall under the following two scenarios:

1. The CAPI recipient has a person-level discontinuance reason of "Gets SSI/SSP" or "Gets SSI"
2. OR, they have any other discontinuance reason and are receiving SSI/SSP in Other Program Assistance

1.1 Current Design

The current CA 1037 baseline logic does not correctly identify/count cases in Line 8a because it searches only for program level discontinuance reason of "Gets SSI/SSP" which is generally not used in CalSAWS. Usually, if a CAPI recipient is discontinued for several person level eligibility reasons, including "Gets SSI/SSP", the program level discontinuance reason is set as "No Elig Member" and thus, not picked up by this line.

Additionally, the logic doesn't perform any check on the Other Program Assistance List to see if a discontinued CAPI recipient is in receipt of SSI/SSP.

1.2 Requests

1. Update the logic of Line 8a to count programs that fall under the following two scenarios:
    a. The CAPI recipient has a person-level discontinuance reason of "Gets SSI/SSP"
    b. OR, they have any other discontinuance reason and are receiving SSI/SSP in Other Program Assistance

1.3 Overview of Recommendations

1. Update the logic of Line 8a to:
    a. Check for discontinuance reason of "Gets SSI/SSP" or "Gets SSI" at the person level
    b. And, to perform an additional check for receipt of SSI/SSP in the Other Program Assistance List

1.4 Assumptions

1. Per the changes made in Release 20.07 via SCR CA-202055, CAPI will aid no more than one person per program. Individuals can apply to CAPI either as a single person or married couple, but there will only ever be one active person on a program block at a time. If dealing with a couple case, they are each a MEM on their own program and a FRE on their spouse's program.

2 RECOMMENDATIONS

2.1 CA 1037 State Report

2.1.1 Overview

1. Update the logic of Line 8a to:
   a. Check for discontinuance reason of "Gets SSI/SSP" at the person level
   b. And, to perform an additional check for receipt of SSI/SSP in the Other Program Assistance List

2.1.2 CA 1037 State Report Screenshot

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY DEPARTMENT OF SOCIAL SERVICES

Cash Assistance Program for Immigrants
Monthly Caseload Movement Statistical Report

Send one copy of this form to:
California Department of Social Services
Data Systems and Survey Design Bureau, M.S. 9-081
P. O. Box 944243
Sacramento, CA 944244-2430
FAX: (916) 657-2074

COUNTY NAME	CONSORTIUM	COUNTY CODE	REPORT MONTH/YEAR
<?COUNTY_NAME?>	C-IV	<?COUNTY_ID?>	<?RPT_MONTH?>

PART A. APPLICATIONS		
1. Application(s) brought forward from last report month (Item 5 from previous report month)........	1	0
2. Application(s) received during the report month (Sum of Items 2a. and 2b. below)........	2	0
a. Application(s) Received........	3	0
b. Request(s) for Restoration........	4	0
3. Total Applications during the report month (Sum of Items 1 and 2 above)........	5	0
4. Application(s) Disposed of during the report month (Sum of Items 4a., 4b., 4c., and 4d. Below)........	6	0
a. Application(s) Approved........	7	0
b. Restorations........	8	0
c. Application(s) Denied or Withdrawn........	9	0
d. Other Approval(s)........	10	0
5. Application(s) carried forward to the next report month(Item 3 minus Item 4 above)........	11	0

PART B. CASELOAD	ALIEN STATUS				TOTAL
	Qualified (1A)	Non-qualified (6K)	Sponsored (6M)	Limited Term (6T)	
6. Case(s) brought forward from last report month (Item 9 from previous report month)........	12 0	13 0	14 0	15 0	16 0
7. Case(s) added during the report month (Sum of Items 7a-c below)........	17 0	18 0	19 0	20 0	21 0
a. Case(s) Approved........	22 0	23 0	24 0	25 0	26 0
b. Case(s) Restored........	27 0	28 0	29 0	30 0	31 0
c. Other Case Approval(s)........	32 0	33 0	34 0	35 0	36 0
8. Case(s) Discontinued during the report month (Sum of Items 8a. and 8b. below)........	37 0	38 0	39 0	40 0	41 0
a. Discontinued due to receiving Federal SSI/SSP........	42 0	43 0	44 0	45 0	46 0
b. Other Discontinuance(s)........	47 0	48 0	49 0	50 0	51 0
9. Case(s) carried forward to the next report month (Items 6 + 7 minus Item 8 above)........	52 0	53 0	54 0	55 0	56 0
PART C. PAID RECIPIENTS					
10. Total Recipient(s) paid during the report month........	57 0	58 0	59 0	60 0	61 0

Comments:

Item 5 from previous month	<?LINE_5_ADJ?>
Item 9 from previous report month (Qualified)	<?QUALIFIED_CNT?>
qualified)	<?NON_QUALIFIED_CNT?>
Item 9 from previous report month (Sponsored)	<?SPONSORED_CNT?>
Item 9 from previous report month (Limited Term)	<?LIMITED_CNT?>

REPORT PREPARED BY:	TELEPHONE	DATE
	( )	

CA1037 (1/2000)

Figure 2.1.1 – CA 1037 State Report Screenshot

Note: No updates are being made to the report template.

2.1.3 Description of Change

1. Update Line 8a of the CA 1037 report to perform the following logic:
    a. First, check for any discontinuance reason of "Gets SSI/SSP" or "Gets SSI" in the EDBC_PERS and EDBC_PERS_STAT_RSN tables. For example, if Case 1111111 has a CAPI program that is discontinued for multiple reasons – "Gets SSI/SSP" and "CAPI RE Not Complete" – it will be counted in Line 8a.

       Technical Note: for the most recent EDBC run of the Line 8 CAPI program, perform a check on the EDBC_PERS table for the individual with ROLE_TYPE = 'MEM'.

        If EDBC_PERS.STAT_RSN_CODE = "Gets SSI/SSP" (Code 25) or "Gets SSI" (Code JW) – *count in Line 8a.*

        Otherwise, perform a second check on the EDBC_PERS_STAT_RSN table for the individual with ROLE_TYPE = 'MEM'.

            If there is any record where EDBC_PERS_STAT_RSN.STAT_RSN_CODE = "Gets SSI/SSP" (Code 25)– *count in Line 8a.*

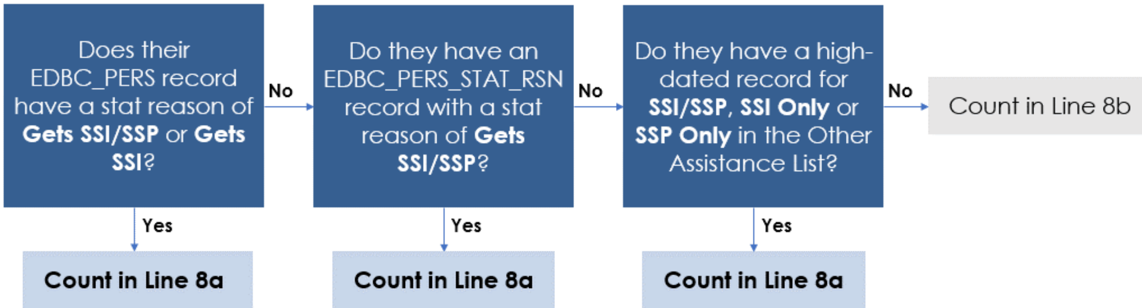
                Note: Code JW does not need to be included in this check because it is not used in the EDBC_PERS_STAT_RSN table.

    b. If there is no "Gets SSI/SSP" or "Gets SSI" discontinuance reason in either of these tables, perform an additional check for an SSI/SSP program in the Other Program Assistance List.

       Technical Note: If the recipient has a high-dated record for "SSI/SSP", "SSI Only" or "SSP Only" (CATGRY_ID 18) in the OTHER_PGM_ASSIST table for that case – *count in Line 8a*

2. Consistent with the current logic, Line 8b – Other Discontinuance(s) will continue to be the count of all individuals not captured in Line 8a.

The logic can be summarized by the following visual:



2.1.4 Report Location

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

2.1.5 Counties Impacted

All CalSAWS counties

2.1.6 Security Updates

N/A

2.1.7 Report Usage/Performance

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	CA 1037 State Report	CA 1037 Report

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.1.11	The LRS shall support all reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures, including statistical, operational, workload, and fiscal reports.	Update the logic for Line 8a of the CA 1037 report to accurately capture all CAPI programs discontinued due to receiving SSI/SSP.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
N/A			

5 MIGRATION IMPACTS

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

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207127 | DDID 2215

Update Appointment Management Solution to Add Snooze Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Farhat Ulain
	Reviewed By	Matthew Lower, Long Nguyen, Amy Gill, Michael Wu, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/13/2021	1.0	Initial Revision	Farhat Ulain

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1 OVERVIEW

The Reception Log is used to track Customer visits to the county offices. When a Reception Log record is created, an electronic message is automatically sent to the Message Center (a worker must be associated to the Reception Log record). The Message Center/E-mail notification informs the worker that the Customer is checked-in and is currently waiting to be seen. Furthermore, a worker can acknowledge the notification by pressing the 'Acknowledge' button.

1.1 Current Design

In the CalSAWS system, when a Reception Log record is created and the worker is notified, there is no other way to remind the worker that the Customer is waiting in the lobby to be seen.

1.2 Requests

Add a Snooze functionality in the Reception Log and in the Message Center that will remind the worker about a customer who is waiting in the lobby to be seen. Additionally, the Snooze functionality will allow the worker to specify the reason for the delay.

1.3 Overview of Recommendations

1. Add Snooze functionality in the Reception Log Detail page and in the Message Center.
2. Add a Snooze column to the Visit Purpose List page.
3. Add a Snooze field to the Visit Purpose Detail page.

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.
2. Snooze will not shift remaining appointments in the day.
3. All Snooze history will be saved with number of snoozes and the Snooze Reasons.

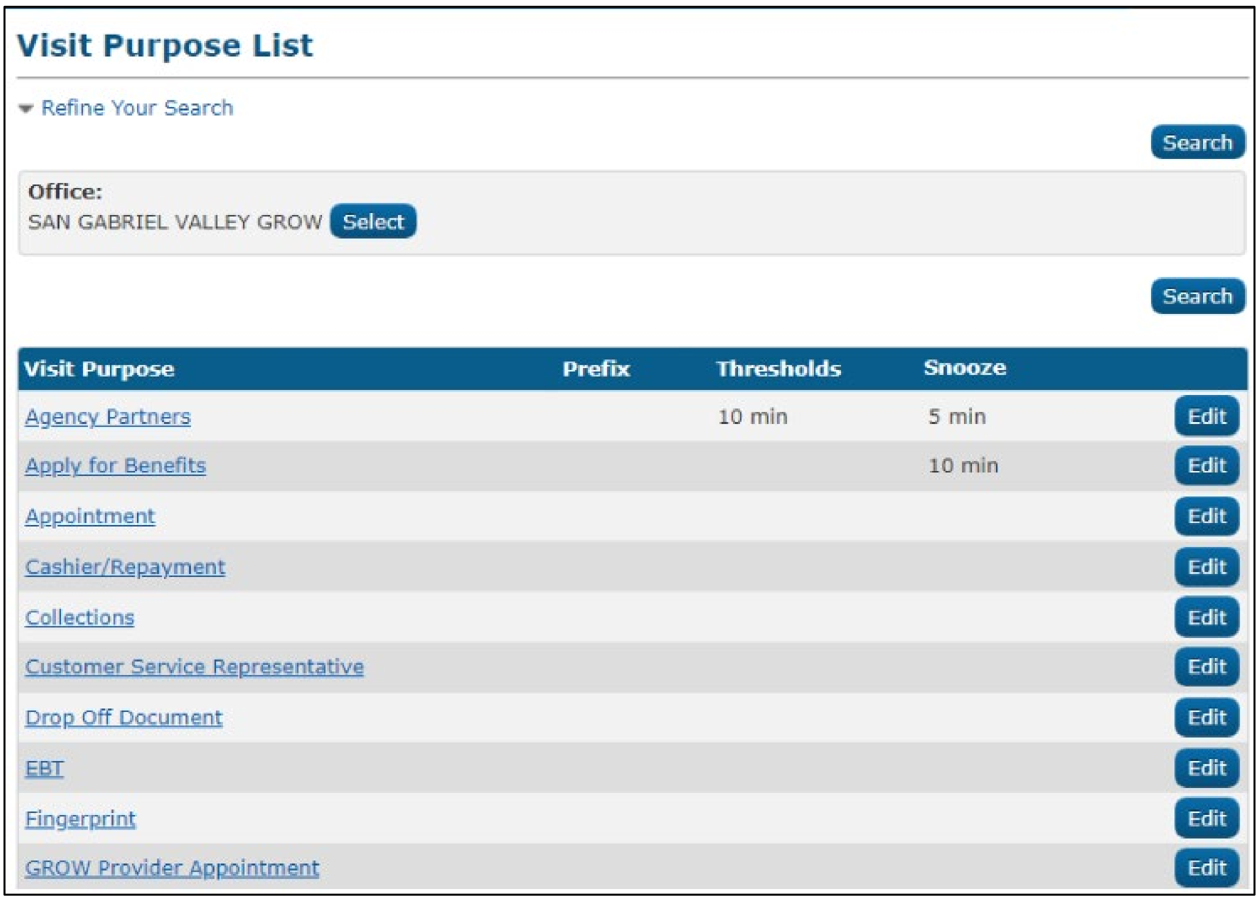
2 RECOMMENDATIONS

2.1 Visit Purpose List

2.1.1 Overview

The Visit Purpose List page provides a list view of all appointment types with the threshold time configured. This change will add a Snooze column in the Visit Purpose List page to display the Snooze minutes configured for the appointment type.

2.1.2 Visit Purpose List Page Mockup



Visit Purpose	Prefix	Thresholds	Snooze	
Agency Partners		10 min	5 min	Edit
Apply for Benefits			10 min	Edit
Appointment				Edit
Cashier/Repayment				Edit
Collections				Edit
Customer Service Representative				Edit
Drop Off Document				Edit
EBT				Edit
Fingerprint				Edit
GROW Provider Appointment				Edit

Figure 2.1.2-1 – Visit Purpose List Page

2.1.3 Description of Change

1. Add a Snooze column to the Visit Purpose List page as displayed in Figure 2.1.2-1.
   a. This column will display the Snooze Minutes for the appointment type formatted as "{Snooze Minutes} min".

2.1.4 Page Locations

Global: Admin Tools

Local: Office Admin

Task: Visit Purpose

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add page mapping for the new fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Visit Purpose Detail

2.2.1 Overview

The Visit Purpose Detail page provides detailed information about an appointment type per office. Multiple levels of thresholds and the email recipient can be configured in this page for escalation. This change will add a Snooze field to this page that will be used to remind the user about an appointment time before the escalation begins.

2.2.2 Visit Purpose Detail Page Mockup

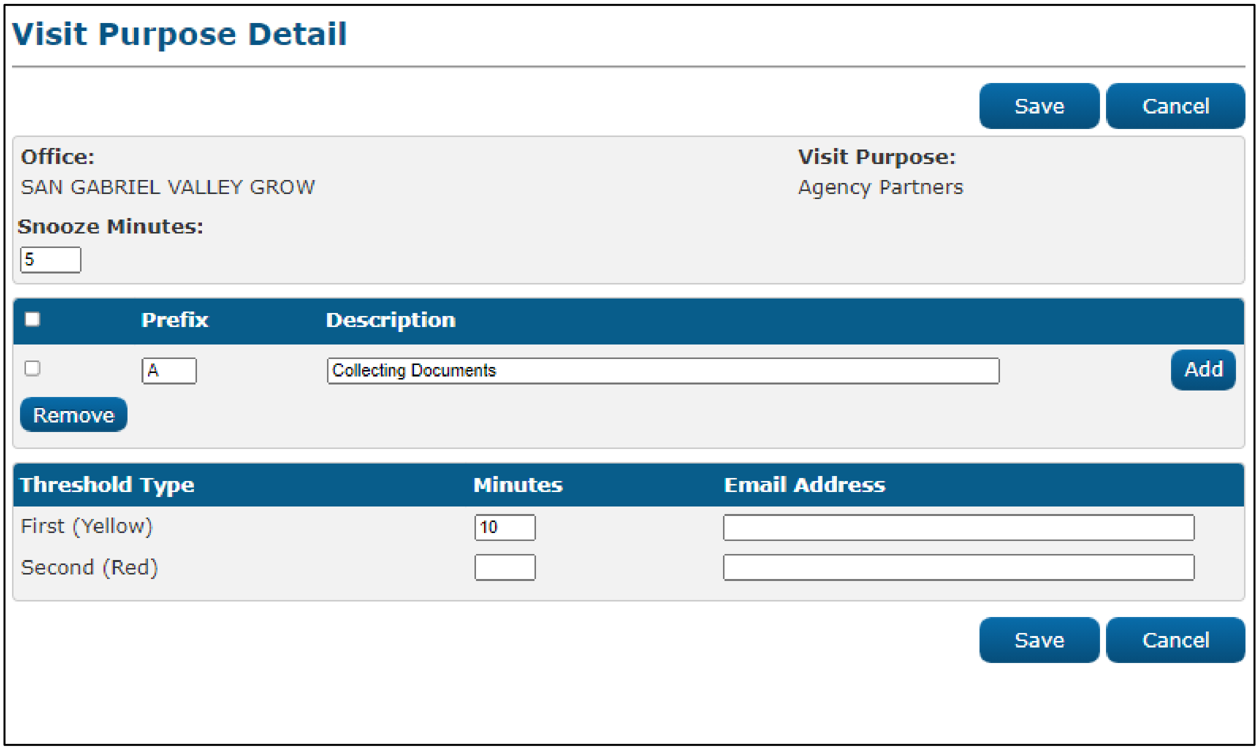


Figure 2.2.2-1 – Visit Purpose Detail Page

2.2.3 Description of Change

1. Add a Snooze Minutes field to the Visit Purpose Detail page as displayed in Figure 2.2.2-1.
   a. A text box will be displayed below the Snooze Minutes field to configure the Snooze Minutes per Visit Purpose. This field will only contain whole numbers.
   Note: CalSAWS does not allow more than 3 digits, negative and non-zero numbers to be entered in the Minutes field. This field will follow the same logic.
2. Snooze Minutes will not exceed the number of minutes that is entered for either of the Threshold Type.
   a. A validation will be displayed:

      Snooze Minutes - Cannot exceed the Threshold Type Minutes.

   b. If the Threshold Type does not have Minutes assigned, it will not be considered for the validation trigger.

   Note: A message notification that appears in the Message Center will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page.

2.2.4 Page Locations

Global: Admin Tools

Local: Office Admin

Task: Visit Purpose

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Add page mapping for the new fields.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Reception Log Detail

2.3.1 Overview

A Reception Log record gets created and notifies the worker when a customer checks in for an appointment. This change will add a Snooze functionality to the Reception Log Detail page for the user to snooze the notification for the set number of minutes that is configured in the Visit Purpose Detail page.

2.3.2 Reception Log Detail Page Mockups

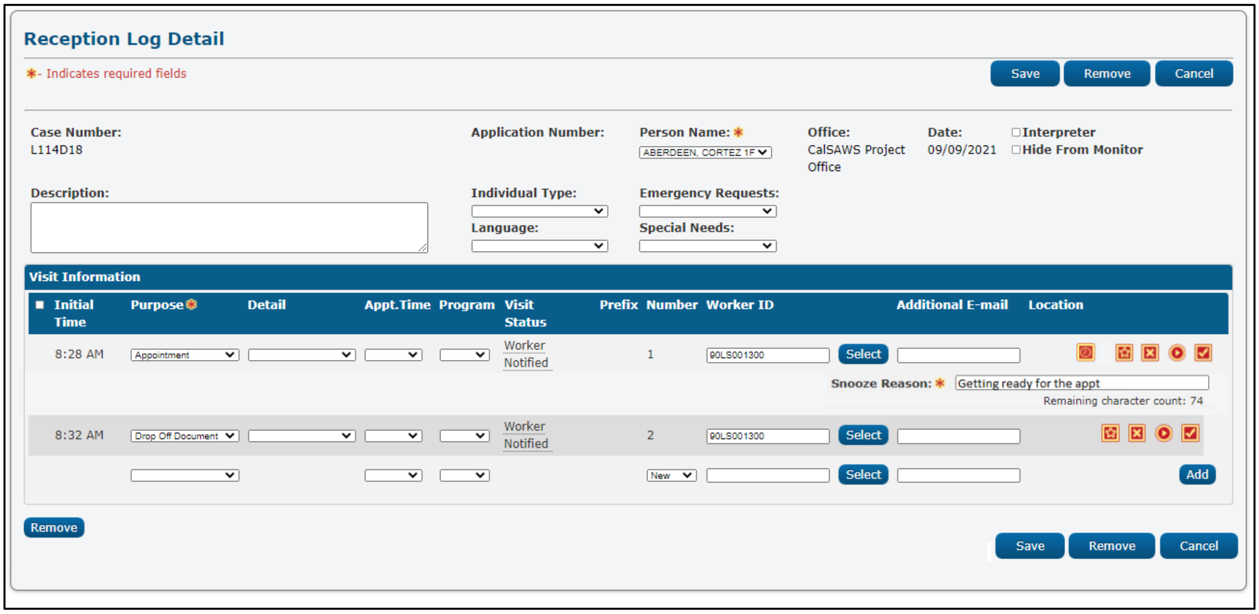
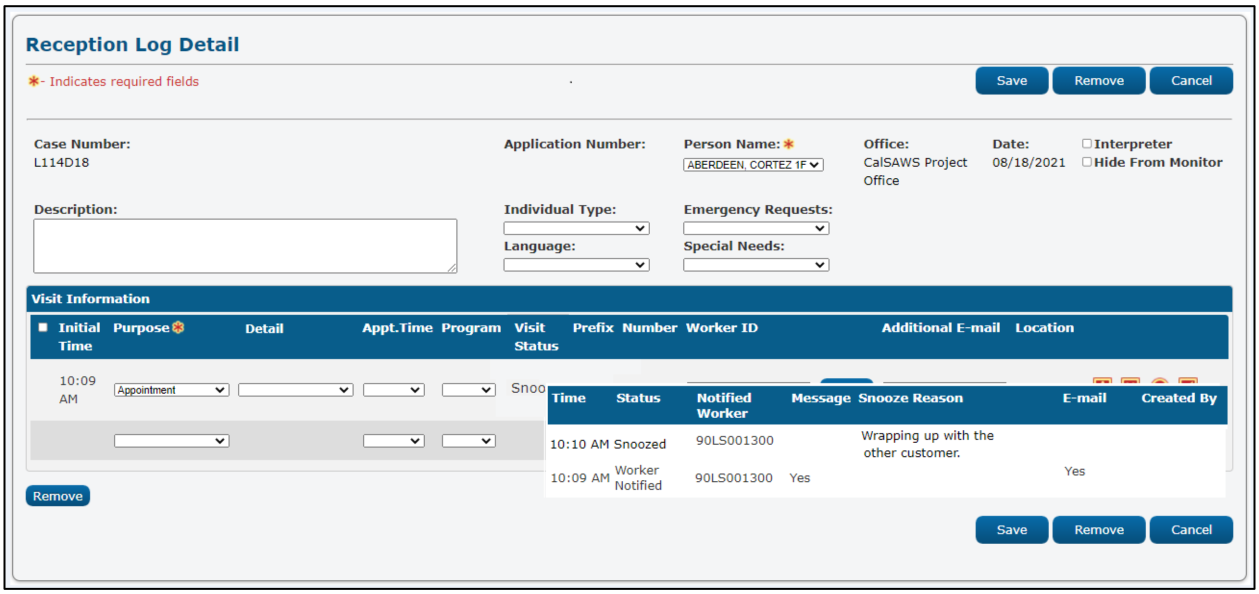


Figure 2.3.2-1 – Reception Log Detail Page



2.3.3 Description of Change

1. Add a Snooze icon to the Reception Log Detail page as displayed in the Figure 2.3.2-1.
   a. Snooze Icon:

   b. Upon clicking on the Snooze icon, a Snooze Reason field with a text box will be displayed.

   c. User will be able to enter a snooze reason in the text box for snoozing the appointment.
      i. The text box will be a required field.
      ii. Maximum character limit for the text box will be 100 characters.
      iii. This field will display the remaining character count underneath.
   d. Upon entering the Snooze Reason and saving the record, the appointment will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page for a Visit Purpose.
2. Update Status column label to be Visit Status as displayed in the Figure 2.3.2-1/2.3.2-2.
   a. Add a Snooze Reason column in the tooltip of Visit Status column.
   b. The Snooze Reason text will be displayed in the Snooze Reason column in the Visit Status tooltip as displayed in Figure 2.3.2-2.
   c. The Snooze Reason column will be dynamic and will only be displayed when an appointment is snoozed and the snooze reason is entered by the user.
   d. When the appointment is snoozed, the 'Snoozed' status will be displayed in the Status column of the tooltip.
      i. The Snoozed status will be mapped with "Customer Status – Waiting To Be Seen".
3. The Snooze icon will only be displayed for the appointments that are configured for the Snooze in the Visit Purpose Detail page.
4. The Snooze icon will only be displayed when the Visit Status is 'Worker Notified', 'Worker Acknowledged', and 'Snoozed'.

Note: The Message Center notification for the appointment will re-appear when the number of Snooze minutes is over. If the user snoozes multiple times, prior to the previous Snooze Minutes completing, a new Snooze time will be set on the appointment and the previous Snooze time will be discarded.

2.3.4 Page Locations

CalSAWS Home Page

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Add page mapping for the new and updated fields.

2.3.7 Page Usage/Data Volume Impacts

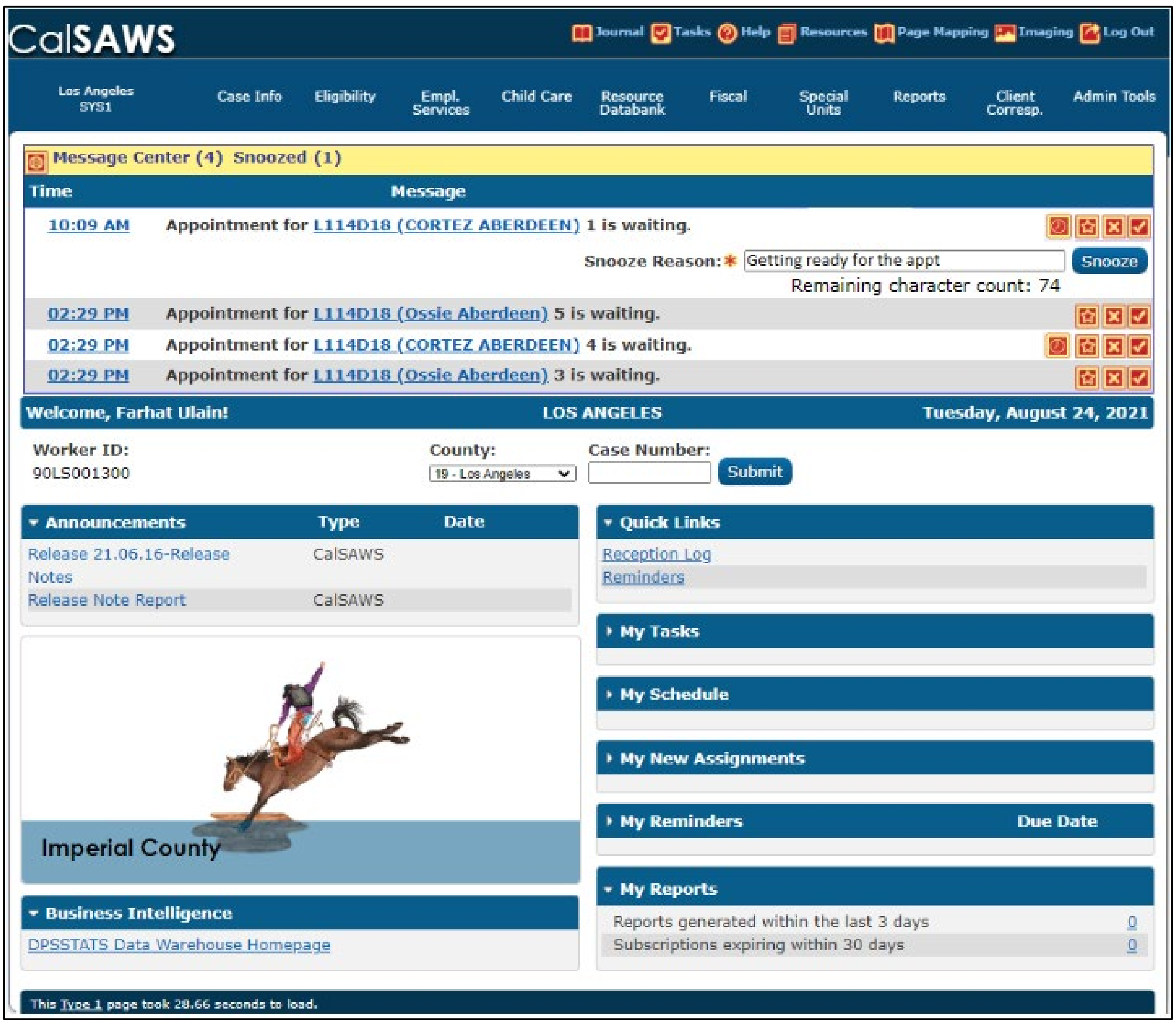
N/A

2.4 Message Center

2.4.1 Overview

The Message Center displays the e-mail notification when a customer checks in for the appointment. Currently, the Message Center displays the message with the Acknowledge, No Response, and Complete icons. This change will add a Snooze functionality in the Message Center for the workers to snooze the appointment.

2.4.2 Message Center – Mockup



2.4.3 Description of Change

1. Update Message Center header to add Snoozed field next to the Message field as displayed in Figure 2.4.2-1.
   a. The Snoozed field will be dynamic and will only be displayed when a notification has been snoozed.
2. Add a Snooze icon in the Message Center as displayed in figure 2.4.2-1
   a. Upon clicking on the Snooze icon, a Snooze Reason field with a text box and a Snooze button will be displayed underneath.
   b. Users will be able to enter a reason in the text box for snoozing the appointment.
      i. The text box will be a required field.
      ii. Maximum character limit for the text box will be 100 characters.
   iii. This field will display the remaining character count underneath.
   c. Upon entering the Snooze Reason and clicking on the Snooze button, the appointment will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page for the appointment type.
      i. A notification will re-appear when the number of Snooze Minutes is over for the appointment.
3. The Snooze icon will only be displayed for the appointments that are configured for Snooze in the Visit Purpose Detail page.
4. The Snooze icon will only be displayed when the Visit Status is set to 'Worker Notified', Worker Acknowledged', and 'Snoozed'.
5. The number of snoozes and the most recent Snooze Reason text will be sent with both levels of thresholds/escalation emails.
   a. Add the 'Number of Snoozes' and the 'Last Snooze Reason' to the body of the existing threshold/escalation email.

      Body of the escalation email:

      Waiting Time is over the {First/Second} threshold limit
      Time Waited: {Minutes the appointment is past due}
      Visit Purpose: {Purpose of the visit}
      Number Assigned: {Assigned Number}
      Case Number: {Case Number}
      Number of Snoozes: {Number of times the user has snoozed the appointment}
      Last Snooze Reason: {Most recent snooze reason entered by the user}

Note: Users will be able to Snooze an appointment more than once.

2.4.4 Page Locations

N/A

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

3 MIGRATION REQUIREMENTS

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2215	The Contractor shall update the Appointment Management Solution to include “snooze” functionality on appointment notifications, which allow the user to reschedule the appointment for a county-specified number of minutes later by pressing one button and prompts the user for a reason for the delay. The county administrators must be able to control whether this feature is enabled in their county.	Assuming the appointment notification referenced is in CalSAWS. Assuming the user referenced is a county staff member. Assuming snooze doesn’t shift remaining appointments in the day.	Snooze functionality will be added in the Reception Log and in the Message Center, enabling the worker to Snooze an appointment, before the escalation begins.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208186

Modify Customer Activity Detail Page to Retain all Customer Activity Statuses

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Farhat Ulain
	Reviewed By	Matthew Lower, Long Nguyen, Lien Phan, Gingko Luna, Himanshu Jain, Shilpa Suddavanda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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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, Customer Activity Detail page does not display all the statuses of an activity. If an activity status gets updated on the same day, previous status gets overridden and the most recent status is displayed in Customer Activity Detail page.

1.2 Requests

Add 'Status History' section in Customer Activity Detail page to display all previously updated statuses and the status dates of the activity.

1.3 Overview of Recommendations

Update Customer Activity Detail Page to add 'Status History' section. This section will display all previously updated statuses and the status dates of the activity in Customer Activity Detail page.

1.4 Assumptions

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

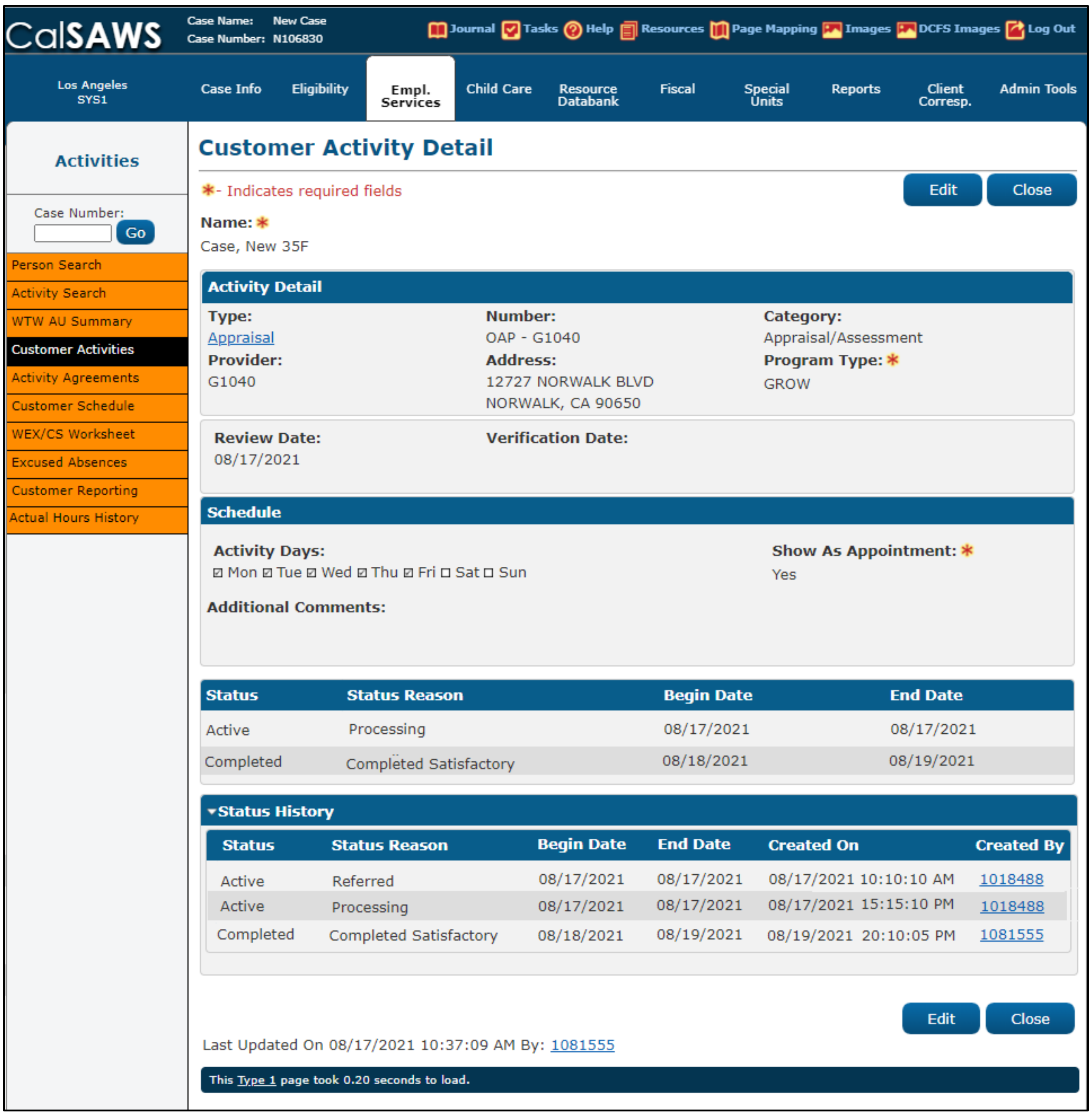
2 RECOMMENDATIONS

2.1 Customer Activity Detail Page

2.1.1 Overview

Add ‘Status History’ section in Customer Activity Detail page.

2.1.2 Customer Activity Detail Page – Mockup



2.1.3 Description of Change

1. Update Customer Activity Detail page to add collapsible Status History section as displayed in figure 2.1.2-1.
   a. This section will display all statuses that were added to the activity.
   b. This section will be collapsed when the Customer Activity Detail page gets loaded.
   c. In the Status History section, there will be a table with the following columns.
      i. Status - This column will display the status of the activity.
      ii. Status Reason – This column will display the status reason of the activity.
      iii. Begin Date – This column will display the status begin date of the activity.
      iv. End Date – This column will display the status end date of the activity.
      v. Created On – This column will display the date and time of the activity status formatted as <dd/mm/yyyy hh:mm:ss AM/PM>.
      vi. Created By – This column will display the staff Id of the worker who updates the activity status.
         a. The staff id will be a hyperlink.
         b. Clicking on the staff id link will navigate the user to the Worker Detail page.
2. Update Transaction History Detail page to remove following fields from the page.
   - Status
   - Status Reason
   - Begin Date
   - End Date

2.1.4 Page Locations

Global: Employment Services

Local: Activities

Task: Customer Activities

2.1.5 Security

N/A

2.1.6 Page Mapping

Update page mapping for the new fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.5	The CalSAWS 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 status History section will be added to display all statuses and dates and time of the activity status.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214912
DDID 2240, 2246

Task Management
Enhanced Task Search

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

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to Task search capabilities.

1.1 Current Design

The CalSAWS System contains a Task Search page within the Task Pop-Up allowing county staff to search for Tasks. This page includes various attributes that can be used during a Task search.

1.2 Requests

Update the Task Search page within the CalSAWS System Task Pop-Up to include additional attributes that can be used for Task searches.

1.3 Overview of Recommendations

1. Refine the options in the Program attribute on the Task Pop-Up Task Search page to be consistent with other CalSAWS System pages.
2. Modify the Task Pop-Up Task Search page to include functionality to search by Program Status/Status Date, Created Date, Created By Worker, and Long Description text.

1.4 Assumptions

N/A.

2 RECOMMENDATIONS

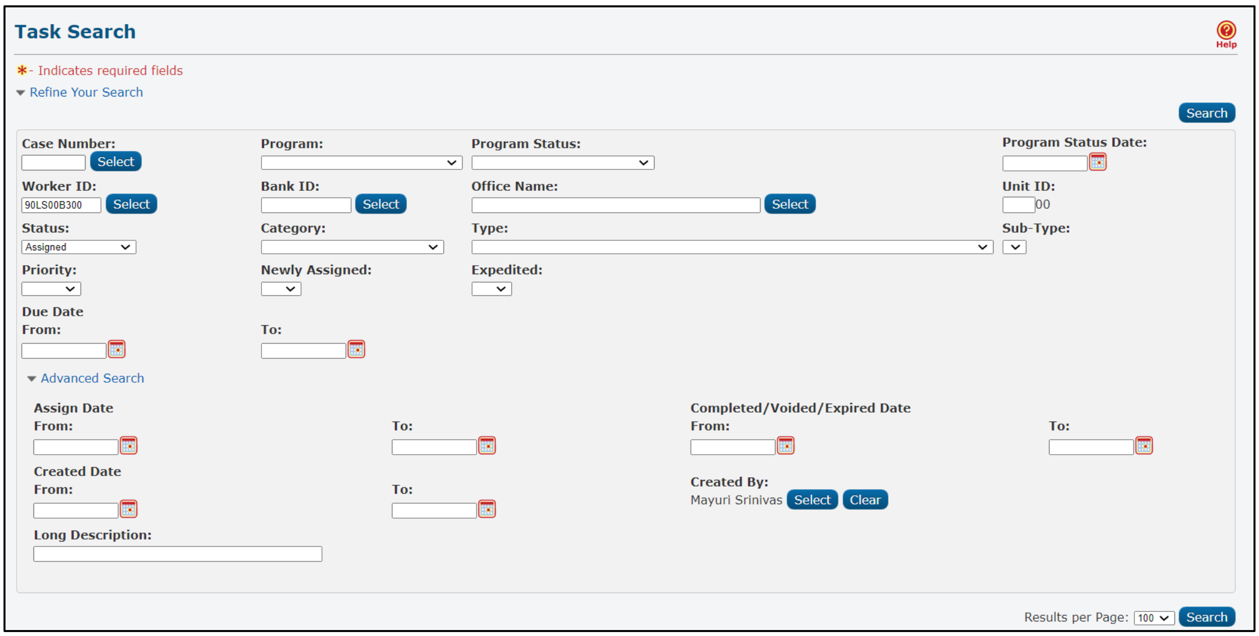
This section outlines recommendations to enhance the Task Pop-Up Task Search options in the CalSAWS System.

2.1 Task Pop-Up – Task Search

2.1.1 Overview

This section describes recommendations to update the Task Pop-Up Task Search page to incorporate additional search options.

2.1.2 Task Pop-Up – Task Search Mockup



2.1.3 Description of Changes

Update the Task Pop-Up – Task Search page in the CalSAWS System as outlined below. Note: If the Search Button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the search results section.

1. Refine the options within the Program dropdown based on the list specified in Appendix 7.1. The options will display in alphabetical order.
2. Program Status – This field will dynamically display when a value is selected in the Program dropdown. This dropdown field allows the user to search by a specific program status for the Task program. If the User searches with this parameter, the User must also input a value in the Program Status Date field. Searches with a Program, Program Status,

and Program Status Date will only evaluate Tasks that are associated to a Program. The values that will be available in this dropdown are included in Appendix 7.2. The options will display in alphabetical order.

3. Program Status Date – This field will dynamically display when a value is selected in the Program Status dropdown. This field will default to the current system date. This date field allows a User to filter Tasks by a specific program status date for the Task program. Searches with a Program, Program Status, and Program Status Date will only evaluate Tasks that are associated to a Program.

   For Example: Case 123 has a CalWORKs program that was Active from June 1st 2021 to June 30th 2021 and Discontinued from July 1st indefinitely.

6/1/2021 6/30/2021	7/1/2021 >>>
ACTIVE	**DISCONTINUED**

   Suppose Case 123 has a Task associated to the CalWORKs program. The Following table illustrates the result of searching by specific Program Status and Program Status Date values for this example:

Status	**Status Date**	**Result**
Active	06/15/2021	The Task is returned because the CalWORKs program for this Task was Active on 6/15/2021.
Active	07/15/2021	No Results because the CalWORKs program for this Task was not Active on 07/15. It is Discontinued at this time, so it does not meet the search condition.
Discontinued	06/15/2021	No Results because the CalWORKs program for this Task was not Discontinued on 06/15/2021. It is Active at this time, so it does not meet the search condition.
Discontinued	7/15/2021	The Task is returned because the CalWORKs program for this Task was Discontinued on 07/15/2021.

4. Add the following search options to the Advanced Search Section of the page:
   a. Created Date– Displays two date fields allowing a user to search for Tasks by the Task created date. The optional date fields are:

i. From – A date field specifying the beginning of the date range to search by Task created dates.
ii. To – A date field specifying the end of the date range to search by Task created dates.

Searches by these dates are inclusive. For example, if a user searches with:

From: 01/01/2022

To: 01/03/2022

The search will look for Tasks created on 01/01/2022, 01/02/2022 and 01/03/2022.

If a value is specified in the From field, and the To field is left empty. The processing will search for Tasks that have been created on or after the date in the From field.

b. Created By – A field that will filter Tasks created by a specific Staff. A "Select" **BUTTON** displays to the right of this field that will navigate to the Select Staff page allowing the User to search for a specific Staff. A "Clear" **BUTTON** displays to the right of the "Select" button if a Staff has been selected for this field. The Clear button allows the user to clear this attribute if necessary. This field only allows searching of Tasks created by a true Staff person, it does not allow searching for Tasks created by a batch process.
c. Long Description – A text field which will filter Task results if the Long Description attribute of the Task includes the text within this field (upper/lower case does not matter). This field is limited to 100 characters.

Example: If a Task Long Description is "Bob Jones has reached the WTW 24 month clock", searching with any of the following text strings in the Long Description field will return the Task in the results:

1. "WTW 24"
2. "Bob JONES"
3. "month clock"
4. "Bob Jones has reached the WTW 24 month clock"

2.1.4 Page Validations

1. "Created Date – the To date must be after the From date."
   a. Add a validation message to display when the User enters a value in the Created Date "To" field that is after the Created Date "From" field within the search parameters.

2.1.5 Page Location

N/A.

2.1.6 Security Updates

N/A.

2.1.7 Page Mapping

Update page mapping to include new attributes.

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

3 SUPPORTING DOCUMENTS

N/A.

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2246	The CONTRACTOR shall update the Task Management solution to allow users to search for tasks by keyword in the Long Description field of the task, search by the user that created the task, or created on date range. The CalSAWS Software will validate that the search scope is sufficiently small and demand greater specificity before running the search on too many tasks.	Assuming current requirement for minimum search criteria of Case Number, Office, Unit, or Worker is sufficient to contain search scope.	This design is adding functionality to the CalSAWS System allowing Users to search for Tasks with the additional options specified.
2240	**Original:** The CONTRACTOR shall update My Task, Task Search, and Worklist page so that a user can search for tasks by program status(es) and corresponding status effective date. **Revised:** The CONTRACTOR shall update the Task Search page so that a user can search for tasks by program status(es) and corresponding status effective date.	N/A.	This design is adding functionality to the CalSAWS System allowing Users to search for Tasks with the additional options specified.

5 MIGRATION IMPACTS

N/A.

6 OUTREACH

N/A.

7 APPENDIX

7.1 List of Programs

a. AAP
b. Adult Protective Services
c. CAPI
d. CFET
e. Cal-Learn
f. CalFresh
g. CalWORKs
h. Child Care
i. Child Protective Services
j. Disaster CalFresh
k. Diversion
l. Foster Care
m. Homeless - Perm
n. Homeless – Temp
o. Immediate Need
p. IHSS/CMIPS II
q. Kin-GAP
r. Linkages Adult Services
s. Medi-Cal
t. Multipurpose Senior Service
u. Nutrition Benefit
v. RCA
w. REP
x. Welfare to Work

In addition to the above, the following GA/GR programs will be included based on the viewing county:

County	Programs
Los Angeles	a. GROW b. General Assistance/General Relief
1. Alpine 2. Amador 3. Butte 4. Calaveras 5. Colusa 6. Del Norte 7. El Dorado 8. Glenn 9. Humboldt 10. Imperial 11. Inyo 12. Kern 13. Kings	a. General Assistance (Managed) b. General Assistance (Non-Managed)

County	Programs
14. Lake 15. Lassen 16. Madera 17. Marin 18. Mariposa 19. Mendocino 20. Merced 21. Modoc 22. Mono 23. Monterey 24. Napa 25. Nevada 26. Plumas 27. Riverside 28. San Benito 29. San Bernardino 30. San Joaquin 31. Shasta 32. Sierra 33. Siskiyou 34. Stanislaus 35. Sutter 36. Tehama 37. Trinity 38. Tuolumne 39. Yuba	
1. Alameda 2. Contra Costa 3. Fresno 4. Orange 5. Placer 6. Sacramento 7. San Diego 8. San Francisco 9. San Luis Obispo 10. San Mateo 11. Santa Barbara 12. Santa Clara 13. Santa Cruz 14. Solano 15. Sonoma 16. Tulare 17. Ventura 18. Yolo	a. General Assistance/General Relief b. GA/GR Employment Services

7.2 Program Status Options:

y. Active
z. Deferred
aa. Denied
bb. Deregistered
cc. Discontinued
dd. Exempt
ee. Good Cause
ff. Ineligible
gg. Non-Comp
hh. Pending
ii. Sanction
jj. Waiting to Transfer

CalSAWS

California Statewide Automated Welfare System

Design Document

DRAFT

CA-215672 DDID 2320/2314 FDS: GA GR Phase 2 Batch 2 (4 Rules) - Income Rules and Corresponding NOA Reasons

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Peterson Etienne, Stephanie Hugo, Taylor Fitzhugh
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/8/2021	1.0	Initial draft.	Peterson Etienne, Stephanie Hugo, Taylor Fitzhugh
07/29/2021	1.1	Removed the status reason 'Prev. Lumpsum POI' set in Educational Grants and loans and will be moved to Lumpsum POI functionality.	Peterson Etienne
08/05/2021	1.2	The functionality 'Educational Grant and loan', 'Shared Housing' and 'Indigent Burial' will be removed and moved to phase 3 release.	Peterson Etienne
08/10/2021	1.3	Changed the status reason Elig Child < 18 to Elig Child >18.	Peterson Etienne
08/12/2021	1.4	Update CalWIN income type: (CBP In-kind for CAAP SSIP, CALM, PAES) (CBP In-kind for CAAP GA) (CBP In-kind for CAAP – Other) (CBP In-kind for CAAP – Stabilization) to utilize conversion mapping.	Peterson Etienne
8/12/2021	1.5	Removed status reasons from inkind income functionality due to they fail the individual, discussion are still going on about why are members being failed in financial evaluation. They will be brought back in phase 2 batch 4 CA-229096	Jennifer Chen
8/18/2021	1.6	Added additional conditions for status reasons for AU Eligible for Family functionality based on the visio flow chart. Changed the income type condition from Unemployment to	Peterson Etienne

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		UIB for the status reason Gross Income > Grant in Unearned income. Removed the following status reason in Unearned income: 1. Aid Date Expired – The logic was moved due to it being set for batch and it will be handled in a future SCR. 2. Aid Ended – Was removed since the logic was moved to financial overall flow functionality in SCR CA-224578. 3. AIK – Income Disregard Not Counted – The status reason does not effect the program or person so it was removed. 4. Shelter Expense Allowed - The status reason does not effect the program or person so it was removed. 5. Prev. Lumpsum POI – The logic is being moved to Lumpsum functionality in SCR CA-229096. 6. AIK - Receives Income - The status reason does not affect the program or person, so it was removed. 7. Lumpsum POI - Discontinue. - The status reason does not affect the program or person, so it was removed. 8. In-kind Income Not Received - The status reason does not affect the program or person, so it was removed. 9. Income Verification Pending - The status reason does not affect the program or person, so it was removed. 10. Gross Income > Grant – The status reason was removed	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		due to it being person level failure reason. 11. Income Unverified by Sponsor – this status reason that fails the program is already set in earned income verification.	
08/24/2021	1.7	Removed 'Needs Met' condition in in-kind income functionality.	Peterson Etienne
8/30/2021	1.8	Removed 2 verification from inkind income due to they are duplicate of earned income verification	Jennifer Chen
8/31/2021	1.9	Added 2 assumptions for inkind income functionality	Jennifer Chen
8/31/2021	2.0	Removed XAF642 - Sponsor In-kind Income unverified' Correspondences	Harish Katragadda

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1 OVERVIEW

This SCR will implement the household composition and Non-financial functionality for the new CalWIN General Assistance/General Relief (GA/GR) solution in CalSAWS

1.1 Current Design

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their General Relief Opportunities for Work (GROW) program. Currently CalWIN manages their GA/GR program logic by using a Rule Matrix which can be accessed by the county to allow each county administrator to customize the behavior to their specific county.

1.2 Requests

A new CalWIN GA/GR solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will automate the household composition and Non-financial functionality for the new solution

1.3 Overview of Recommendations

1. Add all the required Data Collection elements to implement the Financial functionalities for the new solution
2. Create new Admin Summary and Detail pages that can be accessed in Admin tools by the County Admin staff
3. A new set of Admin detail pages, Rules, Batch and NOA triggers will be added for the below Financial.

    1. AU Eligible for Family
    2. Budget
    3. In-Kind Income
    4. Unearned Income

1.4 Assumptions

1. The existing Los Angeles county rules will remain unchanged.
2. This SCR CA-215672 is based on the WCDS approved documents.
3. The design of the rules is for each CalWIN county based on the Gainwell documents approved by the counties.
4. This SCR CA-215672 is phase two of four which consists of 4 CalWIN rulesets for Financial. The remaining rulesets will be designed in SCR CA-224578 and CA-229096. Three of the SCR's (CA-215916, CA-215672 and CA-224578) will be implemented in the 21.11 release and CA-229096 will be implemented in 22.01 release.

5. The functionality of this SCR CA-215672 will be disabled until activated by the system property flag established in SCR CA-215687 which is part of the 20.11 release.
6. Any logic related to San Francisco explicitly called out in relevant WCDS approved use cases will be included in this design. Any, San Francisco sub program logic independent of the rule will be added in SCR CA-215677 DDID 2374 scheduled for 22.01.
7. Alerts will be handled separately outside the Rules design in a separate SCR CA-220119.
8. During testing the EDBC will result in 0 benefit as resource will be set to PASS. Resource and reporting logic will be added in phase 3 release 21.11 (CA-215917).
9. All functionality related to new fields will only affect the rules related to an individual county's General Assistance/General Relief program and will not impact the rules of other programs, unless specified.
10. All Data collection used in EDBC determination is effective for the benefit month.
11. Leveraged rules are main rules from another use cases whose logic are also used in this use case. Leveraged rules in this SCR whose main use case are not designed in phase 1 or 2 cannot be tested using the admin page. Example: Institutional status use case has a leverage rule that is a main rule in Earned income use case. Since Earned income use case is not designed in phase 1 or 2, this leverage rule will not be able to be tested from the admin page.
12. EDBC summary page layout will follow current Los Angeles County GA EDBC summary. The following sections will be in the EDBC summary page, others will be added in later phases: EDBC Header, EDBC Information, Program Configuration, Reporting Configuration, Allotment, Page Mappings (PMCR) and Security (STCR). Note: Allotment will have all 0 for values, and Security will follow current Los Angeles county security framework.
13. End to End testing of EDBC and Correspondence will not be possible until 22.01 release.
14. All calculation for computed values will detailed in the Visio diagram.
15. 'Participation status' will be an internal flag in CalSAWS, when a participation status is set in the rule it will replace the previous set status for each individual.
16. Logic that checks or creates Sanctions cannot be tested until CA-227328 is implemented.
17. Currently 'Aid to pay date' will trigger MU trigger to fail GA the month after the 'Aid to pay date'. Worker will be responsible to fail the program for prior benefit months.
18. The following status reasons will be designed as a CalWIN status code in this SCR but will be translated in a future design:
    a. X10224
19. Changes to the Financial Data Collection pages will be moved to SCR CA-232396
20. Inkind income chart amount (DB table to get chart(standard) amount based on inkind income type) used in inkind income functionality will not have all of the inkind income types. For the inkind income types that is not in the table, the inkind income chart amount will be 0. This will be fixed with SCR CA-232396.

21. Inkind income functionality, 'total CAAP inkind income amount' and the status reason it trigger 'Inkind income exceed limit' cannot be tested until SCR CA-232396 is complete.

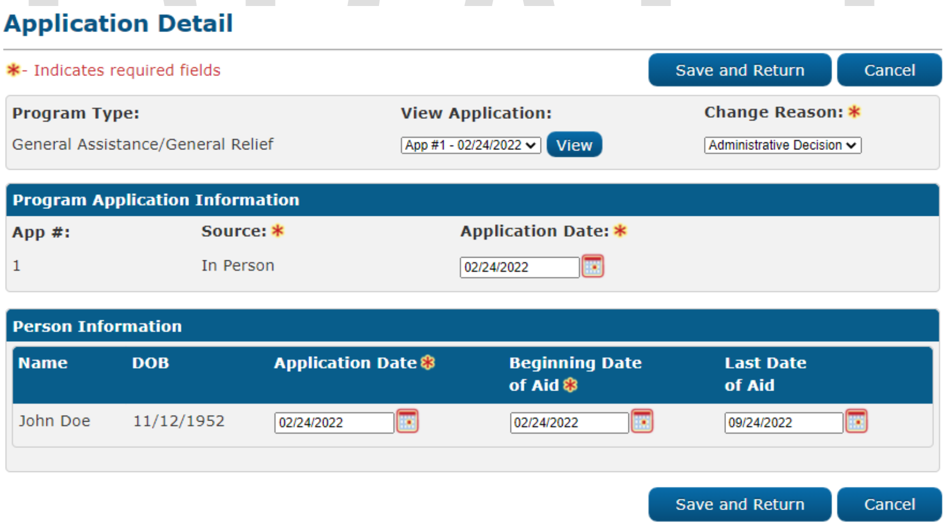
2 RECOMMENDATIONS

2.1 Application Detail

2.1.1 Overview

The "Application Detail" page is used to modify the user's base application information. This page will be modified to add a Last Date of Aid Column for the GA/GR Automated EDBC/CC solution that will be used by EDBC to close and prorate program benefits.

2.1.2 Application Detail Mockup



2.1.3 Description of Changes

1. Add the "Last Date of Aid" column. This column will only display when the user is in the context of the General Assistance/ General Relief program associated with the GA/GR Automated EDBC/CC solution.

2. Add the validation, "The Last Date of Aid must be after the Beginning Date of Aid". This validation will trigger when the Last Date of Aid is On- or prior to the Beginning Date of Aid.

2.1.4 Page Location

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

2.1.5 Security Updates

No Security Updates.

2.1.6 Page Mapping

Add page mappings for the new field.

2.1.7 Page Usage/Data Volume Impacts

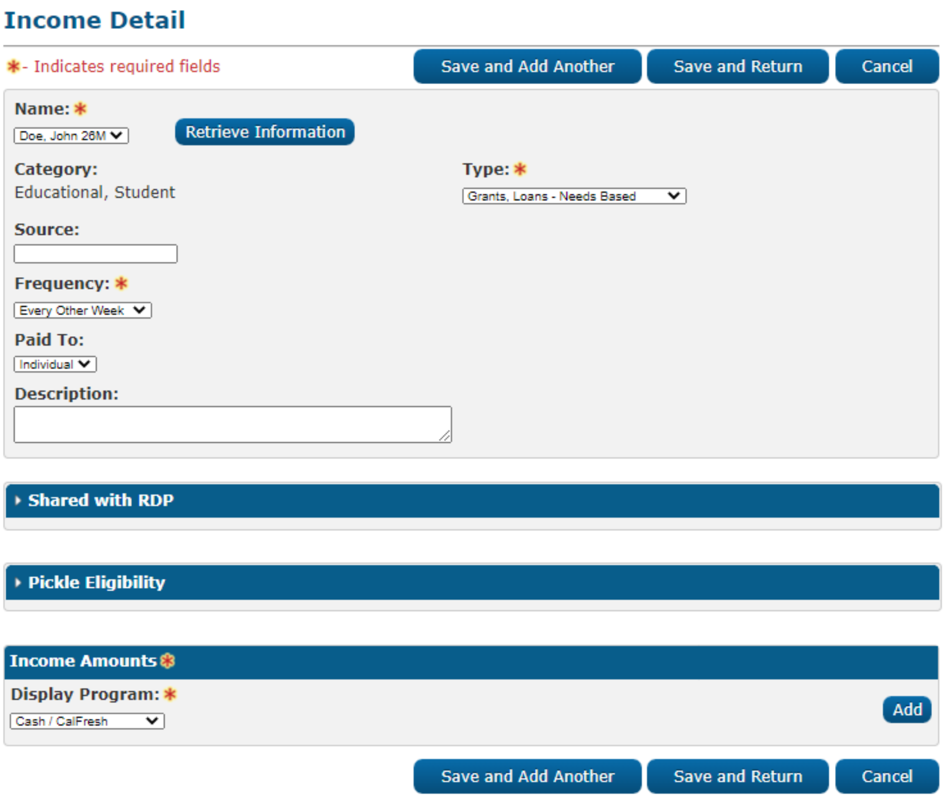
No page usage impacts.

~~2.2 Income Detail~~

~~2.2.1 Overview~~

~~The "Income Detail" page is used to record information regarding a person's housing situation. This page will be updated to track an individual's CHASS Shelter information.~~

~~2.2.2 Income Detail Mockup~~



~~2.2.3 Description of Changes~~

1. ~~Add the "Paid To" Dropdown field. This field will only be editable in Create and Edit modes. This field will only display when the Category is Educational, Student. This field will default to blank and have the following options:~~
    a. ~~Individual~~
    b. ~~Institution~~

~~2.2.4 Page Location~~

- ~~**Global:** Case Info~~
- ~~**Local:** Customer Information~~
- ~~**Task:** Financial -> Income~~

~~2.2.5 Security Updates~~

~~No Security Updates.~~

~~2.2.6 Page Mapping~~

~~Add page mappings for the new field.~~

~~2.2.7 Page Usage/Data Volume Impacts~~

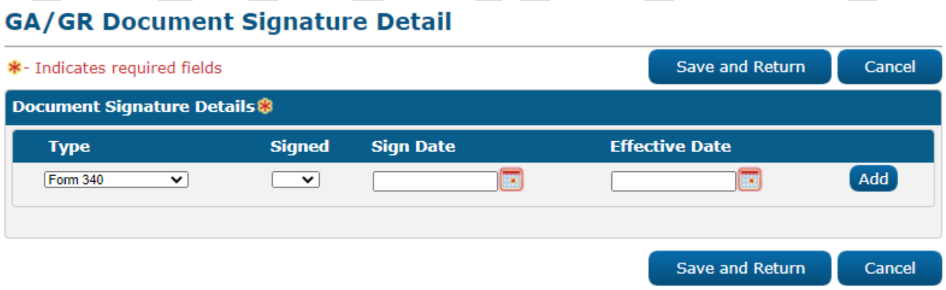
~~No page usage impacts.~~

2.3 Document Signature Detail

2.3.1 Overview

The "Document Signature Detail" page is used to record information regarding a person's housing situation. This page will be updated to track an individual's CHASS Shelter information.

2.3.2 Document Signature Detail Mockup



2.3.3 Description of Changes

1. Add the "Form 340" option to the Type dropdown.

2.3.4 Page Location

- **Global:** Case Info
- **Local:** Customer Information
- **Task:** GR -> Document Signature

2.3.5 Security Updates

No Security Updates.

2.3.6 Page Mapping

No page mappings required.

2.3.7 Page Usage/Data Volume Impacts

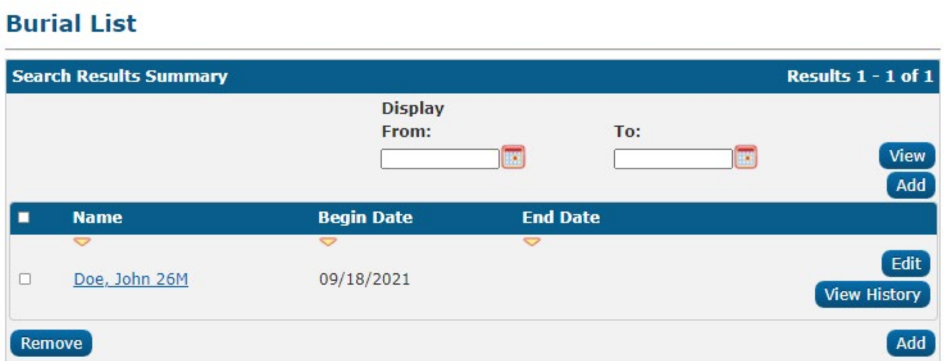
No page usage impacts.

2.4 Burial List

2.4.1 Overview

The “Burial List” page is used to display information regarding the burial of a deceased participant.

2.4.2 Burial List Mockup



2.4.3 Description of Changes

1. Display From: This field will be the limit for the earliest date that the displayed records will be available. The default view will display active within the last 90 days.
2. To: This field will be the upper limit for when a record ended.
3. View: This button will reload the search results based on the dates provided.
4. Add: if the user has the “BurialDetailEdit” right, the Add button will display and take the user to the “Burial Detail” in create mode.
5. Checkbox: The checkboxes will only display when the user has the “BurialDetailRemove” right.
6. Name: This will display the name of the individual the record is applicable for. If the user has the “BurialDetailView” right, the name will display as a hyperlink that will take the user to the “Burial Detail” in view mode.
7. Begin Date: The begin Date of the Burial record.
8. End Date: The end Date of the Burial record.
9. Edit: if the user has the “BurialDetailEdit” right, the edit button will display and take the user to the “Burial Detail” in edit mode.

10. View History: This button will take the user to the Transaction History Detail for the associated record. This button will only display when the user has the "BurialDetailView" right.
11. Remove: This button will delete the records with the checkboxes selected. This button will only display when the user has the "BurialDetailRemove" right.

2.4.4 Page Location

- **Global:** Case Info
- **Local:** Customer Information
- **Task:** GR -> Burial

2.4.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
BurialDetailEdit	Burial Detail	Burial Detail Edit
BurialDetailView	Burial Detail	Burial Detail View, Burial Detail Edit
BurialListView	Burial List	Burial List View, Burial Detail View, Burial Detail Edit
BurialDetailRemove	Burial List	Burial Detail Remove

Security Groups:

Security Group	Group Description	Group to Role Mapping
Burial Detail Edit	This group has the capability to access the Burial Detail page to view, edit, and create information.	See the Security Matrix for the group to role associations
Burial Detail View	This group has the capability to access the Burial Detail page to view information.	See the Security Matrix for the group to role associations

Security Group	Group Description	Group to Role Mapping
Burial List View	This group has the capability to access the Burial List page to view information.	See the Security Matrix for the group to role associations
Burial Detail Remove	This group has the capability to access the Burial List page to remove information.	See the Security Matrix for the group to role associations

2.4.6 Page Mapping

Add page mappings for the new page.

2.4.7 Page Usage/Data Volume Impacts

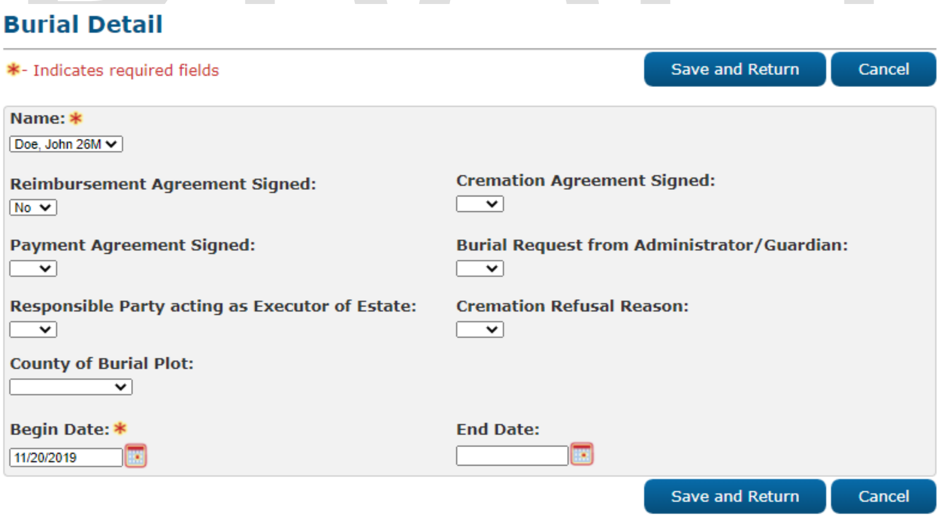
No page usage impacts.

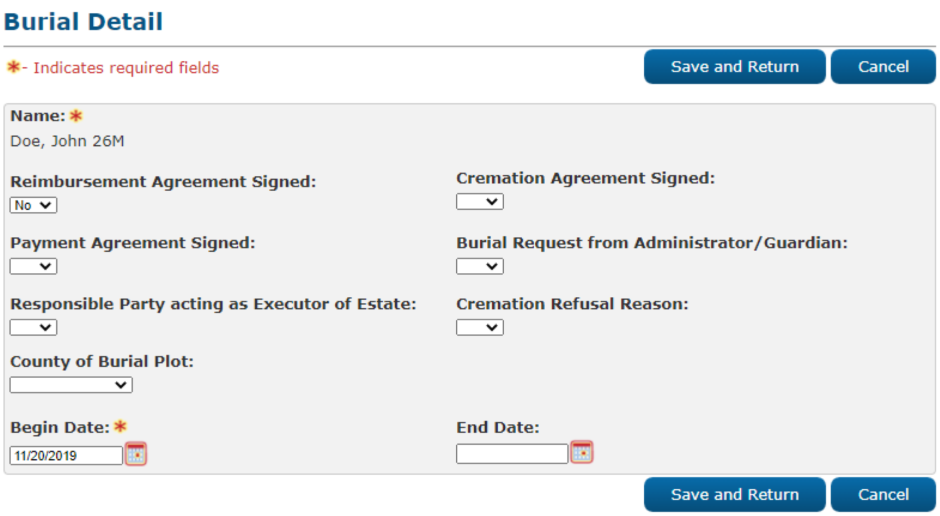
2.5 Burial Detail

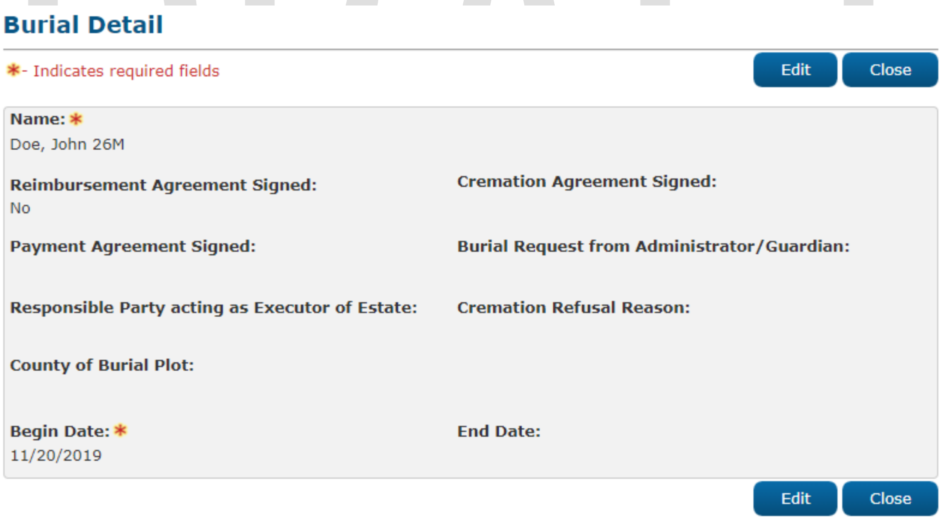
2.5.1 Overview

The “Burial Detail” page is record information about the burial of a GA/GR participant.

2.5.2 Burial Detail Mockup







2.5.3 Description of Changes

1. Name: Name of the Participant. This dropdown will have a list of all case members. This dropdown will default to "-Select-". This field will be required. This field will only be editable in create mode.
2. Reimbursement Agreement Signed: Indicates if the Reimbursement Agreement was signed by a surviving relative. This Yes/No dropdown

will default to blank. This field will only be editable in create and edit mode.

3. Cremation Agreement Signed: Indicates if the Cremation Agreement was signed by a surviving relative. This Yes/No dropdown will default to blank. This field will only be editable in create and edit mode.
4. Payment Agreement Signed: Indicates if the Payment Agreement was signed by a surviving relative. This Yes/No dropdown will default to blank. This field will only be editable in create and edit mode.
5. Burial Request from Administrator/Guardian: Indicates if the Burial Request from Administrator/Guardian was signed. This Yes/No dropdown will default to blank. This field will only be editable in create and edit mode.
6. Responsible Party acting as Executor of Estate: Indicates if the Responsible Party is acting as the Executor of Estate. This Yes/No dropdown will default to blank. This field will only be editable in create and edit mode.
7. Cremation Refusal Reason: Indicates the reason the cremation of the deceased was refused. This dropdown will default to blank. This field will only be editable in create and edit mode. This field will have the following options:
    a. Family Preference
    b. Insufficient Funds
    c. Legal Issues
    d. Other
    e. Owns Burial Plot
    f. Personal Preference
    g. Religion
    h. Sociological Reasons
    i. Will states no cremation
8. County of Burial Plot: The name of the county the burial plot is located in. This field will default to blank. This field will only be editable in create and edit mode. This field will be a dropdown with the following values in the given order:
    a. Alameda
    b. Alpine
    c. Amador
    d. Butte
    e. Calaveras
    f. Colusa
    g. Contra Costa
    h. Del Norte
    i. El Dorado
    j. Fresno
    k. Glenn
    l. Humboldt
    m. Imperial
    n. Inyo
    o. Kern

p. Kings
q. Lake
r. Lassen
s. Los Angeles
t. Madera
u. Marin
v. Mariposa
w. Mendocino
x. Merced
y. Modoc
z. Mono
aa. Monterey
bb. Napa
cc. Nevada
dd. Orange
ee. Placer
ff. Plumas
gg. Riverside
hh. Sacramento
ii. San Benito
jj. San Bernardino
kk. San Diego
ll. San Francisco
mm. San Joaquin
nn. San Luis Obispo
oo. San Mateo
pp. Santa Barbara
qq. Santa Clara
rr. Santa Cruz
ss. Shasta
tt. Sierra
uu. Siskiyou
vv. Solano
ww. Sonoma
xx. Stanislaus
yy. Sutter
zz. Tehama
aaa. Trinity
bbb. Tulare
ccc. Tuolumne
ddd. Ventura
eee. Yolo
fff. Yuba
ggg. Out of State

9. Begin Date: Indicates the effective start date of the record. This Date field will default to blank. This field will only be editable in create and edit mode.

10. End Date: Indicates the effective end date of the record. This Date field will default to blank. This field will only be editable in create and edit mode.
11. Save and Return: This button will only appear in Create and Edit Modes. This button will save the record to the database and return the user to the Burial List page. Records will be effective dated based on the participant.
12. Edit: This button will on appear in View Mode and the user has the "BurialDetailEdit" right. This button will reload the page in Edit mode for the given record.
12. Cancel: This button will only appear in Create and Edit Modes. This button will discard all changes and return the user to the Burial List page. Cancel: This button will only appear in Create and Edit Modes. This button will discard all changes and return the user to the Burial List page.
13. Close: This button will only appear in View Modes. This button will return the user to the Burial List page.

2.5.4 Page Location

- **Global:** Case Info
- **Local:** Customer Information
- **Task:** GR -> Burial

2.5.5 Security Updates

No Security Updates.

2.5.6 Page Mapping

Add page mappings for the new page.

2.5.7 Page Usage/Data Volume Impacts

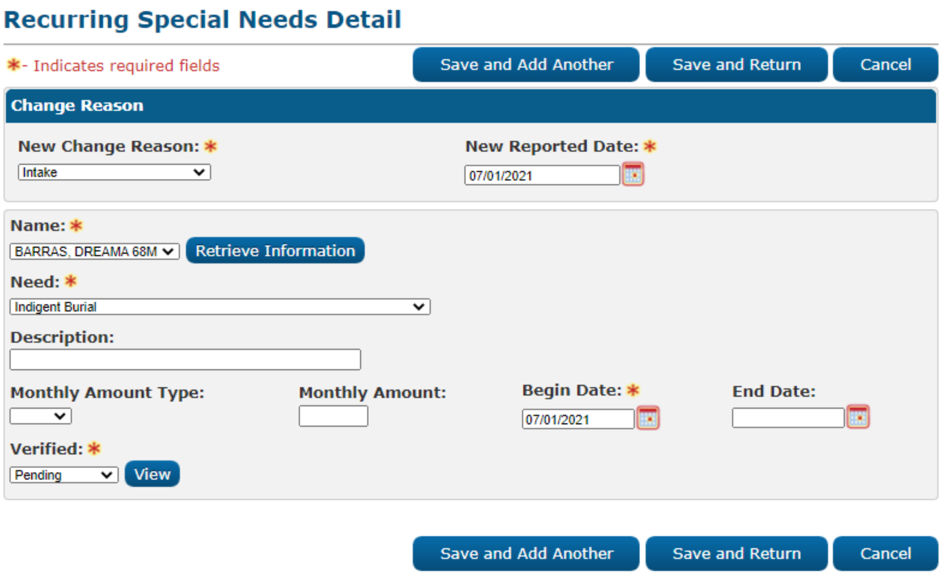
No page usage impacts.

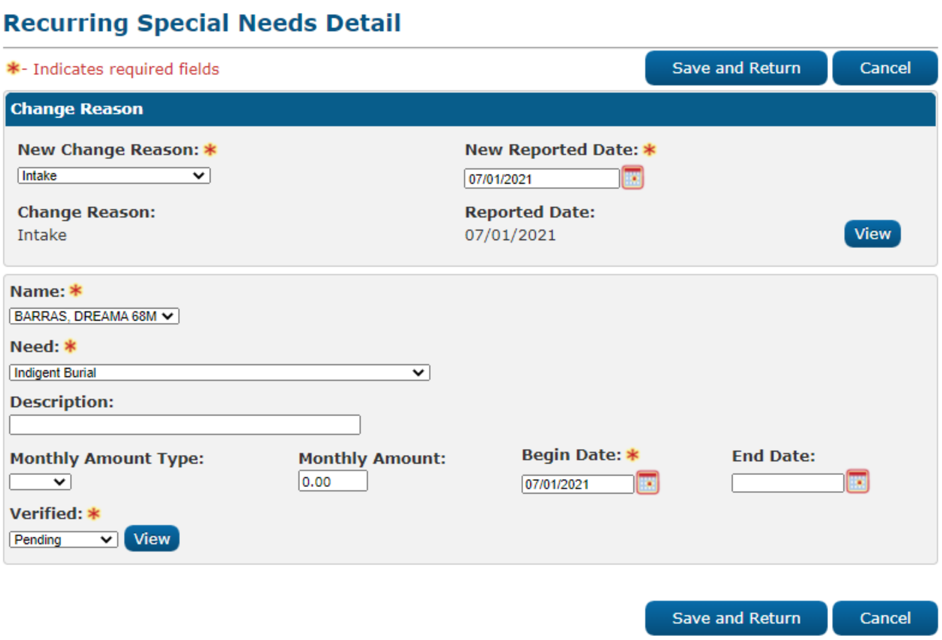
2.6 Recurring Special Needs Detail

2.6.1 Overview

The "Recurring Special Needs Detail" page is used to record information about needs that need to be paid or in recurring fashion. This page will be updated to add additional need types needed for GA/GR rules for the Automated GA/GR EDBC/CC solution.

2.6.2 Recurring Special Needs Detail Mockup





Recurring Special Needs Detail

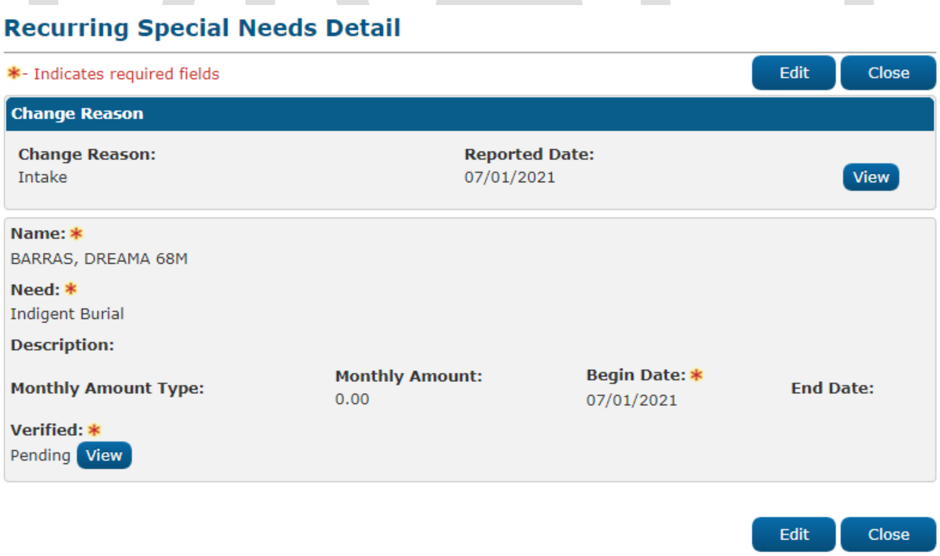
*- Indicates required fields | Save and Return | Cancel

Change Reason

New Change Reason: * Intake
New Reported Date: * 07/01/2021
Change Reason: Intake
Reported Date: 07/01/2021 | View

Name: * BARRAS, DREAMA 68M
Need: * Indigent Burial
Description:
Monthly Amount Type:
Monthly Amount: 0.00
Begin Date: * 07/01/2021
End Date:
Verified: * Pending | View

Save and Return | Cancel



Recurring Special Needs Detail

*- Indicates required fields | Edit | Close

Change Reason

Change Reason: Intake
Reported Date: 07/01/2021 | View

Name: * BARRAS, DREAMA 68M
Need: * Indigent Burial
Description:
Monthly Amount Type:
Monthly Amount: 0.00
Begin Date: * 07/01/2021
End Date:
Verified: * Pending | View

Edit | Close

2.6.3 Description of Changes

1. Add the following options to the Need dropdown. The new options will use the existing ordering:
    a. Indigent Burial
    b. Indigent Cremation

2.6.4 Page Location

- **Global:** Case Info
- **Local:** Customer Information
- **Task:** Financial -> Special Needs

2.6.5 Security Updates

No Security Updates.

2.6.6 Page Mapping

No page mappings required.

2.6.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.7 Income

2.7.1 AU Eligible for Family Functionality

2.7.1.1 County Admin Detail – AU Eligible for Family

2.7.1.1.1 Overview

A new County Admin Detail page for AU Eligible for Family will be created. This page is viewed by the County Administrator to view the list of rules applicable for the AU Eligible for Family functionality to their county.

2.7.1.1.2 Description of Changes

a. The Admin page detail for AU Eligible for Family will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Family GA Program applicable.	N	N	Y	Y	Y	N	Y	Y	N	N	Y	N	Y	N	N	Y	N	N
Children in application minors.	N	N	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	Y	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX303C001	Family GA Program applicable.
EDX303C002	Children in application minors.

* The following rule will not be migrated into CalSAWS for the following reasons.

CalWIN Number	CalWIN Description	Reason
EDX303C003	Grant on AU Size	Excluded since both yes and no ends this functionality.
EDX303C005	CalWORKs SFU	Excluded since this does not have a function.
EDX303C007	CalWORKs ineligible SFU	Excluded since the trigger does not exists.
EDX303C006	N/A	Excluded - Not in copybook

2.7.1.2 EDBC Changes

2.7.1.2.1 Overview

This section will provide the Eligibility Rules flow for AU Eligible for Family Program Person Eligibility that can be filtered for each CalWIN County.

2.7.1.2.2 Description of Change

AU Eligible for Family Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
Sanctioned in CW	Cash Non-Compliance for CalWORKs	Eligibility non-compliance detail

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Eligible for CalWORKs' will be set as a display status reason when all the following conditions
    a. There is at least one 'Child' in the program (that has not failed).
    b. The rule ' Family GA Program applicable.' is active.
    c. All of the members in the program are currently aided in CW. (Check Other program assistant page, current case and different case)

Category	Short Description
73	Eligible for CalWORKs

2. The new program/person status reason CT73 'No Eligible Child > 18' will be set as a display status reason when all the following conditions
    a. There is at least one 'Child' in the program.
    b. The rule ' Family GA Program applicable.' is active.
    c. At least one of the members on program is not currently aided in CW.
    d. Determine if ~~any~~ all of the following is not true:
        i. ~~The individual has a cash Non-Compliance for CalWORKs.~~
        ii. Any of the individual on the program ~~has a CW Time limit status reason.~~ failed CalWORKs due to time clock.
        iii. The individual is sanctioned in CalWORKs for the benefit month
    e. The rule ' Children in application minors.' is active.
    f. There is not a 'Child' on the program under 18 years old.

Category	Short Description

73	~~No Eligible Child > 18 Elig. Child < 18~~ Elig Child > 18

3. The new program/person status reason CT73 'CW Sanction/Time Limit' will be set as a display status reason when all the following conditions
   a. There is at least one 'Child' in the program.
   b. The rule 'Family GA Program applicable.' is active.
   c. At least one of the members on program is not currently aided in CW.
   d. Determine if any of the following is true:
      i. ~~The individual has a cash Non-Compliance for CalWORKs.~~
      ii. The individual is sanctioned in CalWORKs for the benefit month
      iii. Any of the individual on the program ~~has a CW Time limit status reason.~~ failed CalWORKs due to time clock.

Category	Short Description
73	CW Sanction/Time Limit

2.7.1.3 Correspondence Reason Codes

2.7.1.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.7.1.3.2 Description of Change

1. **<u>Reason Code: XAF306 – Eligible for CalWORKs</u>**
   a. Trigger Condition
      i. This notice generates for the applicable counties when the program was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Eligible for CalWORKs'.
   b. Program Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Solano	Discontinuance	GA - Discontinuance - Eligible for CalWORKs	053	12141

2.7.1.4 Project Requirements

DDID 2320/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	Business Rule: {Family GA Program applicable} CalSAWS must determine whether to fail an individual applying for GA/GR based on eligibility of CalWORKs family members]	The rule 'Family GA Program applicable. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Children in application minors } CalSAWS must determine whether to fail an individual applying for GA/GR based on children in application are minors]	The rule 'Children in application minors. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

2.7.2 Budget Functionality

2.7.2.1 County Admin Detail – Budget

2.7.2.1.1 Overview

A new County Admin Detail page for Budget will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Budget functionality to their county.

2.7.2.1.2 Description of Changes

a. The Admin page detail for Budget will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Set prospective Budgeting.	Y	N	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	N
Set prospective Budgeting if Benefit month is within two months of Begin Date of Aid.	N	Y	N	N	N	N	N	N	Y	Y	N	N	N	N	N	N	N	Y
Set prospective Budgeting for income that is not earned, un-earned or self-employment.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDD001C003	Set prospective Budgeting.
EDD001C004	Set prospective Budgeting if Benefit month is within two months of Begin Date of Aid.
EDD001C006	Set prospective Budgeting for income that is not earned, un-earned or self-employment.

2.7.2.1 Project Requirements

DDID 2320/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	Business Rule: {Budget Method determination} CalSAWS must determine the budgeting method for budget calculation prospectively.]	The rule 'Set prospective Budgeting. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Budget Method determination} CalSAWS must determine the budgeting method for budget calculation based on payment month .]	The rule 'Set prospective Budgeting if Benefit month is within two months of Begin Date of Aid. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

DDID 2320/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Budget Method determination} CalSAWS must determine the budgeting method for budget calculation based on Income and payment month.]	The rule 'Set prospective Budgeting for income that is Earned, Un-Earned and Self-employment. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

2.7.3 In-kind income Functionality

2.7.3.1 County Admin Detail – In-kind income

2.7.3.1.1 Overview

A new County Admin Detail page for In-kind income will be created. This page is viewed by the County Administrator to view the list of rules applicable for the In-kind income functionality to their county.

2.7.3.1.2 Description of Changes

a. The Admin page detail for In-kind income will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
In-kind Income applicable.	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
Count earned in-kind income as un-earned income.	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	N
Pro-rate homeless and housed benefits.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX305C001	In-kind income applicable.
EDX305C002	Count earned in-kind income as un-earned income.
EDX305C003	Pro-rate homeless and housed benefits.

Leverage Rule

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Earned income – San Mateo Only.	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N
Grant greater than $5.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Prorate GR payments.	N	**Y**	N	**Y**	N	N	N	N	N	**Y**	N	N	**Y**	N	N	N	**Y**	**Y**
Earned income – Fresno Only.	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Alameda Only.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Santa Barbara Only.	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N
Earned income – Sacramento Only.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N

CalWIN Number	CalSAWS Rule
EDX309C010	Earned income – San Mateo Only.
EDX321C005	Grant greater than $5.
EDX304C002	Prorate GR payments.
EDX309C003	Earned income – Fresno Only.
EDX309C001	Earned income – Alameda Only.
EDX309C011	Earned income – Santa Barbara Only.

EDX309C006	Earned income – Sacramento Only.

2.7.3.2 EDBC Changes

2.7.3.2.1 Overview

This section will provide the Eligibility Rules flow for In-kind income Program Person Eligibility that can be filtered for each CalWIN County.

2.7.3.2.2 Description of Change

In-kind income Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
~~(CBP In-kind for CAAP SSIP, CALM, PAES)~~	~~Category: In-kind earned Income type: CBP-SSIP, CALM, PAES~~	~~Income Detail~~
~~(CBP In-kind for CAAP GA)~~	~~Category: In-kind earned Income type: CBP-GA~~	~~Income Detail~~
~~(CBP In-kind for CAAP – Other)~~	~~Category: In-kind earned Income type: CBP-Other~~	~~Income Detail~~
~~(CBP In-kind for CAAP – Stabilization)~~	~~Category: In-kind earned Income type: CBP-Stabilization~~	~~Income Detail~~
~~Entire Need Met~~	~~Category: In-kind earned Needs Met~~	~~Income Detail~~

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

Verification:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

Note: The following status reason will be placed at the end of non-financial low with the lowest priority.

1. The new program/person status reason CT73 'FTP In-kind Income' will be set as a display status reason when all the following conditions
    a. The rule 'In-kind income applicable.' is active.
    b. The leverage rule ' Earned income – San Mateo Only.' not active.
    c. the individual has the status 'FTP Income'.
    d. The income is category 'income in-kind earned' or 'income in-kind unearned'

Category	Short Description
73	FTP In-kind Income

~~2. The new program/person status reason CT73 'Income Unverified' will be set as a display status reason when all the following conditions~~
    ~~a. The rule 'In-kind income applicable.' is active.~~
    ~~b. The rule 'Earned income – San Mateo Only.' is not active.~~
    ~~c. The individuals 'Needs Met' is 'No'~~
    ~~d. There is income valid for the Benefit month.~~
    ~~e. The rule ' Pro-rate homeless and housed benefits.' is not active.~~
    ~~f. The Individual has the income type: Housing Earned for the Income Category: In-kind earned.~~
        - ~~Income type: CBP-SSIP, CALM, PAES"~~
        - ~~Income type: CBP-GA"~~
        - ~~Income type: CBP-Other"~~
        - ~~Income type: CBP-Stabilization"~~
    ~~g. The individual has the status reason 'FTP Income'.~~
    ~~h. The rule 'Earned income – Fresno Only.' is active.~~

~~Category~~	~~Short Description~~
~~73~~	~~Income Unverified~~

~~3. The new program/person status reason CT73 'Income Unverified by Sponsor' will be set as a display status reason when all the following conditions~~
    ~~a. The rule 'In-kind Income applicable.' is active.~~
    ~~b. The rule 'Earned income – San Mateo Only.' is not active.~~
    ~~c. The individuals 'Needs Met' is 'No'~~

~~d. There is income valid for the Benefit month.~~
~~e. The rule ' Pro-rate homeless and housed benefits.' is not active.~~
~~f. The Individual has the income type: Housing Earned for the Income Category: In-kind earned.~~
- ~~Income type: CBP-SSIP, CALM, PAES"~~
- ~~Income type: CBP-GA"~~
- ~~Income type: CBP-Other"~~
- ~~Income type: CBP-Stabilization"~~

~~g. The individual has the status reason 'FTP Income'.~~
~~h. The rule 'Earned income – Fresno Only.' is active.~~
~~i. The Individual is a 'Deemed Sponsor'. This is determined in Sponsored Non-citizen cert period functionality.~~

Commented [JC1]: How is this determined? A flag set in use case or checking if the participation status is 'deemed'?

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Income Unverified by Sponsor~~

2.7.3.3 ~~Correspondence Reason Codes~~

2.7.3.3.1 ~~Overview~~

~~This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.~~

~~The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.~~

2.7.3.3.2 ~~Description of Change~~

1. ~~**Reason Code: XAF642 – Sponsor In-kind Income unverified**~~
   a. ~~Trigger Condition~~
      i. ~~This notice generates for the applicable counties when the program was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Sponsor In-kind Income unverified'.~~
      ~~or~~
      ii. ~~This notice generates for the applicable counties when the program was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Sponsor In-kind Income unverified'.~~
   b. ~~Program Level Reason~~

~~c. County-specific information:~~

~~County~~	~~Action~~	~~Document Description~~	~~Number~~	~~Template~~
~~Fresno~~	~~Discontinuance~~	~~General Relief Discontinuance-Sponsored Alien Requirements~~	~~068-A~~	~~11539~~
~~Fresno~~	~~Denial~~	~~General Relief Denial - Sponsored Alien Requirements~~	~~127-C~~	~~610725~~

~~***NOTE: This reason is also triggered in the Unearned Income Functionality**~~

2.7.3.4 Project Requirements

DDID 2320/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Inkind Income Applicable} CalSAWs must determine whether Inkind income is applicable in a GA/GR case.]	The rule 'In-kind Income applicable.' 'will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Inkind Income Prorate CAAP Homeless} CalSAWs must prorate CAAP homeless and housing benefits.]	The rule 'Count earned in kind income as un-earned income.' 'will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Inkind Income Exempt Earned} CalSAWs must exempt earned Inkind income for GA/GR.]	The rule 'Pro-rate homeless and housed benefits.' 'will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

2.7.4 Unearned Income Functionality

2.7.4.1 County Admin Detail – Unearned Income

2.7.4.1.1 Overview

A new County Admin Detail page for Unearned Income will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Unearned Income functionality to their county.

2.7.4.1.2 Description of Changes

a. The Admin page detail for Unearned Income will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Income deductions.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Use net income.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y
Count all income excluding exemptions.	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
Income and cost of expense.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX310C002	Income deductions.
EDX310C003	Use net income.
EDX310C004	Count all income excluding exemptions.
EDX310C005	Income and cost of expense.

Leverage Rule

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Grant greater than $5.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Inkind Income applicable	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
Earned income – Alameda Only.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Santa Barbara Only	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N
Earned income – Sacramento Only.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Maximum Housing allowance if homeless	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N
Housing and Basic Needs Test	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Exempt based on usage of payment	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	Y	N	N	Y
Apply POI as lump sum received	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
POI by no rounding and days.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	N	N
Pro-rate homeless and housed benefits	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Count earned in-kind income as un-earned income.	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	N	N
Earned income – Fresno Only.	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – San Francisco Only.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Always Use Actuals for Earned Income	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N

CalWIN Number	CalSAWS Rule
EDX321C005	Grant greater than $5.
EDX305C001	In-kind Income applicable.
EDX309C001	Earned income – Alameda Only.
EDX309C011	Earned income – Santa Barbara Only.
EDX309C006	Earned income – Sacramento Only.

EDX323C015	Maximum Housing allowance if homeless.
EDX323C016	Housing and Basic Needs Test.
EDX312C004	Exempt based on usage of payment.
EDX312C006	Apply POI as lump sum received.
EDX316C011	POI by no rounding and days.
EDX305C003	Pro-rate homeless and housed benefits.
EDX305C002	Count earned in-kind income as un-earned income.
EDX309C003	Earned income – Fresno Only.
EDX309C008	Earned income – San Francisco Only.
EDX304C003	Always Use Actuals for Earned Income.

2.7.4.2 EDBC Changes

2.7.4.2.1 Overview

This section will provide the Eligibility Rules flow for Unearned Income Program Person Eligibility that can be filtered for each CalWIN County.

2.7.4.2.2 Description of Change

Unearned Income Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
Income date receive	Begin date	Income amount detail page
~~GA/GR Reported timely~~	~~Timely For GA/GR~~	~~Income Detail~~
Shelter expense	Category: Shelter	Expense detail page
Aid to pay date	Last Date of Aid	Application Detail page
Child spousal expenses	Category: Child/Spousal	Expense detail page

	Support - Court Ordered	

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. ~~The new program/person status reason CT73 'Aid Date Expired' will be set as a display status reason when all the following conditions~~
   a. ~~The Last Date of Aid is a valid date.~~
   b. ~~The benefit month begin date is less than 'Last Date of Aid'.~~

~~Category~~	~~Short Description~~
~~73~~	~~Aid Date Expired~~

2. ~~The new program/person status reason CT73 'Gross Income > Grant' will be set as a display status reason when all the following conditions~~
   a. ~~The rules 'Income deductions.' and 'Earned income – Sacramento Only.' are active.~~
   b. ~~The individual is 'Aid-in-Kind (AIK) recipient'. (This is determined if the primary aid code of the individual is '98').~~
   c. ~~The individual has unearned income for this benefit month.~~
   d. ~~The unearned income type is: UIB Unemployment.~~

~~Category~~	~~Short Description~~
~~73~~	~~Gross Income > Grant~~

3. ~~The new program/person status reason CT73 'Aid Ended' will be set as a display status reason when all the following conditions~~
   a. ~~The Last Date of Aid is a valid date.~~
   b. ~~The benefit month begin date is more than 'Last Date of Aid'.~~
   c. ~~The individual is aided until the benefit month. This is determined if the Last Date of Aid is less than benefit month end date.~~

~~Category~~	~~Short Description~~
~~73~~	~~Aid Ended~~

4. ~~The new program/person status reason CT73 'AIK - Income Disregard Not Counted' will be set as a display status reason when all the following conditions~~
    a. ~~The rule 'Income deductions.' and 'Earned income – Sacramento Only.' is active.~~
    b. ~~The individual is not an 'AIK recipient'. (This is determined if the primary aid code of the individual is not '98').~~
    c. ~~The program is ongoing, and the individual previously received 'AIK – Aid In Kind'.~~
    d. ~~The individual has a Lumpsum period of Ineligibility (POI). (This is determined in the Visio flow diagram)~~
    e. ~~The AIK deferred amount or gross deferred amount is greater than zero.~~
    f. ~~AIK Disregard amount is greater than zero.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~AIK - Income Disregard Not Counted~~

5. ~~The new program/person status reason CT73 'AIK - Income Disregard Counted' will be set as a display status reason when all the following conditions~~
    a. ~~The rule 'Income deductions.' and 'Earned income – Sacramento Only.' is active.~~
    b. ~~The individual is not an 'AIK recipient'. (This is determined if the primary aid code of the individual is not '98').~~
    c. ~~The program is ongoing and previously received 'AIK – Aid In Kind'. (Determination is described in the Visio diagram)~~
    d. ~~The individual has a Lumpsum POI. (This is determined in the Visio flow diagram)~~
    e. ~~The AIK deferred amount or gross deferred amount is more than zero.~~
    f. ~~AIK Disregard amount is zero.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~AIK - Income Disregard Counted~~

6. ~~The new program/person status reason CT73 'Shelter Expense Allowed' will be set as a display status reason when all the following conditions~~
    a. ~~The rule 'Income deductions.' and 'Earned income – Sacramento Only.' is active.~~
    b. ~~The individual is not a 'AIK - Aid In Kind recipient'.~~

c. ~~The program is ongoing and the individual previously received 'AIK – Aid In Kind'. (This determined in the Visio flow chart)~~
d. ~~The individual had a previous lumpsum POI. (Prev. lumpsum POI is determined in the Visio flow diagram)~~
e. ~~The individual AIK deferred amount or gross deferred amount is greater than zero.~~
f. ~~The individual has an expense detail entry with the category: Shelter.~~
g. ~~The individual expense type is valid for that county.~~
h. ~~All the following is true:~~
   - ~~The individual shelter expense month is equal to benefit month end date.~~
   - ~~The benefit month begin date is greater than the effective end date of Expense detail entry~~
   - ~~The benefit month begin date is greater than the effective end date of Expense detail entry with the category: Shelter.~~
i. ~~The Shelter rent amount is more than zero.~~

~~Category~~	~~Short Description~~
~~73~~	~~Shelter Expense Allowed~~

7. ~~The new program/person status reason CT73 'Prev. Lumpsum POI' will be set as a display status reason when all the following conditions~~
   a. ~~The rule 'Income deductions.' and 'Earned income – Sacramento Only.' is active.~~
   b. ~~The individual is not an 'AIK recipient'. (This is determined if the primary aid code of the individual is not '98').~~
   c. ~~The program is ongoing and previously received 'AIK – Aid In Kind'.~~
   d. ~~The individual has a Lumpsum POI. (This is determined in the Visio flow diagram)~~
   e. ~~The AIK deferred amount or gross deferred amount is more than zero.~~
   f. ~~The individual has any shelter expense entry that is effective for the benefit month.~~
   g. ~~The individual expense type is valid for that county.~~
   h. ~~All the following is true:~~
      - ~~The benefit month begin date is less than the effective end date of expense detail entry.~~
      - ~~The benefit month begin date is less than the effective end date of expense detail entry with the category: Shelter.~~
      - ~~The individual shelter expense month is equal to benefit month end date.~~

~~i. The individual did not previously have a lumpsum POI.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Prev. Lumpsum POI~~

~~8. The new program/person status reason CT73 'AIK - Receives Income' will be set as a display status reason when all the following conditions~~

~~a. The rule 'Income deductions.' and 'Earned income – Sacramento Only.' is active.~~
~~b. The individual is not an 'AIK recipient'. (This is determined if the primary aid code of the individual is not '98').~~
~~c. The program is ongoing and previously received 'AIK – Aid In Kind'.~~
~~d. The individual has a Lumpsum POI. (This is determined in the Visio flow diagram)~~
~~e. The AIK deferred amount or gross deferred amount is greater than zero.~~
~~f. The individual has any shelter expense entry that is effective for the benefit month.~~
~~g. The individual expense type valid for the county.~~
~~h. The benefit month begin date is less than the effective end date for the expense detail entry with the category: Shelter.~~
~~i. The individual shelter expense month is equal to benefit month end date.~~
~~j. The individual did not previously have a lumpsum POI.~~
~~k. The rule 'Earned income – Sacramento Only.' is active.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~AIK - Receives Income~~

~~9. The new program/person status reason CT73 'Lumpsum POI - Discontinue.' will be set as a display status reason when all the following conditions~~

~~a. The rule 'Income deductions.' and 'Earned income – Sacramento Only.' is active.~~
~~b. The individual is not an 'AIK recipient'. (This is determined if the primary aid code of the individual is not '98').~~
~~c. The program is ongoing and previously received 'AIK – Aid in Kind'.~~
~~d. The individual has a Lumpsum POI. (This is determined in the Visio flow diagram)~~
~~e. The AIK deferred amount or gross deferred amount is more than zero.~~
~~f. The individual has a existing Lumpsum POI amount.~~

g. ~~The Lumpsum POI months is equal or greater than one and the individual has the Status Reason 'X10224'.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Lumpsum POI - Discontinue.~~

10. ~~The new program/person status reason CT73 'In-kind Income Not Received' will be set as a display status reason when all the following conditions~~
    a. ~~The individual has income that is not 'Exempt'.~~
    b. ~~The individual has the status reason 'FTP Income'.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~In-kind Income Not Received~~

11. ~~The new program/person status reason CT73 'Income Verification Pending' will be set as a display status reason when all the following conditions~~
    a. ~~The individual has income that is not 'Exempt'.~~
    b. ~~The individual does not have the status reason 'FTP Income'.~~
    c. ~~The individual income verification is 'Pending'.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Income Verification Pending~~

12. ~~The new program/person status reason CT73 'Income Unverified by Sponsor' will be set as a display status reason when all the following conditions~~
    a. ~~The individual has income that is not 'Exempt'.~~
    b. ~~The individual has the status reason 'FTP Income'.~~
    c. ~~The rule 'Earned income – Fresno Only.' is active and the individual is deemed. (This is determined in Sponsorship Non-citizen status functionality)~~

Category	**Short Description**
~~73~~	~~Income Unverified by Sponsor~~

2.7.4.3 Project Requirements

DDID 2320/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Unearned Income Defer AIK} CalSAWS must defer non–exempt income for a GA/GR individual who is an AIK recipient.]	The rule 'Income deductions' will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Unearned Income Use Net} CalSAWS must use net unearned income for GA/GR.]	The rule ' Use net income.' will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Unearned Income Exempt Excluded} CalSAWS must count all non–exempt unearned income for GA/GR.]	The rule 'Count all income excluding exemptions.' will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Unearned Income Expense} CalSAWS must use unearned income after income expenses for GA/GR.]	The rule 'Income and cost of expense.' will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.			
2.			

4 MIGRATION IMPACTS

General Assistance/General Relief functionality will be implemented as a new program for the 57 counties excluding Los Angeles county. Los Angeles GA/GR functionality will not be modified.

5 OUTREACH

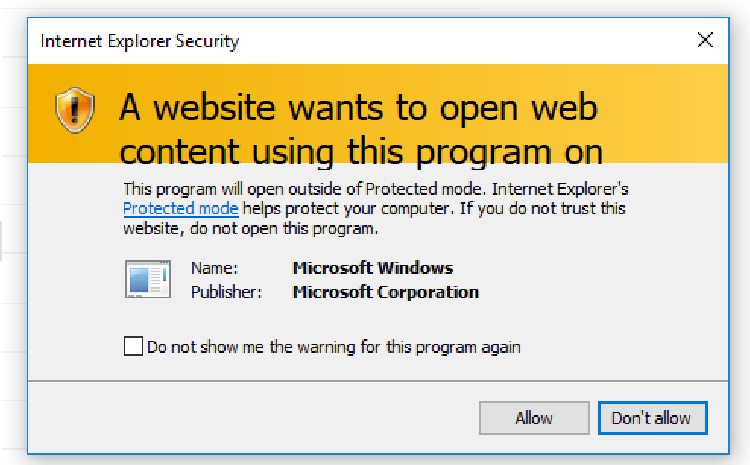
NONE

6 APPENDIX

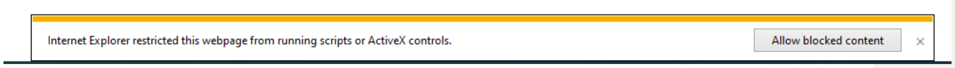
6.1 Rules Flow Diagram

<u>Viewing Visio Document in Internet Explorer</u>

1. This is applicable for Laptops/Desktops that do not have Microsoft Visio software installed.
2. Once you double click the attachment or right click and open with Internet Explorer the Visio will open in internet explorer.
3. *If opening the Visio file from the SharePoint link the Visio file will need to be downloaded first then open with the downloaded file with internet explorer.
4. The following prompt will appear if opening the downloaded Visio file.

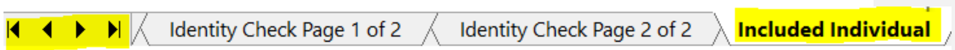


5. Click 'Allow' to open the file on Internet Explorer.
6. The internet Explorer will open with the below pop up in the bottom of the page

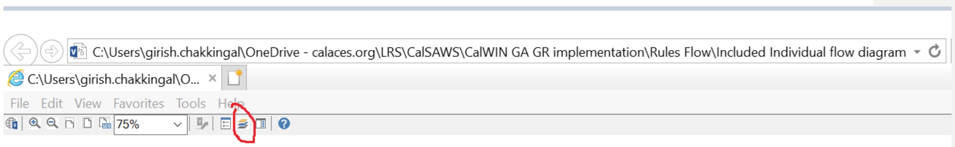


7. Click Allow Blocked Content.

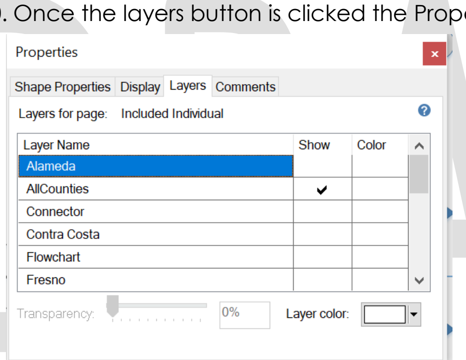
8. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



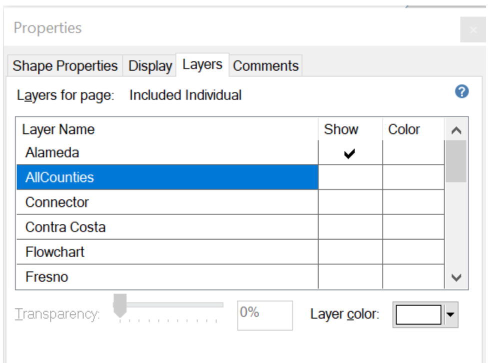
9. Click the layer icon circled in red color below



10. Once the layers button is clicked the Properties box will pop up.



11. Then click the county name that is applicable to you, in this case Alameda



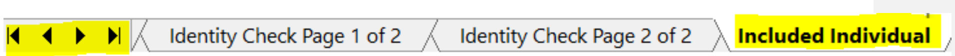
12. Once you select Alameda and close the properties pop up (by clicking the x button at top right corner like closing a tab or window) the flow diagram will show only the rules /functionalities applicable to Alameda.

<u>Viewing Visio Document in Microsoft Visio</u>

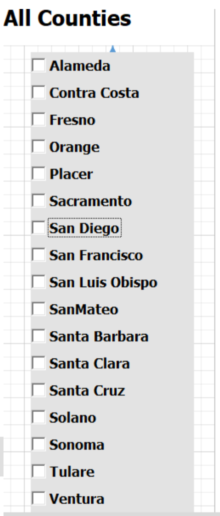
1. This is applicable for Laptops/Desktops that do have Microsoft Visio software installed

2. Once you double click the attachment or right click and open with Visio then it will open in Microsoft Visio

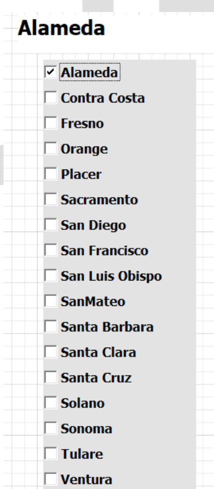
3. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



4. On the right side of the flow diagram the counties names will be displayed as shown below



5. Then click the county name that is applicable to you, in this case Alameda as shown below



6. Once you select Alameda the flow diagram will show only the rules /functionalities applicable to Alameda.

6.2 Reference Table

Reference table for CT73 (Program status reason) and corresponding status reason in this design document. This table shows the values for the new columns added.

a. Key:
   i. GR Priority
      01. The lower the number the higher the priority
   ii. GR Program Role
      01. FE – This indicator means the status reason will change the person role to FRE - 'Financially Responsible – Excluded'
      02. FI – This indicator means this status reason will change the person role to FRI 'Financially Responsible – Included'
      03. MM – This indicator means this status reason will change the person role to MMO 'Medi-Cal Member Only'
      04. UP – This indicator means this status reason will change the person role to UP 'Unaided Person'
   iii. GR Close Person
      01. CanCloseBoth – Indicator means this status reason can close both person and program level.
      02. Y – indicator means this status reason can close the person.
   iv. GR Close Program
      01. CanCloseBoth – Indicator means this status reason can close both person and program level.
      02. Y – Indicator means this status reason can close the program.
   v. General Relief
      01. Y -Indicator means this status reason will be applicable for CalWINs General Relief Program

CalWIN Status	GR Priority	CalSAWs Status (Status Reason)	GA/GR Program Role	GA/GR Close Person	GA/GR Close Program	General Relief	Use Case
XAF307	9260	CW Sanction/Time Limit			Y	Y	AU Eligible For Family GA
XAF308	9300	Elig Child >18			Y	Y	AU Eligible For Family GA
XAF306	9320	Eligible for CalWORKs			Y	Y	AU Eligible For Family GA
XAF410	4300	Aid ended			Y	Y	Financial overall

XAF635	9420	FTP In-kind Income		Y		Y	Inkind Income
XAF001	9460	Income Unverified			Y	Y	Inkind Income
XAF642	9480	Income Unverified by Sponsor			Y	Y	Inkind Income
XAF377	4230	Gross Income > Grant		Y		Y	Unearned Income
XAF002	4250	Income Verification Pending				Y	Unearned Income
XAF311	4260	Shelter Expense Allowed				Y	Unearned Income
XAF312	4270	AIK - Income Disregard Not Counted				Y	Unearned Income
XAF313	4280	AIK - Income Disregard Counted				Y	Unearned Income
XAN411	4320	AIK - Receives Income				Y	Unearned Income
XAN415	4330	AIK - Receives Income				Y	Unearned Income
XAF001	9460	Income Unverified			Y	Y	Unearned Income
XAF642	9480	Income Unverified by Sponsor			Y	Y	Unearned Income
XAF345	9620	Prev. Lumpsum POI			Y	Y	Unearned Income

6.3 CalWIN RT table search reference (used by developers)

This table has how CalWIN currently search for county defined values used in EDBC. Developers will use this information to get the required values in CalSAWS.

Use Case	CalSAWs Table	Description (summary of what we are doing in this table)	Example	Category ID

Inkind Income	Inkind income Chart amount	The table 'Inkind income chart amount' (CT10688) will provide the Chart Amount for specific combination of values for counties that opted into GR. The County Code (CT 15), Household Size, Income Type(CT 186) and the county region will be used to determine the Inkind income chart amount	Example: Get the Inkind income chart amount for the income type 'Housing Earned (97)' Placer (31) for a household size is 1 and the region is 2. Search: Inkind income chart amount From: Code Detail Table Where: County Code = '31' Income type = '97 - Housing Earned' Region = 'R2' Category Id = 10688 Result: Inkind income chart amount = 137 Meaning: Placer inkind income chart amount for when the region is R1 and the income type is Housing earned is 137.	10688

Shared Housing	GAGR Deductions	The table 'GAGR Deduction' (CT10663) will provide the disregard allowed amount and deduction disregard Allowed percentage for specific values based on the CalWIN GAGR County. The code number indentifier is used to retrieve the deduction and percentage amount. Each county will have two reference column one will be for disregard allowed amount titled '[County Name] disregard allowed amount' and the other will be for disregard allowed percentage amount titles '[County Name] disregard allowed amount percentage'. Note - [County Name] is a placeholder for whatever county being searched for.	Example: Get Alameda (01) defined 'deduction disregard amount' and deduction disregard percentage for ‘Medical’. Search: Code number identifier = 'ME' From: Code Detail Table Where: Code number identif = 'ME' Category Id = 10663 Result: Alameda disregard allowed amount = 0 Alameda disregard allowed percentage = 75 Meaning: Alameda disregard allowed amount for 'Medical' is 0 and Alameda disregard allowed percentage for 'Applicant earned income' is 75.	10663

Unearned Income	Unearned Income	The table 'GAGR Deduction' (CT10663) will provide the disregard allowed amount and deduction disregard Allowed percentage for specific values based on the CalWIN GAGR County. The code number indentifier is used to retrieve the deduction and percentage amount. Each county will have two reference column one will be for disregard allowed amount titled '[County Name] disregard allowed amount' and the other will be for disregard allowed percentage amount titles '[County Name] disregard allowed amount percentage'. Note - [County Name] is a placeholder for whatever county being searched for.	Example: Get Alameda (01) defined 'deduction disregard amount' and deduction disregard percentage for 'Essential Need Item' (EN). Search: Code number identifier = 'EN' From: Code Detail Table Where: Code number identif = 'EN' Category Id = 10663 Result: Alameda disregard allowed amount = 0 Alameda disregard allowed percentage = 0 Meaning: Alameda disregard allowed amount for 'Essential Need Item' is 0 and Alameda disregard allowed percentage for 'Essential Need Item' is 0.	10663

Unearned Income	Inkind income Chart amount	The table 'Inkind income chart amount' (CT10688) will provide the Chart Amount for specific combination of values for counties that opted into GR. The County Code (CT 15), Household Size, Income Type(CT 186) and the county region will be used to determine the Inkind income chart amount	Example: Get the Inkind income chart amount for the income type 'Housing Earned (97)' Placer (31) for a household size is 1 and the region is 2. Search: Inkind income chart amount From: Code Detail Table Where: County Code = '31' Income type = '97 - Housing Earned' Region = 'R2' Category Id = 10688 Result: Inkind income chart amount = 137 Meaning: Placer inkind income chart amount for when the region is R1 and the income type is Housing earned is 137.	10688

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215916

DDID 2314 FDS: GA GR Rules Phase 2 Batch 1 (6 Rules) - Income Rules and corresponding NOA Reasons

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Peterson Etienne, Stephanie Hugo, Taylor Fitzhugh
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
	1.0	Initial Draft	Peterson Etienne, Stephanie Hugo, Taylor Fitzhugh
08/05/2021	1.1	Removed financial housing functionality and will be moved to phase 3 release.	Peterson Etienne
08/12/2021	1.2	Removed the following status reason from Earned income: Currently Employed Deduction Amount < $10 Self-Employment Exceeds Limit Suspension Not Requested	Peterson Etienne
8/12/2021	1.3	1. Removed Utility allowance functionality because it is obsolete 2. Added verification for earned income 3. Added new rules for earned income to give counties more flexibility to control income deduction 4. Removed status reasons from earned income functionality due to they fail the individual, discussion are still going on about why are members being failed in financial evaluation. They will be brought back in phase 2 batch 4 CA-229096	Jennifer Chen
8/17/2021	1.4	Added additional conditions and changed existing conditions for Responsible Relative functionality status reason to align with the visio flow.	Peterson Etienne
8/24/2021	1.5	1. For reason code 'No Good Cause - Refused Resp. Relative' in Responsible Relative Functionality, updated the condition to not separated.	Jennifer Chen Peterson Etienne Stephanie Hugo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		2. The rule EDX308C003 and EDX308C004 for Earned income Exemption functionality has been removed since the logic has been removed. 3. Removed assumption 'During testing the EDBC will result in 0 benefit as resource will be set to PASS. Resource and reporting logic will be added in phase 3 release 21.11 (CA-215917).' As it is no longer true. 3. Removed Correspondence Reason code XAF345 due to Eligibility removing this status reason as well.	
8/30/2021	1.6	Updated non-mandatory verification to 'mandatory verification after due date'	Jennifer Chen
8/31/2021	1.7	Added assumption for Financial other person and earned income expense	Jennifer Chen
09/21/2021	1.8	Added a new functionality for 'Mandatory after the due date' Verification	Peterson Etienne

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1 OVERVIEW

This SCR will implement the household composition and Non-financial functionality for the new CalWIN General Assistance/General Relief (GA/GR) solution in CalSAWS

1.1 Current Design

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their General Relief Opportunities for Work (GROW) program. Currently CalWIN manages their GA/GR program logic by using a Rule Matrix which can be accessed by the county to allow each county administrator to customize the behavior to their specific county.

1.2 Requests

A new CalWIN GA/GR solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will automate the household composition and Non-financial functionality for the new solution

1.3 Overview of Recommendations

1. Add all the required Data Collection elements to implement the Financial functionalities for the new solution
2. Create new Admin Summary and Detail pages that can be accessed in Admin tools by the County Admin staff
3. A new set of Admin detail pages, Rules, Batch and NOA triggers will be added for the below Financial.

    1. Terminated Income
    2. Deemed income for Parents
    3. Earned Income Exceptions
    4. Financial Other Person
    5. Responsible relative
    6. Earned Income

1.4 Assumptions

1. The existing Los Angeles county rules will remain unchanged.
2. This SCR CA-215916 is based on the WCDS approved documents.
3. The design of the rules is for each CalWIN county based on the Gainwell documents approved by the counties.
4. This SCR CA-215916 is phase one of four which consists of 6 CalWIN rulesets for Financial. The remaining rulesets will be designed in SCR CA-215672, CA-215927 and CA-229096. Three of the SCR's (CA-215672, CA-215916,CA-215927) will be

implemented in the 21.11 release and one CA-229096 will be implemented in 22.01 release.

5. The functionality of this SCR CA-215916 will be disabled until activated by the system property flag established in SCR CA-215687 which is part of the 20.11 release.
6. Any logic related to San Francisco explicitly called out in relevant WCDS approved use cases will be included in this design. Any, San Francisco sub program logic independent of the rule will be added in SCR CA-215677 DDID 2374 scheduled for 22.01.
7. Alerts will be handled separately outside the Rules design in a separate SCR CA-220119.
8. All functionality related to new fields will only affect the rules related to an individual county's GA/GR program and will not impact the rules of other programs, unless specified.
9. All Data collection used in EDBC determination is effective for the benefit month.
10. Leveraged rules are main rules from another use cases whose logic are also used in this use case. Leveraged rules in this SCR whose main use case are not designed in phase 1 or 2 cannot be tested using the admin page. Example: Institutional status use case has a leverage rule that is a main rule in Earned income use case. Since Earned income use case is not designed in phase 1 or 2, this leverage rule will not be able to be tested from the admin page.
11. EDBC summary page layout will follow current Los Angeles County GA EDBC summary page layout. The following sections will be in the EDBC summary page, others will be added in later phases: EDBC Header, EDBC Information, Program Configuration, Reporting Configuration, Allotment, Page Mappings (PMCR) and Security (STCR). Note: Allotment will have all 0 for values, and Security will follow current Los Angeles county security framework.
12. End to End testing of EDBC and Correspondence will not be possible until 22.01 release.
13. All calculation for computed values will detailed in the Visio diagram.
14. 'Participation status' will be an internal flag in CalSAWS, when a participation status is set in the rule it will replace the previous set status for each individual.
15. Logic that checks or creates Sanctions cannot be tested until CA-227328 is implemented.
16. The logic related to expense type WIP for county Contra Costa is moved to SCR CA-232396.
17. The logic related to overpayment garnish amount for Sacramento county is moved to SCR CA-232396.
18. The logic related to timely reported switch is moved to SCR CA-232396
19. Changes to the Financial Data Collection pages will be moved to SCR CA-232396
20. Financial other person functionality cannot be tested in 21.11 release due to the outputs from this functionality are used in SCR CA-229096.
21. Expenses entered in CalSAWS will remain on current expense pages, there are no earned income expenses specific to a particular earned income.

2 RECOMMENDATIONS

2.1 Relationship Detail

2.1.1 Overview

The “Relationship Detail” page is used to record information regarding the relationship between all the members within a case. This page will be updated to allow tracking of responsible relatives.

2.1.2 Relationship Detail Mockup

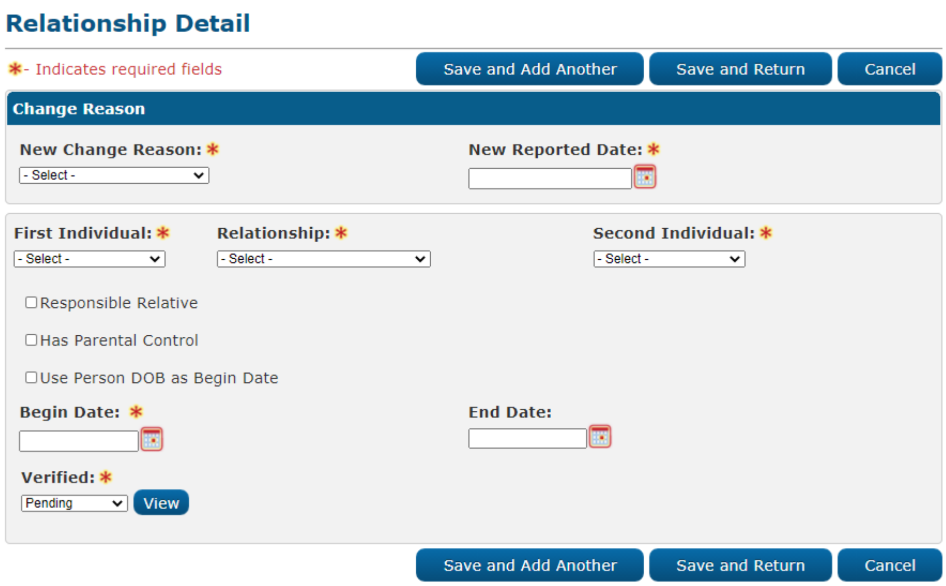


Figure 2.1.2.1 – Relationship Detail Mockup

2.1.3 Description of Changes

1. Add a new field labeled “Responsible Relative”. This field will be a checkbox. This field will indicate that First Individual is the responsible relative of The Second Individual.
2. Add the following validation when the person indicated as Person 2 already has a responsible relative: “A person can have only one responsible relative at a given time.”

2.1.4 Page Location

- **Global:** Case Info
- **Local:** Customer Information
- **Task:** Non-Financial -> Relationship

2.1.5 Security Updates

No Security Updates.

2.1.6 Page Mapping

Add page mappings for the new field.

2.1.7 Page Usage/Data Volume Impacts

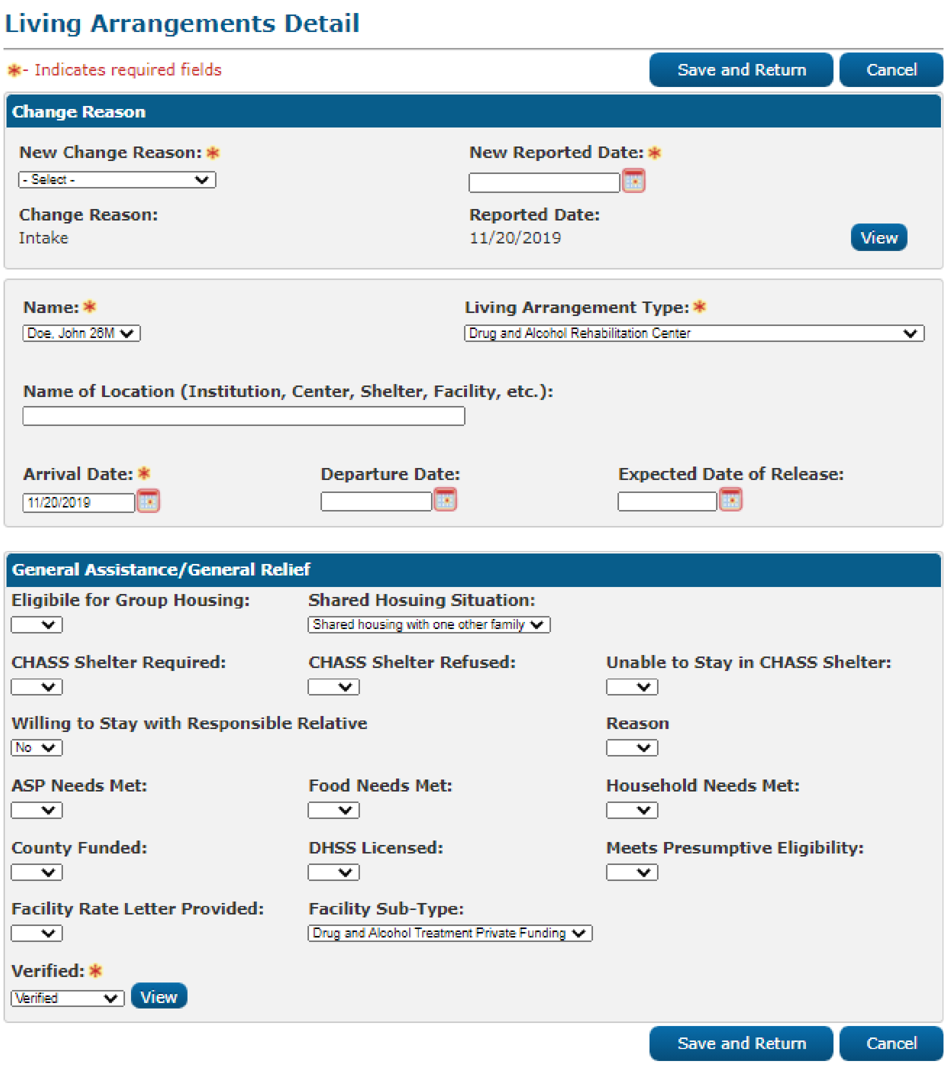
No page usage impacts.

2.2 Living Arrangements Detail

2.2.1 Overview

The “Living Arrangements Detail” page is used to record information regarding a person’s housing situation. This page will be updated to track an individual’s CHASS Shelter information.

2.2.2 Living Arrangements Detail Mockup


Living Arrangements Detail

*- Indicates required fields

Save and Return | Cancel

Change Reason

New Change Reason: *
- Select -

New Reported Date: *

Change Reason:
Intake

Reported Date:
11/20/2019

View

Name: *
Doe, John 26M

Living Arrangement Type: *
Drug and Alcohol Rehabilitation Center

Name of Location (Institution, Center, Shelter, Facility, etc.):

Arrival Date: *
11/20/2019

Departure Date:

Expected Date of Release:

General Assistance/General Relief

Eligibile for Group Housing:

Shared Hosuing Situation:
Shared housing with one other family

CHASS Shelter Required:

CHASS Shelter Refused:

Unable to Stay in CHASS Shelter:

Willing to Stay with Responsible Relative
No

Reason

ASP Needs Met:

Food Needs Met:

Household Needs Met:

County Funded:

DHSS Licensed:

Meets Presumptive Eligibility:

Facility Rate Letter Provided:

Facility Sub-Type:
Drug and Alcohol Treatment Private Funding

Verified: *
Verified

View

Save and Return | Cancel

2.2.3 Description of Changes

1. ~~Add a new option, "AGAP Shelter", to the Living Arrangement Type dropdown.~~
2. Add a General Assistance/General Relief section

3. Add the shared Housing Situation dropdown with the following options. This dropdown will only be editable in Create and Edit modes:
    a. Shared housing with one other facility
    b. Shared housing with one other family
    c. Shared housing with one other individual
    d. Shared housing with two other facilities
    e. Shared housing with two other families
    f. Shared housing with two other individuals
    g. Shared housing with three other facilities
    h. Shared housing with three other families
    i. Shared housing with three other individuals
4. Add a new field labeled "CHASS Shelter Required". This field will be a Yes/No dropdown with a default value of blank. This field will be editable in Create and Edit modes. This field will only display when the "Living Arrangement Type" is "Temporary Housing or Shelter".
5. Add a new field labeled "CHASS Shelter Refused". This field will be a Yes/No dropdown with a default value of blank. This field will be editable in Create and Edit modes. This field will only display when the "Living Arrangement Type" is "Temporary Housing or Shelter".
6. Add a new field labeled "Unable to Stay in CHASS Shelter". This field will be a Yes/No dropdown with a default value of blank. This field will be editable in Create and Edit modes. This field will only display when the "Living Arrangement Type" is "Temporary Housing or Shelter".
7. Add a new field labeled "Willing to Stay with Responsible Relative". This field will be a Yes/No dropdown with a default value of blank. This field will be editable in Create and Edit modes.
8. Add a new field labeled "Reason". This field will be editable in Create and Edit modes. This field will only display when the "Willing to Stay with Responsible Relative" is "No". This field will default value of blank and have the following options:
    a. Death
    b. Domestic Violence
    c. Drug/Alcohol Problem
    d. Family
    e. Fighting
    f. Hospitalization
    g. Illness
    h. Inappropriate Conduct
    i. Incarceration
    j. Marriage
    k. Mental Disability
    l. Moved
    m. No Longer Able to
    n. No Longer Want to
    o. Other Obligations
    p. Physical Disability
    q. Refusal to Accept Employment
    r. Refusal to Attend School

s. Refusal to Attend Training
t. Unable to Locate
u. Unemployment

9. Add a new Yes/No dropdown labeled "Eligible for Group Housing". The field will default to blank. This field will only be Editable in Create and Edit modes.
10. Add a new Yes/No dropdown labeled "Meets Presumptive Eligibility". The field will default to blank. This field will only be Editable in Create and Edit modes.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** Customer Information
- **Task:** Non-Financial -> Living Arrgmt

2.2.5 Security Updates

No Security Updates.

2.2.6 Page Mapping

Add page mappings for the new field.

2.2.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.3 Eligibility Non-Compliance Detail

2.3.1 Overview

The "Eligibility Non-Compliance Detail" page is used to record information regarding the participant's reason for ineligibility on a program. This page will be updated to add additional reasons for Eligibility determinations.

2.3.2 Eligibility Non-Compliance Detail Mockup

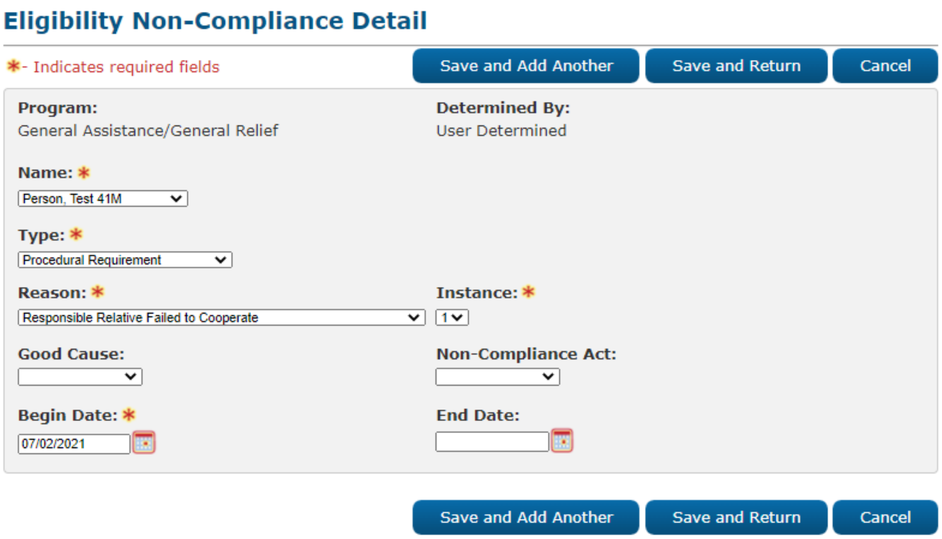


Figure 2.3.2.1 – Eligibility Non-Compliance Detail Mockup

2.3.3 Description of Changes

1. Add "Responsible Relative Failed to Cooperate", to the Reason dropdown when the "Type" is "Procedural Requirement" for the General Assistance/General Relief program.

2.3.4 Page Location

- **Global:** Case Info
- **Local:** Customer Information
- **Task:** Non-Financial -> Non-Compliance

2.3.5 Security Updates

No Security Updates.

2.3.6 Page Mapping

Add page mappings for the new field.

2.3.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.4 Update EDBC Verification Logic

2.4.1 Overview

For GA/GR Automated EDBC/CC Counties Solution the verification functionality for 'Mandatory after the due date' will impact the person/program if the verification is pending after the due date.

2.4.1.1 Description of Change

For Mandatory Verification after due date:

a. If the verification is pending before the verification due date:
   i. A soft validation will be displayed before running the EDBC: 'The following verification(s) have not been received.'
   ii. The EDBC will be a regular EDBC.
   iii. The user can authorize the EDBC.
b. If the verification is pending after the verification due date:
   i. A soft validation will be displayed before running the EDBC: 'The following verification(s) have not been received'.
   ii. The EDBC will be discontinued or denied.
   iii. The user can authorize the EDBC.

2.5 Income

2.5.1 Terminated Income Functionality

2.5.1.1 County Admin Detail – Terminated Income

2.5.1.1.1 Overview

A new County Admin Detail page for Terminated Income will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Terminated Income functionality to their county.

2.5.1.1.2 Description of Changes

a. The Admin page detail for Terminated Income will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Terminate income end dated before benefit month.	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX326C001	Terminate income end dated before benefit month.

DRAFT

2.5.1.2 EDBC Changes

2.5.1.2.1 Overview

This section will provide the Eligibility Rules flow for Terminated Income Program Person Eligibility that can be filtered for each CalWIN County.

2.5.1.2.2 Description of Change

<u>Terminated Income Rules Flow Diagram:</u>

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
Unearned Income	Use CalSAWS current logic to determine unearned income	N/A
Unearned Income end date	End date	Income amount detail
Student income	Income category: education student	Income List
Student income end date	End date	Income Amount detail

Self-employment income	Income category: Earnings and Type: Self Employment	Income List and Income detail
Self-employment income and beg/end date	Begin date/ end date	Income Amount detail
Room and board income	Category: Room and Board	Income List
Room and board income beg/end date	Begin date/ end date	Income Amount detail
Rental income	Category: Rental of Land, Buildings, Personal Property	Income List
Rental income and beg/end date	Begin date/ end date	Income Amount detail
Child/spousal support income	Category: Child/Spousal Support	Income List
Child/spousal support income beg/end date	Begin date/ end date	Income Amount detail
In-kind income	Income Category: Income In-Kind (Earned or Unearned)	Income List
In-kind income beg/end date	Begin date/ end date	Income Amount detail

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

2.5.1.3 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Countable Terminated Income} CalSAWS must not count terminated income retrospectively for GA/GR.]	The Rule 'Terminate income end dated before benefit month.' Will meet this requirement	The following rule is stated in the business flow diagram and admin detail

2.5.2 Deemed Income for Parents Functionality

2.5.2.1 County Admin Detail – Deemed Income for Parents

2.5.2.1.1 Overview

A new County Admin Detail page for Deemed Income for Parents will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Deemed Income for Parents functionality to their county.

2.5.2.1.2 Description of Changes

a. The Admin page detail for Deemed Income for Parents will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Deemed income from parents.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	Y	N	N
Exclude income from parents receiving CalWORKs or SSI.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule

EDX318C001	Deemed income from parents.
EDX318C002	Exclude income from parents receiving CalWORKs or SSI.

2.5.2.2 EDBC Changes

2.5.2.2.1 Overview

This section will provide the Eligibility Rules flow for Deemed Income for Parents Program Person Eligibility that can be filtered for each CalWIN County.

2.5.2.2.2 Description of Change

Deemed Income for Parents Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

2.5.2.3 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Deemed income from parents} CalSAWS must deem all of the parent's income to the individual in a GA/GR case.]	The Rule 'Deemed income from parents.' Will meet this requirement	The following rule is stated in the business flow diagram and admin detail
	[Business Rule: {Deemed Income to Child} CalSAWS must deem the income of parents not receiving public assistance to a GA/GR individual who is treated as a child.]	The Rule 'Exclude income from parents receiving CalWORKs or SSI.' Will meet this requirement	The following rule is stated in the business flow diagram and admin detail

2.5.3 Earned Income exemption Functionality

2.5.3.1 County Admin Detail – Earned Income exemption

2.5.3.1.1 Overview

A new County Admin Detail page for Earned Income exemption will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Earned Income exemption functionality to their county.

2.5.3.1.2 Description of Changes

a. The Admin page detail for Earned Income exemption will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Earned income exemptions applicable.	N	Y	Y	N	N	N	Y	Y	N	N	N	N	N	Y	Y	N	N	N
~~Exempt training expense.~~	~~N~~	~~N~~	~~Y~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~
~~Exempt In-kind training expense.~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~N~~	~~Y~~	~~Y~~	~~N~~	~~N~~	~~N~~
Exempt applicant earned income disregard.	N	Y	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX308C001	Earned income exemptions applicable.
~~EDX308C003~~	~~Exempt training expense.~~
~~EDX308C004~~	~~Exempt In-kind training expense.~~
EDX308C005	Exempt applicant earned income disregard.

* Please note the following rule will not be migrated due to the corresponding reason

CalWIN Rule	CalWIN Description	Reason

EDX308C002	Earning from shelter workshop.	Not used in CalWIN.
EDX308C003	Training reimbursement.	No functionality.
EDX308C004	Training reimbursement up to cost	No functionality.

2.5.3.2 EDBC Changes

2.5.3.2.1 Overview

This section will provide the Eligibility Rules flow for Earned Income exemption Program Person Eligibility that can be filtered for each CalWIN County.

2.5.3.2.2 Description of Change

Earned Income exemption Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
# of days worked per month	Actual Hours Information	Employment Hours Detail
Income type: work incentive	Category: Earning Type: Other	Income Detail
Expense type: home rent	Category: Shelter type: Rent	Income Detail

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

2.5.3.3 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Earned Income Exemptions Applicable} CalSAWS must determine if earned income exemptions are applicable to a GA/GR case.]	The Rule 'Earned income exemptions applicable.' Will meet this requirement	The following rule is stated in the business flow diagram and admin detail
	[Business Rule: {Earned Income Exemptions Training Reimbursement} CalSAWS must exempt training reimbursement income for GA/GR.]	The Rule 'Exempt Training expense.' Will meet this requirement	The following rule is stated in the business flow diagram and admin detail
	[Business Rule: {Earned Income Exemptions Training Reimbursement to Cost} CalSAWS must exempt training reimbursement income up to cost for GA/GR.]	The Rule 'Exempt In-kind Training expense.' Will meet this requirement	The following rule is stated in the business flow diagram and admin detail
	[Business Rule: {Earned Income Exemptions Work Incentive Program} CalSAWS must exempt Work Incentive Program income for GA/GR.]	The Rule 'Exempt applicant earned income disregard.' Will meet this requirement	The following rule is stated in the business flow diagram and admin detail

2.5.4 Financial Other Person Functionality

2.5.4.1 County Admin Detail – Financial Other Person

2.5.4.1.1 Overview

A new County Admin Detail page for Financial Other Person will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Financial Other Person functionality to their county.

2.5.4.1.2 Description of Changes

a. The Admin page detail for Financial Other Person will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.

c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Other Persons applicable.	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N
Domestic partner only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Married persons and Domestic partner.	Y	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX313C001	Other Persons applicable.
EDX313C002	Domestic partner only.
EDX313C003	Married persons and Domestic partner.

2.5.4.2 EDBC Changes

2.5.4.2.1 Overview

This section will provide the Eligibility Rules flow for Financial Other Person Program Person Eligibility that can be filtered for each CalWIN County

2.5.4.2.2 Description of Change

Financial Other Person Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Logic (CalSAWS)	Location Details
Reason for requesting the GA program: 'OT–Other	Check if individual was denied/discontinued	N/A

Person Denied CalWORKs applying for GA'	from CW for the benefit month.	

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

2.5.4.3 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Other Persons Applicable} CalSAWS must determine whether other persons living with GA/GR applicant is eligible for aid]	The Rule 'Other Persons applicable' Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Other Persons Domestic Partner} CalSAWS must determine GA/GR grant when the individual's domestic partner is in the case and receiving public assistance.]	The Rule 'Domestic partner only' Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Other Persons Married or Domestic Partner} CalSAWS must determine GA/GR grant when the individual's husband, wife or domestic partner is in the case and receiving public assistance.]	The Rule 'Married persons and Domestic partner' Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

2.5.5 Responsible relative Functionality

2.5.5.1 County Admin Detail – Responsible relative

2.5.5.1.1 Overview

A new County Admin Detail page for Responsible relative will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Responsible relative functionality to their county.

2.5.5.1.2 Description of Changes

a. The Admin page detail for Responsible relative will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Responsible relative applicable.	N	N	N	Y	N	N	N	N	N	N	Y	N	Y	N	Y	N	Y	N
Fail for responsible relative not cooperating.	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N
Individual refusing to live with responsible relative.	N	N	N	Y	N	N	N	N	N	N	Y	N	N	N	N	N	Y	N
Separation from spouse.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N
Fail when no good cause to refuse to live with responsible relative.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX322C001	Responsible relative applicable.
EDX322C002	Fail for responsible relative not cooperating.
EDX322C003	Individual refusing to live with responsible relative.
EDX322C004	Separation from spouse.
EDX322C005	Fail when no good cause to refuse to live with responsible relative.

2.5.5.2 EDBC Changes

2.5.5.2.1 Overview

This section will provide the Eligibility Rules flow for Responsible relative Program Person Eligibility that can be filtered for each CalWIN County

2.5.5.2.2 Description of Change

Responsible relative Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate attachment in addition to this design document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
Responsible relative	Responsible relative	Relationship detail
Sponsor	Data record	Sponsorship list
Compliance type: responsible relative cooperation	Non-compliance Type: Procedural Requirement Non-compliance reason: Responsible relative failed to cooperate	Eligibility non - compliance
Willing to stay with Responsible Relative	Willing to stay with Responsible Relative	Living arrangement
RSN	Reason	Living arrangement
Filed for legal separation	Marital status: separated	Individual demographics
Institution care: Jail	Incarcerated	Living arrangement
Abuse type: Spouse Abuse	Domestic violence	Confidentiality Detail
Abused by sponsor	sponsored 'yes' > Sponsor abuse with substantial connection between the cruelty and the need for benefits? Is yes	Citizenship status detail

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'No Good Cause - Refused Resp. Relative' will be set as a display status reason when all the following conditions in Either A or B are met:
   A. All the following conditions:
      a. The rule ' Responsible relative applicable' is active.
      b. The individual's responsible relative is not in the home.
      c. The rule 'Fail for responsible relative not cooperating' is not active.
      d. The rule 'Individual refusing to live with responsible relative' is active.
      e. Willing to stay with Responsible Relative is no.
      f. The rule 'Fail when no good cause to refuse to live with responsible relative.' is not active.
   B. All the following conditions:
      a. The rule 'Responsible relative applicable' is active.
      a. ~~The individual's responsible relative is not in the home.~~ The individual has a relationship where the 'responsible relative' check box is checked, and that individual is not in the home
         *Note: from here on the other person in this relationship will be known as the responsible relative. Also there can only be 1 responsible relative.
      b. The rule 'Fail for responsible relative not cooperating' is not active.
      c. The rule ~~'Fail for responsible relative not cooperating'~~ ~~'~~'Individual refusing to live with responsible relative' is not active.
      d. The rule ' Separation from spouse' is active.
      e. The individual the marital status is not separated.
      f. If all the following conditions are not true (Please refer to flow chart on how these are determined):
         i. Spouse is incarcerated.
         ii. Spouse is a drug addict.
         iii. Spouse abuse.

Category	Short Description
73	No Good Cause - Refused Resp. Relative

2. The new program/person status reason CT73 ‘Failed to Comply: Resp. Relative’ will be set as a display status reason when all the following conditions:
    a. The rule 'Responsible relative applicable' is active.
    ~~b. The individual’s responsible relative is not in the home.~~
    The individual has a relationship where the ‘responsible relative’ check box is checked, and that individual is not in the home *Note: from here on the other person in this relationship will be known as the responsible relative. Also there can only be 1 responsible relative.
    c. The rule 'Fail for responsible relative not cooperating' is active.
    d. The responsible relative is also the spouse or sponsor of the individual.
    e. The responsible relative has a non-compliance record and effective for the benefit month.
        i. Type: Procedural Requirement
        ii. Reason: Responsible relative failed to cooperate

Category	Short Description
73	Failed to Comply: Resp. Relative

2.5.5.3 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Responsible Relative applicable} CalSAWS must determine whether responsible relative is applicable to a GA/GR case.]	The rule ‘Responsible relative applicable’ Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Responsible Relative Fail to Cooperate} CalSAWS must determine whether the responsible relative in a GA/GR case has failed to cooperate.]	The Rule ‘fail for responsible relative not cooperating’ Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Responsible Relative Refuse to Reside} CalSAWS must determine whether the GA/GR individual refuses to reside with the responsible relative.]	The Rule 'Individual refusing to live with responsible relative' Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Responsible Relative Spousal Separation} CalSAWS must determine whether the GA/GR individual is separated from their spouse.]	The Rule 'Separation from spouse' Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Responsible Relative not Reside Good Cause} CalSAWS must determine whether the GA/GR individual has Good Cause for refusing to reside with the responsible relative.]	The Rule 'fail when no good cause to refuse to live with responsible relative' Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

2.5.6 Earned Income Functionality

2.5.6.1 County Admin Detail – Earned Income

2.5.6.1.1 Overview

A new County Admin Detail page for Earned Income will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Earned Income functionality to their county.

2.5.6.1.2 Description of Changes

a. The Admin page detail for Earned Income will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.

c. The functionality is effective dated with begin and end date.
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Earned income – Alameda Only.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Contra Costa Only.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Fresno Only	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Orange Only.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Placer Only.	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Sacramento Only.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – San Diego Only.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Earned income – San Francisco Only.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Earned income – San Luis Obispo Only.	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N
Earned income – San Mateo Only.	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N
Earned income – Santa Barbara Only.	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N
Earned income – General.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Santa Cruz and Santa Clara Only.	N	N	N	N	N	N	N	N	N	N	N	Y	Y	N	N	N	N	N
Earned income– Solano Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N
Earned income – Sonoma Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N
Earned income – Tulare Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Earned income – Ventura Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N
Earned income – Yolo Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y
40% Standard Self Employment Deduction.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N

Count self-employment income and deduct expense	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Deduct court ordered child support and/or spousal support	Y	N	Y	Y	N	Y	N	Y	N	N	N	N	N	N	Y	N	N	N
Deduct Taxes, other mandatory expenses related to employment including cost of transportation at the public transport level or work mileage at .22 per mile), FICA, Involuntary medical insurance expense Work related Deduction	Y	Y	N	Y	Y	N	Y	Y	N	Y	N	Y	Y	Y	N	N	N	Y
County Defined Earned Income Deduction/Disregard	Y	N	Y	Y	Y	Y	N	Y	N	N	Y	N	N	N	N	Y	Y	Y

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX309C001	Earned income – Alameda Only.
EDX309C002	Earned income – Contra Costa Only.
EDX309C003	Earned income – Fresno Only.
EDX309C004	Earned income – Orange Only.
EDX309C005	Earned income – Placer Only.
EDX309C006	Earned income – Sacramento Only.
EDX309C007	Earned income – San Diego Only.
EDX309C008	Earned income – San Francisco Only.
EDX309C009	Earned income – San Luis Obispo Only.
EDX309C010	Earned income – San Mateo Only.

EDX309C011	Earned income – Santa Barbara Only.
EDX309C012	Earned income – General.
EDX309C013	Earned income – Santa Cruz and Santa Clara Only.
EDX309C014	Earned income– Solano Only.
EDX309C015	Earned income – Sonoma Only.
EDX309C016	Earned income – Tulare Only.
EDX309C017	Earned income – Ventura Only.
EDX309C018	Earned income – Yolo Only.
EDX309C020	40% Standard Self Employment Deduction.

Leverage Rule

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Do not prorate Quarterly payments.	N	Y	N	Y	N	N	N	N	N	Y	N	N	Y	N	N	N	Y	Y
Always Use Actuals for Earned Income.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
POI by no rounding and days.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	N	N
Budget on employability, housing cost.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Grant greater than $5.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Inkind Income applicable.	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N

CalWIN Number	CalSAWS Rule

EDX304C002	Do not prorate Quarterly payments.
EDX304C003	Use Actuals for Earned Income.
EDX316C011	POI by no rounding and days.
EDX321C001	Budget on employability, housing cost.
EDX321C005	Grant greater than $5.
EDX305C001	Inkind Income applicable.

* The following rule will not be migrated into CalSAWS for the following reasons.

CalWIN Number	CalWIN Description	Reason
EDX309C019	Unanticipated income calculation.	Not used

2.5.6.2 EDBC Changes

2.5.6.2.1 Overview

This section will provide the Eligibility Rules flow for Earned Income Program Person Eligibility that can be filtered for each CalWIN County.

2.5.6.2.2 Description of Change

Earned Income Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
Self-employment	Type: Self-Employment	Income Detail
~~Considered timely for GA/GR~~	~~Timely For GA/GR~~	~~Income Detail~~
~~Number of owners~~	~~Owner(s)~~	~~Self-Employment income Detail~~
~~Percentage owned~~	~~Percentage~~	~~Self-Employment income Detail~~
~~Sole Proprietor~~	~~The individual with the~~	~~Self-Employment income Detail~~

	~~Percentage: 100~~	
Business Expense Deduction Type: actual, standard, monthly average	Deduction Type: Actual, Standard, Monthly Average	Self-Employment Deduction Type Detail
Income terminated	End Date	Income Amount Detail
Income received date	Begin Date	Income Amount Detail
Individual is homeless	Type: Homeless	Living Arrangement Detail
Employment service status: Registered, Pending	Status: Active, Pending	GA/GR Employment Services Status Detail
Employment Service begin date	Begin Date	GA/GR Employment Services Status Detail
Aid to pay date	Begin Date	Payment Amount Used By EDBC
Expense type:	Type:	Expense Detail
Program type PAES, CALM, SSIP, GA or AGEX	Sub-Program Type	General Assistance/General Relief Detail
Institutional type: AGAP (Alternative General assistance program)	Type: AGAP Shelter	Living Arrangement Detail
~~Absent Parent Cessation Readjustment Date~~	~~Requested Cessation of Wage Garnishment~~	~~Income Detail~~

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

Verification:

Verifications will be applied before the Non-Financial rules.

1. Update the existing mandatory verification after due date verification for income amount detail, which sets the status reason CT73 DW 'FTP

Income' for GA GR as per current CalSAWS verification framework to apply to GR.

The following status reasons will be placed at the end of non-financial low with the lowest priority.

2. The new program/person status reason CT73 'Income Unverified by Sponsor' will be set as a display status reason when all the following conditions are met:
    a. The individual has the reason code 'FTP Income'.
    b. The rule 'Earned income – Fresno Only.' is active.
    c. The individual is 'Deemed'

3. The new program/person status reason CT73 'Income Unverified' will be set as a display status reason when all the following conditions are met:
    a. The individual has the reason code 'FTP Income'.

Please note

The following NOA reasons will not be migrated into CalSAWS. These reasons are informational based only, it does not generate any NOA and it does not execute any actions such as discontinuing or denying an individual.

CalWIN Status Number	CalWIN Description
XAF002	Income Received is not Verified.
XAF311	The individual's expenses were allowed in computing net income while in AIK
XAF312	The individual's total earned income disregard is subtracted from gross earnings when computing net income while in AIK.
XAF313	Trigger when earned income disregard is not subtracted from gross earnings while in AIK
XAF414	The individual is a homeless in Solano.
XAN415	The individual has been absent from AIK facility for 3 nights without calling in.
XAF618	Child spousal expenses will be not be counted until suspension/cessation of deductions request date is populated.
XAN411	GA client leaves AIK facility due to discontinuance because client is in receipt of income/increased income.

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. ~~The new program/person status reason CT73 'Deduction Amount < $10' will be set as a display status reason when all the following conditions are met:~~
   a. ~~The individual has an employment record effective for the benefit month.~~
   b. ~~The rule 'Earned income – Sacramento Only.' is active.~~
   c. ~~The individual is active and had the aid code '98' in the previous benefit month.~~
   d. ~~The individual does not have an expense category: 'Child/Spousal Support Court ordered' and expense type: Child Support – Court ordered entry or their Overpay Garnish amount is less than 0. (Please refer to Visio flow chart for Garnish amount calculation)~~
   e. ~~The individual 'Deduction amount' is less than ten and greater or equal to zero. (Please refer to Visio flow chart for Deduction amount calculation)~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Deduction Amount < $10~~

2. ~~The new program/person status reason CT73 'Suspension Not Requested' will be set as a display status reason when all the following conditions are met:~~
   a. ~~The individual has an employment record effective for the benefit month.~~
   b. ~~If any of the following is true:~~
      i. ~~The individual program mode is Active and ' Timely For GA/GR ' is not 'Yes'.~~
      ii. ~~The individual has a spouse (relationship) on the case. (AU size is more than 1)~~
      iii. ~~All the following is true:~~
         1. ~~The rule 'Earned income – Orange Only.' is applicable.~~
         2. ~~The individual has an employment type self-employment.~~
      iv. ~~All the following is true:~~
         1. ~~The rule 'Earned income – Sacramento Only.' is active.~~
         2. ~~The individual has an expense category: 'Child/Spousal Support Court ordered' and expense type: Child Support – Court Ordered entry valid for the benefit month.~~
      v. ~~All the following is true:~~
         1. ~~The rule 'Earned income – San Diego Only.' is active.~~
         2. ~~The individual has expense category: 'Child/Spousal Support Court ordered' and expense type: Spousal Support – Court Ordered.~~
      vi. ~~All the following is true:~~
         1. ~~The rule 'Earned income – San Francisco Only.' is active.~~

Commented [PE1]: There is a condition here will have to check it
i.The individual program is pending.

        2. ~~The employment record is effective for the benefit month.~~
        3. ~~The employment type is self-employment.~~
    vii. ~~All the following is true:~~
        1. ~~The rule ' Earned income – San Mateo Only.' is active.~~
        2. ~~The individual has expense category: 'Child/Spousal Support Court ordered' and expense type: Spousal Support – Court Ordered.~~
    viii. ~~All the following is true:~~
        1. ~~The rule 'Earned income – Ventura Only.' is active.~~
        2. ~~The individual employment type is not self-employment.~~
    ix. ~~All the following is true:~~
        1. ~~The rule ' Earned income – Sonoma Only.' is active.~~
        2. ~~The employment type is not self-employment.~~

c. ~~The individual has an expense category: 'Child/Spousal Support Court ordered' and Expense type: Child Support – Court ordered for the 'income to be processed end date' month and it is verified. (Please reference Visio flow diagram to determine 'income to be processed end date')~~
d. ~~The frequency is not 'Irregular/infrequent'.~~
e. ~~The rule 'Earned income – Sacramento Only.' is active.~~
f. ~~The individual 'Requested Cessation of Wage Garnishment' is before the Expense amount begin date or the individual 'Requested Cessation of Wage Garnishment' is not within 30 days of Expense amount begin date.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Suspension Not Requested~~

3. ~~The new program/person status reason CT73 'Prev. Lumpsum POI' will be set as a display status reason when all the following conditions are met:~~
    a. ~~The individual has an employment record effective for the benefit month.~~
    b. ~~The rule 'Earned income – Placer Only.' is active.~~
    c. ~~The individual is active and had the aid code '98' in the previous benefit month.~~
    d. ~~The individual has lumpsum POI. (This is determined in Educational Grant and Loan)~~
    e. ~~The individual is not currently receiving Aid-in-Kind (AIK) or does not have countable income.~~
    f. ~~The individual is receiving shelter expense for the benefit month.~~
    g. ~~The individual has previous Lumpsum POI entry. (Please reference Visio Flow chart to determine this)~~

Category	**Short Description**
~~73~~	~~Prev. Lumpsum POI~~

4. ~~The new program/person status reason CT73 'Currently Employed' will be set as a display status reason when all the following conditions are met:~~
    a. ~~The individual has an employment record effective for the benefit month.~~
    b. ~~The rule ' Earned income – San Diego Only.' is active.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Currently Employed~~

5. ~~The new program/person status reason CT73 'Self-employment exceeds limit' will be set as a display status reason when all the following conditions are met:~~
    a. ~~The individual has an employment record effective for the benefit month.~~
    b. ~~The rule ' Earned income – San Diego Only.' is active.~~
    c. ~~The accumulated self-employment income amount is more than the total grant amount. (Please reference the Visio flow chart for the calculations of the accumulated self-employment income amount and the total grant amount)~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Self-Employment Exceeds Limit~~

2.5.6.3 Correspondence Reason Codes

2.5.6.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.5.6.3.2 Description of Change

1. ~~**Reason Code: XAF345 – Prev. Lumpsum POI**~~
    a. ~~Trigger Condition~~

~~i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Prev. Lumpsum POI'.~~
~~ii. This notice generates for the applicable counties when the program was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Prev. Lumpsum POI'.~~

~~b. Program Level Reason~~
~~c. County-specific information:~~

~~County~~	~~Action~~	~~Document Description~~	~~Number~~	~~Template~~
~~Contra Costa~~	~~Discontinuance~~	~~GA Discontinuance - Excess Personal Property~~	~~034 1~~	~~12590~~
~~Fresno~~	~~Discontinuance~~	~~General Relief Discontinuance - Lump Sum Income~~	~~015-B~~	~~12717~~
~~Orange~~	~~Discontinuance~~	~~GRDisc - Lump Sum Benefits Received~~	~~082 A~~	~~11611~~
~~Orange~~	~~Denial~~	~~GR Denial - Lump Sum/Liquid Resources - Period of Ineligibility~~	~~236 A~~	~~11608~~
~~Santa Barbara~~	~~Discontinuance~~	~~GR - Disc - Lump Sum~~	~~068-1 (04/04)~~	~~12691~~
~~Santa Clara~~	~~Discontinuance~~	~~GA Discontinuance - Lump Sum Income~~	~~GA 032~~	~~12600~~
~~Santa Clara~~	~~Denial~~	~~GA Denial - Lump Sum Exceeds Need~~	~~GA 121~~	~~12603~~
~~Sonoma~~	~~Discontinuance~~	~~GA Disc - Lump Sum Income~~	~~010-1 (09/99)~~	~~12530~~

2. **Reason Code: XAF642 – Income Unverified by Sponsor**
   a. Trigger Condition
      i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Income Unverified by Sponsor'.
      ii. This notice generates for the applicable counties when the program was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Income Unverified by Sponsor'.
   b. Program Level Reason
   c. County-specific information:

County	Action	Document Description	Number	Template
Fresno	Discontinuance	General Relief Discontinuance-	068-A	11539

		Sponsored Alien Requirements		
Fresno	Denial	General Relief Denial - Sponsored Alien Requirements	127-C	610725

2.5.6.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Earned income method 1 – Alameda Only} CalSAWS must determine whether to calculate earned income with or without deductions for an individual applying for GA/GR based on GA Grant amount and Program mode]	The rule 'Earned income – Alameda Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 2 – Contra Costa Only} CalSAWS must determine whether to include WIP deductions in the earned income calculation for an individual applying for GA/GR based on participation of Work Incentive Program and Program mode]	The rule 'Earned income – Contra Costa Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 3 – Fresno Only} CalSAWS must determine whether to include deductions in the earned income calculation for an individual applying for GA/GR based on single or couple applying for Aid]	The rule 'Earned income – Fresno Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Earned income method 4 – Orange Only} CalSAWS must determine whether to include deductions in the earned income calculation for an individual applying for GA/GR based on type of expenses incurred]	The rule 'Earned income – Orange Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 5 – Placer Only} CalSAWS must determine whether to include mandatory payroll deductions in the earned income calculation for an individual applying for GA/GR]	The rule 'Earned income – Placer Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 6 – Sacramento Only} CalSAWS must determine whether to apply POI or include deductions in the earned income calculation for an individual applying for GA/GR based on program mode, received any Aid in Kind amount, received any child, overpay garnishment or spousal support]	The rule 'Earned income – Sacramento Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Earned income method 7 – San Diego Only} CalSAWS must determine whether to fail an individual applying for GA/GR, and include deductions in the earned income calculation based on GA Grant amount, spousal or child support or deemed sponsor]	The rule 'Earned income – San Diego Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 8 – San Francisco Only} CalSAWS must determine whether to include deductions and disregards in the earned income calculation for an individual applying for GA/GR]	The rule 'Earned income – San Francisco Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 9 – San Luis Obispo Only} CalSAWS must determine whether to include deductions in the earned income calculation for an individual applying for GA/GR]	The rule 'Earned income – San Luis Obispo Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 10 – San Mateo Only} CalSAWS must determine whether to include deductions in the earned income calculation for an individual applying for GA/GR based on individual deemed participation status]	The rule 'Earned income – San Mateo Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Earned income method 11 – Santa Barbara Only} CalSAWS must determine whether to include deductions in the earned income calculation for an individual applying for GA/GR based on Program mode and eligibility month]	The rule 'Earned income – Santa Barbara Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 12 – not in use} CalSAWS must determine whether to include deductions in the earned income calculation for an individual applying for GA/GR based on income type]	The rule 'Earned income – General. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 13 – Santa Cruz and Santa Clara Only} CalSAWS must determine whether to include deductions in the earned income calculation for an individual applying for GA/GR based on income type]	The rule 'Earned income – Santa Cruz and Santa Clara Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Earned income method 14 – Solano Only} CalSAWS must determine whether to include tax and mandatory payroll deductions in the earned income calculation for an individual applying for GA/GR based on income type]	The rule 'Earned income– Solano Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 15 – Sonoma Only} CalSAWS must determine whether to include tax mandatory payroll, child, or spousal support deductions in the earned income calculation for an individual applying for GA/GR based on income type]	The rule 'Earned income – Sonoma Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 16 – Tulare Only} CalSAWS must determine whether to apply earned income disregards in the earned income calculation for an individual applying for GA/GR based on income type]	The rule 'Earned income – Tulare Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Earned income method 17 – Ventura Only} CalSAWS must determine whether to apply earned income disregards and deductions in the earned income calculation for an individual applying for GA/GR based on income type]	The rule 'Earned income – Ventura Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Earned income method 18– Yolo Only} CalSAWS must determine whether to apply earned income disregards and deductions in the earned income calculation for an individual applying for GA/GR based on income type]	The rule 'Earned income – Yolo Only. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {40% Standard Self Employment Deduction} CalSAWS must determine whether to apply standard or actual deductions in the earned income calculation for an individual applying for GA/GR]	The rule '40% Standard Self Employment Deduction. 'Will meet this requirement.	The following rule is stated in the business flow diagram and admin detail.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.			

2.			

4 MIGRATION IMPACTS

General Assistance/General Relief functionality will be implemented as a new program for the 57 counties excluding Los Angeles county. Los Angeles GA/GR functionality will not be modified.

5 OUTREACH

NONE

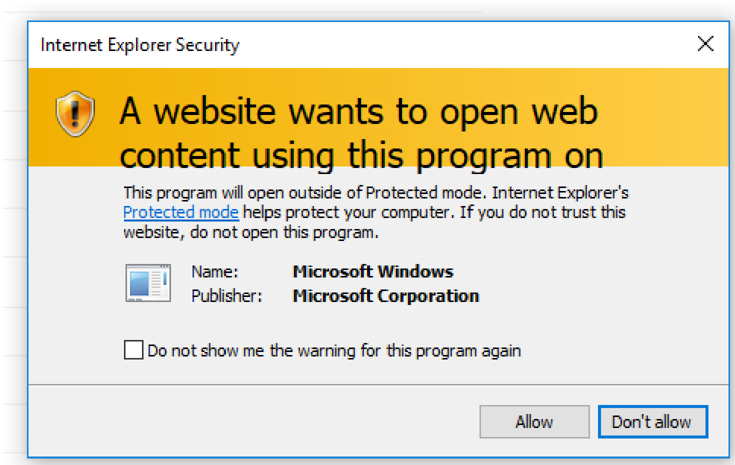
6 APPENDIX

6.1 Rules Flow Diagram

Viewing Visio Document in Internet Explorer

1. This is applicable for Laptops/Desktops that do not have Microsoft Visio software installed.
2. Once you double click the attachment or right click and open with Internet Explorer the Visio will open in internet explorer.
3. *If opening the Visio file from the SharePoint link the Visio file will need to be downloaded first then open with the downloaded file with internet explorer.

4. The following prompt will appear if opening the downloaded Visio file.

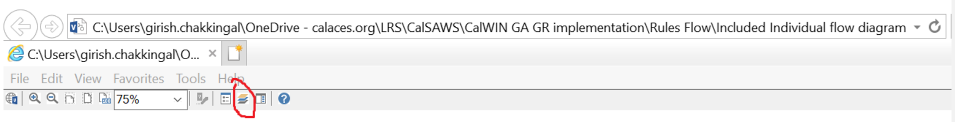


5. Click ‘Allow’ to open the file on Internet Explorer.
6. The internet Explorer will open with the below pop up in the bottom of the page

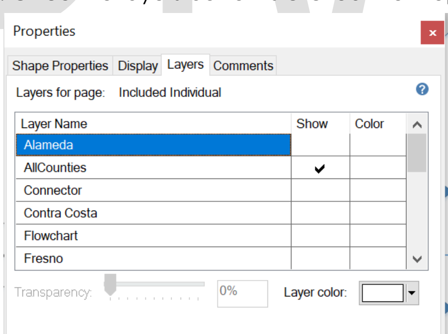
7. Click Allow Blocked Content.

8. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)

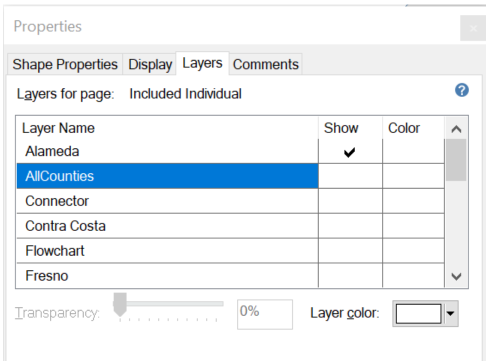
9. Click the layer icon circled in red color below



10. Once the layers button is clicked the Properties box will pop up.



11. Then click the county name that is applicable to you, in this case Alameda



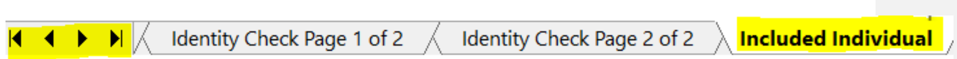
12. Once you select Alameda and close the properties pop up (by clicking the x button at top right corner like closing a tab or window) the flow diagram will show only the rules /functionalities applicable to Alameda.

<u>Viewing Visio Document in Microsoft Visio</u>

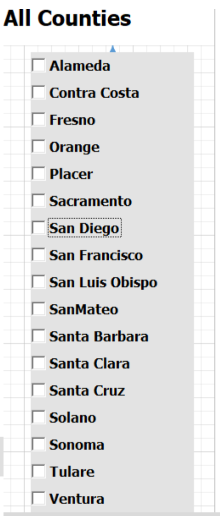
1. This is applicable for Laptops/Desktops that do have Microsoft Visio software installed

2. Once you double click the attachment or right click and open with Visio then it will open in Microsoft Visio

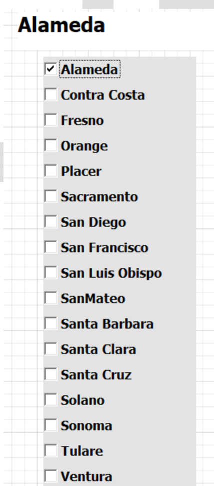
3. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



4. On the right side of the flow diagram the counties names will be displayed as shown below



5. Then click the county name that is applicable to you, in this case Alameda as shown below



6. Once you select Alameda the flow diagram will show only the rules /functionalities applicable to Alameda.

6.2 Reference Table

Reference table for CT73 (Program status reason) and corresponding status reason in this design document. This table shows the values for the new columns added.

a. Key:
   i. GR Priority
      01. The lower the number the higher the priority
   ii. GR Program Role
      01. FE – This indicator means the status reason will change the person role to FRE - 'Financially Responsible – Excluded'
      02. FI – This indicator means this status reason will change the person role to FRI 'Financially Responsible – Included'
      03. MM – This indicator means this status reason will change the person role to MMO 'Medi-Cal Member Only'
      04. UP – This indicator means this status reason will change the person role to UP 'Unaided Person'
   iii. GR Close Person
      01. CanCloseBoth – Indicator means this status reason can close both person and program level.
      02. Y – indicator means this status reason can close the person.
   iv. GR Close Program
      01. CanCloseBoth – Indicator means this status reason can close both person and program level.
      02. Y – Indicator means this status reason can close the program.
   v. General Relief
      01. Y -Indicator means this status reason will be applicable for CalWINs General Relief Program

CalWIN Status	GR Priority	CalSAWs Status (Status Reason)	GA/GR Program Role	GA/GR Close Person	GA/GR Close Program	General Relief	Use Case
verification	7055	FTP Income				Y	earned Income
XAF378	9240	Currently Employed		Y		Y	Earned Income
XAF331	9280	Deduction Amount < $10		Y		Y	Earned Income
XAF001	9460	Income Unverified			Y	Y	Earned Income

XAF642	9480	Income Unverified by Sponsor			Y	Y	Earned Income
XAF345	9620	Prev. Lumpsum POI			Y	Y	Earned Income
XAF379	9660	Self-Employment Exceeds Limit		Y		Y	Earned Income
XAF343	9700	Suspension Not Requested		Y		Y	Earned Income
XAF384	9400	Failed to Comply: Resp. Relative			Y	Y	Responsible Relative
XAF383	9560	No Good Cause - Refused Resp. Relative			Y	Y	Responsible Relative
verification	7050	FTP Proof of Utility Expense				Y	Utility Allowance
verification	not used	FTP Proof Utility Expense				Y	Utility Allowance

6.3 CalWIN RT table search reference (used by developers)

This table has how CalWIN currently search for county defined values used in EDBC. Developers will use this information to get the required values in CalSAWS.

Use Case	CalSAWs Table	Description (summary of what we are doing in this table)	Example	Category ID

Earned Income	GAGR Deductions	The table 'GAGR Deduction' (CT10663) will provide the disregard allowed amount and deduction disregard Allowed percentage for specific values based on the CalWIN GAGR County. The code number indentifier is used to retrieve the deduction and percentage amount. Each county will have two reference column one will be for disregard allowed amount titled '[County Name] disregard allowed amount' and the other will be for disregard allowed percentage amount titles '[County Name] disregard allowed amount percentage'. Note - [County Name] is a placeholder for whatever county being searched for.	Example: Get Alameda (01) defined 'deduction disregard amount' and deduction disregard percentage for 'Applicant earned income' for Alameda. Search: Code number identifier = 'AE' From: Code Detail Table Where: Code number identif = 'AE' Category Id = 10663 Result: Alameda disregard allowed amount = 0 Alameda disregard allowed percentage = 75 Meaning: Alameda disregard allowed amount for 'Applicant earned income' is 0 and Alameda disregard allowed percentage for 'Applicant earned income' is 75.	10663

Earned Income Exemption	GAGR Deductions	The table 'GAGR Deduction' (CT10663) will provide the disregard allowed amount and deduction disregard Allowed percentage for specific values based on the CalWIN GAGR County. The code number indentifier is used to retrieve the deduction and percentage amount. Each county will have two reference column one will be for disregard allowed amount titled '[County Name] disregard allowed amount' and the other will be for disregard allowed percentage amount titles '[County Name] disregard allowed amount percentage'. Note - [County Name] is a placeholder for whatever county being searched for.	Example: Get Alameda (01) defined 'deduction disregard amount' and deduction disregard percentage for 'Applicant earned income' for Alameda. Search: Code number identifier = 'AE' From: Code Detail Table Where: Code number identif = 'AE' Category Id = 10663 Result: Alameda disregard allowed amount = 0 Alameda disregard allowed percentage = 75 Meaning: Alameda disregard allowed amount for 'Applicant earned income' is 0 and Alameda disregard allowed percentage for 'Applicant earned income' is 75.		10663

Financial Other Persons	EDBC Levels and Limits	EDBC Levles and Limits' (CT 351) is an existing table which will be used to retrieve the 'Minimium Basic Standard of Adequate Care' (MBSAC), Non Exempt Grant amount and Exempt Grant amount based on the household size and the county Region. The following Code Number Identif will be used when seaching for the following amounts: Non Exempt Grant Amount: 10 - CalWORKs NonExempt MAP - Region 1 11 - CalWORKs Non-Exempt MAP - Region 2 Exempt Grant Amount: 12 - CalWORKs Exempt MAP - Region 1 13 - CalWORKs Exempt MAP - Region 2 MBSAC: 14 - CalWORKs Applicant MBSAC - Region 1. 15 - CalWORKs Applicant MBSAC - Region 2. The reference column is based by the unit size. Example: Reference column 1 (UnitSize1) = Unit Size 1 Reference column 2 (UnitSizePersons2) = Unit size 2 *Please Note - each code number identif is divided by Region 1 or Region 2 choose the respective code number	Example: Get Alameda (01) (Region 2) defined Minimum Basic Standard of Adequate Care(MBSAC) Non Exempt Grant amount for a house hold size = 2. Search: UnitSize2Persons2 From: Code Detail Table Where: Code number identif = 11 Result: Alameda (Region 2) defined Minimum Basic Standard of Adequate Care(MBSAC) Non Exempt Grant amount for a house hold size = 2 is 661. Please Note: This is an example and does not accurately give the Region for Alameda.		351

		identifier that represents the County Region.		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218060

Read Only EDBCs for SAR7 or RE Due Month within 10 day Negative Action

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Meenavalli S
	Reviewed By	Jason F, Ritu Ch, Caroline B, Binh Tran

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/14/2021	1.0	Initial Draft	Meenavalli S

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1 OVERVIEW

In CalSAWS, for CW(CalWORKs), RCA(Refugee Cash Assistance) and FS (Cal-Fresh) Programs when the SAR7 or RE EDBC's run, CalSAWS application will evaluate and determine the benefits based on the worker entered data collection details. The new EDBC benefit amount could be either an increase or decrease or the same based on the new data entered. Note that RCA Program will have SAR7 and not RE.

1.1 Current Design

For the CW/RCA and FS Programs when the SAR7 or RE EDBC's run with any new Income added etc., that negatively impacts the benefits and also if the EDBC is run after the 10-day NOA cutoff for the SAR7/RE due month, the EDBC is determined as Read-Only EDBC's for the future month and Regular EDBCs for the come up (future-future) month.

The Run reason SAR7/RE is being set on the future (Read-Only) month and the SAR7/RE packets that are marked as "Reviewed-Ready to Run EDBC" are not being flipped to "Complete-EDBC Accepted" on the Customer Reporting Pages.

Also, for RE's the RE Due date is not being advanced due to the RE month determined as Read-Only.

In addition, EDBC restricts the worker from accepting an EDBC by displaying a hard validation when the EDBC is not run from the month after the SAR7/RE Due month and the packet status is "Reviewed – Ready to run EDBC".

1.2 Requests

The purpose of this SCR is to set the first month which is having Regular EDBC with the Run reason SAR7/RE and the SAR7/RE packets that are marked as "Reviewed-Ready to Run EDBC" to be flipped to "Complete-EDBC Accepted" on the Customer Reporting Pages.

Also, for RE's the RE Due date should be advanced based on the RE due month.

1.3 Overview of Recommendations

- Update the EDBC logic to set the Run reason SAR7/RE on the month with Regular EDBC.
- Update the EDBC logic to advance the RE due month based on the RE run reason.
- Update the Customer Reporting logic to flip the SAR7/RE packets that are marked as "Reviewed-Ready to Run EDBC" to "Complete-EDBC Accepted".
- Suppress the hard validation "[Packet Name] Ready to Run EDBC for [Month after Packet due month]." when the month after the RE/SAR7 is a "Read-Only" EDBC with Type Reason: 10-Day Negative Action.

1.4 Assumptions

- There will be no Batch Run for this SCR.
- The EDBC future month Ready-Only after the 10-day will not have any impact.
- This change will apply to all counties.

- SCR CA-232056 (Release TBD) – Reduce CalFresh Benefits after RE without 10 Day Notice is created and will be prioritized as per the CW/CF Priority list.
- SCR CA-52723 (Release 18.07) – Customer Reporting Updates is implemented in CalSAWS for the worker to restrict from accepting an EDBC by displaying a hard validation when the EDBC is not run from the month after the SAR7/RE Due month and the packet status is "Reviewed – Ready to run EDBC".

2 RECOMMENDATIONS

2.1 CW/FS EDBC Rules Update

2.1.1 Overview

To ensure that RE/SAR7 run reason populate on the Regular EDBC month, EDBC rules need to be updated.

2.1.2 Description of Changes

1. Update the EDBC logic to set the Run reason SAR7/RE on the first month which is having Regular EDBC.
2. Update the EDBC logic to advance the RE due month based on the RE run reason when Authorized.
3. Update the Customer Reporting logic to flip the SAR7/RE packets that are marked as "Reviewed-Ready to Run EDBC" to "Complete-EDBC Accepted" when Authorized.
4. Update the current validation "[Packet Name] Ready to Run EDBC for [Month after Packet due month]." to be suppressed when the below conditions are met:
    a. Month after SAR7/RE Due month is Read Only EDBC that is Authorized
    b. Read Only EDBC has Type Reason: 10-Day Negative Action
    c. RE/SAR7 packet Due date is the prior month as that of the RO (Read Only) EDBC month
    d. The status of the current RE/SAR7 packet is 'Reviewed- Ready to Run EDBC' for the given program
    e. New or current EDBC is Regular EDBC with the EDBC Run Reason set as SAR7/RE

<u>EDBC Scenario 1:</u> Case with CW/CF RE Due: 07/31/2021.

a. Mark the RE Packet in Customer Reporting Page to "Reviewed-Ready to Run EDBC".
b. Add income to reduce the benefits and
c. Run EDBC after the 10-day cutoff for 08/2021 and 09/2021.

Expected Results:

i. CW/CF EDBC for 08/2021 will be Read-Only EDBC with Type Reason: 10-Day Negative Action
ii. CW/CF EDBC for 09/2021 will be Regular EDBC with reduced benefits
iii. 09/2021 EDBC will have Run reason: RE
iv. RE Packet to be flipped to “Complete-EDBC Accepted” when Authorized.
v. RE Due date to be advanced when Authorized.

<u>EDBC Scenario 2:</u> Case with CW/CF SAR Due: 07/31/2021.

a. Mark the SAR7 Packet in Customer Reporting Page to “Reviewed-Ready to Run EDBC”.
b. Add income to reduce the benefits and
c. Run EDBC after the 10-day cutoff for 08/2021 and 09/2021.

Expected Results:

i. CW/CF EDBC for 08/2021 will be Read-Only EDBC with Type Reason: 10-Day Negative Action
ii. CW/CF EDBC for 09/2021 will be Regular EDBC with reduced benefits
iii. 09/2021 EDBC will have Run reason: SAR7
iv. SAR7 Packet to be flipped to “Complete-EDBC Accepted” when Authorized.

<u>EDBC Scenario 3:</u> Case with CW/CF SAR Due: 07/31/2021.

a. Mark the SAR7 Packet in Customer Reporting Page to “Reviewed-Ready to Run EDBC”.
b. Add income to reduce the benefits
c. Run EDBC after the 10-day cutoff for single month 08/2021 and Authorize which should result in Read-Only EDBC with Type Reason: 10-Day Negative Action.
d. Run single month EDBC for 09/2021.

Expected Results:

i. CW/CF EDBC for 09/2021 will be Regular EDBC with reduced benefits
ii. 09/2021 EDBC will have Run reason: SAR7
iii. When “Accept” is clicked to authorize, the hard validation message “SAR7 Ready to Run EDBC for 08/2021.” should not be displayed and restrict worker from accepting the regular EDBC.
iv. SAR7 Packet to be flipped to “Complete-EDBC Accepted” when Authorized.

Below are different Reporting Types for the change to be applied.

CODES	EDBC Reporting Types	SCR Impact
AR	Annual Reporting	Yes
MS	Semi-Annual Reporting	Yes
SA	Semi-Annual Reporting Annually	Yes

2.1.3 Programs Impacted

CalWORKs, Refugee Cash Assistance, Cal-Fresh

2.1.4 Performance Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	EDBC	CalSAWS Run EDBC screens for CW/CF SAR7/RE	SCR CA-218060 – CalSAWS RE-SAR7 Exa
2.	EDBC	C-IV Run EDBC screens for CW/CF SAR7/RE	SCR CA-218060 – C-IV RE-SAR7 Example

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.1	The LRS shall fully automate and perform all aspects of the eligibility determination process and benefit level calculations for all categories of public assistance in a single pass without manual intervention.	The automation on the SAR7/RE packets status change and benefits calculation will be used to correctly evaluate for the Regular EDBC come-up month.

5 MIGRATION IMPACTS

None

6 OUTREACH

None

7 APPENDIX

None

California Statewide Automated Welfare System

Design Document

CA-218425

Remove 'Level of Approval Required' field on Payment Request

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eric Wu
	Reviewed By	Sidhant Garg, Eric Chu

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/22/2021	1.0	Initial Version	Eric Wu

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1 OVERVIEW

1.1 Current Design

The Payment Request Detail page allows the User to Add, Edit, and View the payment request information. On the page, the "Level of Approval Required" field indicates the current level of approval required. the field displays obsolete Authorization Level - 'Supervisor' when the 1st Level Authorization is needed and 'Deputy' when the 2nd Level Authorization is needed. Because the status "Awaiting Approval(L1)/(L2)" are self-explanatory, the field is not applicable anymore.

1.2 Requests

1. Remove Level of Approval Required field on Payment Request Detail page.

1.3 Overview of Recommendations

1. Remove Level of Approval Required field on Payment Request Detail page.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Payment Request Detail

2.1.1 Payment Request Detail Mockup

Service Arrangement Details

Payee Name: [redacted]	**Case Name:** Case Name	**Case Number:** [redacted]
Program: Welfare to Work	**Funding Source:**	**Aid Code:** 32 - CW-TANF-Timed Out (State)
Need Category: Transportation	**Need Type:** Bus Pass - Valid Month	**Voucher Number:**
Service Type:	**Employed:** No	

Requested Amount: * 100.00	**Adjusted Amount:** 100.00	**Advanced:** * Yes	**Service Arrangement Requested Amount:** 300.00
Status: * Awaiting Approval (L2)	**Service Month:** * 04/2021	**Issuance Method:** * EBT	**Service Arrangement Remaining Amount:** 0.00
Pay Code: * WT SO TR UE	**Receipt Verification Date:**	**Receipt Amount:**	
Received Date: * 05/05/2021	**Creation Date:**	**Invoice Number:**	
Delivery Method: * Mail	**Immediacy:** * Routine	**Purchase Order Number:**	
Comments:			

Payment Request Detail without Level of Authorization Required

2.1.2 Description of Changes

Remove the Level of Approval Required field on the Payment Request Detail.

2.1.3 Page Location

Global: Fiscal

Local: Payment Request

Task: Payment Request Search

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.9.2.2	The LRS shall automatically route authorization requests to the correct authorization level(s), as specified by COUNTY.	Update the system to remove the obsolete Level of Approval Required field.

5 MIGRATION IMPACTS

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

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219921

Update SAR 2 to Generate using EDBC Logic

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor Gorry
	Reviewed By	Priya Sridharan, Raj Devidi, Himanshu Jain, Shilpa Suddavanda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/5/21	1.0	Initial Creation	Connor Gorry
4/15/21	1.1	Revisions per CF/CW Committee Feedback	Connor Gorry
8/8/2021	1.2	Submitted for Committee Approval	Connor Gorry
9/1/2021	1.3	Updates per Committee Feedback	Connor Gorry

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1 OVERVIEW

1.1 Current Design

CalSAWS currently utilizes the 3/15 version of the SAR 2 in English and Spanish, and generates the form via batch for CalFresh, CalWORKs, and RCA programs. However, current batch logic has necessitated the use of additional manual DCR's when the SAR 2 is generated for COLA runs.

This change will update the SAR 2 to the latest state-published version (6/19) in English, Spanish, and all Threshold Languages. Per CRPC 2241, this update will also add verbiage and population for 'Effective Month' to better inform SAR 2 recipients of when changes take effect.

This change will also transition the SAR 2 from its current Batch logic to EDBC logic, allowing it to generate for COLA runs and when multiple changes occur across a multi-month window.

1.2 Requests

Update the SAR 2 to the latest state version and transition the SAR 2's generation to trigger via Run EDBC.

1.3 Overview of Recommendations

1. Update SAR 2 to the 6/19 version in the Template Repository, Add and Automate the SAR 2 to generate via Run EDBC
2. Update the SAR 2 in the SAR 7/SAR 7 Addendum/SAR 2 Template to the 6/19 version

1.4 Assumptions

1. In CalSAWS, the CW and CF IRT Amount(s) is/are also included on the SAR 7 Form.
2. The SAR 7 Addendum/SAR 2/SAR 7 bundle will maintain its current logic to generate via Batch for Migration counties. The SAR 2 within this bundle will maintain its current variable population logic.
3. Mentions of 'CalWORKs' throughout this document also apply to Refugee Cash Assistance (RCA) Program.
4. RCA does not have a Redetermination process; a SAR 2 will not be sent for Redetermination for RCA program only (but can be sent if the case also has CalFresh).
5. A SAR 2 triggered for one program will also display the information for the other program if the case has Active status. For example, if the SAR 2 is triggered for a CalFresh Redetermination, an Active RCA case will also populate income, AU size, and IRT amount in the CalWORKs column. For example, for PACF households the IRT will be the CalWORKs IRT for CalFresh. For Mixed CalWORKs/CalFresh Households, the IRT will be the 130% FPL, or N/A as appropriate for the CalFresh Program.

6. This change only effects the SAR 2's generation, variable population, and Form version; No Eligibility/EDBC changes will be made with this SCR.
7. Variables for Income, IRT Limit Amount, and Household/AU size for all programs will be dependent upon the Effective Date when the SAR 2 is generated via Run EDBC; i.e., a SAR 2 with an Effective Date of 10/2021 will populate with the IRT Limit Amount for 10/2021, Household Size as of 10/2021, and household income as of 10/2021.
8. If a SAR 2 is generated for a case with only one program - CalFresh or CalWORKs – information in the column for the other program (Income, Household/AU size, IRT Limit amount) will be left blank.
9. Like other forms generated by EDBC, the SAR 2 will include the enhanced functionality to only generate when fully authorized (functionality added with CA-223587), can be previewed, appear in the EDBC's NOA list page, and appear in Distributed Documents after it has been generated.
10. The SAR 2 will generate with the outlined triggers for cases with the new Semi-Annual Non-Reporting type, established for ESAP cases with CA-220040. The existing SAR 2 Batch job will be re-purposed to generate for ESAP cases on the 12^{th} and 24^{th} months of the RE Period.
11. A SAR 2 will only be generated once per EDBC run in a single-month EDBC scenario. If multiple SAR 2 triggers are met (for example, a new RE period begins and the CW IRT changes for the September 2021 Effective Month) only one SAR 2 will generate from EDBC.
12. Multi-month EDBC scenarios outlined in the Appendix will apply after the implementation of CA-224153, which will update NOA Suppression logic for Multi-Month EDBC runs.
13. The AR 2 and AR 2 SAR are both currently generated using Run EDBC. A port of their logic generates these Forms when the reporting type changes to their respective types. This logic will remain unchanged.

2 RECOMMENDATIONS

2.1 Update SAR 2 to the 6/19 version, Update Trigger Conditions to generate via Run EDBC

2.1.1 Overview

Update the SAR 2 in the Template Repository to the latest 6/19 version. Per CRPC 2144, the updated SAR 2 will also contain a new variable for "Effective Month", which will populate upon form generation from the Template Repository.

State Form: SAR 2

Current Programs: CF, CW, RCA

Current Attached Form(s): N/A

Current Forms Category: Forms

Existing Languages: English, Spanish

Template Repository Visibility: All Counties

2.1.2 Updates to SAR 2 XDP

The SAR 2 will be updated to the two-impression 6/19 version in English, Spanish, and all threshold languages.

Updated Languages:

English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

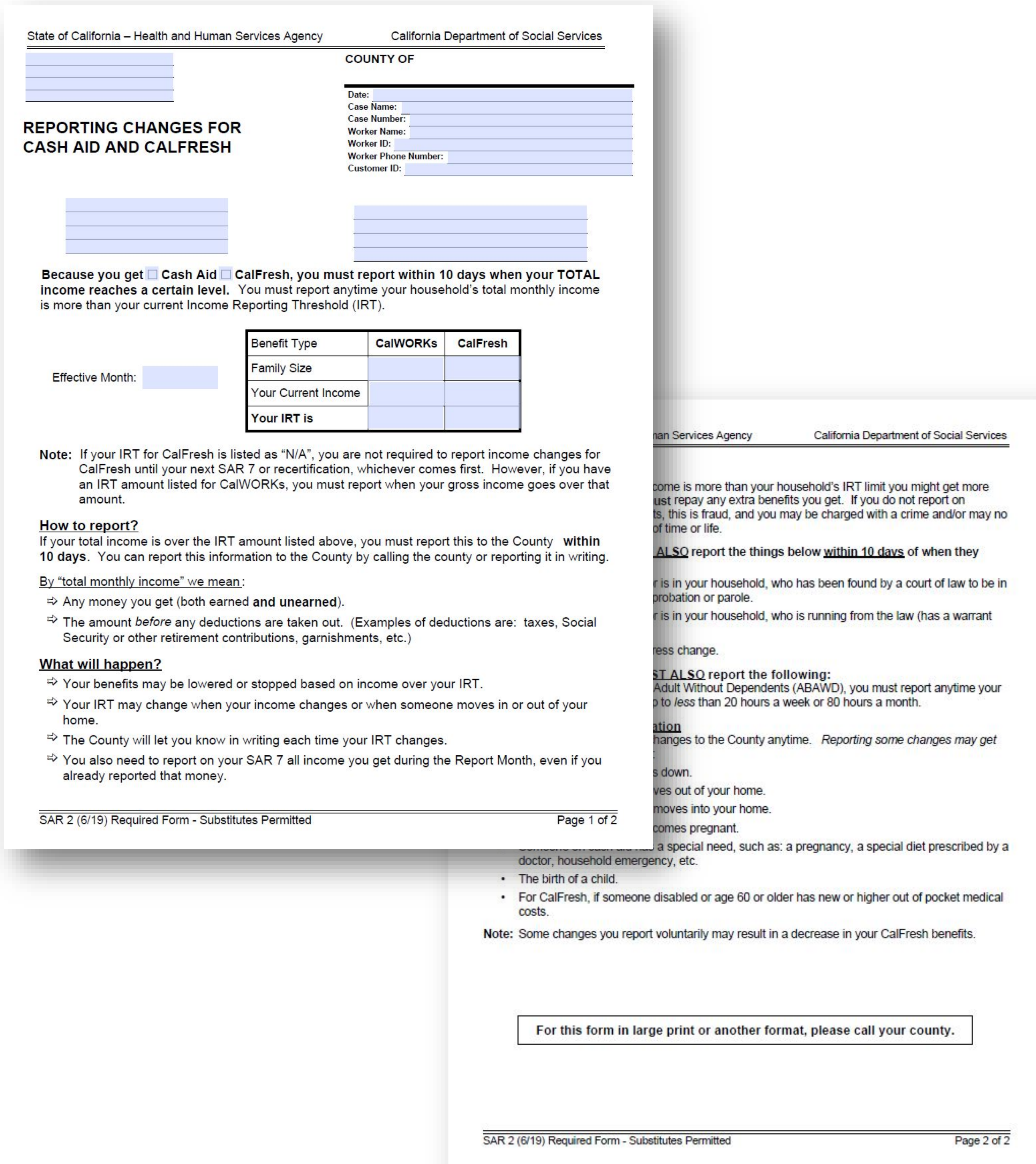
Form Title: Reporting Changes for Cash Aid and CalFresh

Form Number: SAR 2

Forms Category: Forms

Include NA Back 9: N

Form Mockups/Examples: See Supporting Documents #1



State of California – Health and Human Services Agency California Department of Social Services

COUNTY OF

Date:
Case Name:
Case Number:
Worker Name:
Worker ID:
Worker Phone Number:
Customer ID:

REPORTING CHANGES FOR CASH AID AND CALFRESH

Because you get ☐ Cash Aid ☐ CalFresh, you must report within 10 days when your TOTAL income reaches a certain level. You must report anytime your household's total monthly income is more than your current Income Reporting Threshold (IRT).

Effective Month:

Benefit Type	CalWORKs	CalFresh
Family Size		
Your Current Income		
Your IRT is		

Note: If your IRT for CalFresh is listed as "N/A", you are not required to report income changes for CalFresh until your next SAR 7 or recertification, whichever comes first. However, if you have an IRT amount listed for CalWORKs, you must report when your gross income goes over that amount.

How to report?

If your total income is over the IRT amount listed above, you must report this to the County **within 10 days**. You can report this information to the County by calling the county or reporting it in writing.

By "total monthly income" we mean:

- Any money you get (both earned **and unearned**).
- The amount *before* any deductions are taken out. (Examples of deductions are: taxes, Social Security or other retirement contributions, garnishments, etc.)

What will happen?

- Your benefits may be lowered or stopped based on income over your IRT.
- Your IRT may change when your income changes or when someone moves in or out of your home.
- The County will let you know in writing each time your IRT changes.
- You also need to report on your SAR 7 all income you get during the Report Month, even if you already reported that money.

SAR 2 (6/19) Required Form - Substitutes Permitted Page 1 of 2

…an Services Agency California Department of Social Services

…come is more than your household's IRT limit you might get more …ust repay any extra benefits you get. If you do not report on …ts, this is fraud, and you may be charged with a crime and/or may no …of time or life.

…**ALSO report the things below within 10 days of when they**

…r is in your household, who has been found by a court of law to be in …probation or parole.

…r is in your household, who is running from the law (has a warrant

…ress change.

…**ST ALSO report the following:**

…Adult Without Dependents (ABAWD), you must report anytime your …to *less* than 20 hours a week or 80 hours a month.

…**ation**

…hanges to the County anytime. *Reporting some changes may get*

…s down.

…ves out of your home.

…moves into your home.

…comes pregnant.

…a special need, such as: a pregnancy, a special diet prescribed by a doctor, household emergency, etc.

- The birth of a child.
- For CalFresh, if someone disabled or age 60 or older has new or higher out of pocket medical costs.

Note: Some changes you report voluntarily may result in a decrease in your CalFresh benefits.

For this form in large print or another format, please call your county.

SAR 2 (6/19) Required Form - Substitutes Permitted Page 2 of 2

2.1.3 Update SAR 2 Variable Population

Create and populate a new variable for Effective Month that will populate with the EDBC month for which other variables will apply.

When generated from the Template Repository, this will be the month selected from the 'Effective Month' calendar menu (currently 'SAR Due Month', will be updated with Recommendation 2.1.5). When the SAR 2 is generated via Run EDBC, the Effective Month will be the

Variable Name	Population	Formatting	Editable*	Template Repository Population	Populates with Form Generation
Effective Month	Populate with the Effective Month selected from the SAR Document Parameters Page (when generated from the Template Repository) **OR** Populate with the EDBC begin date (when generated via Run EDBC) Example: 09/2021	Arial, Size 10 mm/yyyy	Y	Y	Y
Cash Aid Checkbox	Checked if Case has Active CalWORKs or RCA program(s) for the Effective Month	Standard Checkbox	Y	Y	Y
CalFresh Checkbox	Checked if case has Active CalFresh program for the Effective Month	Standard Checkbox	Y	Y	Y

CW AU Size	CW AU Size for the Effective Month Example: 4 **OR** Blank, if the case does not have CalWORKs or RCA	Arial, Size 10	Y	Y	Y
CW Income	Monthly income from the CalWORKs program budget for the Effective Month. Example: $2500.00 **OR** Blank, if the case does not have CalWORKs or RCA	Arial, size 10 $x,xxx.xx	Y	Y	Y
IRT_CW	The CalWORKs IRT Limit Amount for the Effective Month. (CW_Budget.NEW_ IRT_Limit_AMT) **OR** Blank, if the case does not have CalWORKs or RCA	Unchanged from existing formatting.	Y	Y	Y
CF HH Size	Populate with the CalFresh Household Size for the Effective Month. Example: 4 **OR**	Arial, Size 10	Y	Y	Y

	Blank, if the case does not have CalFresh				
CF Income	Monthly income from the CalFresh program budget for the Effective Month. Example: $2,500.00 **OR** Blank, if the case does not have CalFresh	Arial, Size 10 $x,xxx.xx	Y	Y	Y
IRT_CF	The CalFresh IRT Limit dollar value for the Effective Month. (FS_Budget. New_IRT_Limit_AMT) **OR** 'N/A' if the CalFresh household does not have an IRT Limit Amount for the Effective Month. (IRT_IND is 'N') **OR** Blank, if the case does not have CalFresh	Unchanged from existing formatting.	Y	Y	Y

* Note: The Editable column of the table above refers to if the variable will be editable when populated. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated.

Variables Requiring Translations: N/A

2.1.4 Add SAR 2 Generation Conditions to Trigger via Run EDBC

Generate the SAR 2 via Run EDBC when the following conditions apply:

- Case is Active CalFresh, CalWORKs, **and/or** RCA, with a Semi-Annual Reporting Type (SAR) or a Semi-Annual Reporting Annually (SARA), or Semi-Annual Non-Reporting (SARN) Reporting Type
  - A SAR 2 can be generated if a case is CalFresh only, CalWORKs only, or has both CalFresh and CalWORKs (or RCA)

AND

- At Intake EDBC where the program(s) has been Approved.
- Previous EDBC's Reporting Type was not SAR, SARA, or SARN.
- A successful Redetermination EDBC for the program(s) is being authorized.
- The CalFresh IRT Limit Amount* has changed from the previous successful EDBC **OR** the CalWORKs IRT Limit Amount has changed from the previous successful EDBC

  *Note: Current Batch processes generate the SAR 2 when the CalFresh IRT Indicator changes. New NOA logic will update the SAR 2 to trigger for CalFresh whenever the IRT Limit amount changes, aligning SAR 2 generation for CF with that of CalWORKs, and with policy.

Contingent on SCR CA-224153: For multi-month EDBC runs, the SAR 2 can generate multiple times if there is/are more than one change in the IRT value(s), or if a new RE window begins and then there is a change in an IRT limit amount. These and other SAR 2 generation scenarios can be found in the Appendix.

Like other NOA Forms generated via EDBC, the SAR 2 will only generate via EDBC when fully authorized; It can be Previewed, appear in the EDBC's list of notices, and be saved to Distributed Documents (see CA-223587).

2.1.5 Update the Document Parameters Page for the SAR 2

Update the Document Parameters Page to read "Effective Month" over the Date Selection calendar field when the SAR 2 is generated from the Template Repository (currently this field is labeled 'SAR Due Month').

Note: This change will only affect the Document Parameters when a SAR 2 is generated. Other Forms utilizing SARReporting.jsp will still show 'SAR Due Month' when generated from the Template Repository.

2.2 Update SAR 7 Addendum/SAR 2/SAR 7 bundle to include the revised SAR 2

2.2.1 Overview

Update the SAR 7 Addendum/SAR 2/SAR 7 bundle used by the Migration Counties to utilize the updated SAR 2 (6/19).

State Form: SAR 7 Addendum/SAR 2/SAR 7

Current Programs: CF, CW, RCA

Current Attached Form(s): N/A

Current Forms Category: Forms

Existing Languages: English, Spanish

Template Repository Visibility: Migration Counties

2.2.2 Updates to SAR 7 Addendum/SAR 2/SAR 7 XDP

The SAR 7 Addendum/SAR 2/SAR 7 will be updated to include the SAR 2 (6/19) in English and Spanish.

Updated Languages:

English, Spanish

Form Title: Reporting Changes for Cash Aid and CalFresh/Semi-Annual Eligibility Status Report

Form Number: SAR 7 Addendum/SAR 2/SAR 7

Forms Category: Forms

Include NA Back 9: N

Form Mockups/Examples: See Supporting Documents #2

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	SAR 2 (6/19) Mockups	SharePoint
2	Client Correspondence	SAR 7 Addendum/SAR 2/SAR 7 with SAR 2 (6/19) Mockups	SharePoint

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1208	The LRS shall accommodate and generate State-mandated forms, notices, and NOAs that cannot be changed.	Updates the SAR 2 to the latest state version.
CAR-1247	The LRS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	Updates SAR 2 Trigger Conditions to generate via NOA EDBC.

5 APPENDIX

5.1 Multi-Month SAR 2 EDBC Generation Scenarios

The following scenarios outline potential SAR 2 generation instances when the EDBC is run across a multi-month window. **Multi-month scenarios are contingent upon CA-224153,** which updates the multi-month EDBC runs to amend existing suppression logic.

5.1.1 CalFresh IRT Limit Amount Changes, then CW IRT Limit Amount Changes

In the below scenario, the SAR 2 will be generated twice in a multi-month window for a mixed CW/CF case (non-PACF), where the IRT Values:

- For CalFresh change from March to April (from $500 to $600), causing the SAR 2 to generate for the **April** Effective Month
- For CalWORKs/RCA change from May to June (from $550 to $650), causing the SAR 2 to generate for the **June** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	$550
March	$500	$550
April	**$600**	$550
May	$600	$550
June	$600	**$650**
July	$600	$650

5.1.2 CalFresh or CalWORKs IRT Limit Amount Changes, then changes again

In the below scenario, the SAR 2 will be generated twice in a multi-month window for a mixed CW/CF case (non-PACF), where the IRT Values:

- For CalFresh change from March to April (from $500 to $600), causing the SAR 2 to generate for the **April** Effective Month
- For CalFresh change again from June to July (from $600 to $700), causing the SAR 2 to generate for the **July** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	$550
March	$500	$550

April	**$600**	$550
May	$600	$550
June	$600	$550
July	**$700**	$550

The same logic will be applied if the CW IRT Amount were to change twice in a multi-month window. In this example, the SAR 2 will be generated for **April** and **July**.

5.1.3 IRT Values do not change, but there is a new RE Period

In the below scenario, the SAR 2 will be generated once in the multi-month window for a mixed CW/CF case (non-PACF), where the IRT Values have not changed, but a new RE Period has begun in the **May** Effective Month.

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	$550
March	$500	$550
April	$500	$550
May	$500	$550
June	$500	$550
July	$500	$550

5.1.4 New RE Period Begins, then IRT Changes

In the below scenario, the SAR 2 will be generated twice in the multi-month window for a mixed CW/CF case (non-PACF), where:

- A new RE Period begins for the **April** Effective Month
- The CalWORKs IRT Amount changes from May to June, causing the SAR 2 to generate for the **June** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	$550
March	$500	$550
April	$500	$550

May	$500	$550
June	$500	**$650**
July	$500	$650

5.1.5 New RE Period Begins, CalFresh IRT Amount changes to N/A

In the below scenario, the SAR 2 will be generated twice in the multi-month window for a mixed CW/CF case (non-PACF), where:

- A new RE Period begins for the **March** Effective Month
- The CalFresh IRT Amount changes to N/A from April to May, causing the SAR 2 to generate for the **May** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	
March	$500	
April	$500	
May	**N/A**	
June	N/A	
July	N/A	

In this example, the Household reported and verified that their income was between 131% and at or below 200% FPL. The CalFresh IRT amount changes to 'N/A' between the April and May EDBC's, due to the case's income exceeding 130% FPL. This case does not have CalWORKs or RCA program.

5.1.6 Case has CF IRT and amount changes; Later Approved for CalWORKs with an IRT

In the below scenario, the SAR 2 will be generated three times in the multi-month window for a mixed CW/CF case (non-PACF), where:

- A new RE Period began in March, generating the SAR 2 for the **March** Effective Month
- Case has CalFresh, and the IRT Limit amount changes from March to April, generating the SAR 2 for the **April** Effective Month
- Case is Approved for CalWORKs with an IRT Limit for June, generating the SAR 2 for the **June** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	
March	**$500**	
April	**$600**	
May	$600	
June	$600	**$550**
July	$600	$550

In this example, the case does not have CalWORKs or RCA program with an IRT Limit until the June Effective Month.

Here, a SAR 2 will be generated for the **March**, **April**, and **June** effective months.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-222133

Create preview functionality for CalSAWS Lobby Kiosk and CalSAWS Lobby Tablet

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Michael Wu, Sai Ram Bodla, Aman P Mishra, Himanshu Jain, Shilpa Suddavanda, Derek Wright

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/14/2021	1.0	Initial	Kusnadi.E

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1 OVERVIEW

The Lobby Management was designed to facilitate the automation of the lobby experience for participants that are visiting the county offices. Two of the devices that are currently used to support this automation are the CalSAWS Lobby Kiosk and the CalSAWS Lobby Tablet. The device flows for these devices are configurable and county workers are able to configure the device flow through the Flow Management Detail page in CalSAWS. Currently, there is no functionality to allow the users to preview what the device flow will look like prior to saving the device flow configuration. This SCR will update CalSAWS with the functionality to preview the device flow that is created/updated by the user.

1.1 Current Design

Currently, when a user creates/updates the device flows (the on-screen actions the participants navigate through when using the devices) for the CalSAWS Lobby Kiosk and the CalSAWS Lobby Tablet they are not able to preview how the device flow will look and feel.

1.2 Requests

Create a preview functionality that will allow users to preview how the device flow that was saved will look and feel.

1.3 Overview of Recommendations

1. Add a 'Preview' button to the Flow Management Detail page.
2. Create a new page that will display a preview of the device flow look and feel.

1.4 Assumptions

1. Existing functionality will remain unchanged unless called out as part of the device.
2. The preview functionality implemented by this SCR (CA-222133) is created based on how the CalSAWS Lobby Kiosk and CalSAWS Lobby Tablet currently look.
3. Additional training will be done to provide guidance on how the Preview functionality will work.

2 RECOMMENDATIONS

Create a preview functionality that will allow users to preview how the Device Flow that was created and saved will look and feel.

2.1 Flow Management Detail

2.1.1 Overview

The Flow Management Detail page allows a user to create or edit a device flow for the CalSAWS Lobby Kiosk and the CalSAWS Lobby Tablet. This SCR will add a 'Preview' button to the Flow Management Detail page that will open a new page that previews how the Device flow will look and feel.

2.1.2 Flow Management Detail Mockup

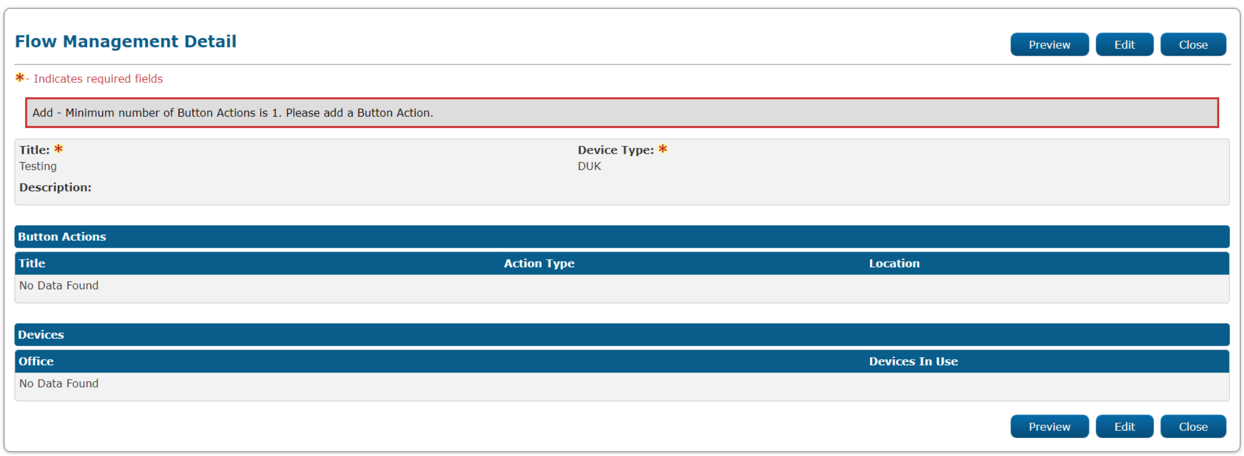


Figure 2.1.1 – Flow Management Detail (View mode) with Preview Button.

2.1.3 Description of Changes

1. Add a 'Preview' button to the Flow Management Detail page in 'View' mode as shown on Figure 2.1.1.
    a. 'Preview' button will be located next to the 'Edit' button.
    b. Clicking on the 'Preview' button will open a new window that will preview how the button actions will look and feel. Refer to Section 2.2 for more details on the new Preview page.
        i. The device flow that displays on the Preview page is specific for the device flow that the user has created and saved for that specific Flow Management record.
        ii. When the 'Preview' page is already open and updates were made to the device flow, the user must click on the

        'Preview' button again in order for the changes to be reflected through the 'Preview' page.
      iii. When the user clicks on the 'Preview' button and there is a Preview page that is already open in a new window, the existing Preview page will be refreshed (another Preview page will not be opened in a separate window).

2. Add a new validations to the Flow Management Detail page.
   a. The following validation message will display on the Flow Management Detail page when in View mode as shown on Figure 2.1.1
      i. Validation message will be triggered when the user clicks on the 'Preview' button and there is no Button Action added.
      ii. Message to be display: 'Add – Minimum number of Button Actions is 1. Please add a Button Action.'

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Device Flow Mgmt.**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Preview Page

2.2.1 Overview

Create a new page that will open in a new window to preview how the device flow that was saved will look and feel as defined by the user on the Flow Management Detail page.

2.2.2 Preview Page Mockups

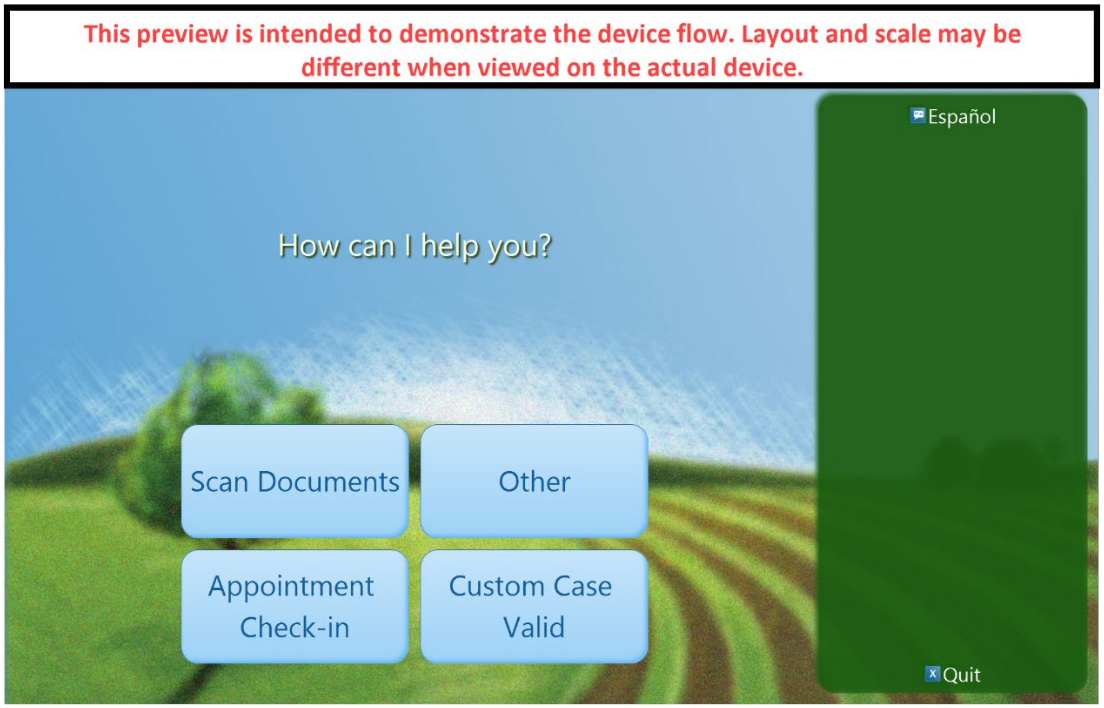


Figure 2.2.1 – How can I help you? screen (English)

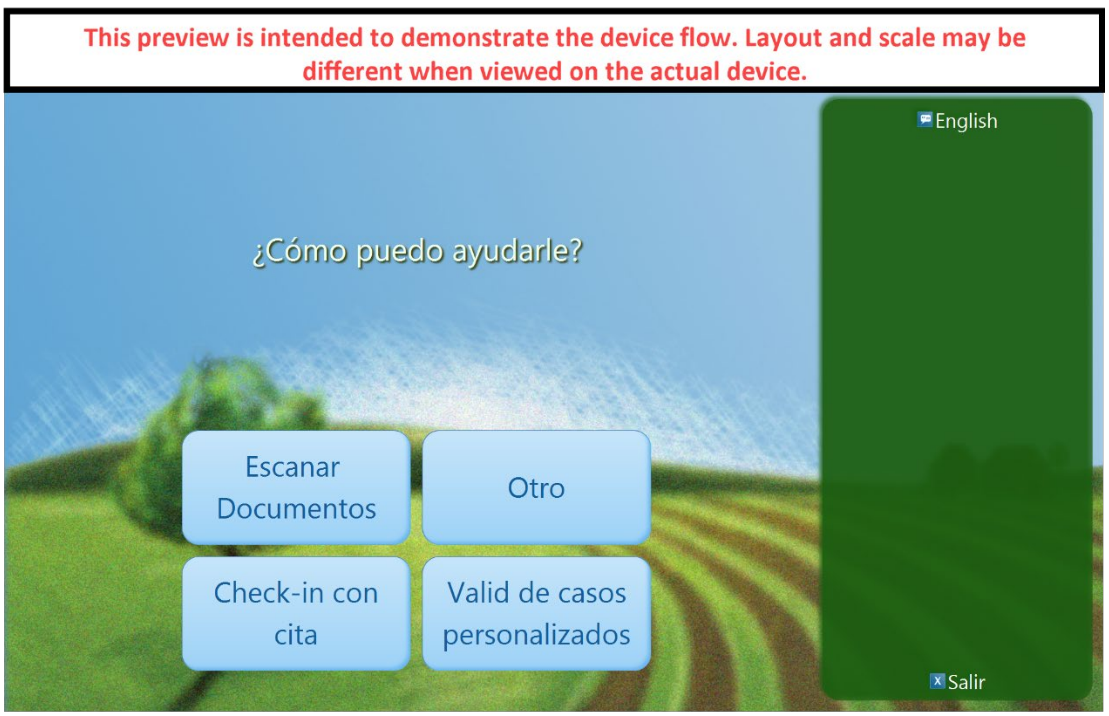


Figure 2.2.2 – How can I help you? screen (Spanish)

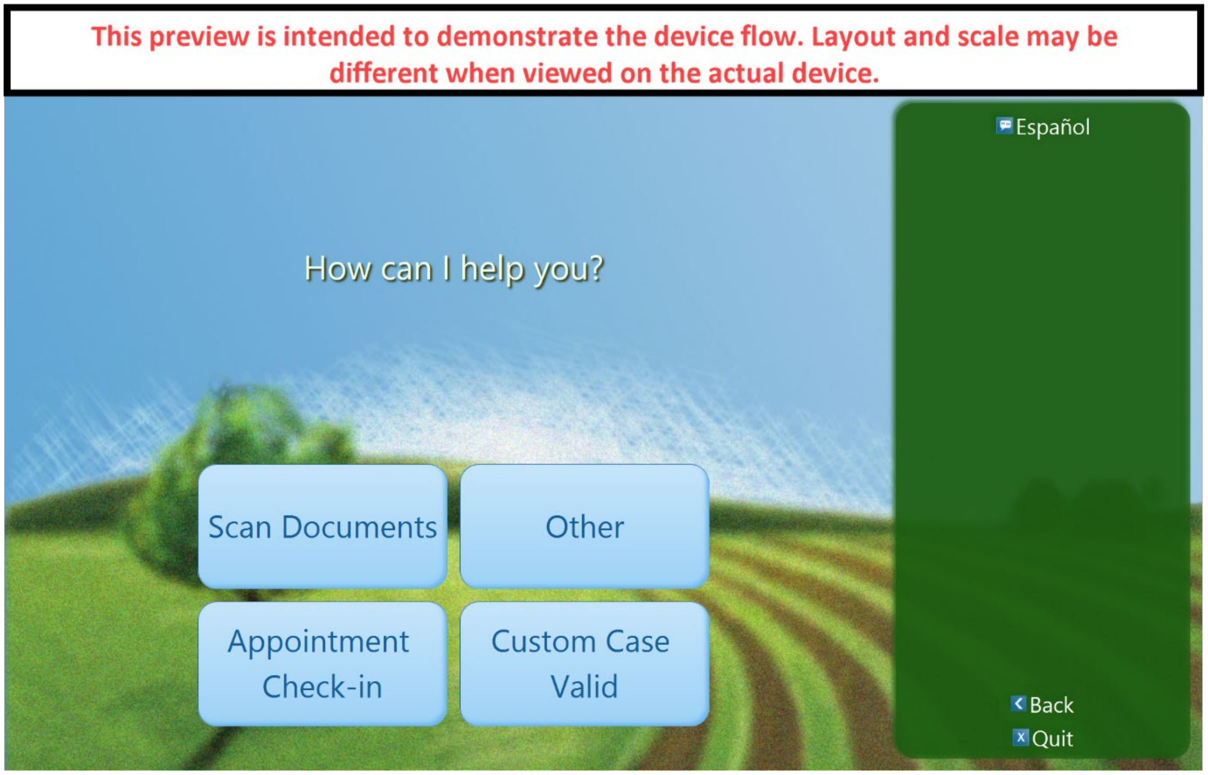


Figure 2.2.3 – Additional Action screen (English)

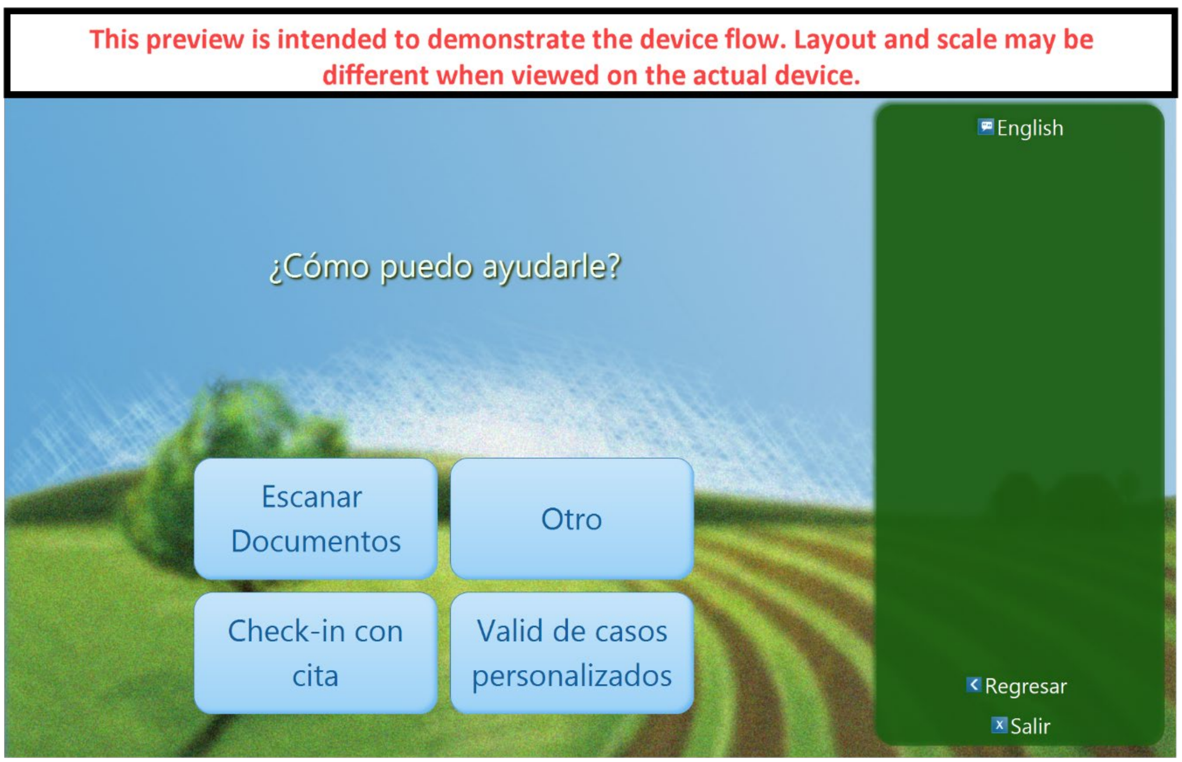


Figure 2.2.4 – Additional Action screen (Spanish)

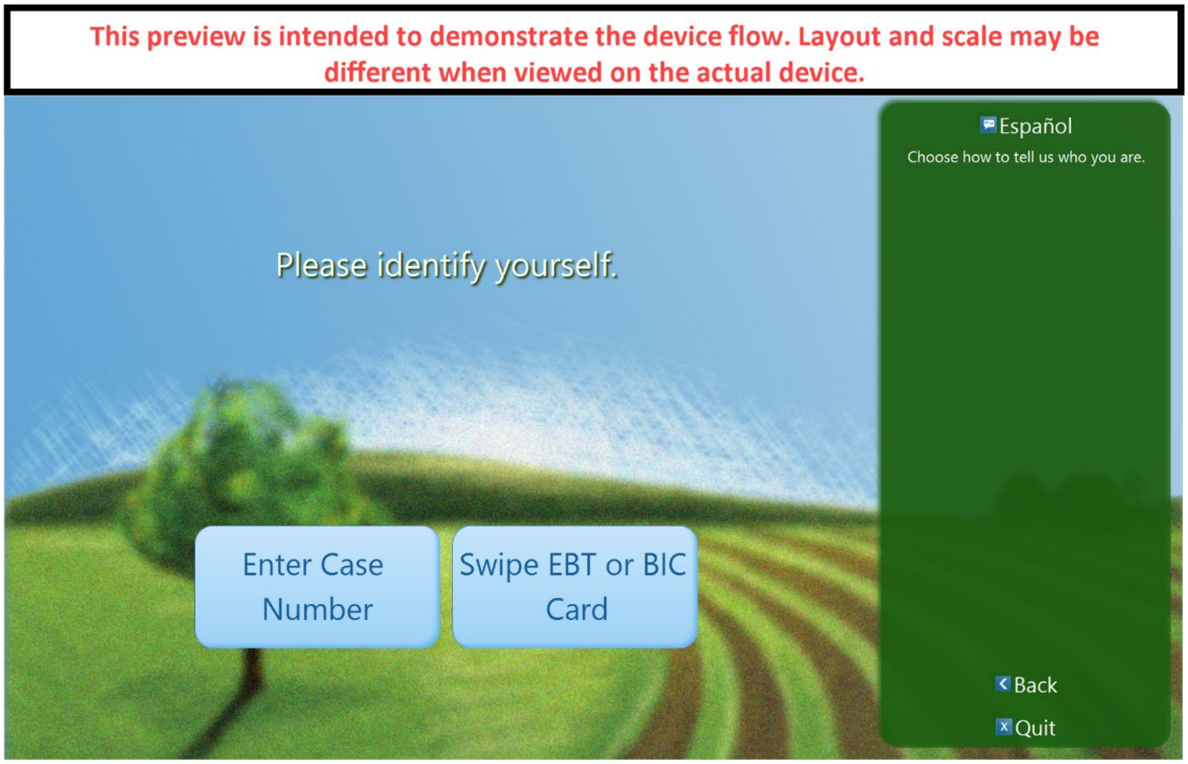


Figure 2.2.5 – Please identify yourself screen (English)

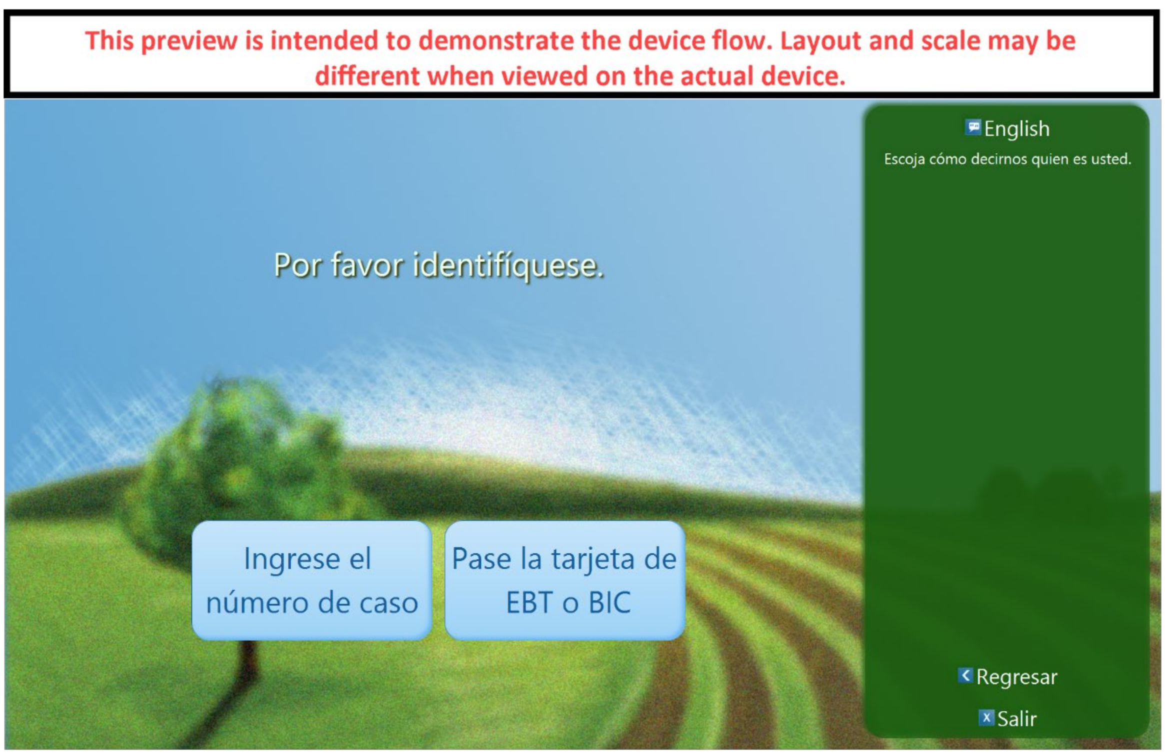


Figure 2.2.6 – Please identify yourself screen (Spanish)

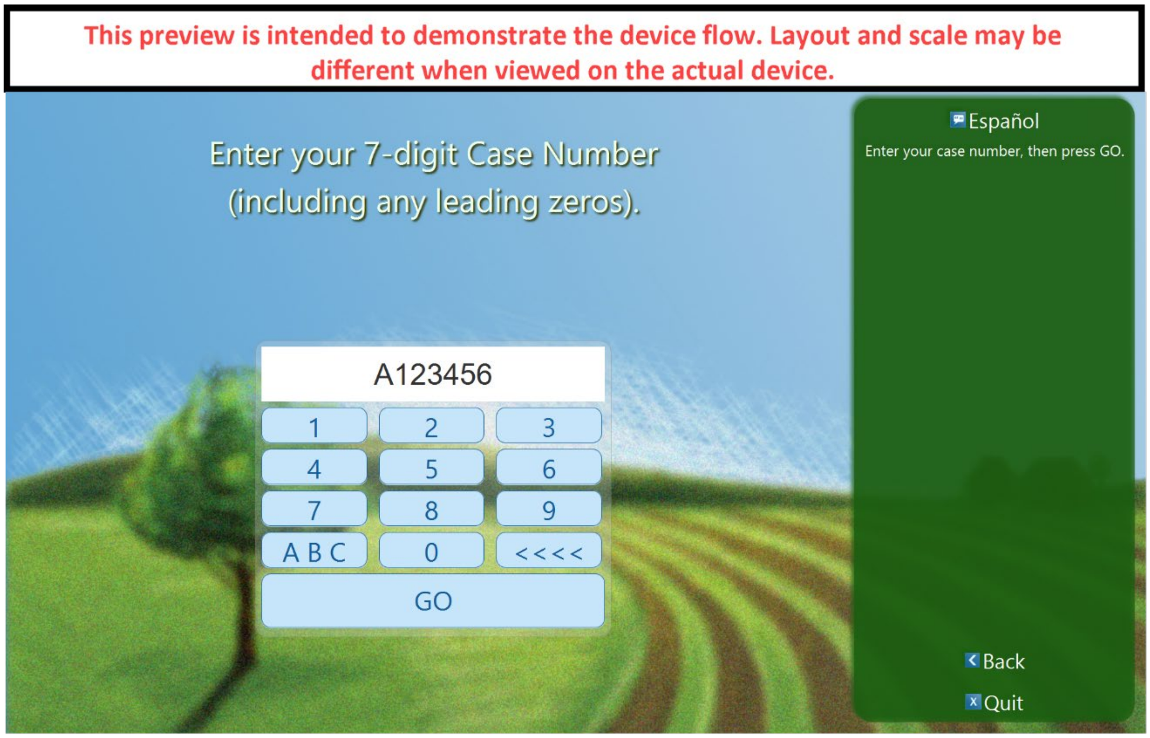


Figure 2.2.7 – Enter your Case Number screen (English)

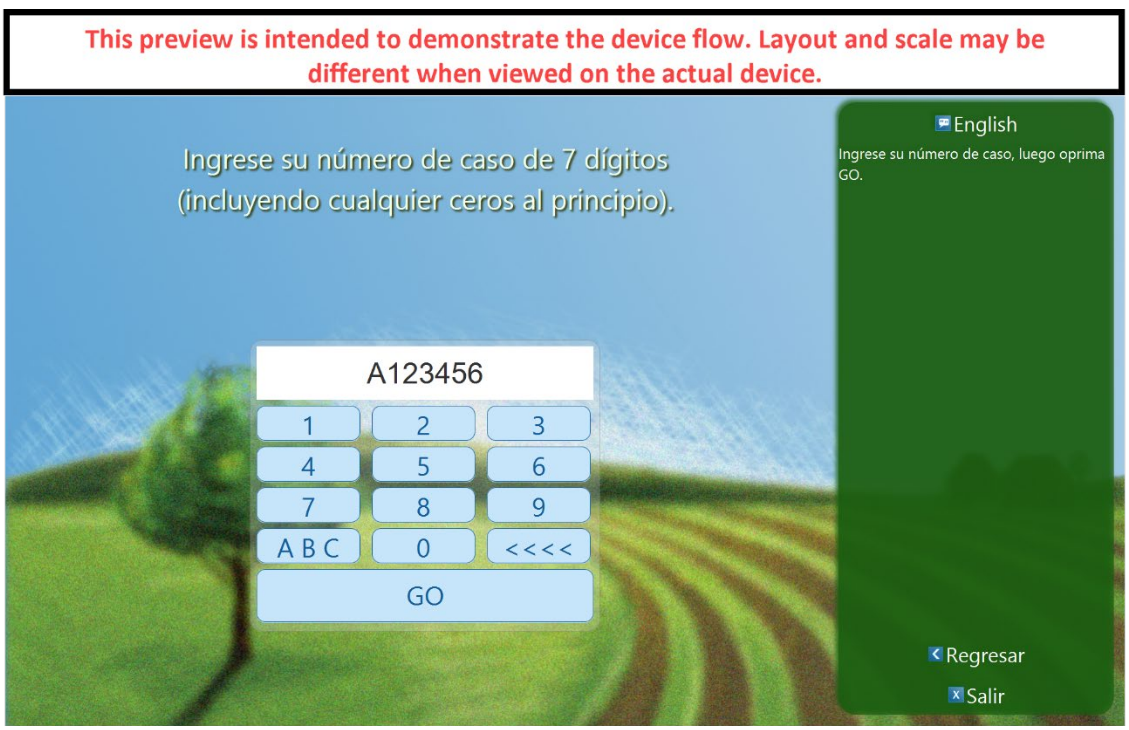


Figure 2.2.8 – Enter your Case Number screen (Spanish)

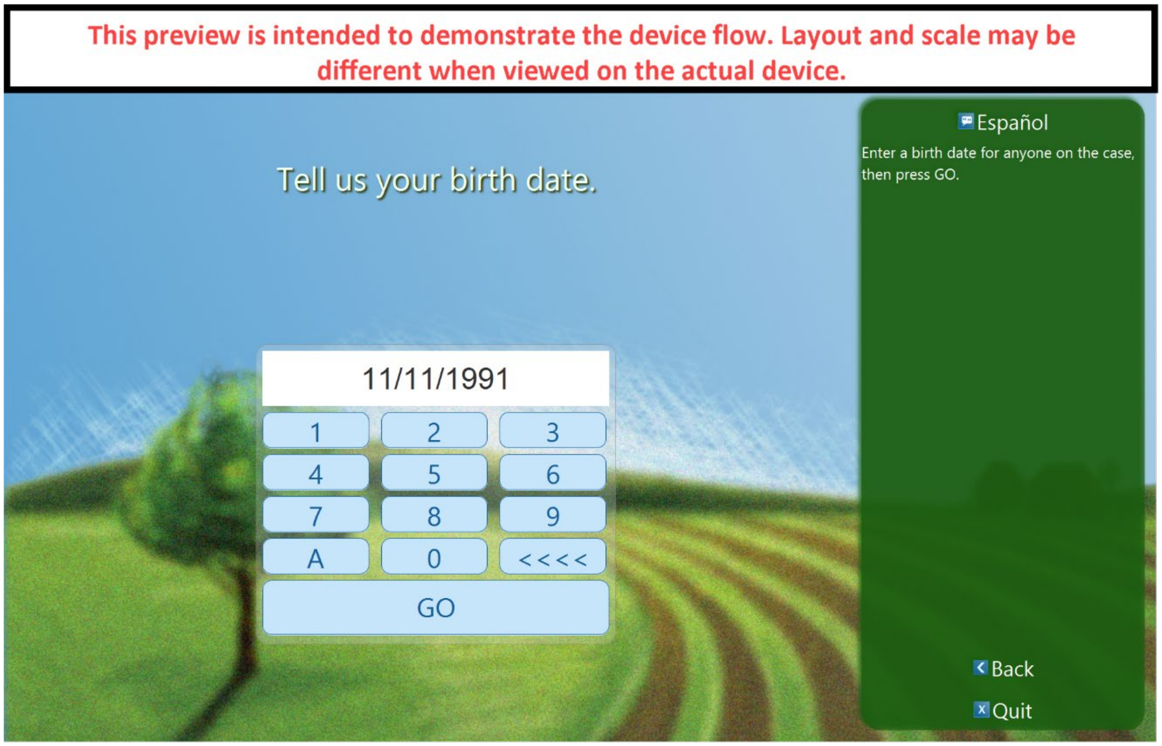


Figure 2.2.9 – Tell us your birth date screen (English)

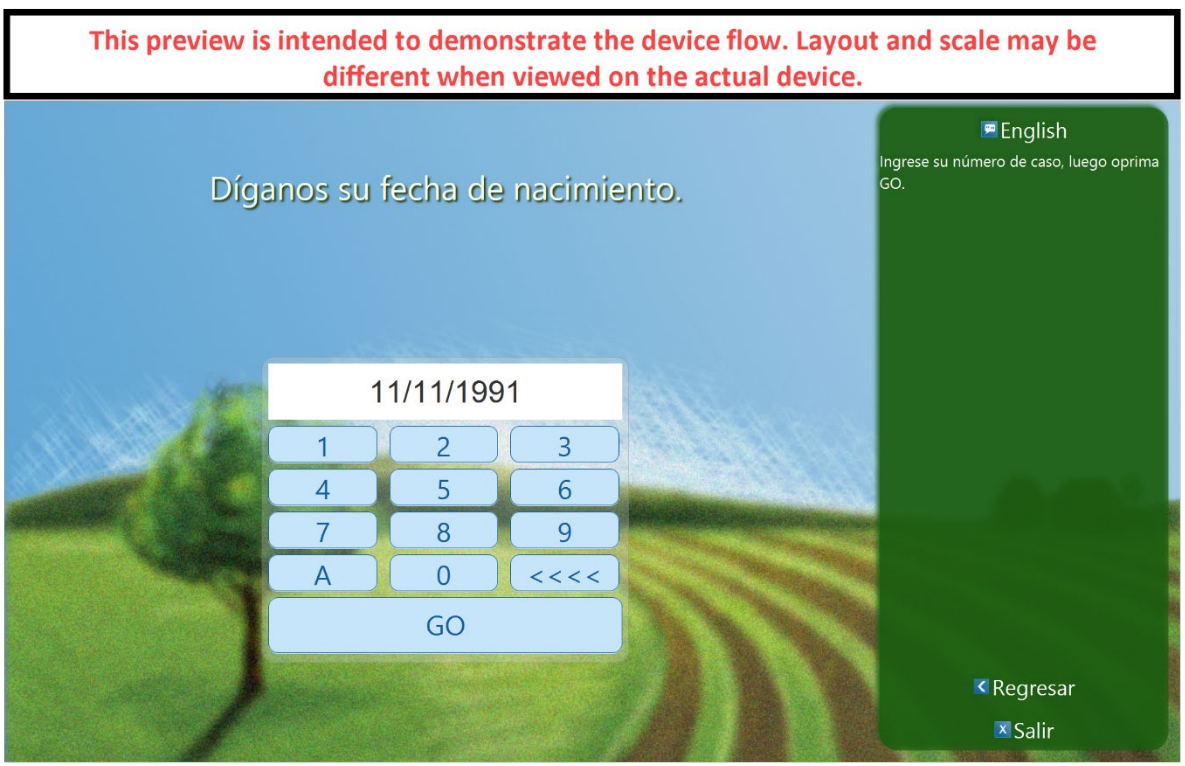


Figure 2.2.10 – Tell us your birth date screen (Spanish)

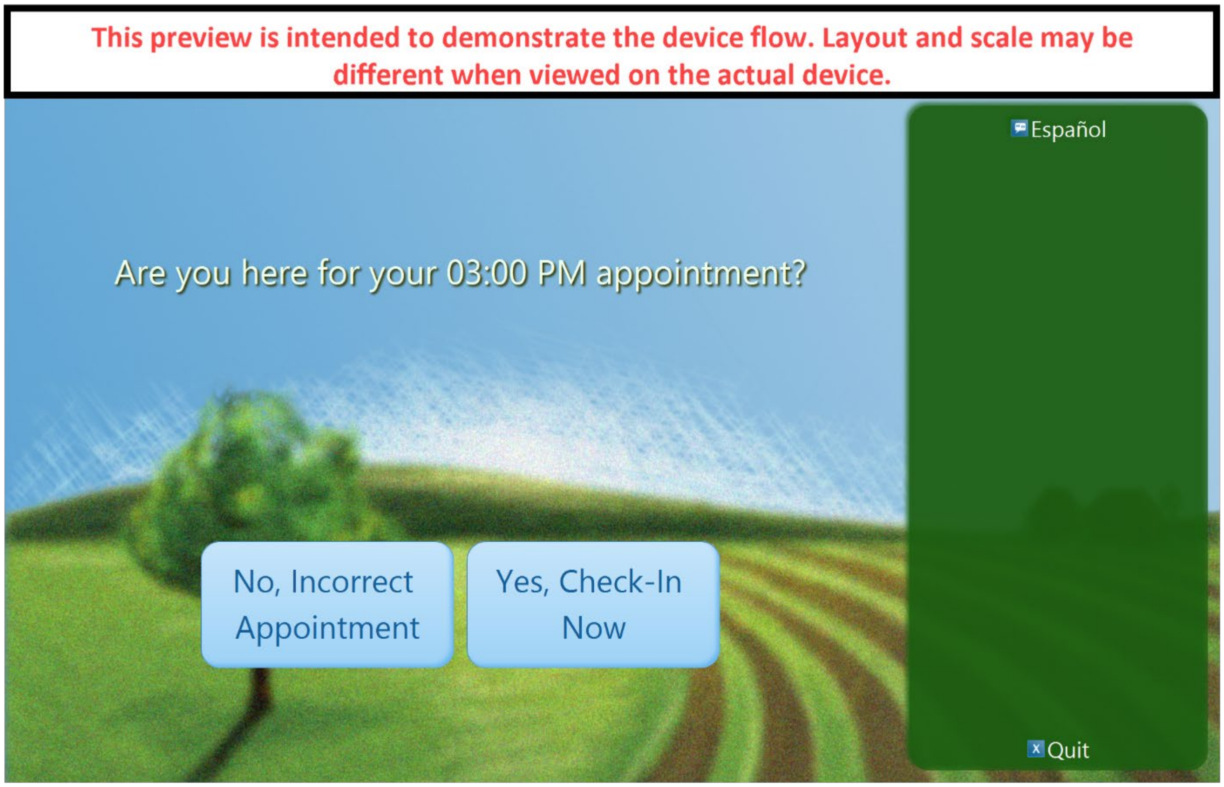


Figure 2.2.11 – Are you here for your Appointment screen (English)

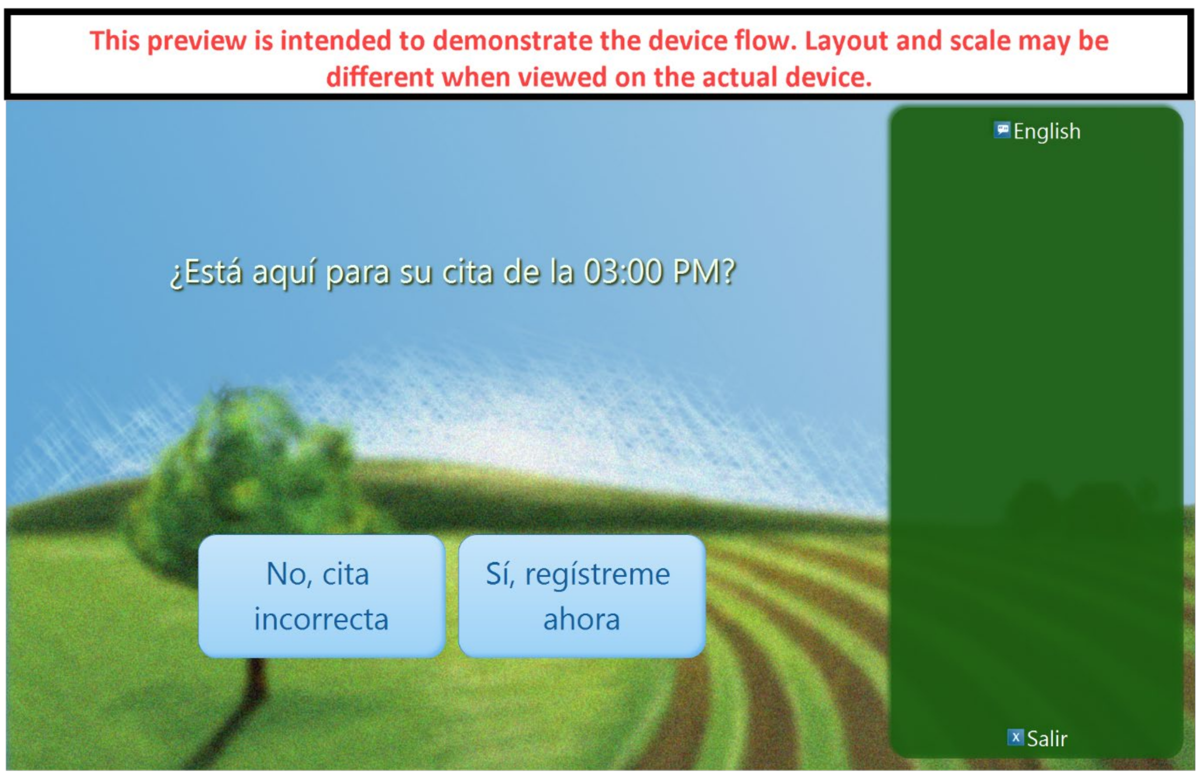


Figure 2.2.12 – Are you here for your Appointment screen (Spanish)

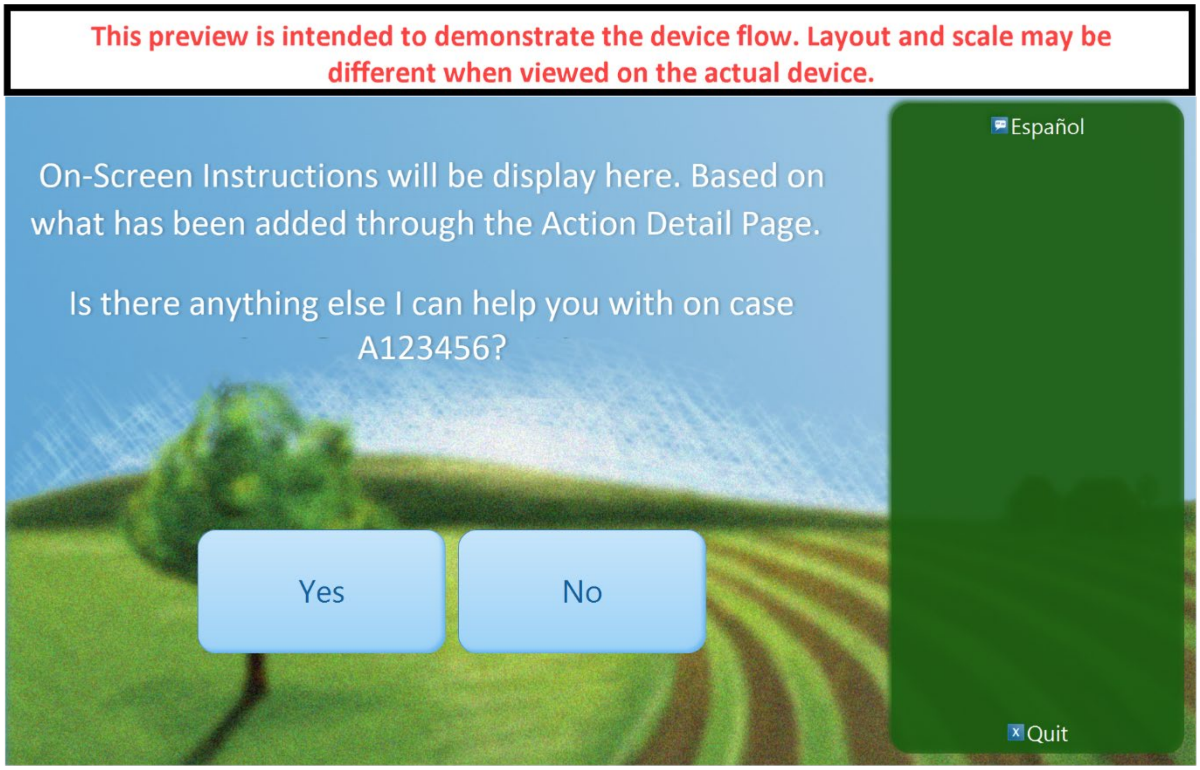


Figure 2.2.13 – Appointment Confirmation screen (English)

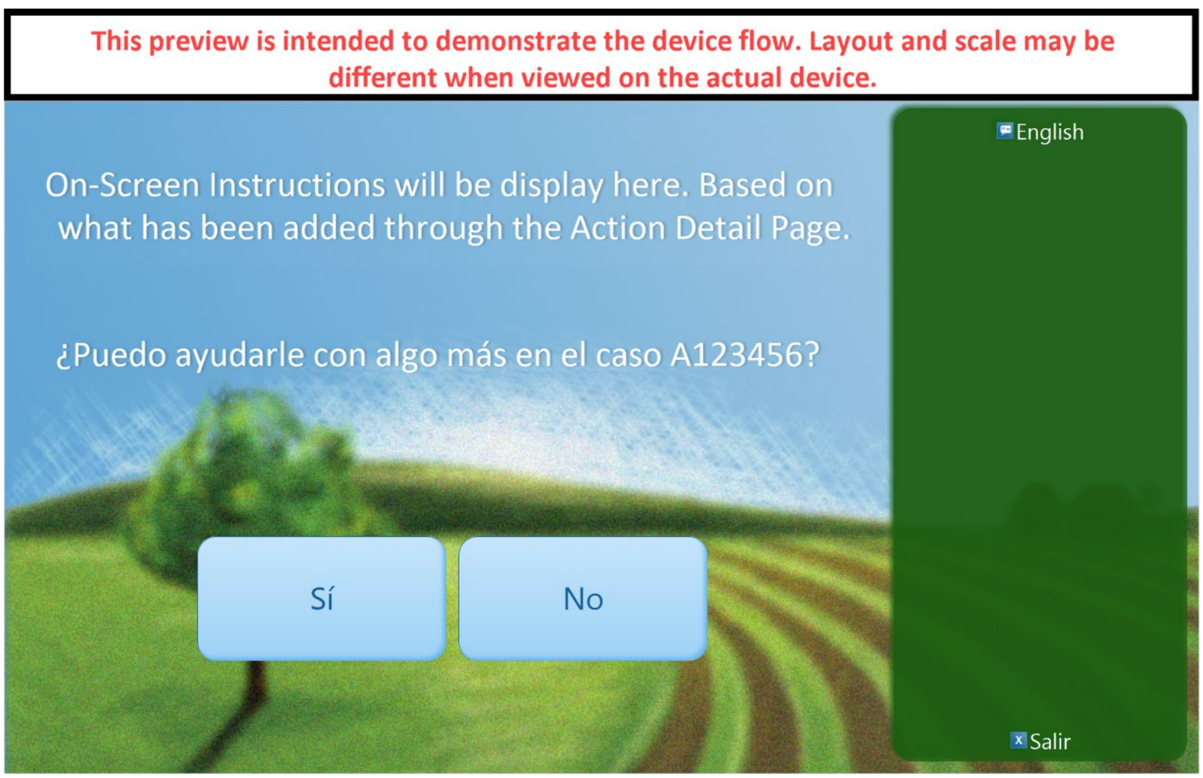


Figure 2.2.14 – Appointment Confirmation screen (Spanish)

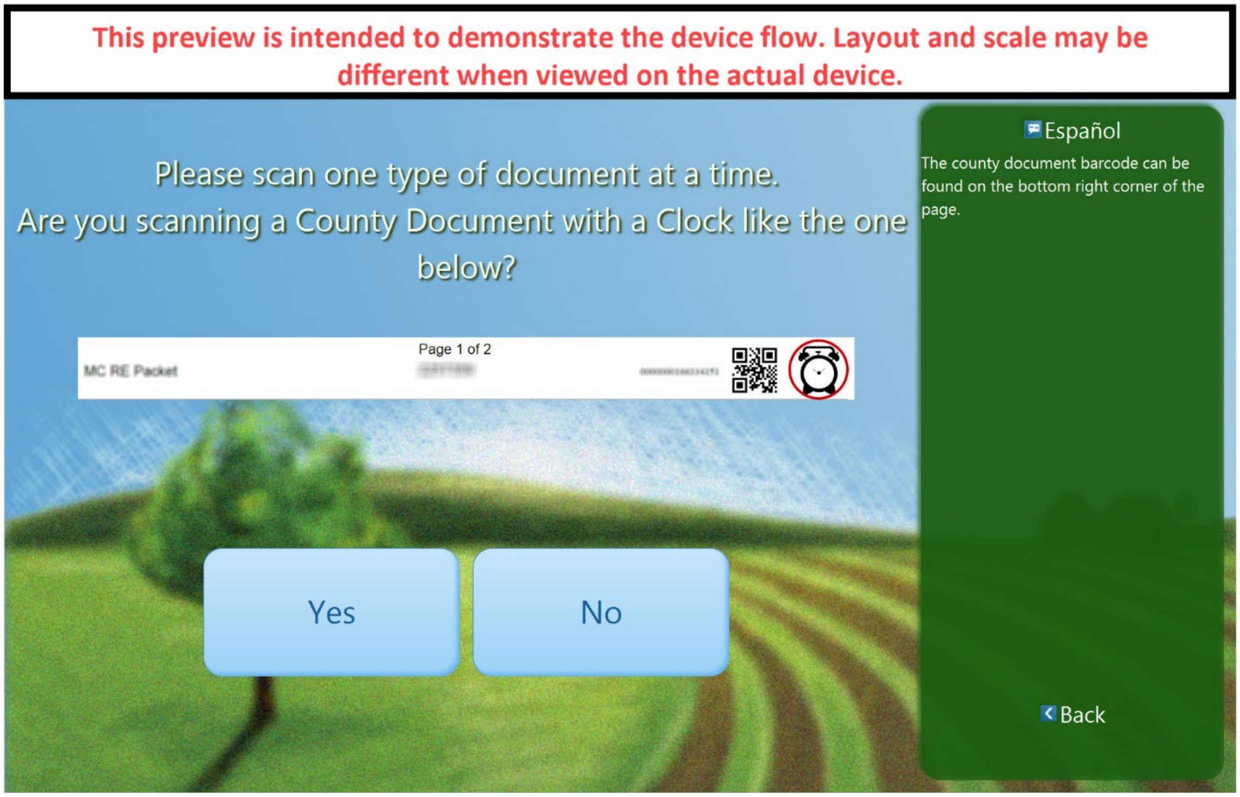


Figure 2.2.15 – Please scan one type of document screen (English)

Figure 2.2.16 – Please scan one type of document screen (Spanish)

Figure 2.2.17 – What type of document is it? screen (English)

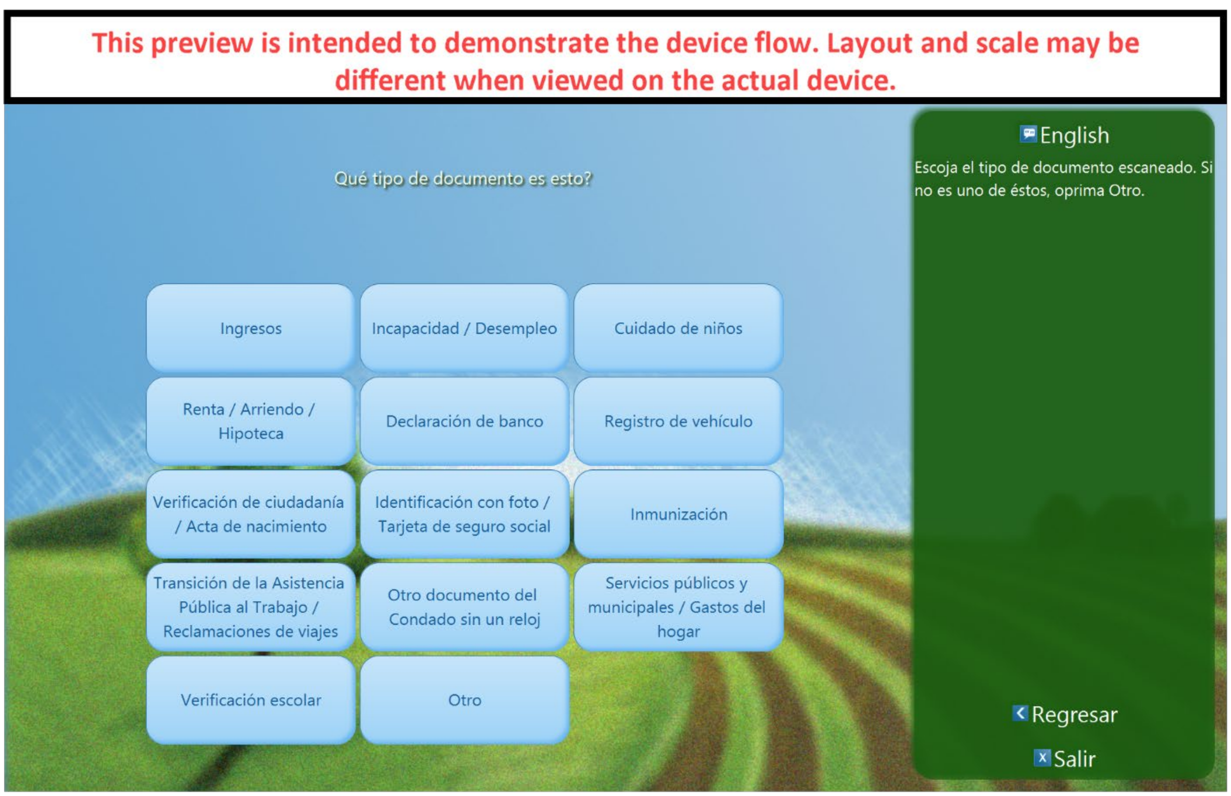


Figure 2.2.18 – What type of document is it? screen (Spanish)

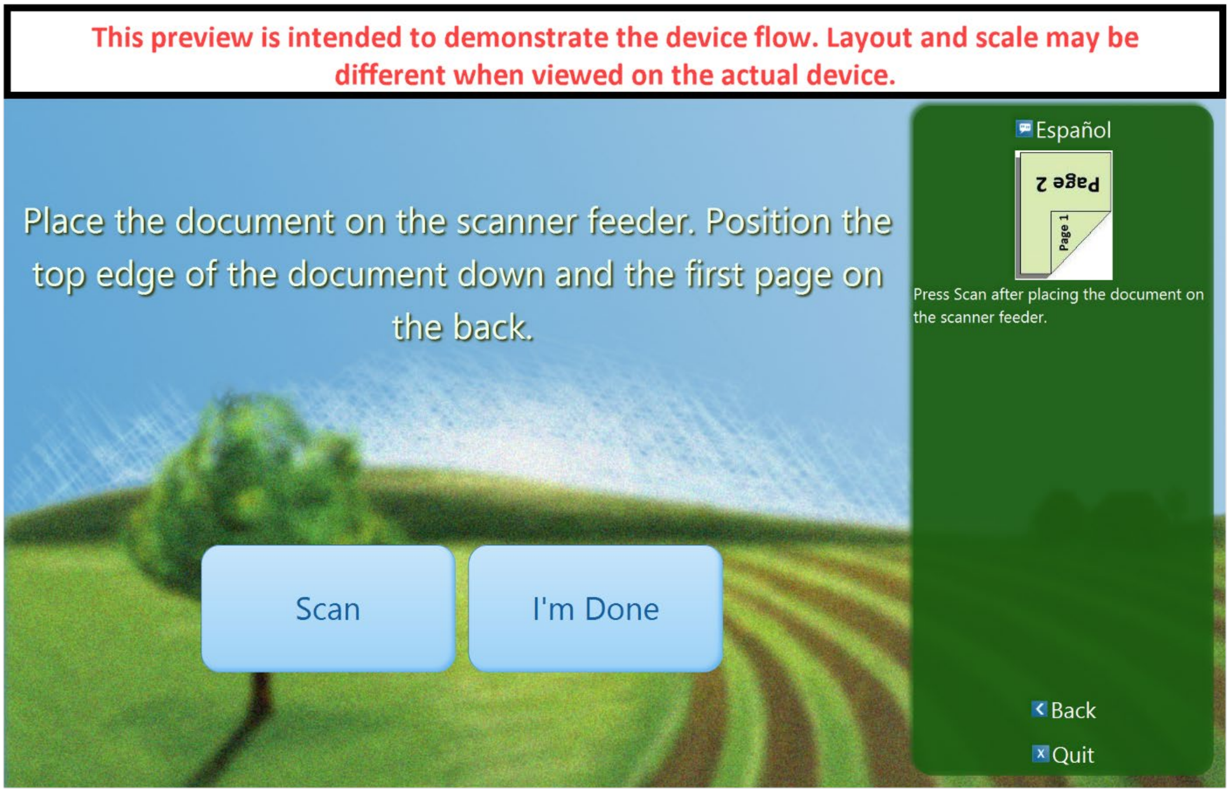


Figure 2.2.19 – Place the document on the scanner screen (English)

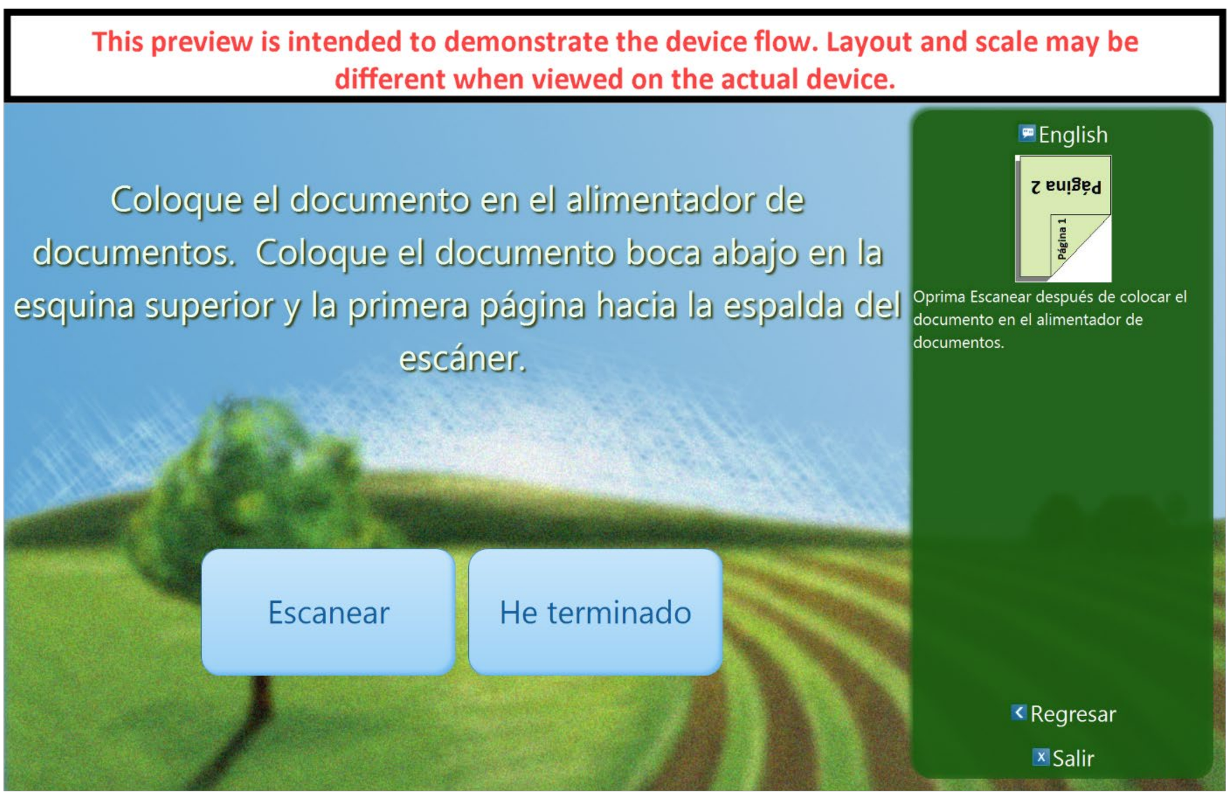


Figure 2.2.20 – Place the document on the scanner screen (Spanish)

Figure 2.2.21 – Scanning Document screen (English)

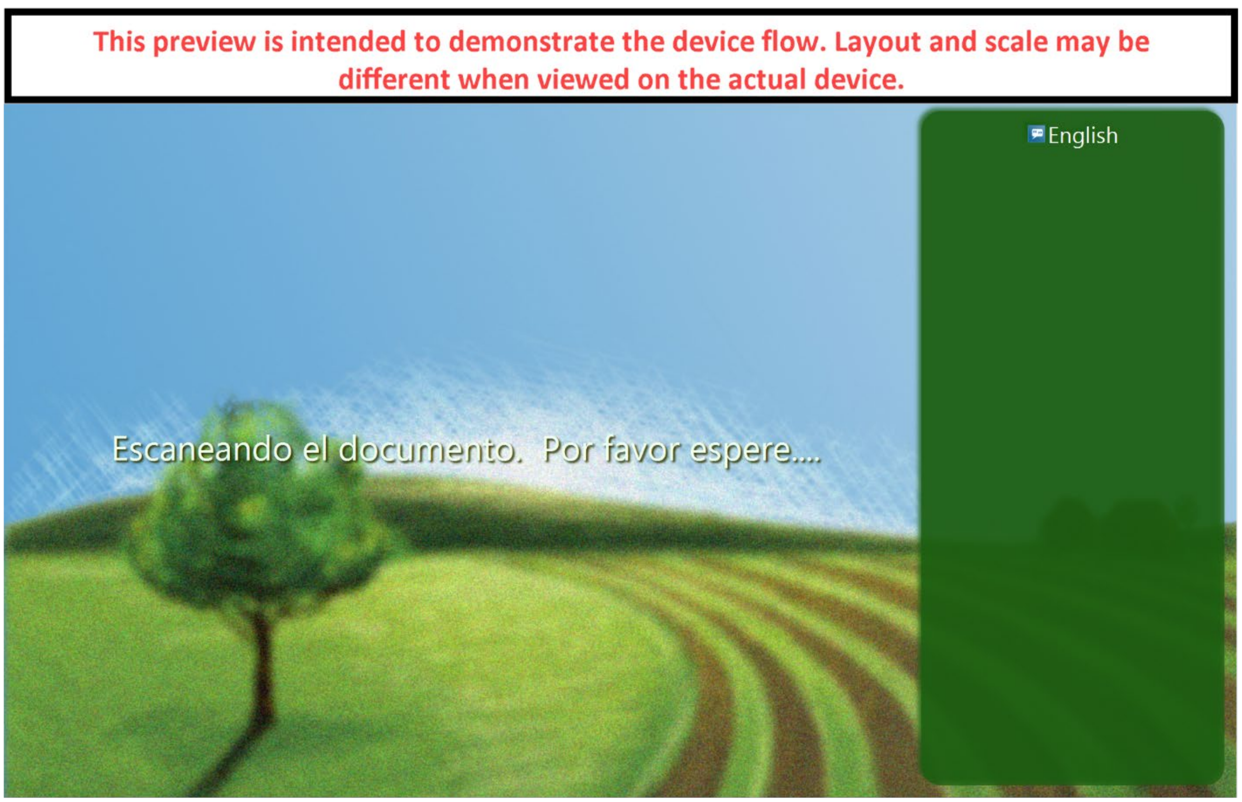


Figure 2.2.22 – Scanning Document screen (Spanish)

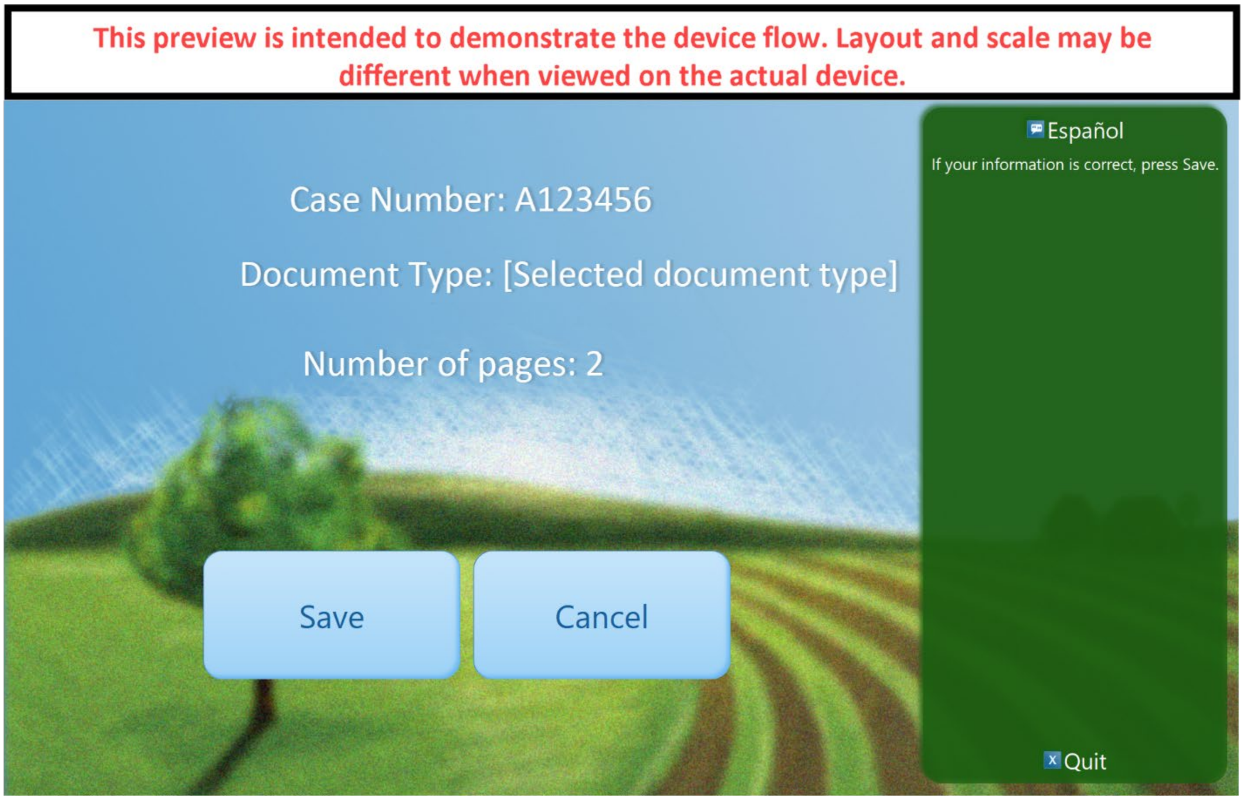


Figure 2.2.23 – Document review screen (English)

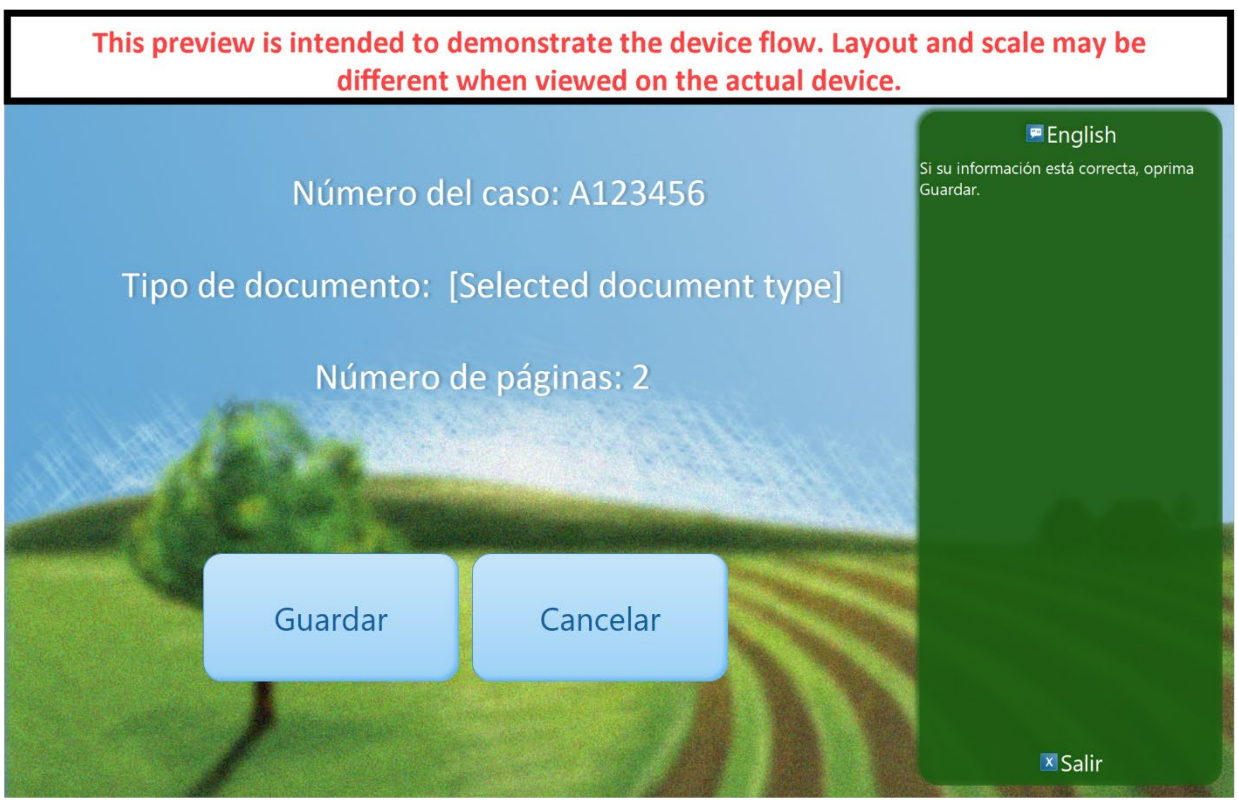


Figure 2.2.24 – Document review screen (Spanish)

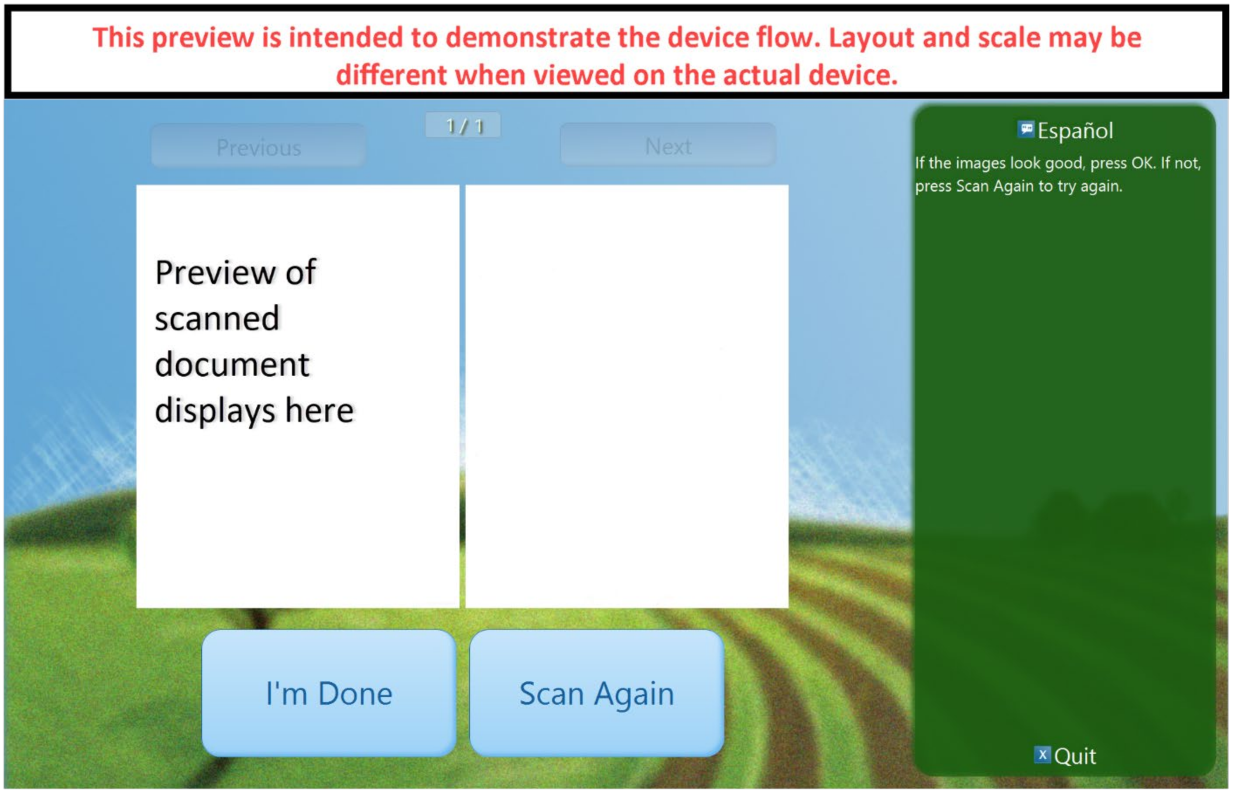


Figure 2.2.25 Document preview screen (English)

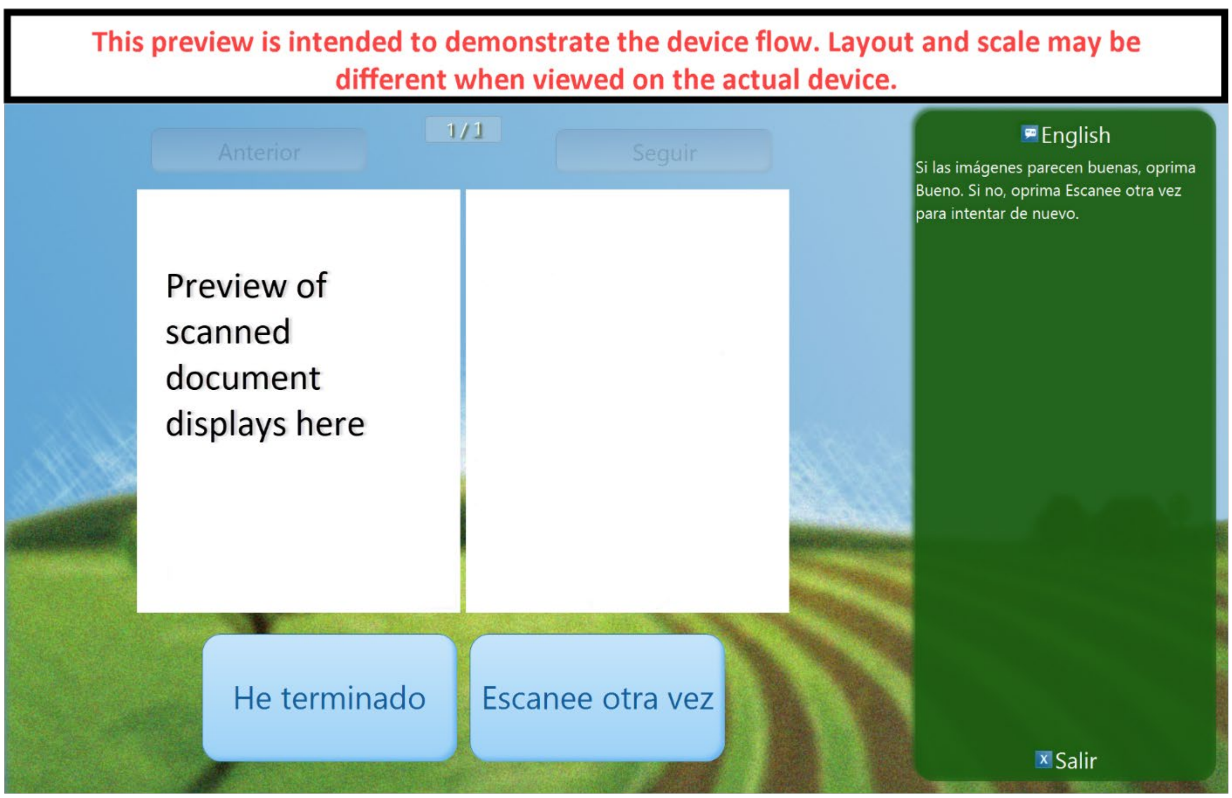


Figure 2.2.26 – Document preview screen (Spanish)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

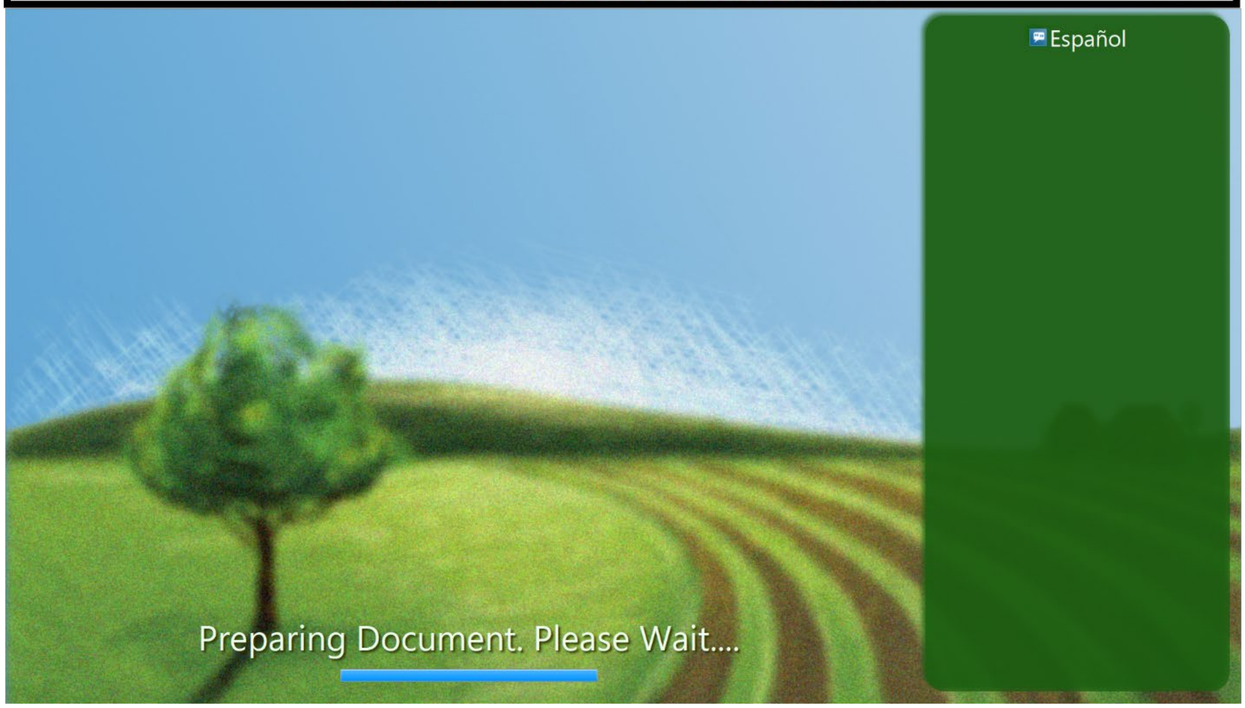


Figure 2.2.27 – Preparing document screen (English)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

Figure 2.2.28 – Preparing document screen (Spanish)

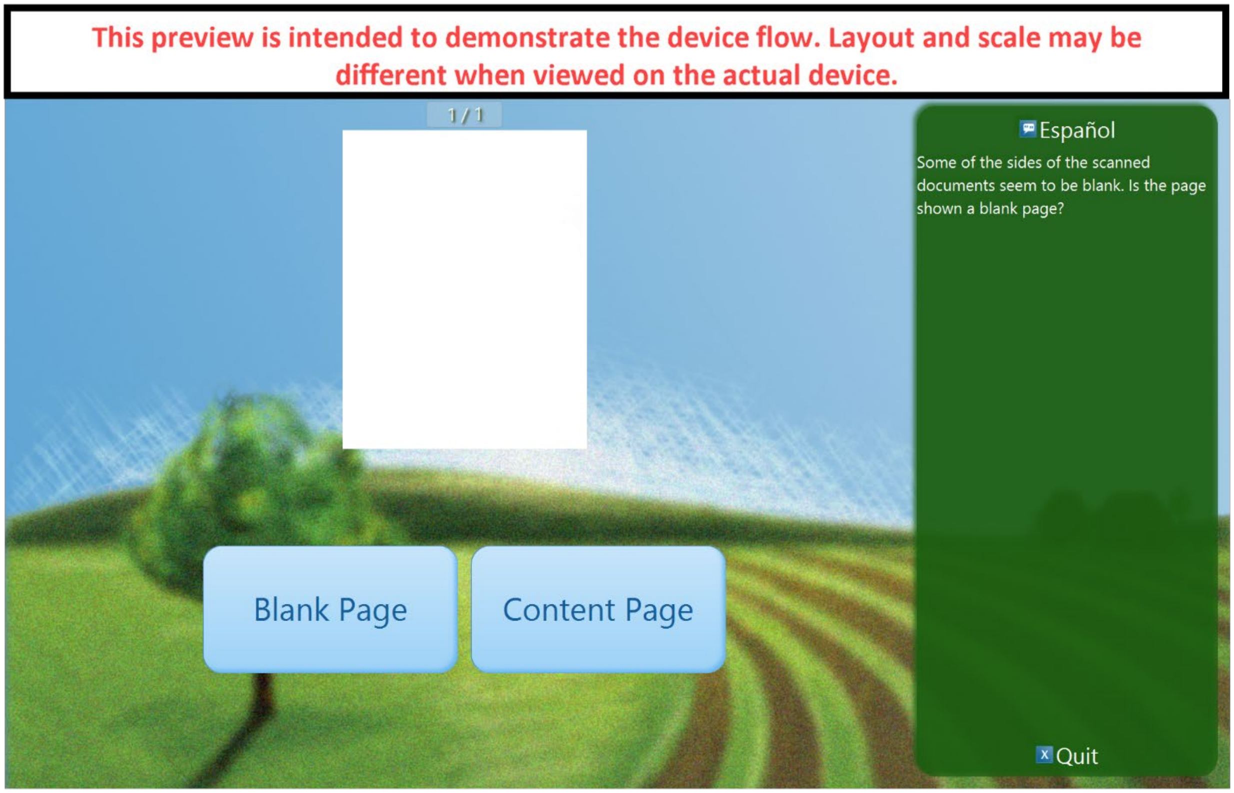


Figure 2.2.29 – Blank page screen (English)

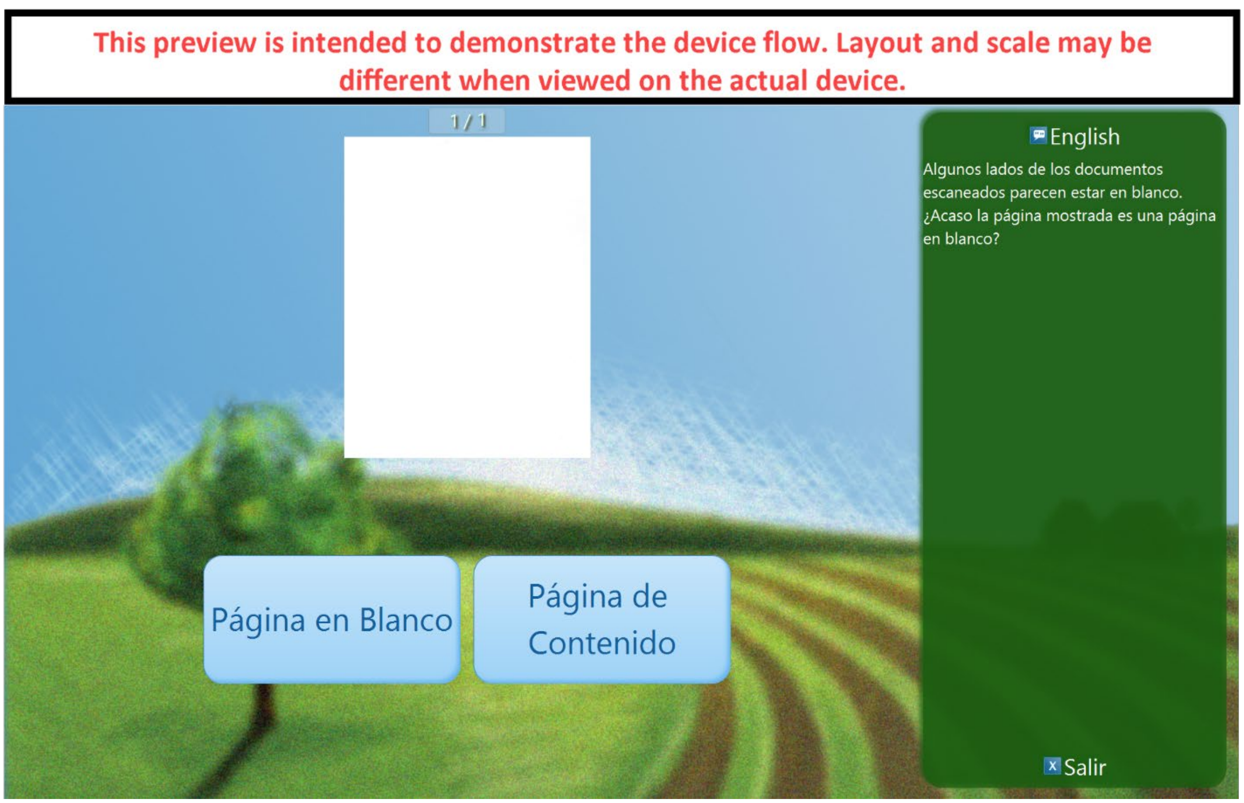


Figure 2.2.30 – Blank page screen (Spanish)

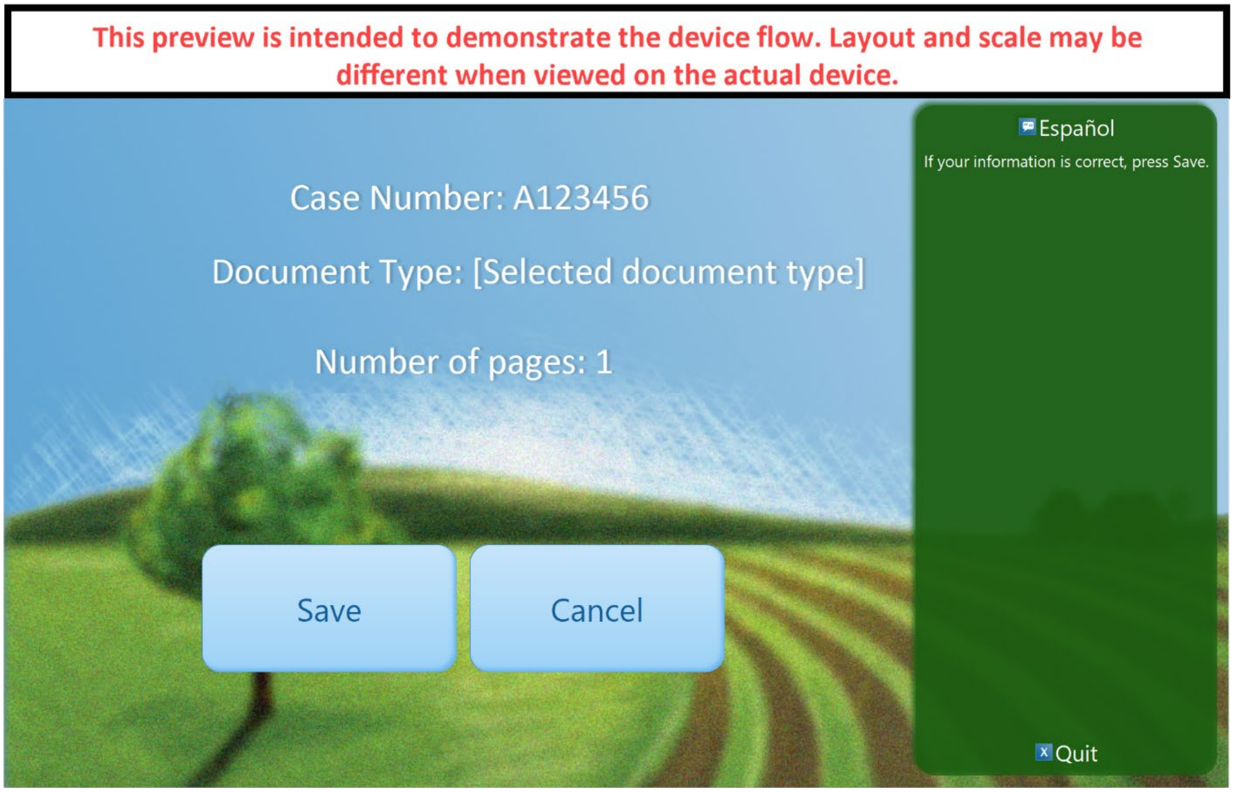


Figure 2.2.31 – Document upload confirmation screen (English)

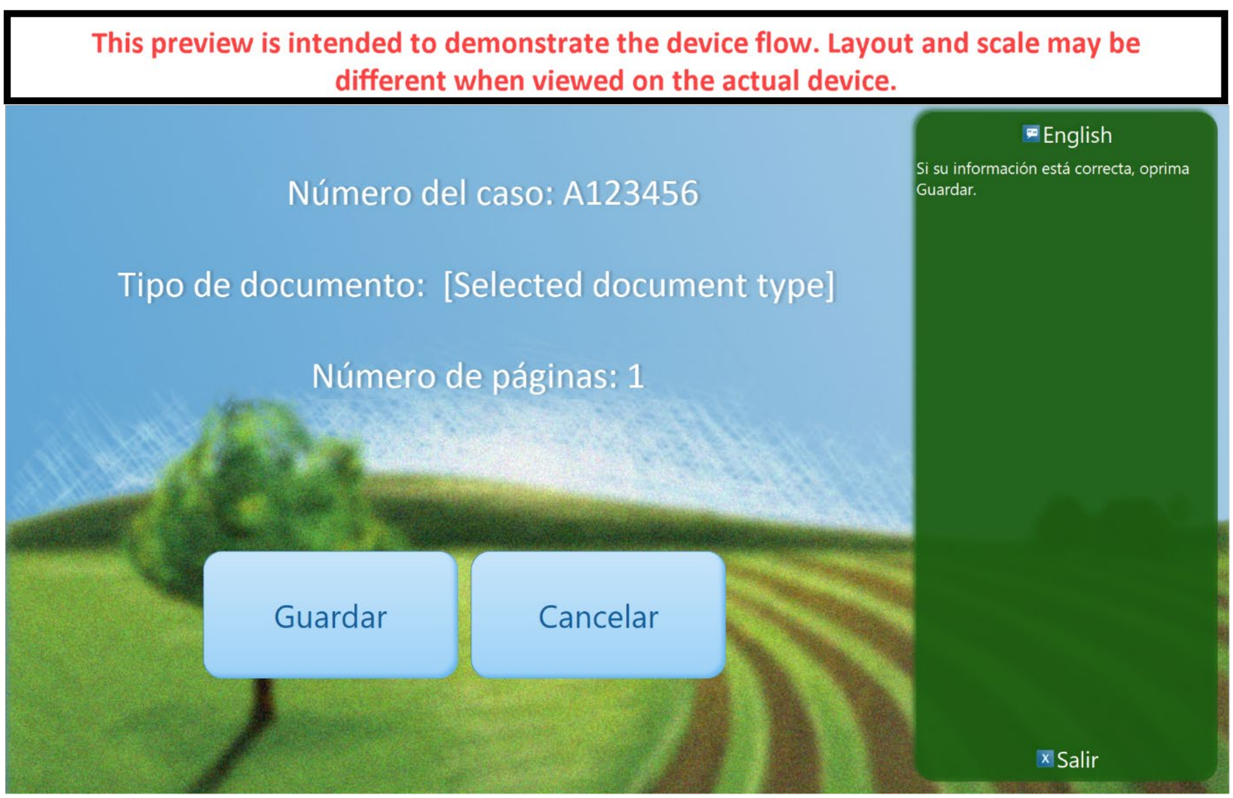


Figure 2.2.32 – Document upload confirmation screen (Spanish)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

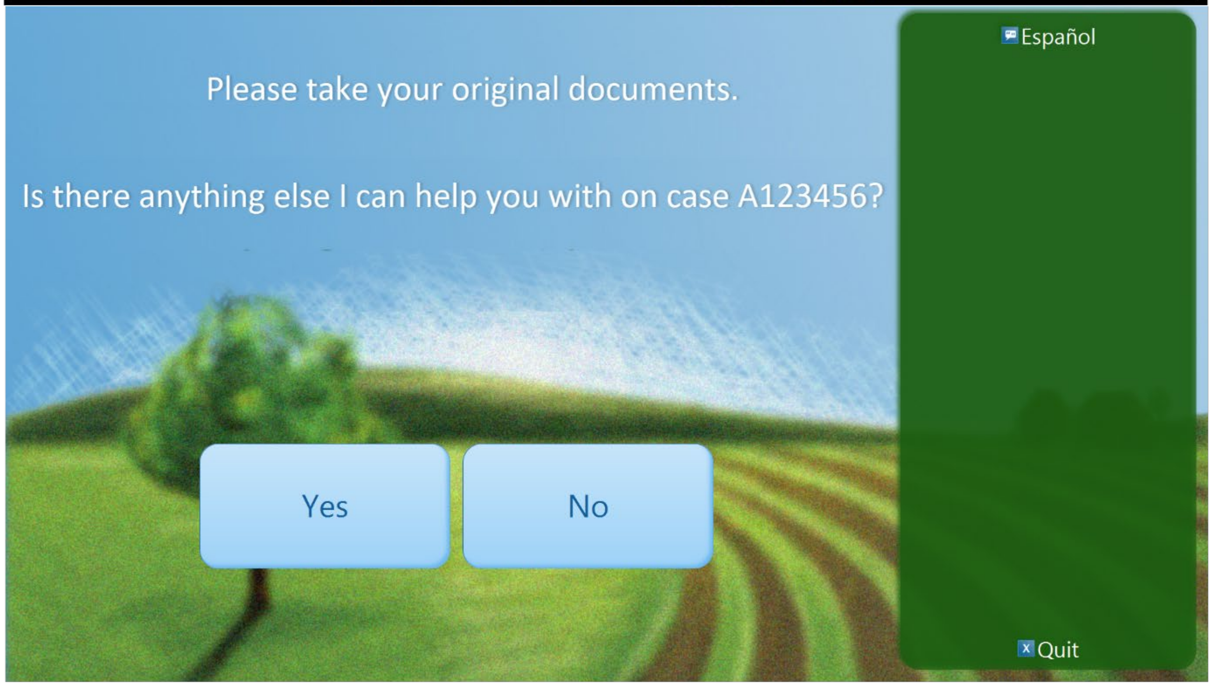


Figure 2.2.33 – Please take your original document screen (English)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

Figure 2.2.34 – Please take your original document screen (Spanish)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

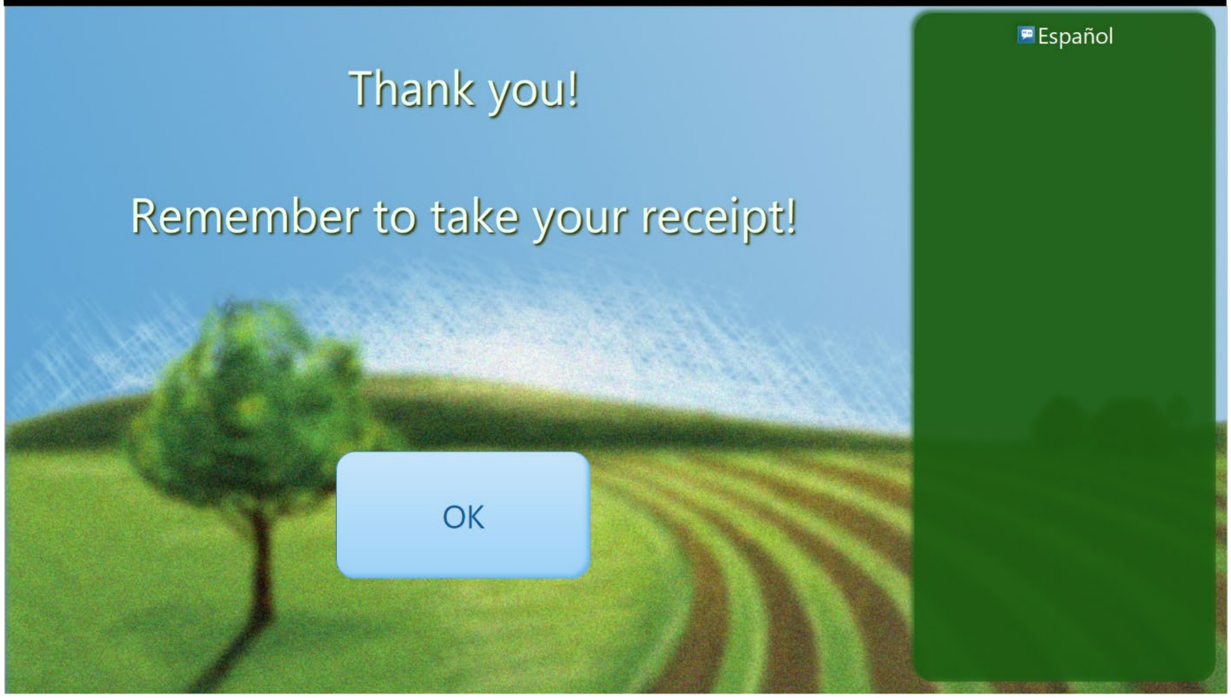


Figure 2.2.35 – Thank you without Prefix screen (English)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

Figure 2.2.36 – Thank you without Prefix screen (Spanish)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

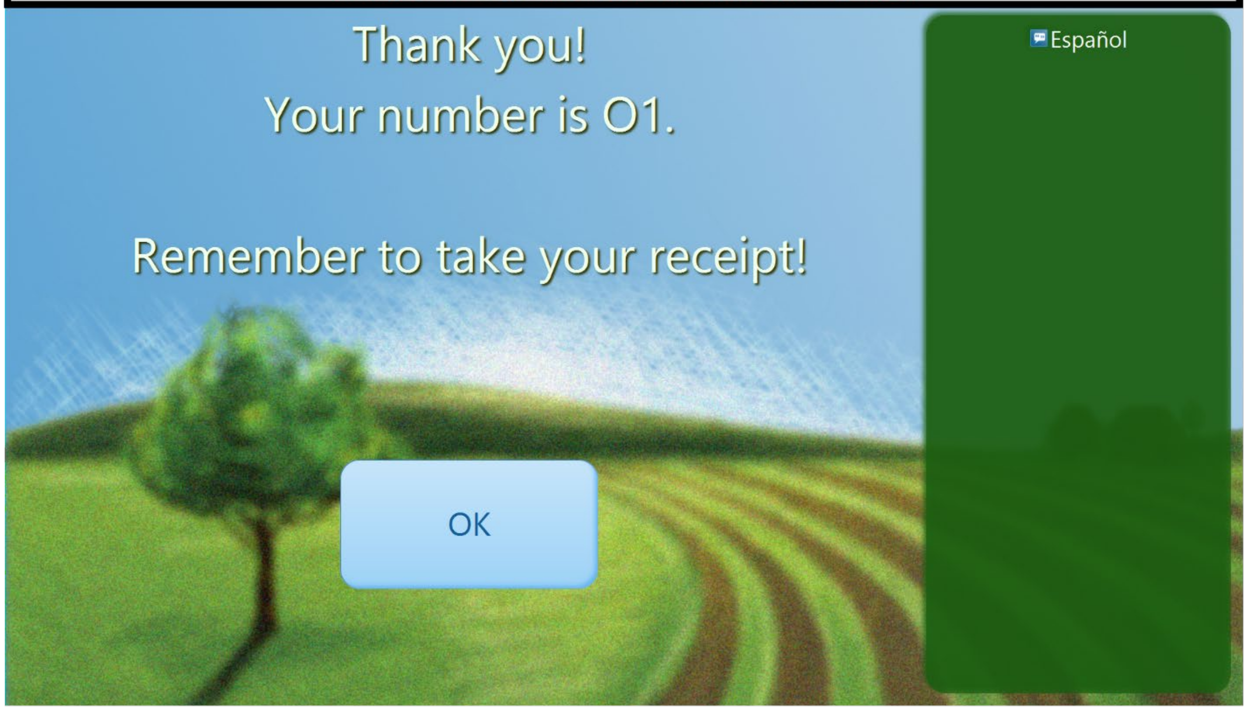


Figure 2.2.37 – Thank you with Prefix screen (English)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

Figure 2.2.38 – Thank you with Prefix screen (Spanish)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

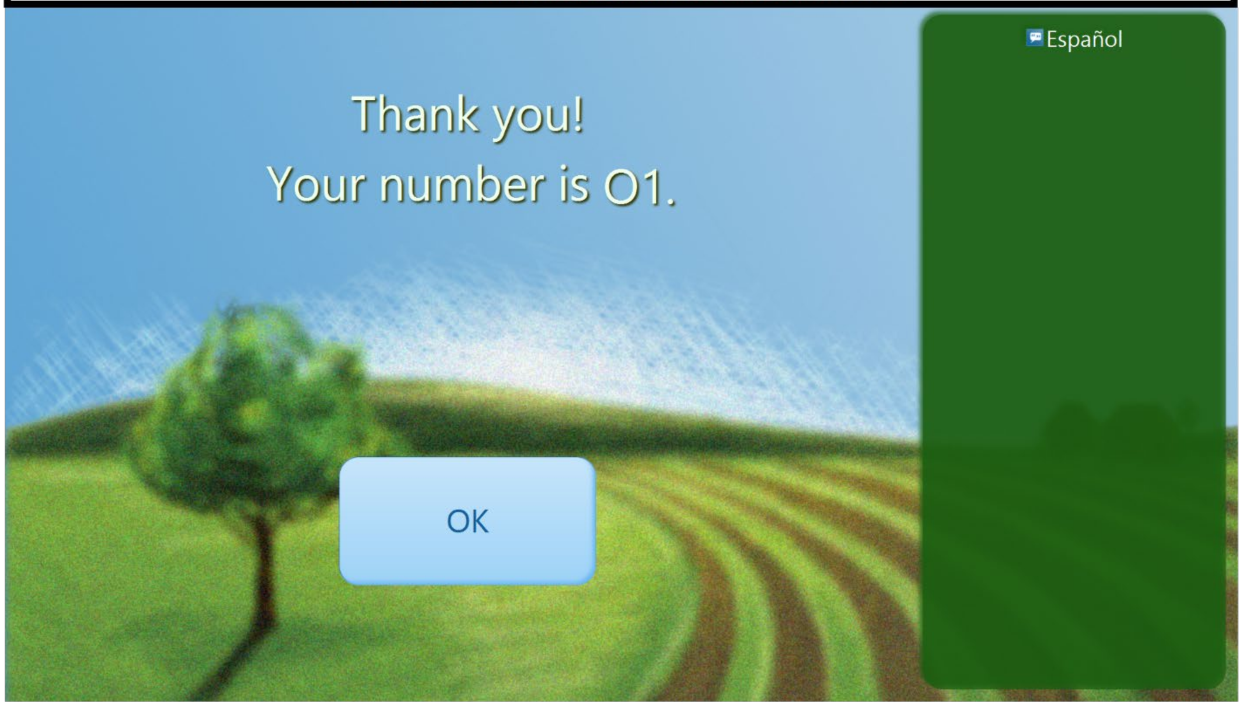


Figure 2.2.39 – Thank you without receipt screen (English)

This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device.

2.2.3 Description of Changes

1. Create a new page that will allow users to preview what the Button Action will look like on the CalSAWS Lobby Kiosk or the CalSAWS Lobby Tablet that is configured with a Kiosk flow.
    a. The Preview page will open in a new window when a user clicks on the 'Preview' button through the Flow Management Detail page. Refer to section 2.1.3 for more details on the 'Preview' button.
        i. The device flow that displays on the Preview page is specific for the device flow that the user has created and saved for that specific Flow Management record.
        ii. Preview page will display the following text at the top of the page for all the screens as shown on Figure 2.2.1 through 2.2.40.
            1. Text will display the following message: "This preview is intended to demonstrate the device flow. Layout and scale may be different when viewed on the actual device."
                a. Text will display inside a box with white background and black outline.
                b. Text will display in red color.
        iii. The Preview page will have the same background as the CalSAWS Lobby devices (open field with a tree) along with the green overlay on the right side of all screens.
            1. Green box overlay on the right side of the page and display the following information within the box.
                a. Display the 'Message' icon along with the text 'Español'.
                    i. 'Message' icon and the text 'Español' be located in the middle top of the green box overlay.
                    ii. Clicking on the 'Español' text will refresh the page and the Preview page will now be in Spanish mode.
                    iii. When the Preview page is in Spanish mode the text 'Español' will be replaced with the text 'English'.
                        1. Clicking on the 'English' text will refresh the page and the Preview page will now be in English mode.
                    iv. 'Message' icon and the text 'English' (when in Spanish mode) or 'Español' will display at every screens.
                b. Display the 'x' icon along with 'Quit' text.

i. ‘x’ icon and the ‘Quit’ text will be located on the middle bottom of the green box overlay.
ii. When the Preview page is in Spanish mode the text ‘Quit’ will be replaced with the text ‘Salir’.
iii. ‘x’ icon and the text ‘Quit’ or ‘Salir’ (when in Spanish mode) will display at every screens except for the following screens:
    1. ‘Please scan one type of document’ screen.
    2. ‘Scanning Document’ screen.
    3. ‘Preparing document’ screen
    4. ‘Thank you without Prefix’ screen.
    5. ‘Thank you with Prefix’ screen.

c. Display the ‘left arrow’ icon along with ‘Back’ text.
    i. ‘Left arrow’ icon and the ‘Back’ text will be located right above the ‘x’ icon and the ‘Quit’ text of the green box overlay.
    ii. When the Preview page is in Spanish mode the text ‘Back’ will be replaced with the text ‘ Regresar’.
    iii. Clicking on ‘Back’ or ‘Regresar’ text (when in Spanish mode) will take the user to the previous screen.
    iv. Display the ‘left arrow’ icon along with the text ‘Back’ or ‘Regresar’ for the following screens:
        1. ‘Additional Action’ screen
        2. ‘Please Identify yourself’ screen.
        3. ‘Enter your Case Number’ screen.
        4. ‘Tell us your birth date’ screen.
        5. ‘Please scan one type of document’ screen.
            a. Clicking ‘Back’ or ‘Regresar’ (when in Spanish mode) will take the user back to the ‘How can I help you screen?’.
        6. ‘Place the document on the scanner’ screen.

7. 'What type of document is this?' screen.

iv. The Preview page will automatically open to the 'How can I help you?' screen (this will always be the 1st screen for the Preview page when it first opens) and will be in English mode when the page initially open as shown on Figure 2.2.1 and Figure 2.2.2.

1. The screen will be titled 'How can I help you?' on top of the screen.
    a. When the Preview page is in Spanish mode the titled will be '¿Cómo puedo ayudarle?'
2. Button actions that were added and saved by the user through the Flow Management Detail page will be display in the middle of the screen.
    a. A maximum of 4 button actions can be displayed at a time.
    b. The amount of button actions that are displayed is based on the amount of button actions that are added on the Flow Management Detail page.
    c. The location of where the button actions will be displayed in the middle of the screen is based on the location defined on the Flow Management Detail page.
        i. Locations of button actions can be Top Left, Top Right, Bottom Left and Bottom Right
    d. The title of each button actions is based on the text entered on the 'Title' field on the Action Detail page.
        i. When the Preview page is in Spanish mode the title for the button action is based on the text entered on the 'Spanish Title' field on the Action Detail page.
    e. When a user clicks on the button action, the page will behave as follows:
        i. Clicking on a button action that is associated to an 'Additional Actions' Action type, the user will be directed to the 'Additional Actions' screen.
        ii. Clicking on a button action that is associated to an 'Appointment' Action Type, the user will be directed to the 'Please identify yourself' screen.
        iii. Clicking on a button action that is associated to a 'Document Upload'

Action type, the user will be directed to the 'Please identify yourself' screen.

iv. Clicking on a button action that is associated to a 'Custom' Action type, the user will be directed to either the 'Please identify yourself' screen, the 'Thank you with Prefix' screen, or the 'Thank you without receipt' screen.

b. The 'Additional Action' screen is accessible when a user clicks on an action button that has been associated to an 'Additional Actions' action type from the initial 'How can I help you?' screen and will be available in both English and Spanish as shown on Figure 2.2.3 and Figure 2.2.4.
    i. The screen will be titled 'How can I help you?' on top of the screen.
        1. When in Spanish mode the titled will be '¿Cómo puedo ayudarle?'
        2. Additional button actions that were added and saved by the user through the Flow Management Detail page will be display in the middle of the screen.
            a. A maximum of 4 additional button actions can be displayed at a time.
            b. The amount of additional button actions displayed is based on the amount of additional button actions added on the Flow Management Detail page.
            c. The location of where the additional button actions will be displayed in the middle of the screen is based on the location information defined on the Flow Management Detail page.
                i. Locations of additional button actions can be Top Left, Top Right, Bottom Left and Bottom Right
            d. The title of each additional button action is based on the text entered on the 'Title' field on the Action Detail page for that specific additional button action.
                i. When the Preview page is in Spanish mode the title for the additional button action is based on the text entered on the 'Spanish Title' field on the Action Detail page.
            e. When a user clicks on the additional button action, the page will behave as follows:

i. Clicking on an additional button action that is associated to an 'Appointment' Action Type, the user will be directed to the 'Please identify yourself' screen.
ii. Clicking on the additional button action that is associated to a 'Document Upload' Action type, the user will be directed to the 'Please identify yourself' screen.
iii. Clicking on the additional button action that is associated to a 'Custom' Action type, the user will be directed to either the 'Please identify yourself' screen, the 'Thank you with Prefix' screen or the 'Thank you without receipt' screen.

Note: Clicking on the 'Back' or 'Regresar' text (when in Spanish mode) will take the user back to the 'How can I help you?' screen.

c. The Preview page will display the following screens after a user clicks on an action button or an additional action button that is associated to an Appointment flow (from the 'How can I help you?' screen or from the 'Additional Action' screen). Please review the Appendix section for screen flow.
    i. 'Please identify yourself' screen
        1. Clicking on the 'Enter Case Number' button will take the user to the 'Enter your Case Number' screen.
            a. In Spanish mode, the 'Enter Case Number' button will be titled as 'Ingrese el número de caso'.
    ii. 'Enter your Case Number' screen
        1. Clicking on the 'GO' button will take the user to the 'Tell us your birth date' screen.
    iii. 'Tell us your birth date' screen
        1. Clicking on the 'GO' button will take the user to the 'Are you here for your Appointment' screen.
    iv. 'Are you here for you Appointment' screen
        1. Clicking on the 'Yes, Check-In Now' button will take the user to the 'Appointment confirmation' screen.
            a. In Spanish mode, the 'Yes, Check-In Now' button will be titled as 'Sí, regístreme ahora'
    v. 'Appointment Confirmation' screen

1. Clicking on the 'Yes' or 'Sí' (when in Spanish mode) button will take the user to the 'How can I help you?' screen.
2. Clicking on the 'No' button will take the user to the 'Thank you with a Prefix' screen.
3. 'Thank you with a Prefix' screen
    a. Clicking on the 'OK' button will take the user back to the first screen, which is the 'How can I help you?' screen .
        i. In Spanish mode, the 'OK' button will be titled as 'Bueno'.

d. The Preview page will display the following screens after a user clicks on an action button or additional action button that is associated to a Document Upload flow (from the 'How can I help you?' screen or from the 'Additional Action' screen). Please review the Appendix section for screen flow.
    i. 'Please identify yourself' screen
        1. Clicking on the 'Enter Case Number' button will take the user to the 'Enter your Case Number' screen.
            a. In Spanish mode, the 'Enter Case Number' button will be titled as 'Ingrese el número de caso'.
    ii. 'Enter your Case Number' screen
        1. Clicking on the 'GO' button will take the user to the 'Tell us your birth date' screen.
    iii. 'Tell us your birth date' screen
        1. Clicking on the 'GO' button will take the user to the 'Please scan one type of document' screen.
    iv. 'Please scan one type of document' screen
        1. Clicking on the 'Yes' button will take the user to the 'Place the document on the scanner' screen.
            a. In Spanish mode, the 'Yes' button will be titled as 'Sí'
        2. Clicking on the 'No' button will take the user to the 'What type of document is this?' screen
            a. 'What type of document is this?' screen
                i. Clicking on any of the buttons the will take the user to the 'Place the document on the scanner' screen.
    v. 'Place the document on the scanner' screen
        1. Clicking on 'Scan' button the page will automatically display the 'Scanning Document' screen for 3 seconds and then the 'Document review' screen will automatically display right after.
            a. In Spanish mode, the 'Scan' button will be titled as 'Escanear'.

vi. ‘Document review’ screen
    1. Clicking on the ‘Save’ button will take the user to the ‘Document preview’ screen
        a. In Spanish mode, the ‘Save’ button will be titled as ‘Guardar’.
vii. ‘Document preview’ screen
    1. Clicking on the ‘I’m Done’ button will automatically display the ‘Preparing document’ screen for 3 seconds and then the ‘Blank page’ screen will automatically display right after.
        a. In Spanish mode the ‘I’m Done’ button will be titled as ‘He terminado’.
viii. ‘Blank page’ screen
    1. Clicking on the ‘Blank Page’ button will take the user to the ‘Document upload confirmation’ screen.
        a. In Spanish mode, the ‘Blank Page’ button will be titled as ‘Página en Blaco’.
ix. ‘Document upload confirmation’ screen
    1. Clicking on the ‘Save’ button will automatically display the ‘Preparing document’ screen for 3 seconds and then the ‘Please take your original documents’ screen will display right after.
        a. In Spanish mode, the ‘Save’ button will be titled as ‘Guardar’.
x. ‘Please take your original document’ screen
    1. Clicking on the ‘Yes’ or ‘Sí’ (when in Spanish mode) will take the user to the ‘How can I help you?’ screen.
    2. Clicking on the ‘No’ button will take the user to the ‘Thank you without Prefix’ screen.
xi. ‘Thank you without Prefix’ screen
    1. Clicking on the ‘OK’ button will take the user back to the first screen, which is the ‘How can I help you?’ screen .
        a. In Spanish mode, the ‘OK’ button will be titled as ‘Bueno’.

e. The Preview page will display the following screens after a user clicks on an action button or an additional action button that is associated to a Custom flow (this is from the ‘How can I help you?’ screen or from the ‘Additional Action’ screen). Please review the Appendix section for screen flow.
    i. For an action button or an additional action button that is linked to a flow that requires a Case Validation and Print Receipt, the user will be directed to the ‘Please identify yourself’ screen.
        1. ‘Please identify yourself’ screen

a. Clicking on the ‘Enter Case Number’ button will take the user to the ‘Enter your Case Number’ screen.
    i. In Spanish mode, the ‘Enter Case Number’ button will be titled as ‘Ingrese el número de caso’.
    ii. ‘Enter your Case Number’ screen
        1. Clicking on the ‘GO’ button will take the user to the ‘Tell us your birth date’ screen.
            a. ‘Tell us your birth date’ screen
                i. Clicking on the ‘GO’ button will take the user to the ‘Thank you with Prefix’ screen.
                ii. Clicking on the ‘OK’ button on the ‘Thank you with Prefix’ screen will take the user to the ‘How can I help you?’ screen .
                iii. In Spanish mode, the ‘OK’ button will be titled as ‘Bueno’.

ii. For an action button or an additional action button that is linked to a flow that requires a Case Validation, the user will be directed to the ‘Please identify yourself’ screen.
    1. ‘Please identify yourself’ screen
        a. Clicking on the ‘Enter Case Number’ button will take the user to the ‘Enter your Case Number’ screen.
            i. In Spanish mode, the ‘Enter Case Number’ button will be titled as ‘Ingrese el número de caso’.
            ii. ‘Enter your Case Number’ screen
                1. Clicking on the ‘GO’ button will take the user to the ‘Tell us your birth date’ screen.
                    a. ‘Tell us your birth date’ screen

i. Clicking on the 'GO' button will take the user to the 'Thank you without receipt' screen.
ii. Clicking on the 'OK' button on the 'Thank you without receipt' screen will take the user to the 'How can I help you?' screen .
iii. In Spanish mode, the 'OK' button will be titled as 'Bueno'.

iii. For an action button or an additional action button that is linked to a flow that does not require a Case Validation or Print Receipt the user will be directed to the 'Thank you without receipt' screen.
   1. 'Thank you without receipt' screen
      a. Clicking on the 'OK' button will take the user to the 'How can I help you?' screen.
         i. In Spanish mode, the 'OK' button will be titled as 'Bueno'.

iv. For an action button or an additional action button that is linked to a flow that requires a Print Receipt the user will be directed to the 'Thank you with Prefix' screen.
   1. 'Thank you with Prefix' screen
      a. Clicking on the 'OK' button will take the user to the 'How can I help you?' screen.
         i. In Spanish mode, the 'OK' button will be titled as 'Bueno'.

f. The 'Please identify yourself' screen is accessible when a user clicks on an action button or an additional button actions that requires a Case Validation. This screen will be available in both English and Spanish as referenced in Figure 2.2.5 and Figure 2.2.6.
   i. The screen will be titled 'Please identify yourself.' on top of the screen.
      1. When the Preview page is in Spanish mode the titled will be 'Por favor identifíquese.'
      2. Display two buttons in the middle of the screen.
         a. First button will be title: 'Enter Case Number'
            i. In Spanish mode the button title will be: 'Ingrese el número de caso'

ii. Clicking on the button will take the user to the 'Enter your Case Number' screen.
    1. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.

b. Second button will be title: 'Swipe EBT or BIC Card'
    i. In Spanish mode the button title will be: 'Pase la tarjeta de EBT o BIC'
    ii. Clicking on the button will not change the screen.

3. Display the text 'Choose how to tell us who you are.' under the 'Español' text within the green overlay box.
    a. In Spanish mode the text will be 'Escoja cómo decirnos quien es usted.' and will be located under the 'English' text within the green overlay box.

Note: Clicking on the 'Back' or 'Regresar' text (when in Spanish mode) will take the user back to the previous screen they were on ('How can I help you?' screen or the 'Additional Action' screen).

g. The 'Enter your Case Number' screen is accessible when a user clicks on the 'Enter Case Number' or 'Ingrese el número de caso' button (when in Spanish mode) from the 'Please identify yourself' screen. This screen and will be available in both English and Spanish as referenced in Figure 2.2.7 and Figure 2.2.8.
    i. The screen will be titled 'Enter your 7-digit Case Number (including any leading zeros).
        1. In Spanish mode the screen will be titled as 'Ingrese su número de caso de 7 dígitos (incluyendo cualquier ceros al principio).'
    ii. In the middle of the screen, there will be a white box with the text 'A123456' written inside it.
    iii. Directly below the white box will be a total of 5 rows of buttons.
        1. The 1st row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
            a. 1st button will be labeled as '1'
                i. Clicking on the button will not change the screen.
                ii. Label on this button will remain the same in Spanish mode.
            b. 2nd button will be labeled as '2'
                i. Clicking on the button will not change the screen.

        ii. Label on this button will remain the same in Spanish mode.
    c. 3rd button will be labeled as '3'
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
2. The 2nd row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as '4'
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    b. 2nd button will be labeled as '5'
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    c. 3rd button will be labeled as '6'
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
3. The 3rd row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as '7'
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    b. 2nd button will be labeled as '8'
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    c. 3rd button will be labeled as '9'
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
4. The 4th row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as 'A B C'
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.

b. 2nd button will be labeled as '0'
   i. Clicking on the button will not change the screen.
   ii. Label on this button will remain the same in Spanish mode.

c. 3rd button will be labeled as '<<<<'
   i. Clicking on the button will not change the screen.
   ii. Label on this button will remain the same in Spanish mode.

5. The 5th row will have 1 button, and will be labeled as 'GO'.
   a. The label on this button will remain the same in Spanish mode.
   b. Clicking on the 'GO' button will take the user to the 'Tell us your birth date' screen.
      i. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.

iv. Display the text 'Enter your case number, then press GO.' under the 'Español' text within the green overlay box.
   a. In Spanish mode the text will be 'Ingrese su número de caso, luego oprima GO.' and will be located under the 'English' text within the green overlay box.

Note: Clicking on the 'Back' or 'Regresar' text (when in Spanish mode) will take the user back to the previous screen they were on ('Please identify yourself' screen).

h. The 'Tell us your birth date' screen is accessible when a user clicks on the 'GO' button from the 'Enter Case Number' screen. This screen and will be available in both English and Spanish as referenced in Figure 2.2.9 and Figure 2.2.10.
   i. The screen will be titled 'Tell us your birth date.'
      1. In Spanish mode the screen will be titled as 'Díganos su fecha de nacimiento.'
   ii. In the middle of the screen, there will be a white box with the text '11/11/1991' written inside it.
   iii. Directly below the white box will be a total of 5 rows of buttons.
      1. The 1st row will have 3 buttons, and will be labeled as follow and will be in an order from left to right..
         a. 1st button will be labeled as '1'
            i. Clicking on the button will not change the screen.
            ii. Label on this button will remain the same in Spanish mode.
         b. 2nd button will be labeled as '2'

        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    c. 3rd button will be labeled as ‘3’
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
2. The 2nd row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as ‘4’
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    b. 2nd button will be labeled as ‘5’
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    c. 3rd button will be labeled as ‘6’
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
3. The 3rd row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as ‘7’
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    b. 2nd button will be labeled as ‘8’
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    c. 3rd button will be labeled as ‘9’
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
4. The 4th row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as ‘A’
        i. Clicking on the button will not change the screen.

        ii. Label on this button will remain the same in Spanish mode.
    b. 2nd button will be labeled as ‘0’
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.
    c. 3rd button will be labeled as ‘<<<<’
        i. Clicking on the button will not change the screen.
        ii. Label on this button will remain the same in Spanish mode.

5. The 5th row will have 1 button, and will be labeled as ‘GO’.
    a. The label on this button will remain the same in Spanish mode.
    b. Clicking on the ‘GO’ button will take the user to one of the following screen: (this is dependent on the action type that is associated to the button action or additional button action that was clicked by the user)
        i. For a button action or an additional button action link to an ‘Appointment’ action type, user will be directed to the ‘Are you here for your Appointment’ screen.
        ii. For a button action or an additional button action link to an ‘Document Upload’ action type, user will be directed to the ‘Please scan one type of document’ screen.
        iii. For a button action or an additional button action link to an ‘Custom’ action type, user will be directed one of the following screen:
            1. The ‘Thank you with Prefix’ screen.
                a. When the button action or additional button action require a Print receipt.
            2. The ‘Thank you without receipt’ screen.
                a. When the button action or additional button action does not require a Print receipt.

iv. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.

iv. Display the text ‘Enter a birth date for anyone on the case, then press GO.’ under the ‘Español’ text within the green overlay box.

1. In Spanish mode the text will be ‘Ingrese su número de caso, luego oprima GO.’ and will be located under the ‘English’ text within the green overlay box.

Note: Clicking on the ‘Back’ or ‘Regresar’ text (when in Spanish mode) will take the user back to the previous screen they were on (‘Enter your Case Number’ screen).

i. The ‘Are you here for your Appointment’ screen is accessible when a user clicks on the ‘GO’ button from the ‘Tell us your birth date’ screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.11 and Figure 2.2.12.
    i. The screen will be titled ‘Are you here for your 03:00 PM appointment?’ on top of the screen.
        1. When the Preview page is in Spanish mode the titled will be ‘¿Está aquí para su cita de la 03:00 PM ?’
        2. Display two buttons in the middle of the screen.
            a. First button will be title: ‘No, Incorrect Appointment’
                i. In Spanish mode the button title will be: ‘No, cita incorrecta’
                ii. Clicking on the button will take the user to the ‘How can I help you?’ screen.
                    1. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.
            b. Second button will be title: ‘Yes, Check-In Now’
                i. In Spanish mode the button title will be: ‘Sí, regístreme ahora’
                ii. Clicking on the button will take the user to the ‘Appointment confirmation’ screen.
                    1. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.

j. The ‘Appointment Confirmation’ screen is accessible when a user clicks on the ‘Yes, Check-In Now’ or the ‘Sí, regístreme ahora' (when in Spanish mode) button from the 'Are you here for your Appointment' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.13 and Figure 2.2.14.

i. The screen will display the 'On-Screen Instructions' at the top of the screen.
    1. The text 'On-Screen Instructions will be display here. Based on what has been added through the Action Detail page' on Figure 2.2.13 and Figure 2.2.14 will be replaced by the text on the On-Screen Instructions field on the Action Detail page.
        a. In English mode, the English text will be displayed.
        b. In Spanish mode, the Spanish text will be displayed.

ii. Below the On-Screen Instructions the text 'Is there anything else I can help you with on case A123456?' will be displayed.
    1. When the Preview page is in Spanish mode, the text will be '¿Puedo ayudarle con algo más en el caso A123456?'

iii. Display two buttons in the middle of the screen.
    1. First button will be title: 'Yes'
        a. In Spanish mode the button title will be: 'Sí'
            i. Clicking on the button will take the user to the 'How can I help you?' screen.
                1. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.
    2. Second button will be title: 'No'
        a. Clicking on the button will take the user to the 'Thank you with Prefix' screen.
            i. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.

k. The 'Please scan one type of document' screen is accessible when a user clicks on the 'GO' button from the 'Tell us your birth date' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.15 and Figure 2.2.16.

i. The screen will be titled 'Please scan one type of document at a time. Are you scanning a County Document with a Clock like the one below?' on top of the screen.
    1. When the Preview page is in Spanish mode the titled will be 'Por favor escanee un tipo de

document a la vez. ¿Está escaneando un document del condado con un reloj como el de abajo?'

ii. In the middle of the screen, there will be a white box with the following elements display within the box:
    1. The text 'Page 1 of 2' will display within the top middle section of the white box.
    2. In the middle section of the white box there will display 3 different blurred out text along with a QR code and a picture of a clock with a red circle.

iii. Display two buttons below the white box:
    1. First button will be title: 'Yes'
        a. In Spanish mode the button title will be: 'Sí'
            i. Clicking on the button will take the user to the 'Place the document on the scanner' screen.
                1. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.
        b. Second button will be title: 'No'
            i. Clicking on the button will take the user to the 'What type of document is this?' screen.
                1. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.

iv. Display the text 'The county document barcode can be found on the bottom right corner of the page.' under the 'Español' text within the green overlay box.
    1. In Spanish mode the text will be 'Puede encontrar el Código de barras del documento del condado en la parte inferior en la esquina derecha de la página.' and will be located under the 'English' text within the green overlay box.

Note: Clicking on the 'Back' or 'Regresar' text (when in Spanish mode) will take the user back to the 'How can I help you?' screen.

l. The 'What type of document is this? screen is accessible when a user clicks on the 'No' button from the 'Please scan one type of document' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.17 and Figure 2.2.18.

    i. The screen will be titled 'What type of document is this?'
        1. In Spanish mode the screen will be titled as 'Qué tipo de documento es esto?'
    ii. In the middle of the screen, there will be a total of 5 rows of buttons.

1. The 1st row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as ‘Earnings’
        i. In Spanish mode the title will be ‘Ingresos’
        ii. Clicking on the button will take the user to the ‘Place the document on the scanner’ screen.
    b. 2nd button will be labeled as ‘Disability / Unemployment’
        i. In Spanish mode the title will be ‘Incapacidad / Desempleo’
        ii. Clicking on the button will take the user to the ‘Place the document on the scanner’ screen.
    c. 3rd button will be labeled as ‘Child Care’
        i. In Spanish mode the title will be ‘Cuidado de niños’
        ii. Clicking on the button will take the user to the ‘Place the document on the scanner’ screen.
2. The 2nd row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as ‘Rent / Lease / Mortgage’
        i. In Spanish mode the title will be ‘Renta / Arriendo / Hipoteca’
        ii. Clicking on the button will take the user to the ‘Place the document on the scanner’ screen.
    b. 2nd button will be labeled as ‘Bank Statement’
        i. In Spanish mode the title will be ‘Declaración de banco’
        ii. Clicking on the button will take the user to the ‘Place the document on the scanner’ screen.
    c. 3rd button will be labeled as ‘Vehicle Registration’
        i. In Spanish mode the title will be ‘Registro de vehículo’
        ii. Clicking on the button will take the user to the ‘Place the document on the scanner’ screen.
3. The 3rd row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as ‘Citizenship Verification / Birth Certificate’

        i. In Spanish mode the title will be 'Verificación de ciudadanía / Acta de nacimiento'
        ii. Clicking on the button will take the user to the 'Place the document on the scanner' screen.
    b. 2nd button will be labeled as 'Photo ID / Social Security Card'
        i. In Spanish mode the title will be 'Identificación con foto / Tarjeta de Seguro social'
        ii. Clicking on the button will take the user to the 'Place the document on the scanner' screen.
    c. 3rd button will be labeled as 'Immunization'
        i. In Spanish mode the title will be 'Inmunización'
        ii. Clicking on the button will take the user to the 'Place the document on the scanner' screen.
4. The 4th row will have 3 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as 'Welfare to Work / Travel Claims'
        i. In Spanish mode the title will be 'Transición de la Asistencia Pública al Trabajo / Reclamaciones de viajes'
        ii. Clicking on the button will take the user to the 'Place the document on the scanner' screen.
    b. 2nd button will be labeled as 'Other county document without a clock'
        i. In Spanish mode the title will be 'Otro documento del Condado sin un reloj'
        ii. Clicking on the button will take the user to the 'Place the document on the scanner' screen.
    c. 3rd button will be labeled as 'Utilities / Household Expenses'
        i. In Spanish mode the title will be 'Servicios públicos y municipals / Gastos del hogar'
        ii. Clicking on the button will take the user to the 'Place the document on the scanner' screen.

5. The 5th row will have 2 buttons, and will be labeled as follow and will be in an order from left to right.
    a. 1st button will be labeled as 'School Verification'
        i. In Spanish mode the title will be 'Verificación escolar'
        ii. Clicking on the button will take the user to the 'Place the document on the scanner' screen.
    b. 2nd button will be labeled as 'Other'
        i. In Spanish mode the title will be 'Otro'
        ii. Clicking on the button will take the user to the 'Place the document on the scanner' screen.

iii. Display the text 'Choose which type of document you scanned. If it isn't one of these, press Other.' under the 'Español' text within the green overlay box.
    1. In Spanish mode the text will be 'Escoja el tipo de documento escaneado. Si no es uno de éstos, oprima Otro.' and will be located under the 'English' text within the green overlay box.

Note: Clicking on the 'Back' or 'Regresar' text (when in Spanish mode) will take the user back to the previous screen they were on ('Please scan one type of document' screen).

m. The 'Place the document on the scanner' screen is accessible when a user clicks on the 'Yes' or 'Sí' (when in Spanish mode) button from the 'Please scan one type of document' screen. This screen is also accessible through the 'What type of document is this?' screen and clicking the 'Earnings' or 'Ingreso' (when in Spanish mode) button. This screen will be available in both English and Spanish as referenced in Figure 2.2.19 and Figure 2.2.20.
    i. The screen will be titled 'Place the document on the scanner feeder. Position the top edge of the document down and the first page on the back.' on top of the screen.
        1. When the Preview page is in Spanish mode the titled will be 'Coloque el documento en el alimentador de documentos. Coloque el documento boca abajo e la esquina superior y la primera página hacia la espalda del escáner.'
    ii. Display two buttons in the middle of the screen.
        1. First button will be title: 'Scan'

a. In Spanish mode the button title will be: 'Escanear'
    i. Clicking on the button will take the user to the 'Scanning Document' screen.
        1. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.
b. Second button will be title: 'No'
    i. In Spanish mode the button title will be: 'He terminado'
    ii. Clicking on the button will not change screen.

iii. Display a picture of how the page should be scanned under the 'Español' text within the green overlay box.
    1. In Spanish mode, the picture will be display under the ' English' text.

iv. Display the text 'Press scan after placing the document on the scanner feeder.' under the picture of how the document should be scan within the green overlay box.
    1. In Spanish mode the text will be 'Oprima Escanear después de colocar el documento en el alimentador de documentos.'

Note: Clicking on the 'Back' or 'Regresar' text (when in Spanish mode) will take the user back to the previous screen they were on ('Please scan one type of document' or the 'What type of document is this?' screen).

n. The 'Scanning Document' screen is accessible when a user clicks on the 'Scan' or 'Escanear' (when in Spanish mode) button from the 'Place the document on the scanner' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.21 and Figure 2.2.22.
    i. The screen will be titled 'Scanning Document Please Wait….' in the middle of the screen.
        1. When the Preview page is in Spanish mode the titled will be 'Escaneando el documento. Por favor espere….'
    ii. This screen will be display for a total of 3 seconds only and then it will direct the user automatically to the 'Document review' screen.
o. The 'Document review' screen will automatically be display to the user after the 'Scanning Document' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.23 and Figure 2.2.24.
    i. Display the following text on the top half of the screen:
        1. 'Case Number: A123456'

a. Text will display at the top.
b. In Spanish mode the text will be 'Número del caso: A123456'

2. 'Document Type: [Selected document type]'
    a. Text will display directly below the text 'Case Number: A123456'
    b. In Spanish mode the text will be 'Tipo de documento: [Selected document type]'
3. 'Number of pages: 2'
    a. Text will display directly below the text ''Document Type: The selected document type will display here in the actual Device.'
    b. In Spanish mode the text will be 'Número de páginas: 2'

ii. Display two buttons in the middle of the screen.
    1. First button will be titled: 'Save'
        a. In Spanish mode the button title will be: 'Guardar'
            i. Clicking on the button will take the user to the 'Document preview'' screen.
                1. The mode that the screen is in (English or Spanish) will be retain for the next screen as well.
    2. Second button will be title: 'Cancel'
        a. In Spanish mode the button title will be: 'Cancelar'
        b. Clicking on this button will not change the screen.

iii. Display the text 'If your information is correct, press Save.' under the 'Español' text within the green overlay box.
    1. In Spanish mode the text will be 'Si su información está correcta, oprima Guardar.' and will be located under the 'English' text within the green overlay box.

p. The 'Document preview' screen is accessible when a user clicks on the 'Save' or 'Guardar' (when in Spanish mode) button from the 'Document review' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.25 and Figure 2.2.26.
    i. At the top of the screen there will be 2 buttons.
        1. The first button will be located on the top left side of the screen and will be titled 'Previous' and will be greyed out.
            a. In Spanish mode, it will be titled 'Anterior'.
            b. Clicking on the button will not change the screen.

2. The second button will be located on the top right side of the screen ad will be titled 'Next' and will be greyed out.
    a. In Spanish mode, it will be titled 'Seguir'.
    b. Clicking on the button will not change the screen.

ii. There will be a box with the text '1/1' written inside the box.
    1. Box will be located between the two buttons on the top of the screen.

iii. Display a preview of 2 different page that was scanned side by side.
    1. On the left side it will display a blank page with the text 'Preview of scanned document displays here' written on it.
    2. On the right side it will display a 'blank' page.

iv. At the bottom of the page display two buttons.
    1. The first button will be titled 'I'm Done'.
        a. In Spanish mode, it will be titled 'He terminado'.
        b. Clicking on the button, will take the user to the 'Preparing document' screen.
    2. The second button will be titled 'Scan Again'.
        a. In Spanish mode, it will be titled 'Escanee otra vez'.
        b. Clicking on the button will not change the screen.

v. Display the text 'If the images look good, press OK. If not, press Scan Again to try again.' under the 'Español' text within the green overlay box.
    1. In Spanish mode the text will be 'Si la imágenes parecen buenas, oprima Bueno. Si no, oprima Escanee otra vez para intentar de nuevo.' and will be located under the 'English' text within the green overlay box.

q. The 'Preparing Document' screen is accessible when a user clicks on the 'I'm Done' or 'He terminado' (when in Spanish mode) button from the 'Document preview' screen or the 'Save' or 'Guardar' (when in Spanish mode) button from the 'Document upload confirmation' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.27 and Figure 2.2.28.
    i. The screen will be titled 'Preparing Document. Please Wait….' at the bottom of the screen.
        1. When the Preview page is in Spanish mode the titled will be 'Preparando el documento. Por favor espere….'

ii. Display a blue bar at the bottom of the screen, right underneath the title of the screen.
iii. This screen will be display for a total of 3 seconds only and then it will direct the user automatically to one of the following screen
    1. The user will automatically be taken to the 'Blank page' screen, when the 'Preparing document' was accessed through the 'Document preview' screen.
    2. The user will automatically be taken to the 'Please take your original document' screen, when the 'Preparing document' screen was accessed through the 'Document upload confirmation' screen.

r. The 'Blank page' screen will automatically display right after the 'Preparing document' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.29 and Figure 2.2.30.
    i. There will be a box with the text '1/1' written inside the box.
        1. Box will be located at the top of the screen.
    ii. Display a preview of a blank page directly below the box with the text 1/1.
    iii. At the bottom of the page display two buttons.
        1. The first button will be titled 'Blank Page'.
            a. In Spanish mode, it will be titled 'Página en Blanco'
            b. Clicking on the button, will take the user to the 'Document upload confirmation' screen.
        2. The second button will be titled 'Content Page.
            a. In Spanish mode, it will be titled 'Página de Contenido'
            b. Clicking on the button will not change the screen.
    iv. Display the text 'Some of the sides of the scanned documents seem to be blank. Is the page shown a blank page?' under the 'Español' text within the green overlay box.
        1. In Spanish mode the text will be 'Algunos lados de los documentos escaneados parecen estar en blanco. ¿Acaso la página mostrada es una página en blanco?' and will be located under the 'English' text within the green overlay box.

s. The 'Document upload confirmation' screen is accessible when a user clicks on the 'Blank Page' or 'Página en Blanco' (when in Spanish mode) button from the 'Blank page' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.31 and Figure 2.2.32.

i. Display the following text on the top half of the screen:
    1. 'Case Number: A123456'
        a. Text will display at the top.
        b. In Spanish mode the text will be 'Número del caso: A123456'
    2. 'Document Type: [Selected document type]'
        a. Text will display directly below the text 'Case Number: A123456'
        b. In Spanish mode the text will be 'Tipo de documento: [Selected document type]'
    3. 'Number of pages: 1'
        a. Text will display directly below the text ''Document Type: The selected document type will display here in the actual Device.'
        b. In Spanish mode the text will be 'Número de páginas: 1'

ii. Display two buttons in the middle of the screen.
    1. First button will be titled: 'Save'
        a. In Spanish mode the button titled will be: 'Guardar'
            i. Clicking on the button will take the user to the 'Preparing document' screen.
    2. Second button will be titled: 'Cancel'
        a. In Spanish mode the button title will be: 'Cancelar'
            i. Clicking on this button will not change the screen.

iii. Display the text 'If your information is correct, press Save.' under the 'Español' text within the green overlay box.
    1. In Spanish mode the text will be 'Si su información está correcta, oprima Guardar.' and will be located under the 'English' text within the green overlay box.

t. The 'Please take your original document' screen will automatically display right after the 'Preparing document' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.33 and Figure 2.2.34.
    i. The screen will display the text 'Please take your original documents.' at the top of the screen, followed by the text 'Is there anything else I can help you with on case A123456?' directly below it.
        1. In Spanish mode, the Spanish text will be 'Por favor tome sus documentos originales.' followed by ¿Puedo ayudarle con algo más en el caso A123456?'

ii. Display two buttons in the middle of the screen.
    1. First button will be titled: 'Yes'
        a. In Spanish mode the button will be titled: 'Sí'
            i. Clicking on the button will take the user to the 'How can I help you?' screen.
    2. Second button will be titled: 'No'
        a. Clicking on the button will take the user to the 'Thank you without Prefix' screen.

u. The 'Thank you without Prefix' screen is accessible when a user clicks on the 'No' button from the 'Please take your original document' screen. This screen will be available in both English and Spanish as referenced in Figure 2.2.35 and Figure 2.2.36.
    i. The screen will display the text 'Thank you!' at the top of the screen, followed by the text 'Remember to take your receipt!' directly below it.
        1. In Spanish mode, the Spanish text will be '¡Gracias!' followed by '¡Acuérdese de tomar su recibo!'
    ii. Display one button in the bottom of the screen.
        1. Button will be titled: 'OK'
            a. In Spanish mode the button will be titled: 'Bueno'
                i. Clicking on the button will take the user to the 'How can I help you?' screen.

v. The 'Thank you with Prefix' screen is available in both English and Spanish as referenced in Figure 2.2.37 and Figure 2.2.38.
    i. The 'Thank you with Prefix' screen is accessible through the following screens:
        1. Clicking on the 'No' button from the 'Appointment Confirmation' screen.
            a. Specific to an Appointment flow.
        2. Clicking on the 'GO' button from the 'Tell us your birth date' screen.
            a. Specific to a Custom flow that requires Print receipt.
        3. Clicking on a button action with a Custom Action Type and require Print receipt through the 'How can I help you?' screen.
        4. Clicking on an additional button action with a Custom Action Type and require Print receipt through the 'Additional Action' screen.
    ii. The screen will display the text 'Thank you!' at the top of the screen, followed by 'Your number is "O"1 directly underneath it.

1. In Spanish mode, the Spanish text will be '¡Gracias!' followed by '¡Su número es "O"1' right underneath it.
2. "O" will be replaced by the text entered on the 'Prefix Letter' field on the Action detail page.

iii. Display the text 'Remember to take your receipt!' in the middle of the screen.
   1. In Spanish mode, the text will be '¡Acuérdese de tomar su recibo!'.

iv. Display one button in the bottom of the screen.
   1. Button will be titled: 'OK'
      a. In Spanish mode the button will be titled: 'Bueno'
         i. Clicking on the button will take the user to the 'How can I help you?' screen.

w. The 'Thank you without receipt' screen is available in both English and Spanish as referenced in Figure 2.2.39 and Figure 2.2.40.
   i. The 'Thank you without receipt' screen is accessible through the following screens:
      1. Clicking on the 'GO' button from the 'Tell us your birth date' screen.
         a. Specific to a Custom flow that does not require Print receipt.
      2. Clicking on a button action with a Custom Action Type and does not require Print receipt through the 'How can I help you?' screen.
      3. Clicking on an additional button action with a Custom Action Type and does not require Print receipt through the 'Additional Action' screen.
   ii. The screen will display the text 'Thank you!' at the top of the screen, followed by 'Your number is "O"1 directly underneath it.
      1. In Spanish mode, the Spanish text will be '¡Gracias!' followed by '¡Su número es "O"1' right underneath it.
      2. "O" will be replaced by the text entered on the 'Prefix Letter' field on the Action detail page.
   iii. Display one button in the bottom of the screen.
      1. Button will be titled: 'OK'
         a. In Spanish mode the button will be titled: 'Bueno'
            i. Clicking on the button will take the user to the 'How can I help you?' screen.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Device Flow Mgmt. (Preview button)**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

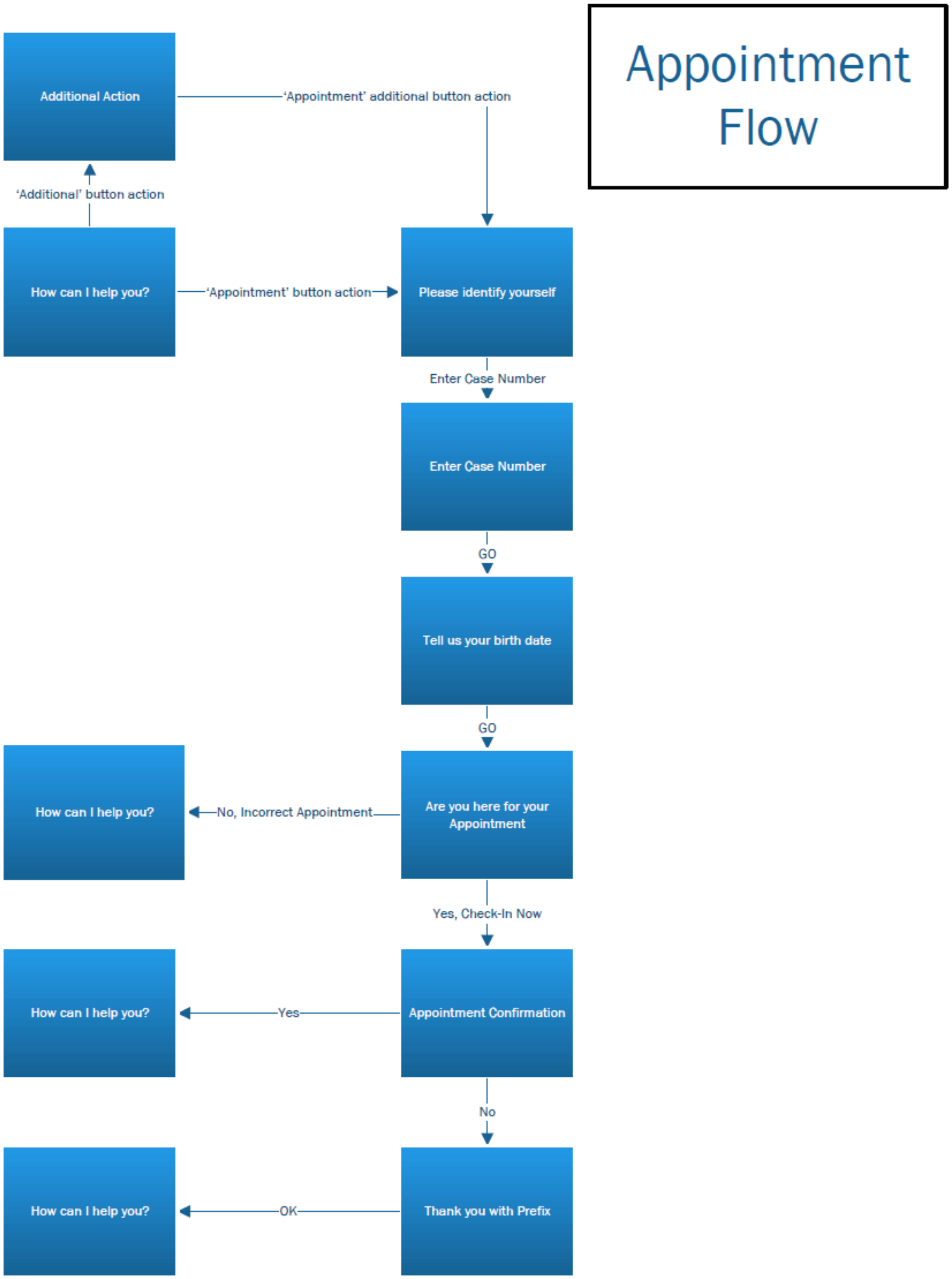
3 REQUIREMENTS

3.1 Project Requirements

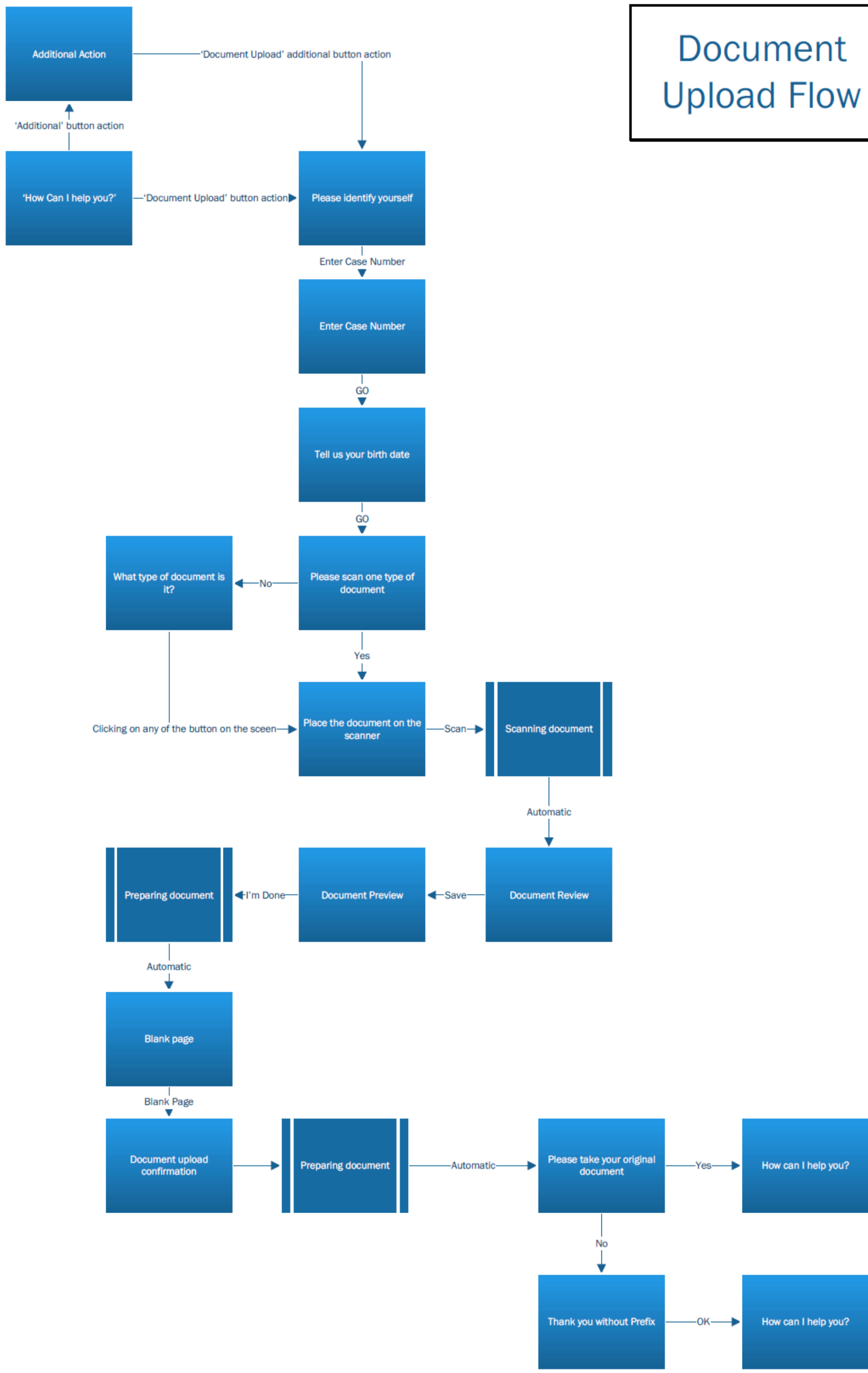
REQ #	REQUIREMENT TEXT	How Requirement Met
3.1.8	8. The LRS shall isolate software from hardware layers by allowing upgrades or changes to operating system software or hardware without requiring extensive change to the LRS Application Software.	Creating a preview functionality to allow users to preview how the device flow created and saved will look and feel.

4 APPENDIX

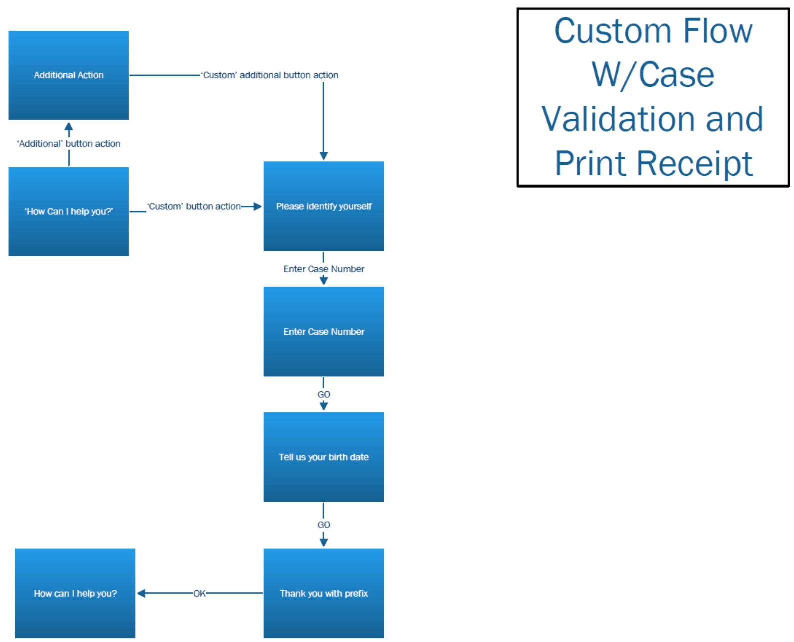
Appointment Flow



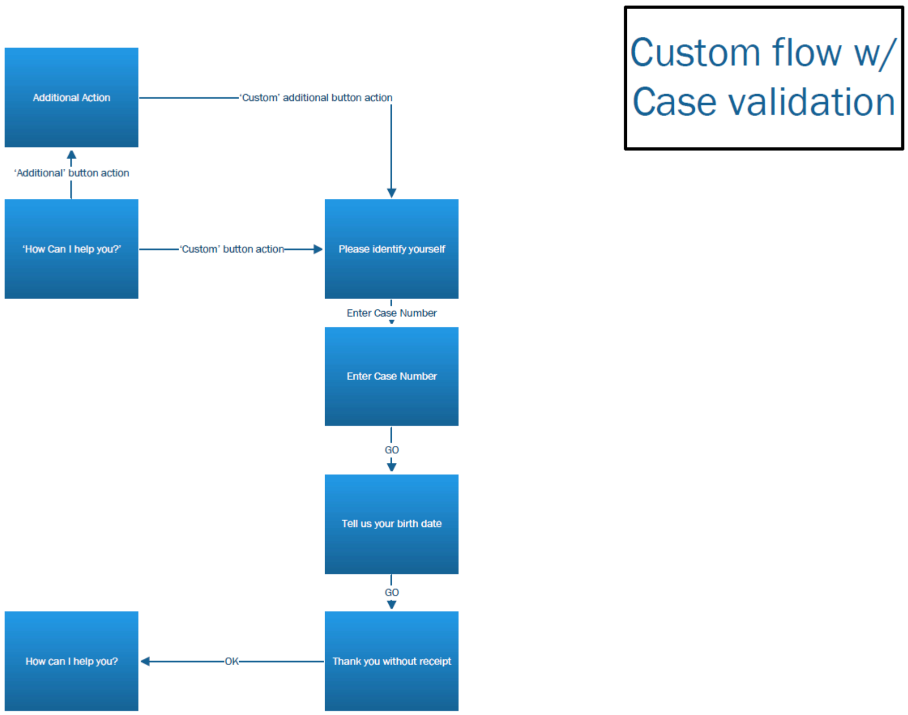
Document Upload Flow



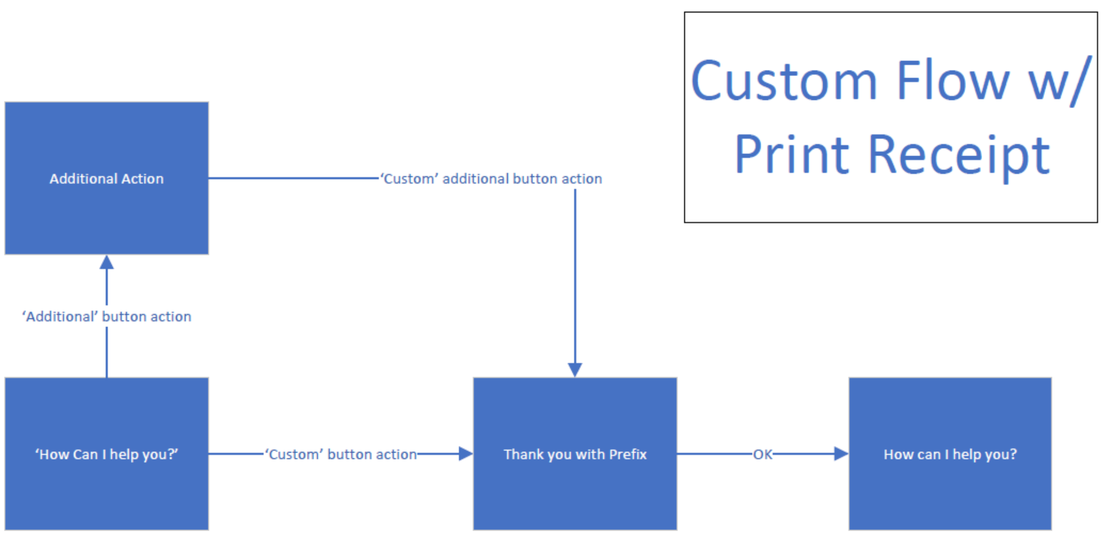
Custom flow with Case Validation and Print Receipt



Custom flow with Case Validation

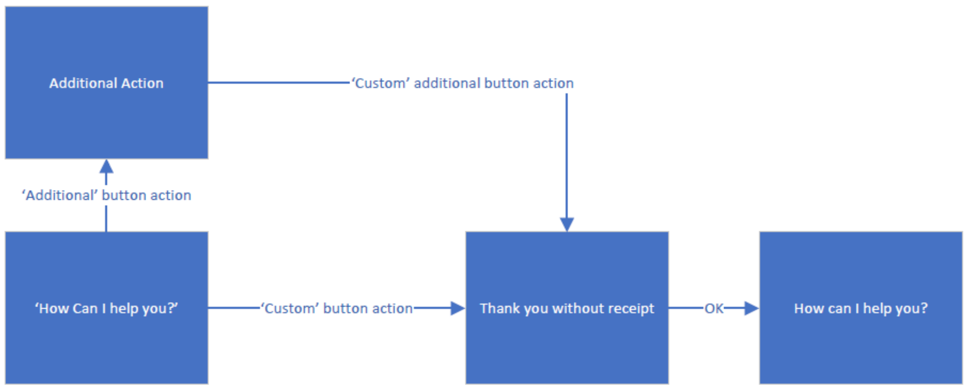


Custom flow with Print Receipt



Custom flow only

Custom Flow



Additional Action
'Custom' additional button action
'Additional' button action
'How Can I help you?'
'Custom' button action
Thank you without receipt
OK
How can I help you?

CalSAWS

California Statewide Automated Welfare System

Design Document

CA – 224578 DDID 2686/2314 FDS: GA GR Phase 2 Batch 3 (4 Rules) - Income Rules and Corresponding NOA Reasons

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Peterson Etienne, Stephanie Hugo, Taylor Fitzhugh
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/8/2021	1.0	Initial draft.	Peterson Etienne, Stephanie Hugo, Taylor Fitzhugh
8/12/2021	1.1	1. Removed status reasons from aid inkind and income test functionality due to they fail the individual, discussion are still going on about why are members being failed in financial evaluation. They will be brought back in phase 2 batch 4 CA-229096 2. Fixed leverage rule name and county applicable for Grant	Jennifer Chen
8/19/2021	1.2	Added Section 2.4 Living arrangements Detail page updates to add fields needed for EDBC rules.	Taylor Fitzhugh
8/24/2021	1.3	Removed assumption 'During testing the EDBC will result in 0 benefit as resource will be set to PASS. Resource and reporting logic will be added in phase 3 release 21.11 (CA-215917).' As it is not longer true.	Jennifer Chen
8/29/2021	1.4	1. Updated Financial income test functionality status reason trigger conditions. 2. Updated Financial overall flow functionality status reason trigger condition.	Jennifer Chen
8/31/2021	1.5	1. Added assumption for aid code 99 cannot be tested in 22.01 release	Jennifer Chen
9/8/2021	1.6	Updated the rule EDX321C017 to not be applicable for SFO and the rule EDX321C019 to be applicable for SFO. Based on the discussion with SFO BA meeting 9/8/2021	Peterson Etienne

		Added a note in EDBC summary page section stating that 'By default all GR Program Person with Member Role will have claiming code as "Non-Federal"'.	
09/21/2021	1.7	Updated the following rules for Sacramento based on Request 659088: EDX321C018 Drop cents – down rounding to N EDX321C019 Pay the benefit in dollars and cents - No rounding to Y	Peterson Etienne

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1 OVERVIEW

This SCR will implement the household composition and Non-financial functionality for the new CalWIN GA GR solution in CalSAWS

1.1 Current Design

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their General Relief Opportunities for Work (GROW) program. Currently CalWIN manages their GA/GR program logic by using a Rule Matrix which can be accessed by the county to allow each county administrator to customize the behavior to their specific county.

1.2 Requests

A new CalWIN GA/GR solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will automate the financial functionality for the new solution

1.3 Overview of Recommendations

1. Add all the required Data Collection elements to implement the Financial functionalities for the new solution
2. Create new Admin Summary and Detail pages that can be accessed in Admin tools by the County Admin staff
3. A new set of Admin detail pages, Rules, Batch and NOA triggers will be added for the below Financial.
    1. Aid-In-Kind
    2. Financial Income Test
    3. Grant Budget
    4. Overall Financial

1.4 Assumptions

1. The existing Los Angeles county rules will remain unchanged.
2. This SCR CA-224578 is based on the WCDS approved documents.
3. The design of the rules is for each CalWIN county based on the Gainwell documents approved by the counties.
4. This SCR CA-224578 is phase three of four which consists of 4 CalWIN rulesets for Financial. The remaining rulesets will be designed in CA-229096. Three of the SCR's (CA-215916, CA-215672 and CA-224578) will be implemented in the 21.11 release and CA-229096 will be implemented in 22.01 release.
5. The functionality of this SCR CA-224578 will be disabled until activated by the system property flag established in SCR CA-215687 which is part of the 20.11 release.

6. Any logic related to San Francisco explicitly called out in relevant WCDS approved use cases will be included in this design. Any, San Francisco sub program logic independent of the rule will be added in SCR CA-215677 DDID 2374 scheduled for 22.01.
7. Alerts will be handled separately outside the Rules design in a separate SCR CA-220119.
8. All functionality related to new fields will only affect the rules related to an individual county's General Assistance/General Relief program and will not impact the rules of other programs, unless specified.
9. All Data collection used in EDBC determination is effective for the benefit month.
10. Leveraged rules are main rules from another use cases whose logic are also used in this use case. Leveraged rules in this SCR whose main use case are not designed in phase 1 or 2 cannot be tested using the admin page. Example: Institutional status use case has a leverage rule that is a main rule in Earned income use case. Since Earned income use case is not designed in phase 1 or 2, this leverage rule will not be able to be tested from the admin page.
11. EDBC summary page layout will follow current Los Angeles County GA EDBC summary. The following sections will be in the EDBC summary page, others will be added in later phases: EDBC Header, EDBC Information, Program Configuration, Reporting Configuration, Allotment, Page Mappings (PMCR) and Security (STCR). Note: Allotment will have all 0 for values, and Security will follow current Los Angeles county security framework.
12. End to End testing of EDBC and Correspondence will not be possible until 22.01 release.
13. All calculation for computed values will detailed in the Visio diagram.
14. 'Participation status' will be an internal flag in CalSAWS, when a participation status is set in the rule it will replace the previous set status for each individual.
15. Logic that checks or creates Sanctions cannot be tested until CA-227328 is implemented.
16. The changes for the grant calculation are available only for single person program. Multi person grant calculation logic and multi person proration grant is not implemented.
17. Benefit calculations related to shelter, room and board, other person are not implemented.
18. Override functionality for medical deduction is not implemented and cannot be tested.
19. Manual edbc and negative action edbc cannot be run with these changes.
20. The conditions where Period of Ineligibility is 'Yes' can't be tested as the Period of Ineligibility use case is not implemented.
21. Time clock end date cannot be determined and cannot be used in the grant calculation for proration of the benefits as the related use case is not implemented.
22. Drug and Alcohol use case is not implemented. So, the 'Zero Grant Flag' cannot be evaluated and the status reason 'Individual in Approved Drug and Alcohol Trtmnt Fclty Pay Zero Grant' cannot be tested.
23. 'Aid In–kind recipient', used in Aid inkind functionality is set in time clock functionality which is not yet designed. This cannot be tested until it is designed.

24. Changes to the Financial Data Collection pages will be moved to SCR CA-232396
25. For the Financial overall flow, any functionality that is not designed in phase 2 cannot be tested. Flow 6 on the visio cannot be tested at this time as well since 'needs' are not yet designed.
26. All status reason and calculation for Lumpsum POI cannot be tested until phase 3.
27. Aid code 99 used in financial overall flow functionality is set in Indigent burial use case that will be designed in CA-229096, it cannot be tested until the SCR is development is complete.

2 RECOMMENDATIONS

2.1 County Parameter Summary Page

2.1.1 Overview

The County Parameter Summary page will provide the user a list of fiscal functionalities broken down into different categories. The functionalities will lead the user to a detail page in which they can view the individual parameters.

2.1.2 County Parameter Summary Page Mockup

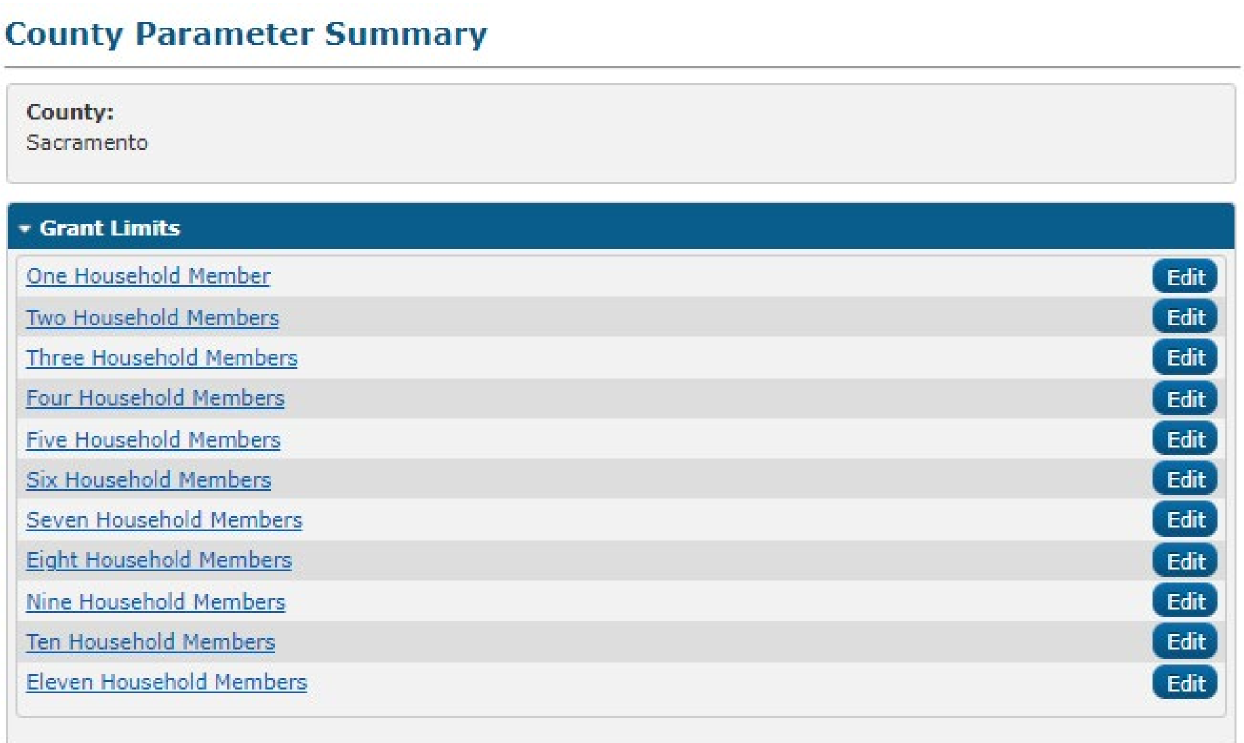


Figure 2.1.2.1 – County Parameter Summary

2.1.3 Description of Changes

1. County – This field will display the county of the user.
2. Grant Limits – This section will contain a list of all Grant Limits for the GA/GR Automated EDBC/CC functionalities that can be edited. Each item listed will be a hyperlink that will lead to the County Parameter Detail page in View mode and will have an Edit button that will lead to the County Parameter Detail page in Edit mode. The following options will be available:
    a. One Household Member
    b. Two Household Members
    c. Three Household Members
    d. Four Household Members
    e. Five Household Members
    f. Six Household Members
    g. Seven Household Members
    h. Eight Household Members
    i. Nine Household Members
    j. Ten Household Members
    k. Eleven Household Members

    Note: A full list of parameters can be found in supporting document, "County Parameter Breakdown Chart.xlsx".

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: County Parameter**

2.1.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
CountyParameterSummaryView	County Parameter Summary	County Parameter Summary View
CountyParameterDetailView	County Parameter Summary	County Parameter Detail View,

Security Right	Right Description	Right to Group Mapping
		County Parameter Detail Edit
CountyParameterDetailEdit	County Parameter Summary	County Parameter Detail Edit

Security Groups

Security Group	Group Description	Group to Role Mapping
County Parameter Summary View	This group has the capability to access the County Parameter Summary page to view existing rule information.	See the Security Matrix for the group to role associations
County Parameter Detail View	This group has the capability to access the County Parameter Summary page to view existing rule information.	See the Security Matrix for the group to role associations
County Parameter Detail Edit	This group has the capability to access the County Parameter Summary page to view and make modifications to existing rule information.	See the Security Matrix for the group to role associations

2.1.6 Page Mapping

No page mappings are required.

2.1.7 Page Usage/Data Volume Impacts

This is a new page and will not be frequented often in a normal workflow.

2.2 County Parameter Detail Page

2.2.1 Overview

The County Parameter Detail page will provide the user a list of parameters associated with a particular functionality.

2.2.2 County Parameter Detail Mockup

County Parameter Detail

Save Cancel

Grant Limits - One Household Member

County:	View Month:
Sacramento	01/2020

Item	Value	Begin Month	End Month
Grant Amount	$336.00		
Exempt Grant Amount	0		
Housing Need Amount	191		
Personal Need Amount	105		
Food Need Amount	0		
Transportation Need Amount	9		
Health Facility Rate	0		
Board and Care Rate	0		
Room and Board Rate	145		
Aid In Kind Amount	0		
Utilities Amount	0		
Housing Need Percentage	57%		03/2020

Pending Updates

Item	Value	Begin Month	End Month	Updated By
Housing Need Percentage	60%	04/2020		92

Save Cancel

Figure 2.2.2.1 – County Parameter Detail

2.2.3 Description of Changes

1. The main body section will be labeled with the parent category selected on the summary page.
2. County – The County of the logged in user.
3. View Month – The date the user is viewing the associated rules for. The calendar icon will allow the user to select the date. The date will display in MM/YYYY format. Standard Date validation for the date format will apply. The default date will be the current month.
4. View – This button will refresh the rule display information based on dates provided. This button will only display in Edit Mode.
5. Item – The Parameter associated to this functionality.
6. Value – Value at the given time. The values will use constraints related to the required data input. (i.e., percentage values will be constrained between 0 and 100, Money values will be constrained to a non-negative value of up to two decimal places).
7. Begin Month – The date the Value is applicable from. This will be a date field in MM/YYY format. This date will always evaluate to the first day of the month selected. This field will only be editable in Create and Edit mode. The validation message, "Begin Month cannot be prior to the current month.", will display if the user attempts to Save with a month prior to the current month.
8. End Month – The date the Value stopped being applicable. This will be a date field in MM/YYY format. This date will always evaluate to the last day of the month selected. This field will only be editable in Create and Edit mode. The validation message, "End Month cannot be prior to the Begin Month.", will display if the user attempts to Save with a month prior to the Begin Month.
9. Pending Updates – This section will display the list of changes made throughout the day that have yet to be applied by users. Changes made by a user will be pending until they are applied via an overnight batch job. The section will display the same information inserted as well as an updated by column. The updated by column will display a staff id as a link to the worker detail page of the user specified.
10. Save and Return - This button will save update the information based on the user's input and return the user to the County Parameter Summary page. This button is only visible in Edit mode.
11. Cancel - This button will return the user to the County Parameter Summary page without applying any changes. This button is only visible in Edit mode.
12. Edit - This button will take the user to the County Parameter Summary Page in Edit mode. This button is only visible in View mode. This button will only display if the user has the "CountyParameterDetailEdit" right
13. Close - This button will return the user to the County Parameter Summary. This button is only visible in View mode.
14. Records created will be effective dated so that there is always a high-dated determination for every rule.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: County Rule**

2.2.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
CountyParameterDetailEdit	County Parameter Summary	County Parameter Detail View

Security Groups

Security Group	Group Description	Group to Role Mapping
County Parameter Detail View	This group has the capability to access the County Parameter Summary page to view existing rule information.	See the Security Matrix for the group to role associations
County Parameter Detail Edit	This group has the capability to access the County Parameter Summary page to view existing rule information.	See the Security Matrix for the group to role associations

2.2.6 Page Mapping

No page mappings are required.

2.2.7 Page Usage/Data Volume Impacts

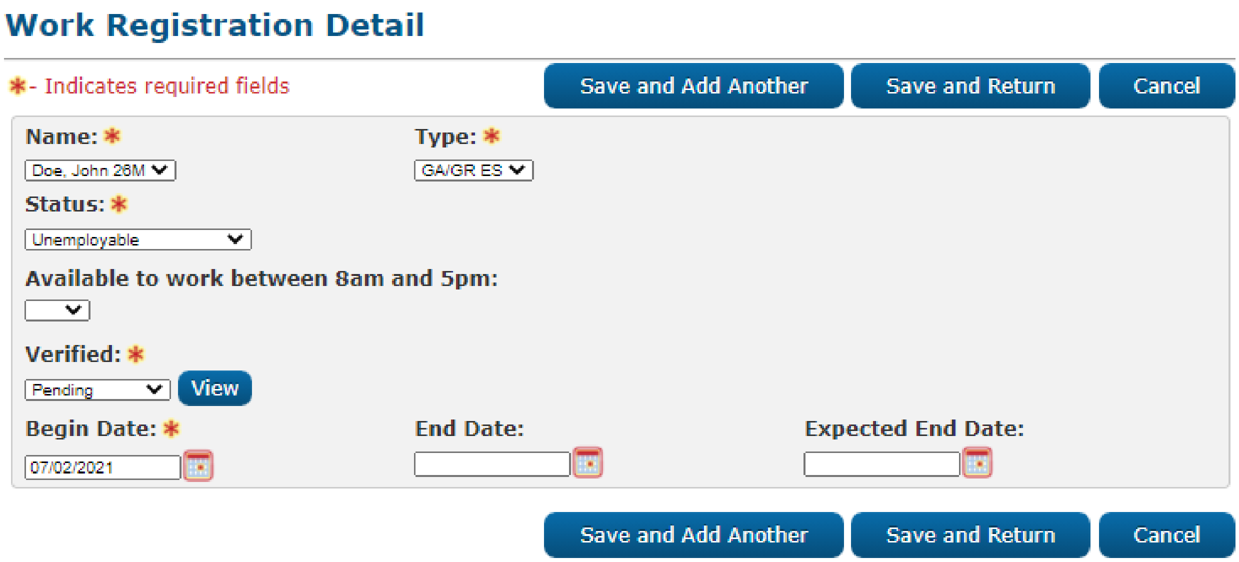
This is a new page and will not be frequented often in a normal workflow.

2.3 Work Registration Detail

2.3.1 Overview

The "Work Registration Detail" page is used to track the employability status for the GROW program. This page will be enhanced to hide fields that are specific to the "GA/GR ES" type.

2.3.2 Work Registration Detail Mockup



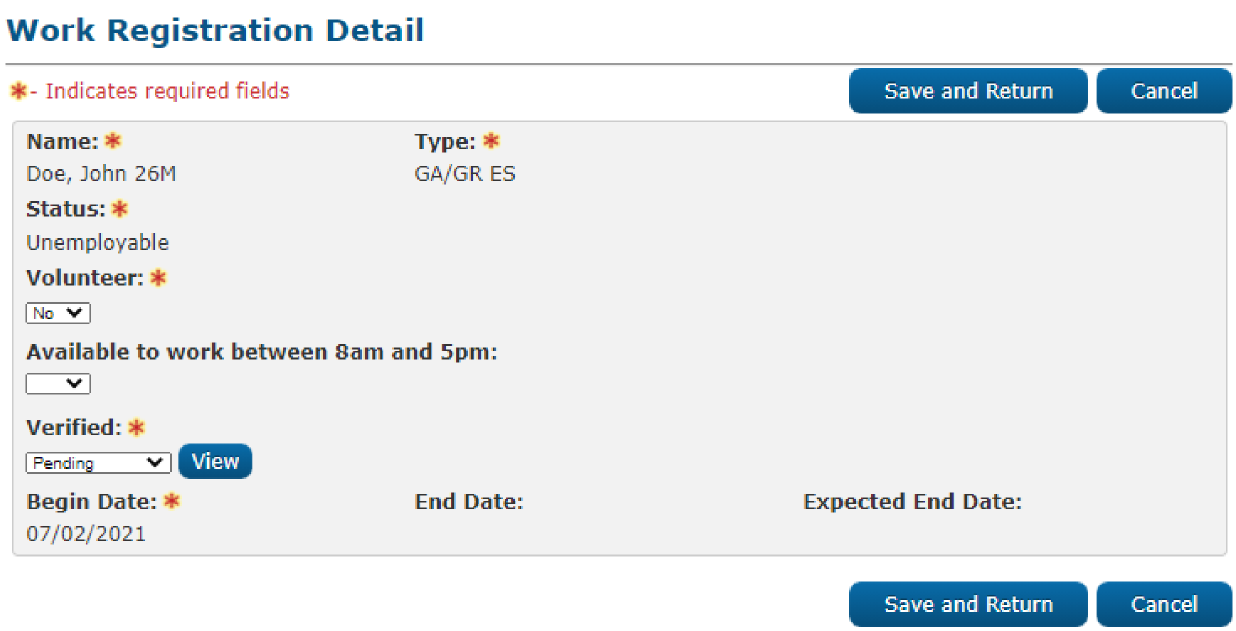


Figure 2.3.2.2 – Work Registration Detail Mockup (Edit Mode)

2.3.3 Description of Changes

1. Update the "Verified" field to only display when the "Type" is "GA/GR ES".
2. Update the "Available to work between 8am and 5pm" field to only display when the "Type" is "GA/GR ES".

2.3.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Work Regist.

2.3.5 Security Updates

No Security Updates.

2.3.6 Page Mapping

No page mappings are required.

2.3.7 Page Usage/Data Volume Impacts

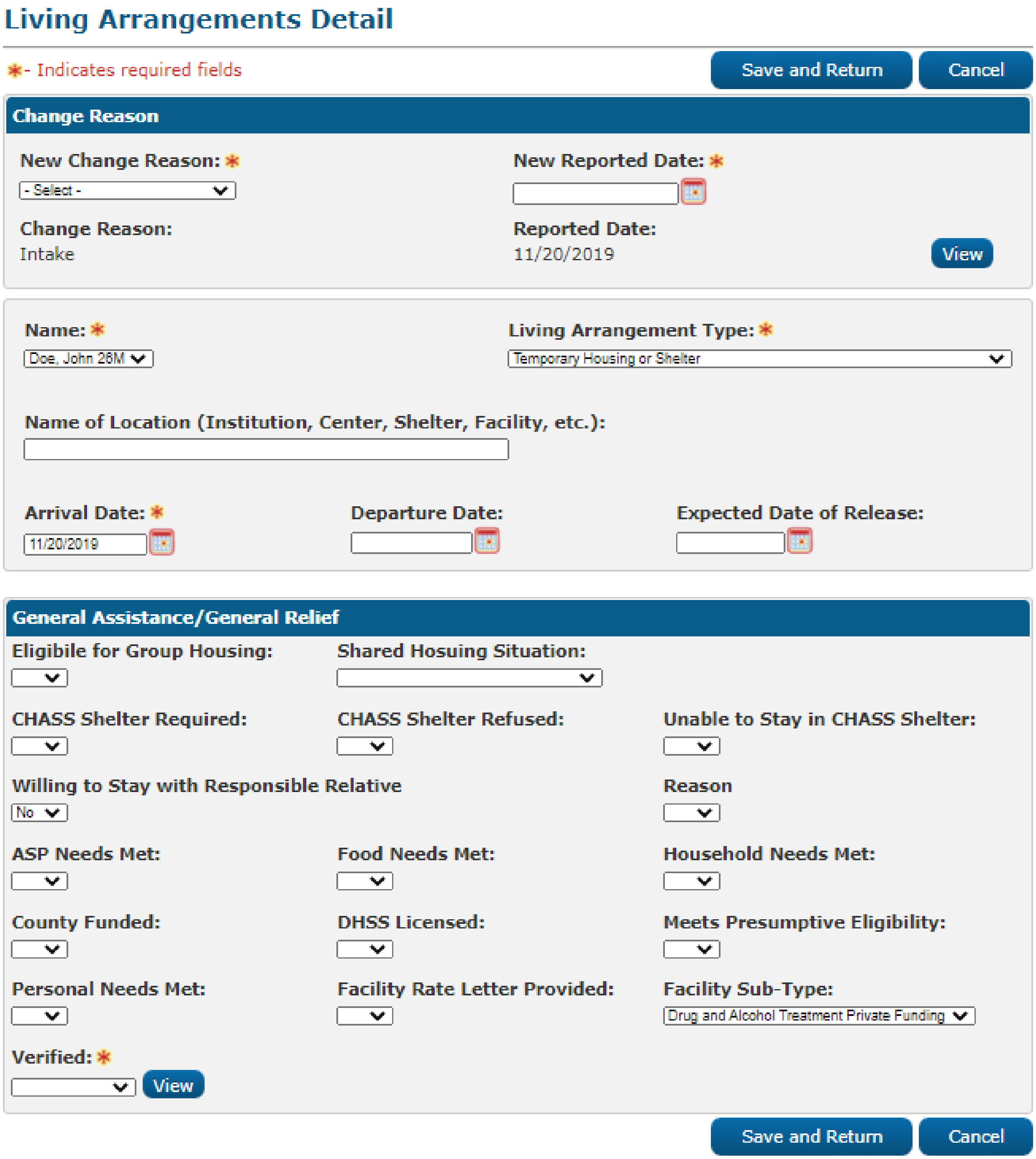
No page usage impacts.

2.4 Living Arrangements Detail

2.4.1 Overview

The "Living Arrangements" page is used to track the living conditions of the participants. This page will be updated to track whether the personal needs of the participant have been met while at the location in which they are residing.

2.4.2 Living Arrangements Detail Mockup



Living Arrangements Detail

*- Indicates required fields

Save and Return | Cancel

Change Reason

New Change Reason: *
- Select -

New Reported Date: *

Change Reason:
Intake

Reported Date:
11/20/2019

View

Name: *
Doe, John 26M

Living Arrangement Type: *
Temporary Housing or Shelter

Name of Location (Institution, Center, Shelter, Facility, etc.):

Arrival Date: *
11/20/2019

Departure Date:

Expected Date of Release:

General Assistance/General Relief

Eligibile for Group Housing:

Shared Hosuing Situation:

CHASS Shelter Required:

CHASS Shelter Refused:

Unable to Stay in CHASS Shelter:

Willing to Stay with Responsible Relative
No

Reason

ASP Needs Met:

Food Needs Met:

Household Needs Met:

County Funded:

DHSS Licensed:

Meets Presumptive Eligibility:

Personal Needs Met:

Facility Rate Letter Provided:

Facility Sub-Type:
Drug and Alcohol Treatment Private Funding

Verified: *

View

Save and Return | Cancel

2.4.3 Description of Changes

1. Add the "Personal Needs Met" dropdown. The field will default to blank. This field will be a Yes/No dropdown. This field will only be editable in Create and Edit modes.

2.4.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Living Arrgmt.

2.4.5 Security Updates

No Security Updates.

2.4.6 Page Mapping

No page mappings are required.

2.4.7 Page Usage/Data Volume Impacts

No page usage impacts.

2.5 Update to EDBC Summary page

2.5.1 Overview

The EDBC Summary page is used to show the overview of the individual specific program. CalWIN GR program will leverage the existing format of EDBC Summary page.

*Please Note: By default all GR Program Person with Member Role will have claiming code as “Non-Federal”.

2.5.2 General Assistance/General Relief (GR) EDBC Summary

General Assistance/General Relief (GR) EDBC Summary

*- Indicates required fields

Close

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2021		07/27/2021	Accepted - Saved	Staff Name

EDBC Information

Quarterly Reporting Period Begin Month: 06/2021

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 90 - GA General Relief Independent Living-CNTY

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Person Name	09/10/1988	MEM		Active	

Reporting Configuration

Name	Adult/Child	Claiming
Person Name	Adult	Non Federal

Work Registration

Name	Status	Status Reason	Begin Date	End Date
Person Name	Unemployable	Administratively	06/01/2021	

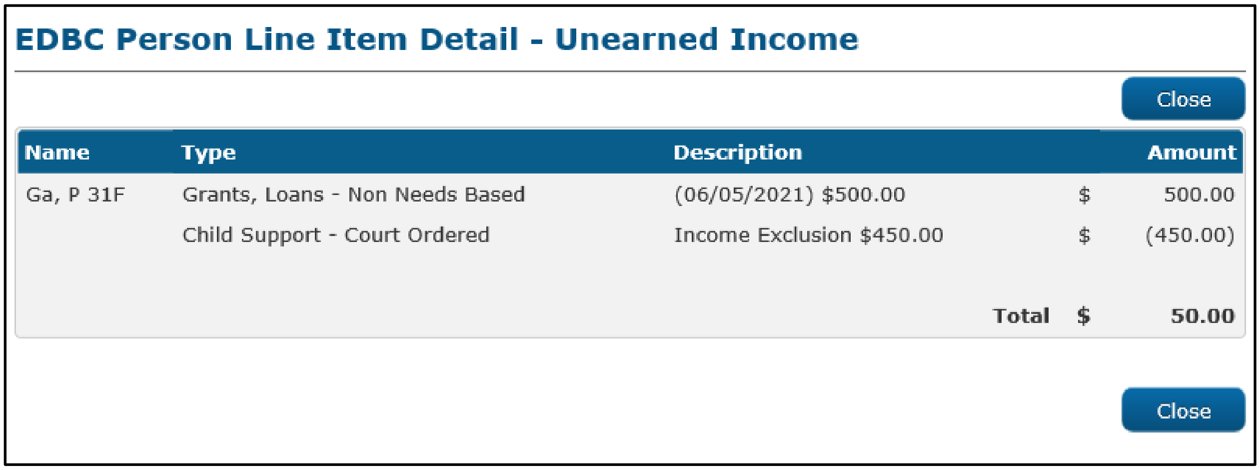
GR Applicant Earned Income Test	Regular	
Gross Earned Income	$	100.00
Earned Income Deductions	-	0.00
Net Earned Income	=	100.00
Potential Grant Amount	$	221.00
Net Earned Income Test Result		Pass

General Assistance/General Relief Budget		Regular
Unearned Income	$	50.00
Earned Income	+	30.00
In-Kind Income	+	20.00
Total Net Income	=	100.00
Assistance Unit Size		1
Potential Grant	$	221.00
Total Net Income	-	100.00
Medical Deduction	-	20.00
Aid Payment	=	101.00

Aid Payment		Regular
Full Month Aid Payment	$	101.00
Dates to Prorate		1-31
Final Aid Payment	$	101.00
Overridden Aid Payment	$	0.00
		Override Payment
Potential Benefit	=	101.00
Previous Potential Benefit	-	0.00
Overpayment Adjustment Amount	-	0.00
Authorized Amount	=	101.00

Figure 2.3.2.1 – General Assistance/General Relief (GR) EDBC Summary

2.5.3 EDBC Person Line Item Detail – Unearned Income


EDBC Person Line Item Detail - Unearned Income

Close

Name	Type	Description		Amount
Ga, P 31F	Grants, Loans - Non Needs Based	(06/05/2021) $500.00	$	500.00
	Child Support - Court Ordered	Income Exclusion $450.00	$	(450.00)
		Total	$	50.00

Close

Figure 2.3.3.1 – EDBC Person Line Item Detail – Unearned Income

2.5.4 Page Location

- **Global: Eligibility**
- **Local: EDBC Results**

2.5.5 Security Updates

No Security Updates.

2.5.6 Page Mapping

No page mappings are required.

2.5.7 Page Usage/Data Volume Impacts

No Data usage impacts.

2.6 Financial

2.6.1 Aid-in-Kind Functionality

2.6.1.1 County Admin Matrix - Aid-in-Kind

2.6.1.1.1 Overview

A new County Admin Detail page for Aid-in-Kind will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Aid-in-Kind functionality to their county.

2.6.1.1.2 Description of Changes

a. The Admin page matrix for Aid-in-Kind will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date
d. The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Aid in Kind applicable.	N	N	N	N	N	Y	N	N	N	N	N	N	Y	N	N	N	N	N
Previously applied AIK.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
AIK on compliance requirements.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX324C001	Aid in Kind applicable.
EDX324C002	Previously applied AIK.
EDX324C003	AIK on compliance requirements.

<u>Leverage Rule</u>

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Indigent Burial Applicable.	N	Y	N	Y	Y	N	N	N	Y	N	N	N	N	N	N	Y	N	N

Return to residence applicable.	N	Y	N	Y	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Number	CalSAWS Rule
EDX302C001	Indigent Burial Applicable.
EDX307C001	Return to residence applicable.

2.6.1.2 EDBC Changes

2.6.1.2.1 Overview

This section will provide the Eligibility Rules flow for AU Eligible for Family Program Person Eligibility that can be filtered for each CalWIN County.

2.6.1.2.2 Description of Change

Aid-in-Kind Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
Employability Status	Status:	Work Registration Detail
Homeless	Living Arrangement Type: Homeless	Living Arrangement Detail
Meets Presumptive Eligibility	Meets Presumptive Eligibility	Living Arrangement Detail
Eligible for Group Living Situation	Eligible for Group Living Situation	Living Arrangement Detail
AIK Bed (Shelter Bed)	Living Arrangement Type: Homeless Sub-Type: Shelter Facility	Living Arrangement Detail
Employable	Status: Employable	Work Registration Detail

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

Form Reason

1. The status reason CT73 'Potential Elig. for AIK' will be set to for the form E10026 when all the following conditions are met:
    a. The individual was not granted GAGR Return to Residence grant and GAGR Indigent Burial Grant. (This is determined in 'return to residence' functionality and 'indigent burial' functionality).
    b. Any of the following is not true:
        i. The rule 'Return to residence applicable' is active.
        ii. The individual's County of Residence on Residency Detail is not the current county.
        iii. The individual has a 'return to residence' record.
    c. The rule ' Indigent Burial Applicable.' is not active.
    d. The rule ' Aid in Kind applicable.' is active.
    e. The individual does meet presumptive eligibility.
    f. The individual is eligible for group living situation.
    g. The rule ' Previously applied AIK.' is active.
    h. The individual has Living Arrangement Type: Homeless and Sub-Type: Shelter Facility.

Category	Short Description
73	Potential Elig. for AIK

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Not Met Presumptive Elig.' will be set as a display status reason when all the following conditions are met:
    a. The individual was not granted GAGR Return to Residence grant and GAGR Indigent Burial Grant. (This is determined in 'return to residence' functionality and 'indigent burial' functionality).
    b. Any of the following is not true:
        i. The rule 'Return to residence applicable' is active
        ii. The individual's County of Residence on Residency Detail is not the current county
        iii. The individual has a 'return to residence' record.
    c. The rule ' Indigent Burial Applicable.' is not active.
    d. The rule ' Aid in Kind applicable.' is active.

e. The individual has a Living Arrangement entry with a Living arrangement Type: Homeless.
f. The individual does not meet presumptive eligibility.

Category	Short Description
73	Not Met Presumptive Elig.

2. The new program/person status reason CT73 'Not Eligible Grp. Living' will be set as a display status reason when all the following conditions are met:
    a. The individual was not granted GAGR Return to residence grant and GAGR Indigent Burial Grant. (This is determined in 'return to residence' functionality and 'indigent burial' functionality).
    b. Any of the following is not true:
        i. The rule 'Return to residence applicable' is active
        ii. The individual's County of Residence on Residency Detail is not the current county
        iii. The individual has a 'return to residence' record.
    c. The rule ' Indigent Burial Applicable.' is not active.
    d. The rule ' Aid in Kind applicable.' is active.
    e. The individual has a Living Arrangement entry with a Living arrangement Type: Homeless.
    f. The individual does meet presumptive eligibility.
    g. The individual is not eligible for group living situation.

Category	Short Description
73	Not Eligible Grp. Living

3. ~~The new program/person status reason CT73 'Job Quit Resides in AIK' will be set as a display status reason when all the following conditions are met:~~
    a. ~~The individual was not granted GAGR Return to Residence grant and GAGR Indigent Burial Grant. (This is determined in 'return to residence' functionality and 'indigent burial' functionality).~~
    b. ~~Any of the following is not true:~~
        i. ~~The rule 'Return to residence applicable' is active~~
        ii. ~~The individual's County of Residence on Residency Detail is not the current county~~
        iii. ~~The individual has a 'return to residence' record.~~
    c. ~~The rule ' Indigent Burial Applicable.' is not active.~~
    d. ~~The rule ' Aid in Kind applicable.' is active.~~
    e. ~~The individual has a Living Arrangement entry with a Living arrangement Type: Homeless.~~
    f. ~~The individual does meet presumptive eligibility.~~
    g. ~~The individual is eligible for group living situation.~~
    h. ~~The rule 'Previously applied AIK.' is active.~~
    i. ~~The program mode is ongoing.~~

Category	Short Description
~~73~~	~~Job Quit Resides in AIK~~

4. The new program/person status reason CT73 'AIK Previously Received' will be set as a display status reason when all the following conditions are met:
   a. The individual was not granted GAGR Return to residence grant and GAGR Indigent Burial Grant. (This is determined in 'return to residence' functionality and 'indigent burial' functionality).
   b. Any of the following is not true:
      iv. The rule 'Return to residence applicable' is active
      v. The individual's County of Residence on Residency Detail is not the current county
      vi. The individual has a 'return to residence' record.
   c. The rule ' Indigent Burial Applicable.' is not active.
   d. The rule ' Aid in Kind applicable.' is active.
   e. The individual has a Living Arrangement entry with a Living arrangement Type: Homeless
   f. The individual does meet presumptive eligibility.
   g. The individual is eligible for group living situation.
   h. The rule 'AIK on compliance requirements.' is active.
   i. The individual is currently aided in GA GR with aid code '98'.
   j. All of the conditions in either A or B is true:
      Condition A:
      1. The rule 'Previously Applied AIK' is not active
      Condition B:
      1. The rule 'Previously Applied AIK' is active
      2. Living Arrangement Type: Homeless
      Sub-Type is not 'Shelter Facility'

Category	Short Description
73	AIK Previously Received

2.6.1.3 Project Requirements

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Aid in Kind Applicable} CalSAWS must determine whether Aid in Kind is applicable in a GA/GR case.]	The rule 'Aid in Kind applicable.'	The following rule is stated in the business flow diagram and admin detail.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Aid In Kind Previously Applied} CalSAWS must determine whether Aid in Kind was previously applied to a GA/GR case.]	The rule 'Previously applied AIK.'	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Aid In Kind Once in a Lifetime} CalSAWS must allow Aid in Kind services once in a lifetime for GA/GR.]	The rule 'AIK on compliance requirements.'	The following rule is stated in the business flow diagram and admin detail.

2.6.2 Financial Income Test Functionality

2.6.2.1 County Admin Matrix - Financial Income Test

2.6.2.1.1 Overview

A new County Admin Detail page for Financial Income Test will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Financial Income Test functionality to their county.

2.6.2.1.2 Description of Changes

a. The Admin page matrix for Financial Income Test will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date
d. The rule functionality can be viewed as of a date using the view date

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Test in kind income.	Y	Y	N	Y	Y	N	Y	Y	Y	N	Y	Y	Y	Y	Y	N	N	Y
Do not test in kind income.	N	N	Y	N	N	N	N	N	N	Y	N	N	N	N	N	Y	Y	N

Income test on adjusted amount.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX320C001	Test in kind income.
EDX320C002	Do not test in kind income.
EDX320C006	Income test on adjusted amount.

<u>Leverage Rule</u>

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Earned income – Alameda Only.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Contra Costa Only.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Fresno Only.	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Orange Only.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Sacramento Only.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – San Diego Only.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – San Mateo Only.	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N
Earned income – Santa Cruz and Santa Clara Only.	N	N	N	N	N	N	N	N	N	N	N	Y	Y	N	N	N	N	N
Earned income – Sonoma Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N
Earned income – Ventura Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N

Earned income – Yolo Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y
CHASS Shelter options.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Number	CalSAWS Rule
EDX309C001	Earned income – Alameda Only.
EDX309C002	Earned income – Contra Costa Only.
EDX309C003	Earned income – Fresno Only.
EDX309C004	Earned income – Orange Only.
EDX309C006	Earned income – Sacramento Only.
EDX309C007	Earned income – San Diego Only.
EDX309C010	Earned income – San Mateo Only.
EDX309C013	Earned income – Santa Cruz and Santa Clara Only.
EDX309C015	Earned income – Sonoma Only.
EDX309C017	Earned income – Ventura Only.
EDX309C018	Earned income – Yolo Only.
EDX314C007	CHASS Shelter options.

* The following rule will not be migrated into CalSAWS for the following reasons.

CalWIN Number	CalWIN Description	Reason
EDX320C003	No description.	Not used
EDX320C004	No description.	Not used
EDX320C005	No description.	Not used

2.6.2.2 EDBC Changes

2.6.2.2.1 Overview

This section will provide the Eligibility Rules flow for AU Eligible for Family Program Person Eligibility that can be filtered for each CalWIN County.

2.6.2.2.2 Description of Change

Financial Income Test Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
Sponsor Household size	sponsor Household size	Sponsorship Detail page
Housing needs are met	Household needs met	Living Arrangement Detail

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new program/person status reason CT73 'Sponsor Income > Grant' will be set as a display status reason when all the following conditions are met:
    a. The individual is a sponsor. (This is determined in the sponsor non-citizen cert period functionality)
    b. Any of the following is true:
        i. The Sponsor deemed earned income amount is greater than 0.
        ii. The Sponsor deemed unearned income amount is greater than 0.
        iii. The Sponsor deemed resource unearned income amount is greater than 0.
        iv. The Sponsor deemed self–employment income amount is greater than 0.
    c. One of the following is true:
        i. The rule ' Earned income – Orange Only.' is active.
        ii. The rule ' Earned income – Contra Costa Only.' is active.
    d. The income from the non-citizen sponsor is more than the sponsored household sponsor's amount.

Category	Short Description
73	Sponsor Income > Grant

2. ~~The new program/person status reason CT73 'Gross Income > Grant' will be set as a display status reason when all the following conditions are met:~~
    a. ~~The rule ' Earned income – Alameda Only.' is active.~~
    b. ~~The GA Budget total countable income amount is greater than GAGR Amount.~~
    c. ~~The GR Budget Total adjustable earned income amount is greater than the GAGR grant amount.~~

~~Category~~	~~Short Description~~
~~73~~	~~Gross Income > Grant~~

3. The new program/person status reason CT73 'Income Exceeds Grant Amount' will be set as a display status reason when all the following conditions are met:
    a. The program is intake
    b. ~~The rule ' Earned income – Alameda Only.' is active.~~
    c. The GR Budget total countable income amount is greater than GAGR Amount.

Category	Short Description
73	Income Exceeds Grant Amount

2.6.2.3 Correspondence

2.6.2.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.6.2.3.2 Description of Change

1. **Reason Code: XAF300 – Sponsor Income > Grant**
    a. Trigger Condition
        i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Sponsor Income > Grant'.

b. Program Level Reason
c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Denial	GA Denial - Sponsor's Income Exceeds Maximum Grant	121 2 (07/02)	12526

2. **Reason Code: XAF301 – Income Exceeds Grant Amount**
   a. Trigger Condition
      i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Income Exceeds Grant Amount'.
      or
      ii. This notice generates for the applicable counties when the program was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Income Exceeds Grant Amount'.
   b. Program Level Reason
   c. County-specific information:

County	Action	Document Description	Number	Template
Alameda	Discontinuance	GA Disc - Excess Income	005 1 (10/10)	12652
Alameda	Denial	GA Denial - Excess Income	120 1 (10/10)	11462
Contra Costa	Denial	GA Denial - Excess Income	120 1	12525
Orange	Discontinuance	GR Disc - Income Exceeds Maximum Aid Payment	005 B	11617
Orange	Denial	GR Denial - Excess Income	120 B	12685
Placer	Discontinuance	Income Exceeds Needs	005	608580
Placer	Denial	Excess Non Exempt Income	120-1	608583
Sacramento	Discontinuance	GA Discontinuance-Needs Met or Income from Various Sources Exceeds Needs	CDS 021-0 (5/93)	607891
Sacramento	Denial	GA DENIAL/EXCESS INCOME	CDS 160-1 (08/97)	12444
Santa Barbara	Discontinuance	GR - Disc - Excess Income	050-2	12333
Santa Barbara	Denial	GR Deny-Excess Income	150-0	12330
Santa Clara	Discontinuance	GA Discontinuance - Earnings Meet Needs	GA 005	12016
Santa Clara	Denial	GA Denial - Excess Income	GA 120	12026
Santa Cruz	Discontinuance	Discontinuance - Excess Income for GA	007-A	12094

Santa Cruz	Denial	Denial - GA Denial Excess Income	125-A	12089
San Diego	Discontinuance	GR Discontinuance - Excess Income	032-2	12725
San Luis Obispo	Denial	GA Denial/Discontinuance - Excess Income	GA 902/903	12475
San Luis Obispo	Discontinuance	GA Denial/Discontinuance - Excess Income	GA 902/903	12476
San Mateo	Discontinuance	GA Discontinuance - Excess income	003 2	11964
San Mateo	Discontinuance	GA Discontinuance - Excess anticipated income	026 0	11964
San Mateo	Denial	GA Denial - Income Exceeds Need	124 0	11953
Solano	Discontinuance	GA - Discontinuance - Excess Earned Income	051	12118
Solano	Denial	GA - Denial Excess Income	ga239h	12113
Sonoma	Discontinuance	GA Disc - Income/Support Exceeds GA Maximum Allowance	021-0 (09/99)	12531
Sonoma	Denial	GA Denial - Excess Income	121-5 (03/96)	12539
Tulare	Discontinuance	GA Disc - Excess Income	032-4	12336
Yolo	Discontinuance	General Assistance Discontinuance - Income Exceeds Need	005-3	12218
Yolo	Denial	General Assistance Denial - Excess Income	120-3	12244

2.6.2.4 Project Requirements

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Income Test Include In-kind} CalSAWS must test In-kind income and include the In-kind income in the total countable earned income received amount for GA/GR.]	The rule 'Test in kind income.'	The following rule is stated in the business flow diagram and admin detail.
	[Business Rule: {Income Test Don't Include In-kind} CalSAWS must not include In-kind income as countable income received for GA/GR.]	The rule 'Do not test in kind income.'	The following rule is stated in the business flow diagram and admin detail.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Income Test Gross} CalSAWS must the total gross earned and unearned income for GA/GR income test.]	The rule 'Income test on adjusted amount.'	The following rule is stated in the business flow diagram and admin detail.

2.6.3 Grant Budget Functionality

2.6.3.1 County Rule Matrix – Grant Budget

2.6.3.1.1 Overview

A new County Rule Detail page for Grant Budget will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Grant Budget functionality to their county.

2.6.3.1.2 Description of Changes

a. The Admin page matrix for Grant Budget will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County.
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date
d. The rule functionality can be viewed as of a date using the view date.

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Budget on employability, housing cost.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Budget on accumulated needs.	N	N	Y	Y	Y	N	N	N	Y	N	Y	Y	Y	N	Y	Y	Y	Y
Budget on number of persons.	Y	N	N	N	N	Y	Y	N	N	Y	N	N	N	Y	N	N	N	Y
Budget on program, HH, Date of aid.	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N
Grant greater than $5.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N

Has individual applied for county Medi–Cal.	N	N	N	N	Y	Y	Y	N	Y	Y	Y	N	N	N	N	N	N	Y
Deduct grant amount for bus tickets.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Subtract $40 from grant amount.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Grant less than $2.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Grant less than $10.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
More than one person eligible.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Round the amount to the next whole dollar – Up rounding.	Y	N	N	N	N	N	N	Y	Y	N	N	N	N	N	N	N	N	N
Drop cents – Down rounding.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	Y	N
Pay the benefit in dollars and cents - No rounding.	N	N	Y	N	N	Y	N	N	N	Y	Y	Y	Y	Y	N	Y	N	N
Round to the whole dollar - Regular rounding.	N	Y	N	N	Y	N	N	N	N	N	N	N	N	N	Y	N	N	Y
No rounding if the amount is prorated and regular rounding when amount is not prorated.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Prorate grant based on 30–day month for all calendar months.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Allow Individual based Medical deduction to all eligible individuals.	Y	N	N	Y	Y	Y	N	N	Y	N	N	N	N	N	N	Y	N	N
Fail case at intake and fail case in future month if intake threshold is not met.	N	N	N	Y	N	Y	N	N	N	N	Y	N	N	N	Y	Y	N	Y
Fail case in month of zero budget grant and fail the future month.	N	N	N	Y	N	Y	Y	N	Y	N	Y	N	N	N	Y	Y	N	Y
Fail case at intake and pass case in future month if intake threshold is not met in the first month but	N	Y	Y	N	N	N	Y	N	Y	Y	N	N	N	Y	N	N	Y	N

met in the second month.																		
Allow zero budget grant for Individual in Drug & Alcohol Treatment Facility.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N
Allow Medical deduction at case level.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Medical coverage deduction – Alameda.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Apply Medical deduction to GA grant.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Exempt Medical deduction for those potentially eligible for Medi–Cal ABD.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Exempt Medical deduction for aged.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Exempt Medical deduction for under 21.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Exempt Medical deduction for individual applied for county Medi–Cal (CMSP).	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Exempt Medical deduction for individual having other health coverage	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Exempt Medical deduction for individual having Prior Aid in Medi–Cal program	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Exempt Medical deduction for pregnancy	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Fail for not applying for county Medi–Cal program (CMSP)	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Rule	CalSAWS Rule
EDX321C001	Budget on employability, housing cost.
EDX321C002	Budget on accumulated needs.
EDX321C003	Budget on number of persons.
EDX321C004	Budget on program, HH, Date of aid.
EDX321C005	Grant greater than $5.
EDX321C006	Has individual applied for county Medi–Cal.
EDX321C007	Deduct grant amount for bus tickets.
EDX321C010	Subtract $40 from grant amount.
EDX321C012	Grant less than $2.
EDX321C013	Grant less than $10.
EDX321C016	More than one person eligible.
EDX321C017	Round the amount to the nearest whole dollar – Up rounding.
EDX321C018	Drop cents – Down rounding.
EDX321C019	Pay the benefit in dollars and cents - No rounding.
EDX321C020	Round to the whole dollar - Regular rounding.
EDX321C021	No rounding if the amount is prorated and regular rounding when amount is not prorated.
EDX321C022	Prorate grant based on 30–day month for all calendar months.
EDX321C023	Allow Individual based Medical deduction to all eligible individuals.
EDX321C025	Fail case at intake and fail case in future month if intake threshold is not met.
EDX321C027	Fail case in month of zero budget grant and fail the future month.
EDX321C029	Fail case at intake and pass case in future month if intake threshold is not met in the first month but met in the second month.
EDX321C034	Allow zero budget grant for Individual in Drug & Alcohol Treatment Facility.
EDX321C035	Allow Medical deduction at case level.
EDX321C037	Medical coverage deduction – Alameda.
EDX321C040	Apply Medical deduction to GA grant.
EDX321C041	Exempt Medical deduction for those potentially eligible for Medi–Cal ABD.
EDX321C042	Exempt Medical deduction for aged.
EDX321C043	Exempt Medical deduction for under 21.
EDX321C044	Exempt Medical deduction for individual applied for county Medi–Cal (CMSP).

EDX321C045	Exempt Medical deduction for individual having other health coverage.
EDX321C046	Exempt Medical deduction for individual having Prior Aid in Medi–Cal program.
EDX321C047	Exempt Medical deduction for pregnancy.
EDX321C050	Fail for not applying for county Medi–Cal program (CMSP).

The following rules are not migrated at this time. They will be migrated when grant calculation for more than one individual is designed in phase 3.

CalWIN Rule	CalSAWS Rule
EDX321C008	Allow 12 bus tickets per person per month.
EDX321C009	Applicant.
EDX321C011	Grant less than 10$.
EDX321C014	Grant less than 1$.
EDX321C015	Grant less than 20$.
EDX321C024	SF GA Couples.
EDX321C026	Suspend case in month of zero budget grant and pass in future month if no ZBG exists.
EDX321C028	Suspend case in month of zero budget grant and pass case for 3 total months from month of zero budget grant.
EDX321C030	Contra Costa Couples.
EDX321C031	Tulare Couples.
EDX321C032	Solano Couples.
EDX321C033	San Mateo Couples.
EDX321C036	Aid at half 2–person rate for Unemployable Spouse of Individual who has a Emp Svc Non-Cooperative Sanction.

Leverage Rule

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Pro-rate homeless and housed benefits.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N

Earned income – Orange Only.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income - Placer Only.	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Sacramento Only.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – San Diego Only.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Rate for homeless in shelter.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Income test on adjusted amount.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Number	CalSAWS Rule
EDX305C003	Pro-rate homeless and housed benefits.
EDX309C004	Earned income – Orange Only.
EDX309C005	Earned income - Placer Only.
EDX309C006	Earned income – Sacramento Only.
EDX309C007	Earned income – San Diego Only.
EDX314C004	Rate for homeless in shelter.
EDX320C006	Income test on adjusted amount.

2.6.3.2 EDBC Changes

2.6.3.2.1 Overview

This section will provide the Eligibility Rules flow for calculating the grant that can be filtered for each CalWIN County.

2.6.3.2.2 Description of Change

Grant Budget Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County. Reference **Appendix 6.1 Rules Flow Diagram** 'Viewing Visio Document in Internet Explorer' for instruction on how to access Visio.

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program or person level when the following conditions are met:

1. The new program/person status reason CT73 'Income Exceeds Grant Amount' will be set as a display status reason and the conditions to set this reason code can be found in the flow "Final Grant Calculation". This status reason will be set when the total net income amount is greater than the potential grant amount.

Category	Short Description
73	Income Exceeds Grant Amount

2. The new program/person status reason CT73 'Net Earned Inc Exceeds Limit' will be set as a display status reason and the conditions to set this reason code can be found in the flow "Trigger Income NoA". This status reason will be set when the full month aid payment is less than net earned income amount.

Category	Short Description
73	Net Earned Inc Exceeds Limit

3. The new program/person status reason CT73 'Net Unearned Inc Exceeds Limit' will be set as a display status reason and the conditions to set this reason code can be found in the flow "Trigger Income NoA". This status reason will be set when the full month aid payment is less than net unearned income amount.

Category	Short Description
73	Net Unearned Inc Exceeds Limit

4. The new program/person status reason CT73 'Inkind Inc Exceeds Limit' will be set as a display status reason and the conditions to set this reason code can be found in the flow "Trigger Income NoA". This status reason will be set when the full month aid payment is less than total in-kind income amount.

Category	Short Description
73	Inkind Inc Exceeds Limit

5. The new program/person status reason CT73 'Net Unearned Inc Exceeds Limit - Ongoing' will be set as a display status reason and the conditions to set this

reason code can be found in the flow "Trigger Income NOA". This status reason will be set when the program is ongoing and secondary income exists.

Category	Short Description
73	Net Unearned Inc Exceeds Limit - Ongoing

Note: This is applicable only for ongoing program and is different from reason set in point 3 above.

6. The new program/person status reason CT73 'Potentially elig for Medi–Cal aged, blind and disabled' will be set as a display status reason and the conditions can found in the flow "County Medical Deduction".

Category	Short Description
73	Potentially elig for Medi–Cal aged, blind and disabled

7. The new program/person status reason CT73 'Did Not Apply for County Medi-cal' will be set as a display status reason and the conditions can found in the flow "County Medical Deduction".

Category	Short Description
73	Did Not Apply for County Medi-cal

8. The new program/person status reason CT73 'Grant Amt is Less Than Zero Grant Level' will be set as a display status reason and the conditions to set this reason code can be found in the flow "Minimum Grant" and "County Medical Deduction". This status reason will be set when the final aid payment is zero or less than intake threshold amount or ongoing threshold amount (defined in county approved reference values).

Category	Short Description
73	Grant Amt is Less Than Zero Grant Level

9. The new program/person status reason CT73 'In Approved Drug and Alcohol Trtmnt Fclty Pay Zero Grant' will be set as a display status reason and the conditions to set this reason code can be found in the flow "Minimum Grant".

Category	Short Description

73	In Approved Drug and Alcohol Trtmnt Fclty Pay Zero Grant

10. The new program/person status reason CT73 'Deemed inc from sponsor is greater than grant amt' will be set as a display status reason and the conditions to set this reason code can be found in the flow "Final Grant Calculation".

Category	Short Description
73	Deemed Inc From Sponsor is Greater Than Grant Amt

2.6.3.3 Correspondence

2.6.3.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.6.3.3.2 Description of Change

1. **<u>Reason Code: XAF304 – Net Unearned Exceeds Limit</u>**
   a. Trigger Condition
      i. This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Net Unearned Exceeds Limit'.
      or
      ii. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Net Unearned Exceeds Limit'.
   b. Program Level Reason
   c. County-specific information:

County	Action	Document Description	Number	Template

Contra Costa	Discontinuance	GA Discontinuance - Unearned Income Meets Needs	007 0 (01/98)	11524
Fresno	Discontinuance	General Relief Discontinuance - Income Meets Needs	008-B (01/05)	12614
Fresno	Denial	General Relief Denial - Income Exceeds Needs	117	12616
Santa Clara	Discontinuance	GA Discontinuance - Unearned Income Meets Needs	GA 007	12015
San Francisco	Discontinuance	CAAP Discontinuance: UIB/DIB/VA Unearned Income Too Great	020 1	12599
Solano	Discontinuance	GA - Discontinuance - Excess Income	050	12118

2. **Reason Code: XAF412 – Net Unearned Exceeds Limit - 2**
    a. Trigger Condition
        i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Net Unearned Exceeds Limit - 2'.
    b. Program Level Reason
    c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Discontinuance	GA Discontinuance-Needs Met or Income from Various Sources Exceeds Needs	CDS 021-0 (5/93)	607891

3. **Reason Code: XAF305 – Inkind Income Exceeds Limit**
    a. Trigger Condition
        i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Inkind Income Exceeds Limit'.
    b. Program Level Reason
    c. County-specific information:

County	Action	Document Description	Number	Template
Orange	Discontinuance	GR Disc - Needs Met by Another Person	021 A	11614

4. **Reason Code: XAF616 – Zero Grant**

a. Trigger Condition
    i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Zero Grant'.
b. Program Level Reason
c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Discontinuance	GA Discontinuance-Needs Met or Income from Various Sources Exceeds Needs	CDS 021-0 (5/93)	607891

2.6.4 Financial Overall Functionality

2.6.4.1 County Admin Matrix - Financial Overall

2.6.4.1.1 Overview

A new County Admin Detail page for Financial Overall will be created. This page is viewed by the County Administrator to view the list of rules applicable for the Financial Overall functionality to their county.

2.6.4.1.2 Description of Changes

a. The Admin page matrix for Financial Overall will have the below functional categories and its associated flag turned on or off based on the current GA/GR functionality for each County
b. The activate switch Yes/No indicate if that functionality is applicable to the displayed county.
c. The functionality is effective dated with begin and end date
d. The rule functionality can be viewed as of a date using the view date

Leverage Rule

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Description	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Prorate on weekly payments.	N	N	N	N	N	Y	N	Y	N	N	Y	N	N	N	N	Y	N	N
Earned income – Alameda Only.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Earned income – Contra Costa Only.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Fresno Only.	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Santa Barbara Only.	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N
Earned income – Sonoma Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N
Grant greater than $5.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Rounds the amount to the nearest whole dollar - Up Rounding.	Y	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N
Drops any cents - Down Rounding.	N	N	N	N	N	Y	Y	N	N	N	N	N	N	N	N	N	Y	N
Pays the benefit in dollars and cents - No Rounding.	N	N	Y	N	N	N	N	Y	N	Y	Y	Y	Y	Y	N	Y	N	N
Round to the whole dollar if $.50 cents or higher else drop off cents - Regular Rounding.	N	Y	N	N	Y	N	N	N	N	N	N	N	N	N	Y	N	N	Y
Contra Costa Couples.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Solano Couples.	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N
Aid at half 2-person rate for Unemployable Spouse of Individual who has a Emp Svc Non-Cooperative Sanction.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Pro-rate homeless and housed benefits.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
CHASS Shelter options.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Shared Housing with Ineligible Spouse – Alameda.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Below is the corresponding CalWIN rule number mapped to CalSAWS rules.

CalWIN Number	CalSAWS Rule
EDX304C001	Prorate on weekly payments.
EDX309C001	Earned income – Alameda Only.
EDX309C002	Earned income – Contra Costa Only.
EDX309C003	Earned income – Fresno Only.
EDX309C011	Earned income – Santa Barbara Only.
EDX309C015	Earned income – Sonoma Only.

EDX321C005	Grant greater than $5.
EDX321C017	Rounds the amount to the nearest whole dollar - Up Rounding.
EDX321C018	Drops any cents - Down Rounding.
EDX321C019	Pays the benefit in dollars and cents - No Rounding.
EDX321C020	Round to the whole dollar if $.50 cents or higher else drop off cents - Regular Rounding.
EDX321C030	Contra Costa Couples.
EDX321C032	Solano Couples.
EDX321C036	Aid at half 2-person rate for Unemployable Spouse of Individual who has a Emp Svc Non-Cooperative Sanction.
EDX305C003	Pro-rate homeless and housed benefits.
EDX314C007	CHASS Shelter options.
EDX300C026	Shared Housing with Ineligible Spouse – Alameda.

2.6.4.2 EDBC Changes

2.6.4.2.1 Overview

This section will provide the Eligibility Rules flow for Financial Overall Program Person Eligibility that can be filtered for each CalWIN County.

2.6.4.2.2 Description of Change

Financial Overall Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

NOA reason not migrated:

CalWIN NOA reason	Reason not migrated
XAN011	No action on person or program and no notice attached.
XAF512	No action on person or program and no notice attached.

XAF513	No action on person or program and no notice attached.
XAF514	No action on person or program and no notice attached.
XAN813	This is used for COLA
XAN814	This is used for COLA
XAF615	Moved to indigent burial in phase 3
XAF435	Moved to indigent burial in phase 3
XAF437	Moved to indigent burial in phase 3
XAF614	Moved to Return to Residence in phase 2 batch 4

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. ~~The new program/person status reason CT73 'Ineligible for Return to Residence' will be set as a display status reason when all the following conditions are met:~~
   a. ~~The budget is prospective.~~
   b. ~~The rule 'Earned income – Alameda Only.' is not active.~~
   c. ~~The individual already received 'Return to Residence' based on the 'Return to Residence functionality.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Ineligible for Return to Residence~~

2. ~~The new program/person status reason CT73 'Ineligible for GR Burial' will be set as a display status reason when all the following conditions are met:~~
   a. ~~The budget is prospective.~~
   b. ~~The rule 'Earned income – Alameda Only.' is not active.~~
   c. ~~The individual already received 'Indigent Burial' based on the 'Indigent Burial' functionality.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Ineligible for GR Burial~~

3. ~~The new program/person status reason CT73 'COLA-Single Individual' will be set as a display status reason when all the following conditions are met:~~
    a. ~~The AU budget size is 1.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~COLA-Single Individual~~

4. ~~The new program/person status reason CT73 'COLA-Married Individual' will be set as a display status reason when all the following conditions are met:~~
    a. ~~The AU budget size > 1.~~
    b. ~~The individual has the marital status 'married'.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~COLA-Married Individual~~

5. ~~The new program/person status reason CT73 'Basic Need - CHASS' will be set as a display status reason when all the following conditions are met:~~
    a. ~~The budget is prospective.~~
    b. ~~The rule 'Earned income – Alameda Only.' is not active.~~
    c. ~~The individual is not considered 'Return to Residence' (Information on determining this is in the Visio document).~~
    d. ~~The individual does not have 'Indigent burial' (Information on determining this is in the Visio document).~~
    e. ~~The rule 'Shared Housing with Ineligible Spouse – Alameda.' is active.~~
    f. ~~The individual is not excluded from the program.~~
    g. ~~The individual needs CHASS shelter is 'YES'.~~
    h. ~~The individual is refusing to be in the CHASS shelter is 'YES'.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Basic Need - CHASS~~

6. ~~The new program/person status reason CT73 'Basic Need - Homeless' will be set as a display status reason when all the following conditions are met:~~
    a. ~~The budget is prospective.~~
    b. ~~The rule 'Earned income – Alameda Only.' is not active.~~
    c. ~~The individual is not considered 'Return to Residence'.~~
    d. ~~The individual does not have 'Indigent burial'.~~
    e. ~~The rule 'Shared Housing with Ineligible Spouse – Alameda.' is active.~~

f. ~~The individual is not excluded from the program.~~
g. ~~The individual is homeless.~~

~~Category~~	~~Short Description~~
~~73~~	~~Basic Need - Homeless~~

7. The new program/person status reason CT73 'Elig. for Indigent Burial' will be set as a display status reason when all the following conditions are met:
    a. ~~The budget is prospective.~~
    b. ~~The rule 'Earned income – Alameda Only.' is not active.~~
    c. ~~The individual is not considered 'Return to Residence'.~~
    d. ~~The individual did not previously receive 'Indigent burial'.~~
    e. ~~The rule 'Shared Housing with Ineligible Spouse – Alameda.' is active.~~
    f. ~~The individual is not excluded from the program.~~
    g. ~~The individual has a shelter expense that is effective for the benefit month.~~
    h. ~~Any of the following is true:~~
        - ~~The individual shelter expense verification is Pending or has the status reason FTP expense.~~
        - ~~The GR Budget household expense total is <= 0.~~

    Due to there are multiple paths to reach to this status reason, please see the visio for the full details. For the final condition to trigger this status reason, program must have aid code 99.

Category	Short Description
73	Elig. for Indigent Burial

8. ~~The new program/person status reason CT73 'Indigent Burial not Granted' will be set as a display status reason when all the following conditions are met:~~
    a. ~~Any of the following is not true:~~
        - ~~The individual has the aid code "99".~~
        - ~~The GR Program is intake.~~

~~Category~~	~~Short Description~~
~~73~~	~~Indigent Burial not Granted~~

9. ~~The new program/person status reason CT73 'Ineligible Indigent Burial' will be set as a display status reason when all the following conditions are met:~~

~~a. Any of the following is not true:~~

- ~~The individual has the aid code "99".~~
- ~~The GR Program is intake.~~

~~**Category**~~	~~**Short Description**~~
~~73~~	~~Ineligible Indigent Burial~~

10. The new program/person status reason CT73 'Aid ended' will be set as a display status reason when all the following conditions are met:

    a. 'Last date of aid' is before the benefit month begin date.

Note: this status reason will be set as the beginning of the EDBC run.

2.6.4.3 Correspondence

2.6.4.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.6.4.3.2 Description of Change

1. ~~**Reason Code: XAF614 – Ineligible for Return to Residence**~~
   - ~~a. Trigger Condition~~
     - ~~i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Ineligible for Return to Residence'.~~
   - ~~b. Person Level Reason~~
   - ~~c. County-specific information:~~

~~County~~	~~Action~~	~~Document Description~~	~~Number~~	~~Template~~
~~Sacramento~~	~~Discontinuance~~	~~DISCONTINUANCE/RELOCATION OF RESIDENT~~	~~CDS 037-1~~	~~12441~~

2. ~~**Reason Code: XAS750 – Deceased**~~
   - ~~a. Trigger Condition~~

i. ~~This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Deceased'.~~
~~or~~

ii. ~~This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Deceased'.~~

b. ~~Person Level Reason~~

c. ~~County-specific information:~~

~~County~~	~~Action~~	~~Document Description~~	~~Number~~	~~Template~~
~~Alameda~~	~~Discontinuance~~	~~GA Disc - Death of Recipient~~	~~001 1 (10/10)~~	~~12659~~
~~Alameda~~	~~Denial~~	~~GA Denial - Withdrawal - Death Of Applicant~~	~~242 1 (10/10)~~	~~12642~~
~~Contra Costa~~	~~Discontinuance~~	~~GA Discontinue - Death of a Recipient~~	~~001 0 (06/90)~~	~~11496~~
~~Contra Costa~~	~~Denial~~	~~GA Denial - Death of Applicant~~	~~242 0~~	~~11519~~
~~Orange~~	~~Discontinuance~~	~~GR Disc - Client Deceased~~	~~001 B~~	~~11590~~
~~Sacramento~~	~~Denial~~	~~GA Discontinuance Death of Recipient~~	~~CDS 001-1~~	~~11736~~
~~Sacramento~~	~~Discontinuance~~	~~GA Discontinuance Death of Recipient~~	~~CDS 001-1~~	~~11735~~
~~Santa Barbara~~	~~Discontinuance~~	~~GR- Disc - Incarcerated, Hospitalized, Death~~	~~056-0~~	~~12334~~
~~Santa Cruz~~	~~Discontinuance~~	~~Discontinuance - GA Discontinuance Due to Death~~	~~099-D~~	~~12094~~
~~San Francisco~~	~~Discontinuance~~	~~CAAP Discontinuance: Death~~	~~001 1~~	~~12599~~

3. **~~Reason Code: XAN813 – COLA-Single Individual~~**

a. ~~Trigger Condition~~

i. ~~This notice generates for the applicable counties when there is a change in benefit amount and the program was 'Active' in the previous saved EDBC and is still 'Active' on the current EDBC with the reason 'COLA-Single Individual'.~~

b. ~~Program Level Reason~~

c. ~~County-specific information:~~

~~County~~	~~Action~~	~~Document Description~~	~~Number~~	~~Template~~
~~Solano~~	~~Change~~	~~GA Change COLA Notice~~	~~C~~	~~12115~~
~~Sonoma~~	~~Change~~	~~Change of GA benefits due to Cola~~	~~+~~	~~12545~~

~~**4. Reason Code: XAN814 – COLA-Married Individual**~~

~~a. Trigger Condition~~

~~i. This notice generates for the applicable counties when there is a change in benefit amount and the program was 'Active' in the previous saved EDBC and is still 'Active' on the current EDBC with the reason 'COLA-Married Individual'.~~

~~b. Program Level Reason~~

~~c. County-specific information:~~

~~County~~	~~Action~~	~~Document Description~~	~~Number~~	~~Template~~
~~Solano~~	~~Change~~	~~GA Change COLA Notice~~	~~C~~	~~12115~~

5. Reason Code: XAF436 – Elig. for Indigent Burial

a. Trigger Condition

i. This notice generates for the applicable counties when the person was 'Pending' and is now 'Active' on the current EDBC with the reason 'Elig. for Indigent Burial'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Tulare	Approval	Indigent Burial Approval	629-G (03/00)	12339

~~**6. Reason Code: XAF435 – Indigent Burial not Granted**~~

~~a. Trigger Condition~~

~~i. This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Indigent Burial not Granted'.~~

~~b. Person Level Reason~~

~~c. County-specific information:~~

~~County~~	~~Action~~	~~Document Description~~	~~Number~~	~~Template~~
~~Tulare~~	~~Denial~~	~~Indigent Burial Denial~~	~~629-G (02/00)~~	~~12338~~

~~**7. Reason Code: XAF437 - Ineligible Indigent Burial**~~

~~a. Trigger Condition~~

~~Form (OCC) will be triggered if the current EDBC has the 'Ineligible Indigent Burial' display reason and the previous EDBC did not.~~

~~b. County-specific information:~~

~~County~~	~~Action~~	~~Document Description~~	~~Number~~	~~Template~~
~~Orange~~	~~N/A~~	~~GR Denial - Burial/Cremation~~	~~245 A (R06/15)~~	~~328514~~

~~* note: Other Client Correspondences (OCCs) will be considered under the "Forms" correspondence category in CalSAWS.~~

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Online	County Parameter Breakdown excel sheet to list out each item and its associated restrictions for the County Parameter Detail page.	County Parameter Breakdown Chart.xlsx
2.			

4 MIGRATION IMPACTS

General Assistance/General Relief functionality will be implemented as a new program for the 57 counties excluding Los Angeles county. Los Angeles GA/GR functionality will not be modified.

5 OUTREACH

NONE

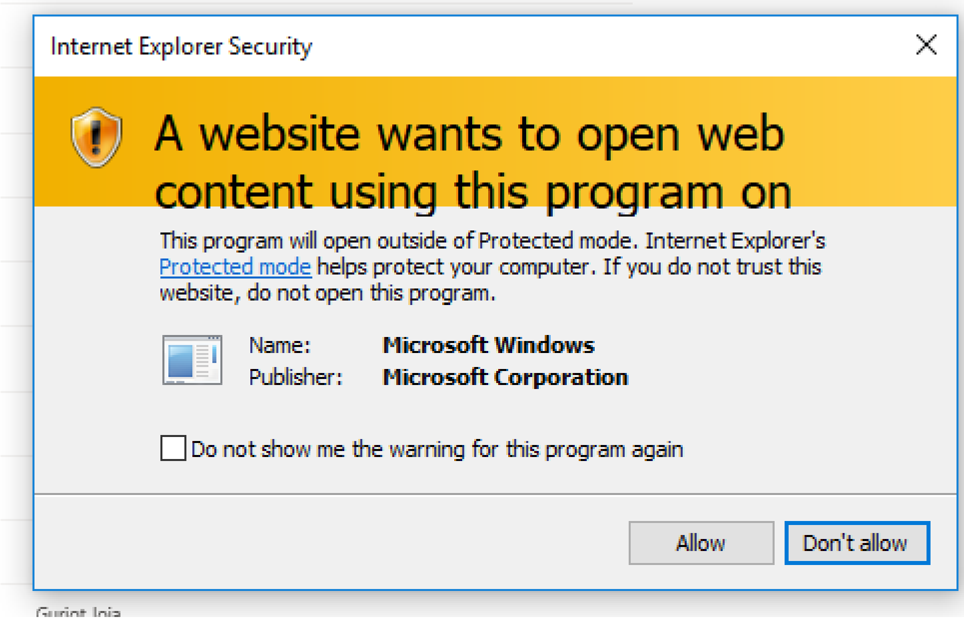
6 APPENDIX

6.1 Rules Flow Diagram

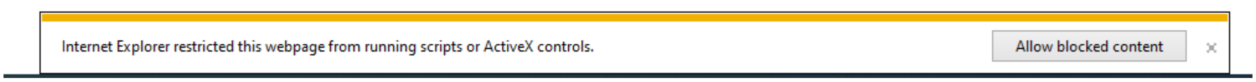
Viewing Visio Document in Internet Explorer

1. This is applicable for Laptops/Desktops that do not have Microsoft Visio software installed.
2. Once you double click the attachment or right click and open with Internet Explorer the Visio will open in internet explorer.
3. *If opening the Visio file from the SharePoint link the Visio file will need to be downloaded first then open with the downloaded file with internet explorer.

4. The following prompt will appear if opening the downloaded Visio file.

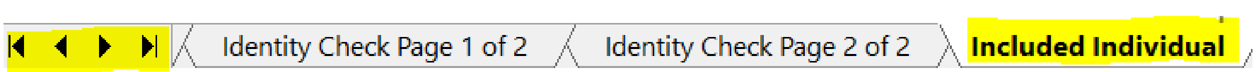


5. Click 'Allow' to open the file on Internet Explorer.
6. The internet Explorer will open with the below pop up in the bottom of the page

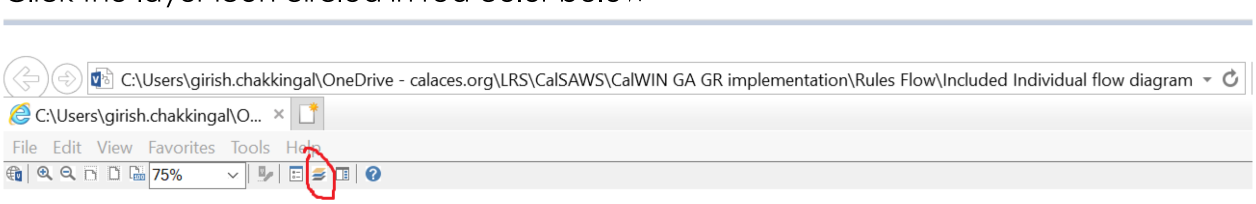


7. Click Allow Blocked Content.

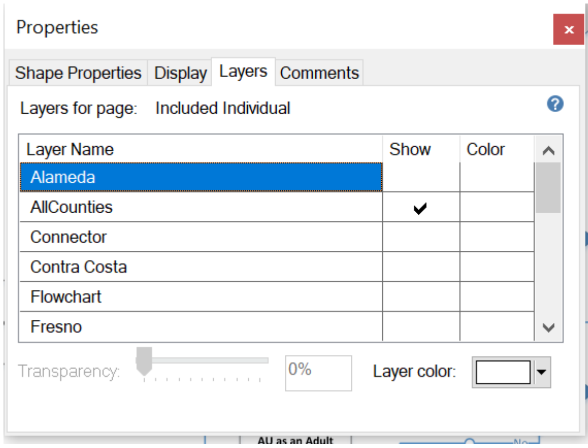
8. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



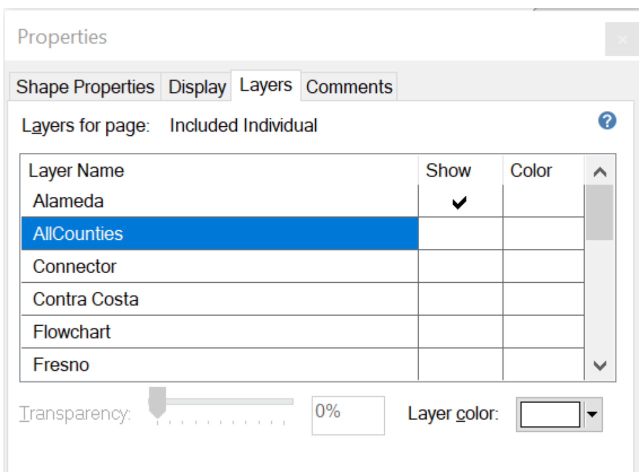
9. Click the layer icon circled in red color below



10. Once the layers button is clicked the Properties box will pop up.



11. Then click the county name that is applicable to you, in this case Alameda



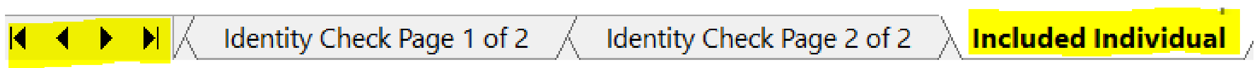
12. Once you select Alameda and close the properties pop up (by clicking the x button at top right corner like closing a tab or window) the flow diagram will show only the rules /functionalities applicable to Alameda.

<u>Viewing Visio Document in Microsoft Visio</u>

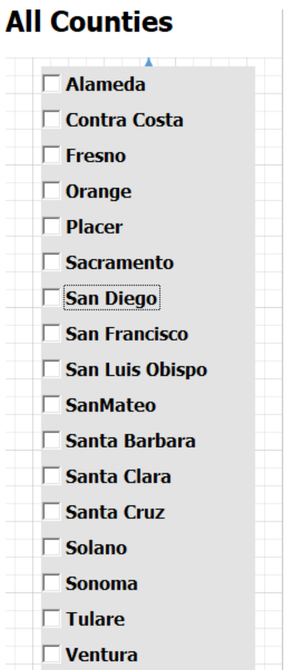
1. This is applicable for Laptops/Desktops that do have Microsoft Visio software installed

2. Once you double click the attachment or right click and open with Visio then it will open in Microsoft Visio

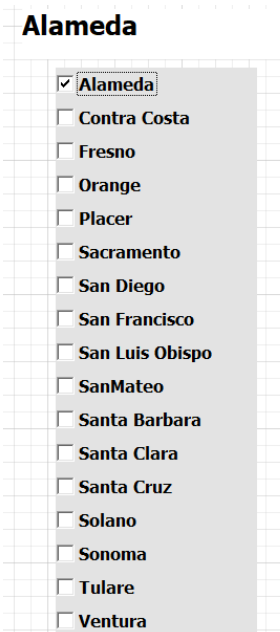
3. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



4. On the right side of the flow diagram the counties names will be displayed as shown below



5. Then click the county name that is applicable to you, in this case Alameda as shown below



6. Once you select Alameda the flow diagram will show only the rules /functionalities applicable to Alameda.

6.2 Reference Table

Reference table for CT73 (Program status reason) and corresponding status reason in this design document. This table shows the values for the new columns added.

a. Key:
    i. GR Priority
        01. The lower the number the higher the priority
    ii. GR Program Role
        01. FE – This indicator means the status reason will change the person role to FRE - 'Financially Responsible – Excluded'
        02. FI – This indicator means this status reason will change the person role to FRI 'Financially Responsible – Included'
        03. MM – This indicator means this status reason will change the person role to MMO 'Medi-Cal Member Only'
        04. UP – This indicator means this status reason will change the person role to UP 'Unaided Person'
    iii. GR Close Person
        01. CanCloseBoth – Indicator means this status reason can close both person and program level.

02. Y – indicator means this status reason can close the person.

iv. GR Close Program

01. CanCloseBoth – Indicator means this status reason can close both person and program level.

02. Y – Indicator means this status reason can close the program.

v. General Relief

01. Y -Indicator means this status reason will be applicable for CalWINs General Relief Program

CalWIN Status	GR Priority	CalSAWs Status (Status Reason)	GA/GR Program Role	GA/GR Close Person	GA/GR Close Program	General Relief	Use Case
E10026	4000	Potential Elig. for AIK				Y	aid inkind
XAF332	4010	Not Eligible Grp. Living				Y	aid inkind
XAF333	4020	Not Met Presumptive Elig.				Y	aid inkind
XAF407	4030	Job Quit Resides in AIK		Y		Y	aid inkind
XAF639	4040	AIK Previously Received			Y	Y	aid inkind
XAF436	4090	Elig. for Indigent Burial				Y	Financial overall
XAF412	4335	Net unearned inc exceeds limit - Ongoing			Y	Y	Grant budget
XAF303	4240	Net earned inc exceeds limit			Y	Y	Grant budget
XAF304	4260	Net unearned inc exceeds limit			Y	Y	Grant budget
XAF305	4285	Inkind Inc exceeds limit			Y	Y	Grant budget
XAF300	4210	Sponsor Income > Grant				Y	Grant budget
XAF335	4290	Did not apply for county Medi-cal			Y	Y	Grant budget
XAF301	4220	Income Exceeds Grant Amount			Y	Y	Grant budget
XAF511	4360	Budget - Medical Deduction Applied to Individual				Y	Grant budget
XAF617	4370	Potentially eligible for Medi–Cal ABD				Y	Grant budget
XAF620	4380	$0 Allot. passed with zero grant–Suspend case				Y	Grant budget

XAF621	4390	Pass with zero grant for three months				Y	Grant budget
XAF616	4310	Grant Amt is less than Zero Grant Level			Y	Y	Grant budget
XAF619	4150	Intake case failed for the first two months			Y	Y	Grant budget
XAF640	4340	In Approved Drug and Alcohol Trtmnt Fclty Pay Zero Grant				Y	Grant budget
XAF300	4210	Sponsor Income > Grant			Y	Y	income test
XAF301	4220	Income Exceeds Grant Amount			Y	Y	income test
XAF377	4230	Gross Income > Grant			Y	Y	income test

6.3 CalWIN RT table search reference (used by developers)

This table has how CalWIN currently search for county defined values used in EDBC. Developers will use this information to get the required values in CalSAWS.

Use Case	CalSAWs Table	Description (summary of what we are doing in this table)	Example	Category ID

Financial Income Test	County Defined Time Limit	The table 'County Defined Time Limit' (CT 10634) will provide the time limit duration for the CaLWIN GAGR CalWIN County. Seach based on the Code number identif 'VQ' . Retrieve the following reference columns: Reference column '[County Name] TIME LIMIT' which will give a numeric value (1,2,3.....). Reference column "[County Name] UNIT OF MEASUREMENT" will give a String Value (D,H,M or Y) with (D = Days, H=Hours, M = Months, Y = Years). These two values will give the duration of 'County Defined Specific Period'. Note - [County Name] is a placeholder for whatever county being searched for.	Example for Searching the time limit table for Voluntary Quit for the county of Alameda : Seach: Reference Column: Alameda Time Limit Reference Column: Alameda Unit of measurement From: Code Detail Table Where: Code number identif = VQ Category Id = 10634 Result: "Alameda Time Limit" = 24 "Alameda Unit of measurement" = D Meaning:Alameda time limit duration for 'Voluntary Quit' is 24 Days	10634

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226672: DDID 2222, 2284, 2291, 2687, 2688, 2689, 2690, 2691, 2692, 2693, 2694, 2695, 2696

Administration Page for Contact Center

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	Prepared By	Kevin Hooke
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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1 OVERVIEW

This design document is for SCR CA-226672 and outlines the addition of a new page to the Contact Center Enhanced Contact Control Panel (ECCP) application (SCR CA-226844). This new page allows Contact Center administrators to configure Contact Center features for their County.

1.1 Current Design

This functionality does not currently exist - currently Administrators make support requests to the CalSAWS Contact Center Operations Team to make these changes on their behalf. The Operations Team makes these configuration changes by interacting with Amazon Web Services (AWS) Connect directly.

1.2 Requests

Develop a new Administration page that allows Contact Center administrators to configure the following features for their County:

- Emergency Open/Close
- Queue Hold Messages
- Courtesy Callback
- Scheduled Callback
- Queue Limits
- After Call Work
- Roll-on/off or Update Agent
- Emergency Message
- Informational Message
- Supervisor Email Notifications
- Create/Delete/Edit Team
- Quick Connects
- Display Hours of Operation

1.3 Overview of Recommendations

Add a new Administration page to the Enhanced CCP application to allow Contact Center Administrators to configure Contact Center features for their County.

1. Add a new Administration page to the Enhanced CCP application that allows configuration of the following.
    a) Emergency Open/Close
    b) Emergency Messages
    c) Queue Hold Messages
    d) Courtesy Callback

e) Scheduled Callback options
f) Queue Limits
g) After Call Work limits
h) Roll-on/Roll-off and update Agent details
i) Informational Messages
j) Supervisor Email Notifications
k) Create/delete Team(s)
l) Quick Connects
m) Display Hours of Operation

2. Integrate access to the Administration page with CalSAWS role-based security and Single Sign On (SSO). Access is restricted to only users who have the 'Contact Center Admin Page' role.
3. Implement a 'cool down' period that requires a 1minute delay between changes to the same configuration option.

1.4 Assumptions

1. All features on the Administration page are customizable by County. An Admin user with the required role to access the Admin Page can view and change the configuration options only for their County.
2. Access to the new Administration page will be via Single Sign On (SSO) using existing CalSAWS security functionality.
3. The following Administration page functions will be disabled for Regional Call Center only counties:
    a) Emergency Open/Close
    b) Emergency Messages
    c) Queue Hold Messages
    d) Courtesy Callback
    e) Scheduled Callback options
    f) Queue Limits
    g) Informational Messages
    h) Supervisor Email Notifications

2 RECOMMENDATIONS

This section outlines recommendations to add a new Administration page to the Enhanced CCP application.

2.1 Administration Page

2.1.1 Overview

Add a new Administration page to the Enhanced CCP application. This page allows the user to customize features of the Contact Center for their County.

2.1.2 Description of Changes

1. Add a new icon/menu item to the Enhanced CCP application, that when clicked, displays the new Administration page.
2. Add a new page to the new Enhanced CCP application that displays available configuration options as a navigation menu.
3. Clicking on items in this menu displays a panel with the configurable options for that selected item. Each of these options is described in the below sections.

2.1.2.1 Administration page Mockup

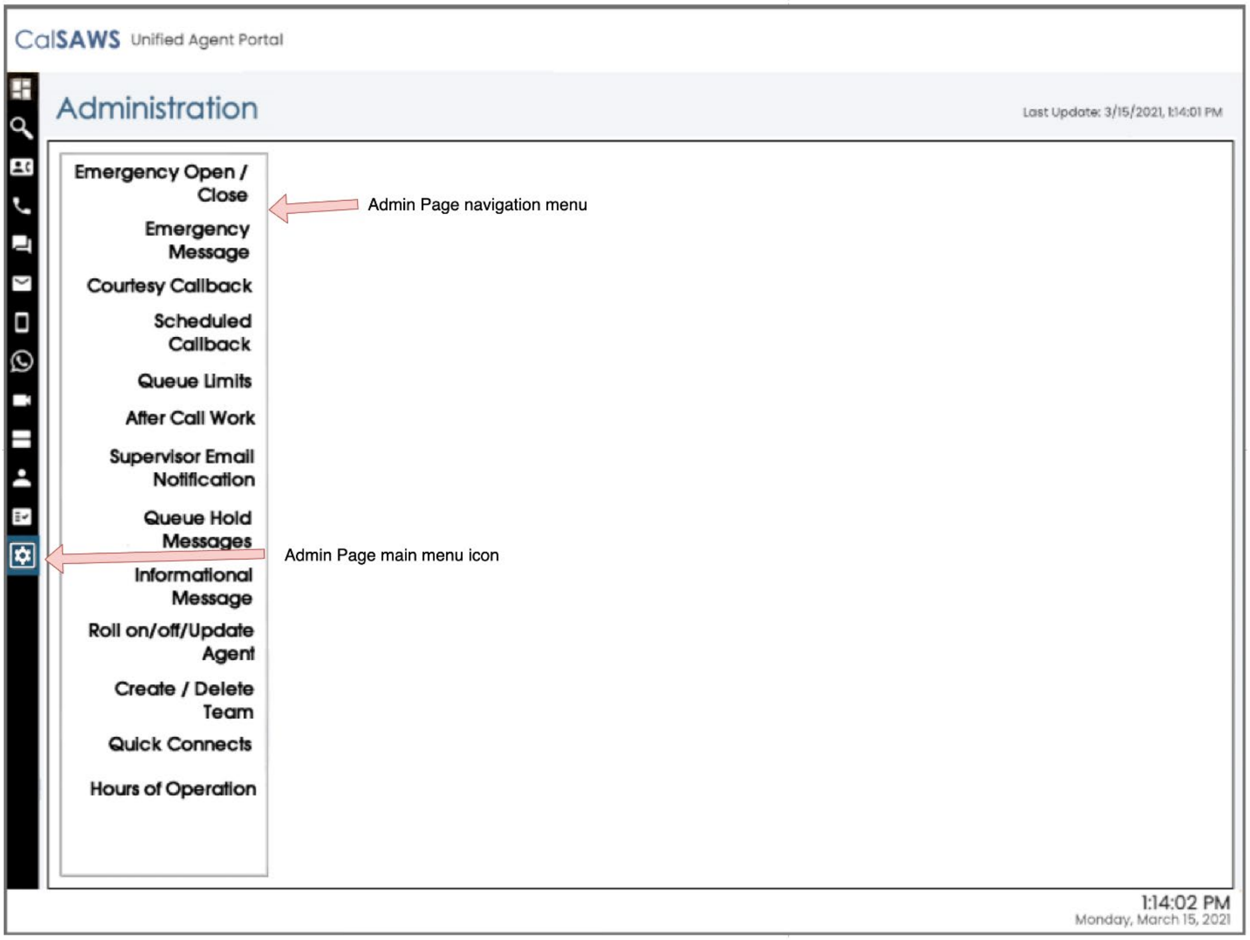


Figure 1 Administration page menu options

2.1.2.2 Administration Page Security

The Administration page is a new page added to the Enhanced CCP application. Access to the Enhanced CCP is controlled using the CalSAWS Identify Provider.

Create a new CalSAWS role 'Contact Center Admin Page' in the CalSAWS system.

Access to the Administration page is restricted to CalSAWS users who have this new CalSAWS role assigned for their County.

There is only one level of security for the Administration page:

- If a user has the 'Contact Center Admin Page' role they are able to access the Administration page. A user that has access to the Administration page is allowed to perform all Admin actions on the page.

- If a user does not have the 'Contact Center Admin Page' role the menu icon for the Administration page does not display and the user is unable to access the page.

2.1.2.3 Administration Page API Security

User actions on the Administration page result in API (Application Programming Interface) calls to background services within the Contact Center AWS account. These services are accessed using API Gateway. Access to these calls is protected by confirming that the user of the Administration page:

a) Is currently authenticated with their CalSAWS credentials
b) Is assigned the 'Contact Center Administration page' role

2.1.2.4 Administration page Security – access without role

If a user does not have the required 'Contact Center Administration page' role, the Administration page icon is not displayed in the navigation menu.

2.1.3 Assumptions

1. User must be a CalSAWS user and must be signed on via the CalSAWS Identity Provider (Single Sign-on) to access the Enhanced CCP.
2. The user must have the 'Contact Center Admin Page' role to access the Administration page.

2.2 Administration Page Configuration Change 'Cool-down'

2.2.1 Overview

When the user changes any of the configurable options from the Administration page, there is a 1 minute 'cool-down' period before they can make an additional change. This is to prevent the user from making changes within a short period of time.

2.2.2 Description of Changes

If the user attempts to change a configurable option less than 1 minute since the last change, a dialog is displayed, as shown in the following dialog mockup section (see section 2.2.3 figure 3).

The user is prevented from making the attempted change until 1 minute has elapsed since the last successful change.

2.2.3 Configuration Change ('Cool-down') Dialog Mockup

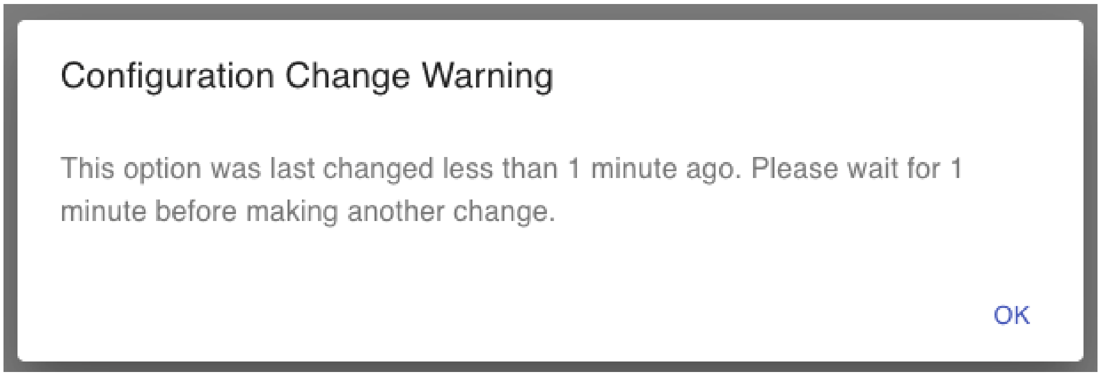


Figure 2 Configuration Change Warning Page Mockup

2.3 Emergency Open/Close

2.3.1 Overview

The Emergency Open/Close feature allows a user of the Administration page to temporarily close the Contact Center for their County in case of an emergency. While closed, all incoming calls to the Contact Center will play the currently selected Emergency Message to the caller (see section 2.9).

The Emergency Message only plays while the Contact Center is closed using this Emergency Open/Close feature. When the Contact Center is re-opened, the automatic message playback will discontinue.

The Emergency Open/Close does not change which Emergency Message is currently selected. The selected Emergency Message can only be changed by an Admin user (using the Emergency Message feature described in section 2.9.

2.3.2 Description of Changes

2.3.2.1 Emergency Open/Close page mockup: Contact Center is open

This page displays when the Contact Center for the user's County is currently open and they click the 'Emergency Open/Close' menu option.

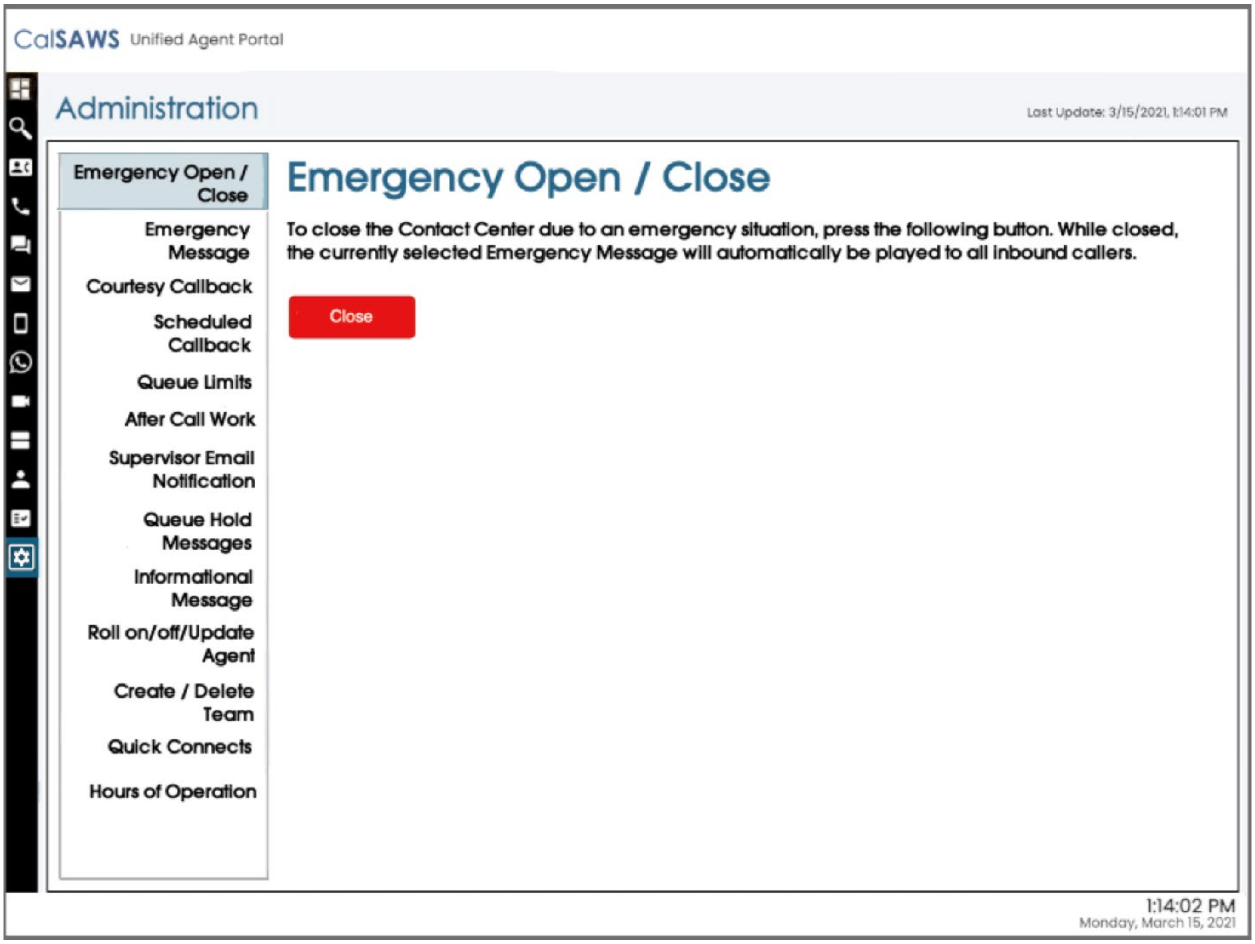


Figure 3 Emergency Closure - Perform Closure Option

2.3.2.2 Emergency Open/Close page mockup: Contact Center is closed

This page displays when the Contact Center for the user's County is currently closed and they click the 'Emergency Open/Close' menu option.

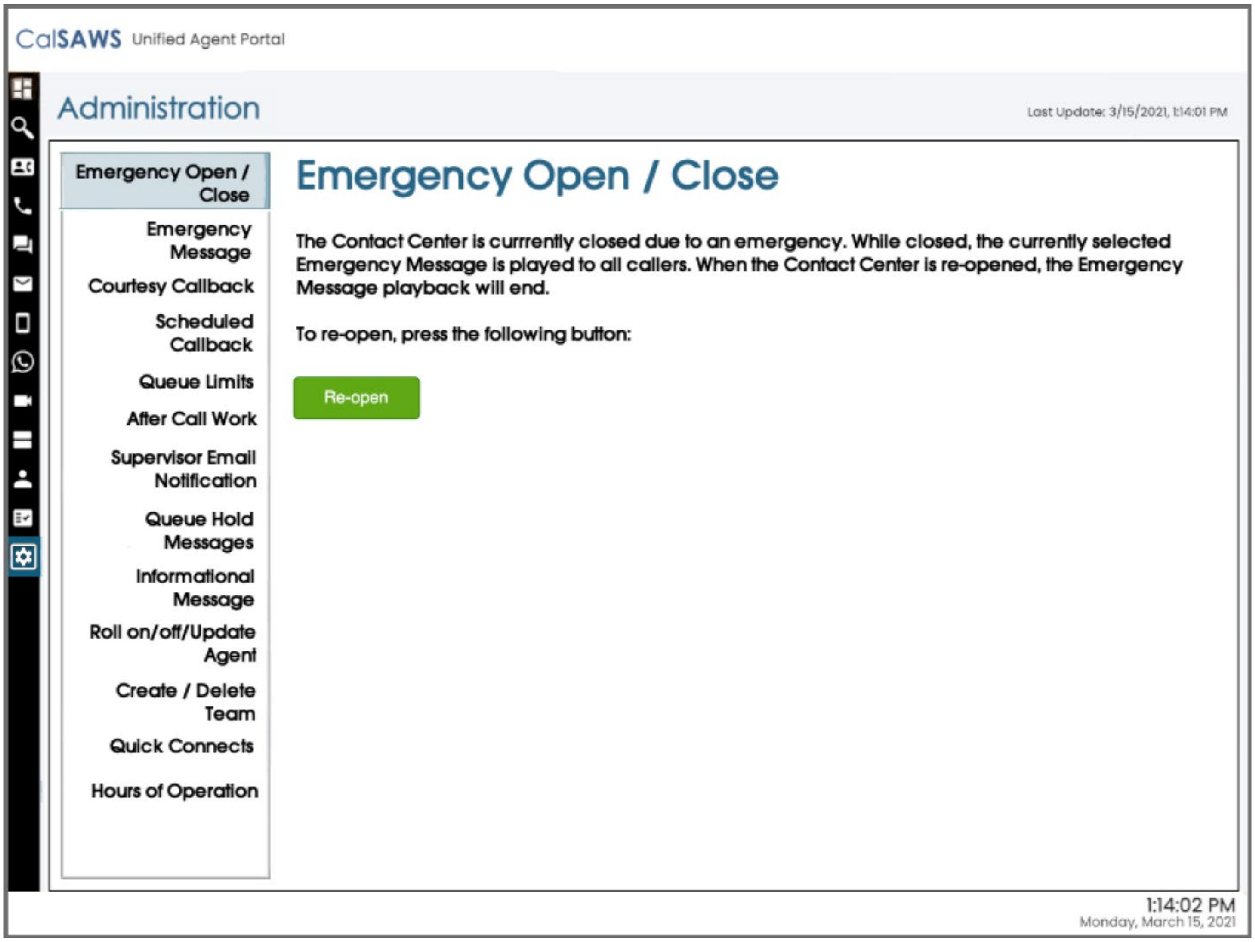


Figure 4 Emergency Closure - Re-open Option

2.3.2.3 Emergency Open/Close – Contact Center closed warning mockup

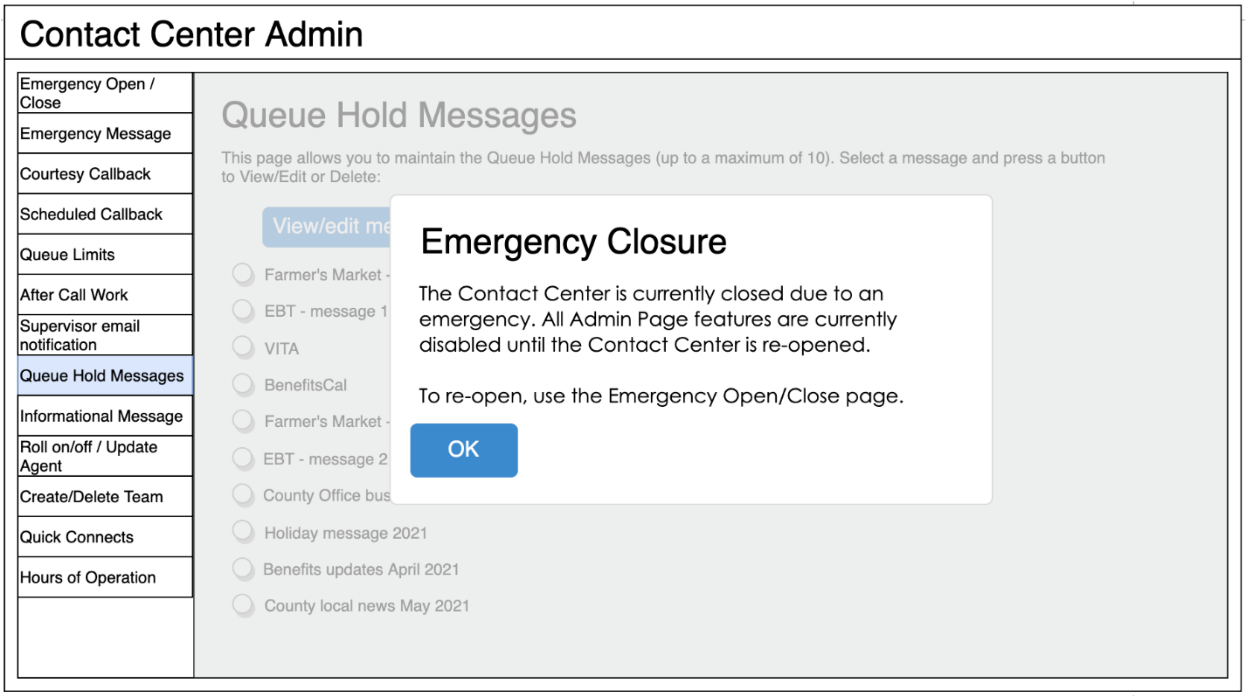


Figure 5 Emergency Closure warning dialog

2.3.2.4 Emergency Open/Close – Contact Center closed warning

If the Contact Center is currently closed due to an emergency and the user clicks on any of the Administration page menu items other than 'Emergency Open/Close', a dialog in Figure 6 is shown to the user. The dialog shows the following message:

"The Contact Center is currently closed due to an emergency. All Administration page features are currently disabled until the Contact Center is re-opened. To re-open, use the Emergency Open/Close page".

If the user presses the "OK" button, the dialog is closed. Features on the current page are available in read-only mode. Any features that perform a create, edit or delete action are disabled until the Contact Center is re-opened.

2.3.2.5 Emergency Open/Close – Contact Center is 'open'

This flow describes the Emergency Open/Close page if the Contact Center is currently in the 'open' state:

1. User selects 'Emergency Open/Close' option from the Administration page

2. System checks the date/time of last Emergency Open/Close. If last change was less than 1 minute ago, then continue, otherwise the "cool-down" dialog is displayed as described in Section 2.2.
3. If last change was more than 1 minute ago, user is prompted with a confirmation message to continue:

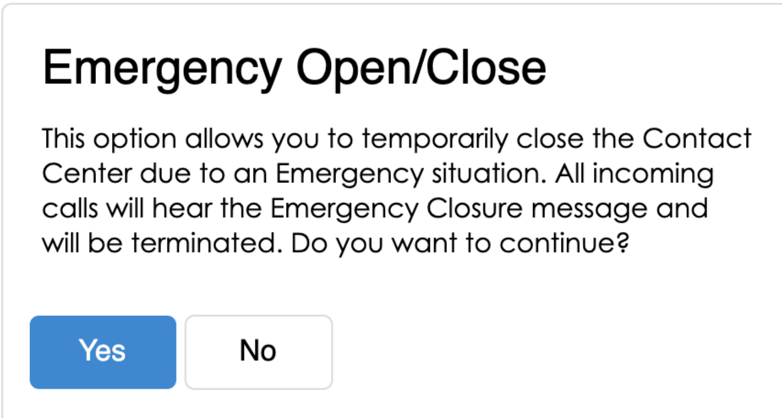


Figure 6 Emergency Closure Confirmation dialog

4. If user selects "No", the user is returned to the Administration page menu and no further action is taken.
5. If the user selects "Yes", the steps in the following section "Perform Emergency Open/Close Procedure" are executed.

2.3.2.6 Emergency Open/Close – Contact Center is 'closed'

This describes the Emergency Open/Close page, if the Contact Center is currently in a 'closed' state:

1. User selects 'Emergency Open/Close option from Administration page
2. Administration page displays Emergency Open/Close re-open dialog:

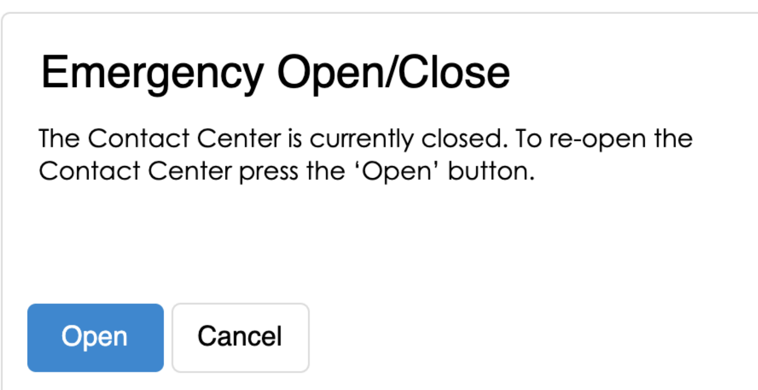


Figure 7 Emergency Open/Close - Re-open dialog

3. The ‘Open’ button is displayed on the page.
4. If the user presses “Cancel”, no action is taken.
5. If the user presses “Open”, the steps in the following section “Perform Emergency Open / Close – Re-open” are executed.

2.3.2.7 Perform Emergency Open/Close - Re-Open via Phone

Update the existing Remote Admin by phone support to allow an authenticated user to perform the Emergency Open and Close process via phone.

This feature complements the performing of the Emergency Open and Close via the Administration page.

- If the closure is performed via the Administration page, the Contact Center can be re-opened using the Administration page or remotely by phone.
- If the closure is performed remotely by phone, the Contact Center can be re-opened remotely by phone or the Administration page.

2.3.2.8 Perform Emergency Open/Close Procedure

When a user selects the ‘Emergency Open/Close option, the system performs the following steps:

1. Calls that are currently in progress with an Agent or are in a queue, continue until they are handled and/or completed.
2. Scheduled Callbacks during the period, when the Emergency Closure is in place will continue, but the callback message will play the Emergency Message and ask the customer to callback at another time.
3. Contact Center Emergency Open/Close status is updated to ‘closed’.
4. The Call Flow for incoming calls checks the Emergency Closure status. If the current status is ‘closed’, the Emergency Message is played to the caller and the call is ended.

2.3.2.9 Perform Re-Open Procedure

1. When a user selects the ‘Re-open’ option, the system performs the following steps: Contact Center Emergency Open / Close status is updated to ‘open’ to indicate Contact Center is now open.
2. The Call Flow for incoming calls checks the Emergency Open/Close status. If the current status is ‘open’, the call flow will continue as normal.

2.3.3 Assumptions

1. All Administration page options will be disabled when Contact Center is closed under an Emergency Closure, apart from the Emergency Closure page and the button to re-open the Contact Center.
2. There is no additional reporting or monitoring to show caller activity during the Emergency Closure (e.g. incoming calls missed while the Contact Center is closed). This information can be retrieved if needed using reports in eGain.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.4 Queue Hold Messages

2.4.1 Overview

The Queue Hold Messages feature on the Administration page allows the Admin user to add, edit and delete up to 10 custom Queue Hold messages for their County. The content of the message is text, which is used to produce a voice message using text to voice.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

These messages are played while a caller is on hold and can be used to remind or inform the caller of upcoming events or other information relevant to the County.

Once a new message is added or an existing message is changed, it is available for playback during the next call waiting in a queue, there is no delay before it can be used.

2.4.2 Description of Changes

2.4.2.1 Queue Hold Messages: No messages defined page mockup

When a user clicks the 'Queue Hold Messages' menu item, if there are no Queue Hold Messages defined, the following page is displayed:

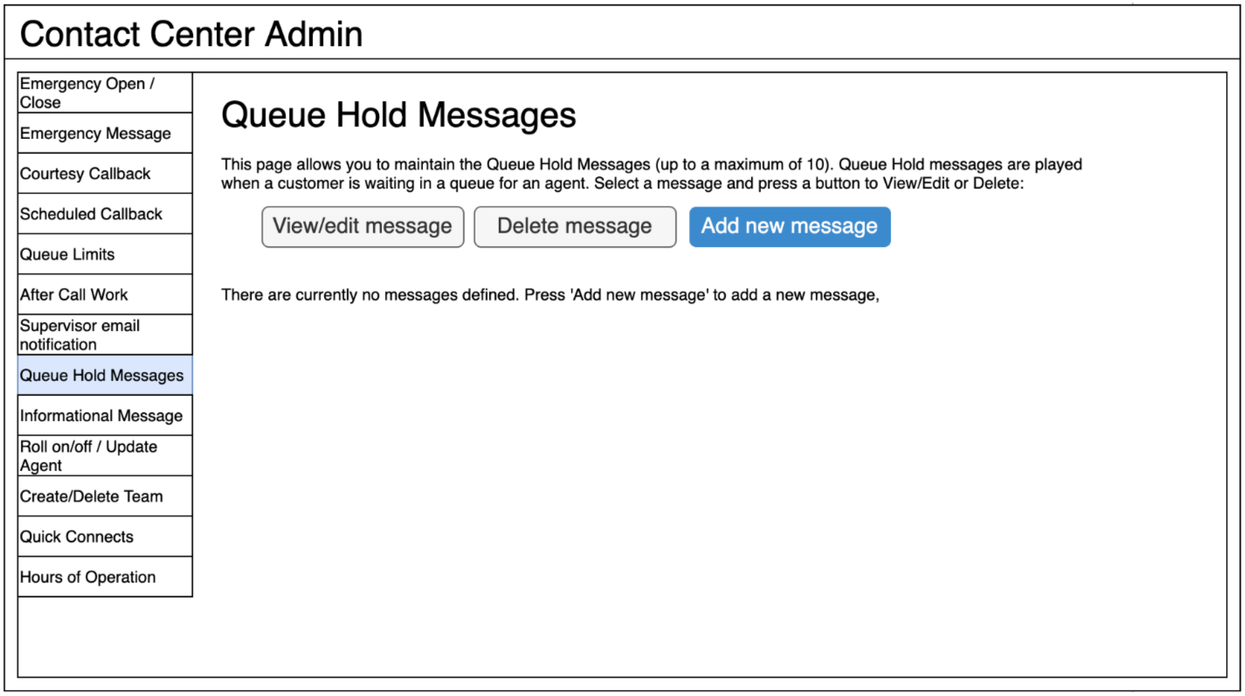


Figure 8 Queue Hold Messages - no messages defined

2.4.2.2 No messages defined

When there are no Queue Hold messages defined, the only enabled option is 'Add new message'.

1. If the user presses 'Add new message', the 'Add new message' dialog appears (see section 2.4.2.4 for mockup)

2.4.2.3 Queue Hold Messages: Messages defined page mockup

When a user clicks the 'Queue Hold Messages' menu item and there are Queue Hold Messages defined, the following page is displayed:

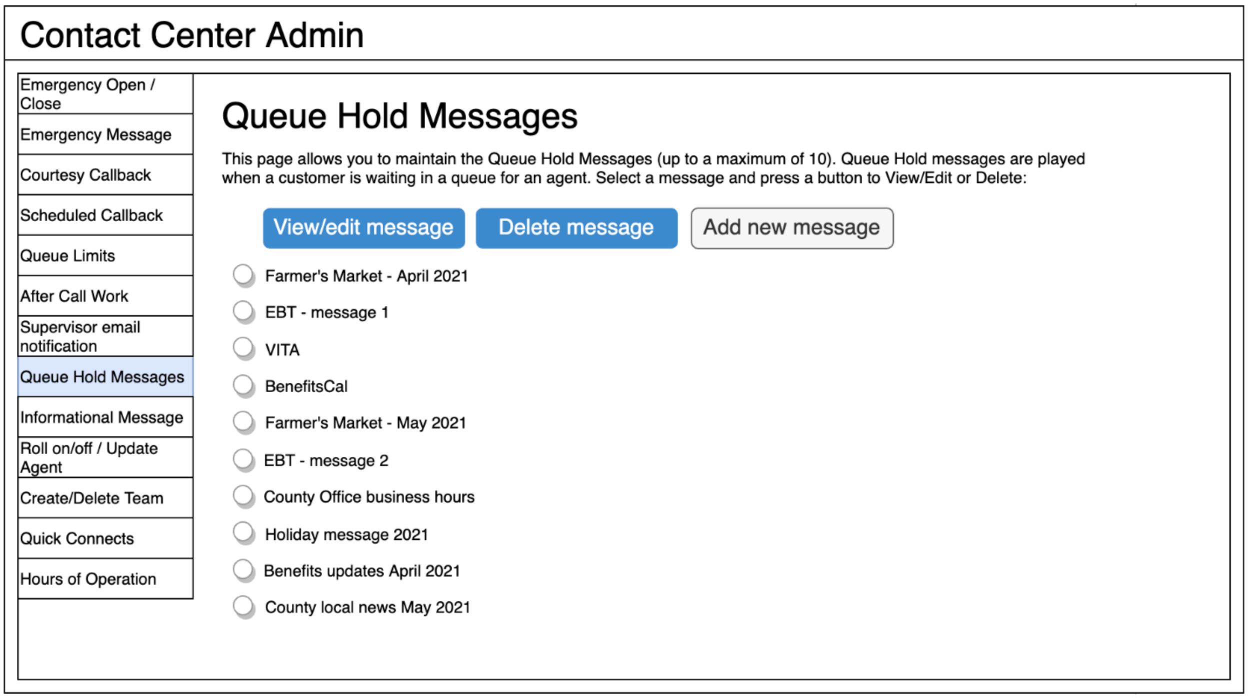


Figure 9 Queue Hold Messages - message display

2.4.2.4 Queue Hold Messages: Add new message page mockup

If the user presses the 'Add new message' button, the following dialog is displayed:

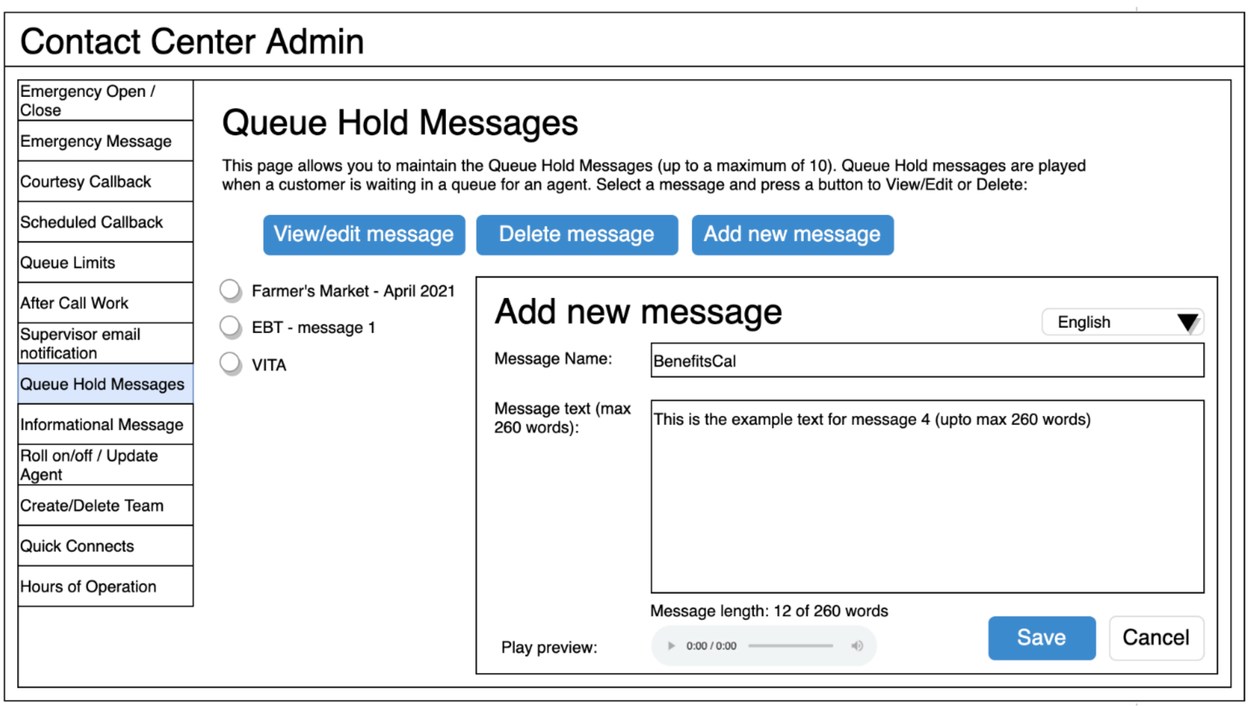


Figure 10 Queue Hold Messages - Add New Message dialog

2.4.2.5 Queue Hold Messages: Language selection dropdown

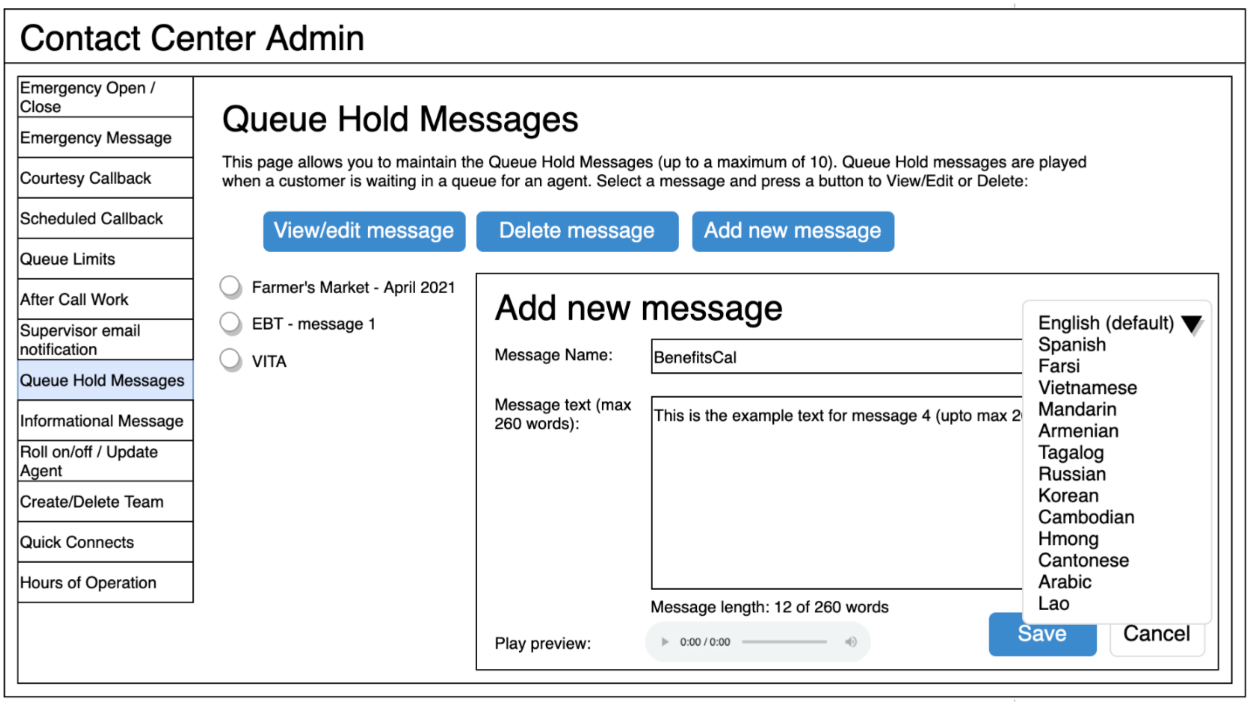


Figure 11 Queue Hold Messages - Language selection dropdown

2.4.2.6 Add new message

1. The 'Add new message' button is only displayed if there are less than 10 defined messages. If the maximum of 10 messages is already defined, the 'Add new message' button is disabled.
2. If the user presses the 'Add new message' button, the 'Add new message' dialog is displayed.
3. User enters a unique message name, up to 60 alphanumeric characters.
4. User enters text for the message, up to a maximum of 260 words. The dialog displays a count of the currently entered number of words that updates as the user types, e.g., "12 of 260 words". The entry field does not accept any additional text entry beyond 260 words.
5. The English version of the message is required.
6. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog

h. Russian
i. Korean
j. Cambodian
k. Hmong
l. Cantonese
m. Arabic
n. Lao

7. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
8. If the user presses the 'Save' button, the message is saved, and the page is updated to show the new message in the list.
9. If the user presses 'Cancel' the dialog is closed and no action is taken.

2.4.2.7 Queue Hold Messages: View/Edit message page mockup

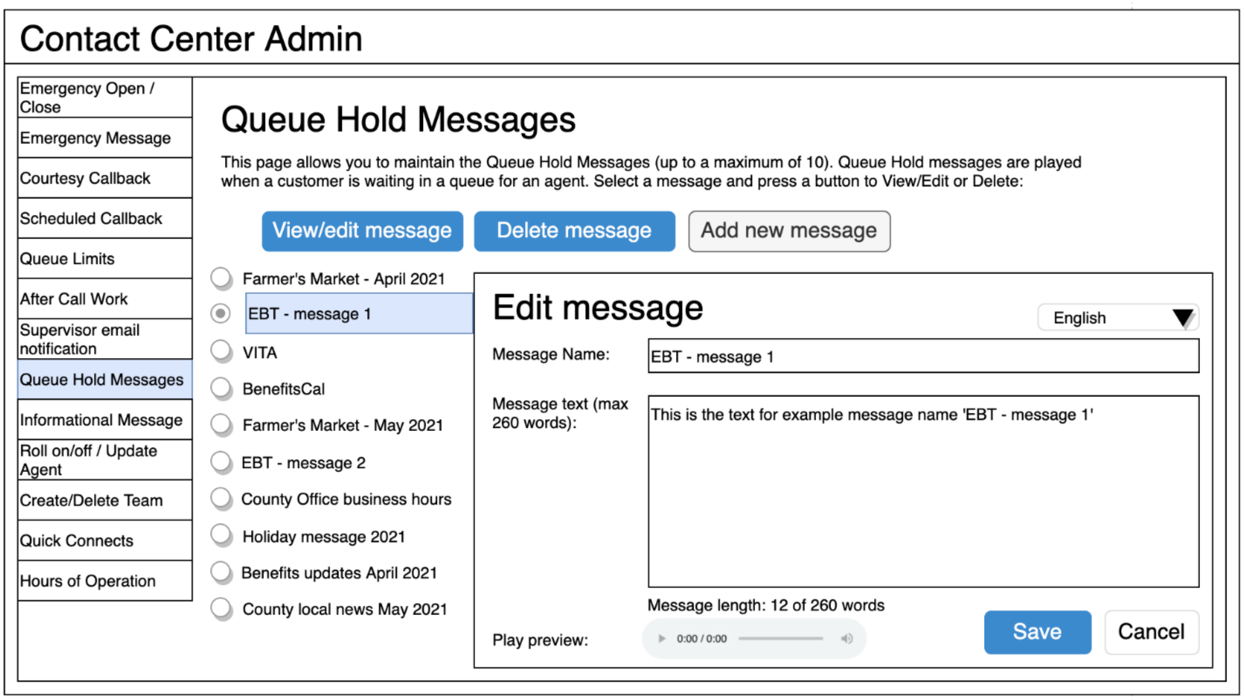


Figure 12 Queue Hold Messages - Edit Message dialog

2.4.2.8 View/Edit message

1. User selects a message by pressing the radio button beside a message. Only one message can be selected.
2. User presses the 'View/Edit message' button, and the 'Edit message' panel is displayed with the 'Message Name' and the 'Message Text' fields populated with the current text of the selected message.

3. User updates the ‘Message Name’ and/or the ‘Message Text’ fields.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog
    h. Russian
    i. Korean
    j. Cambodian
    k. Hmong
    l. Cantonese
    m. Arabic
    n. Lao
6. If the user presses the ‘Save button’ the changes are saved and the dialog closes.
7. If the user presses the ‘Cancel’ button, no changes are made and the dialog closes.

2.4.2.9 Queue Hold Messages: Delete Message page mockup

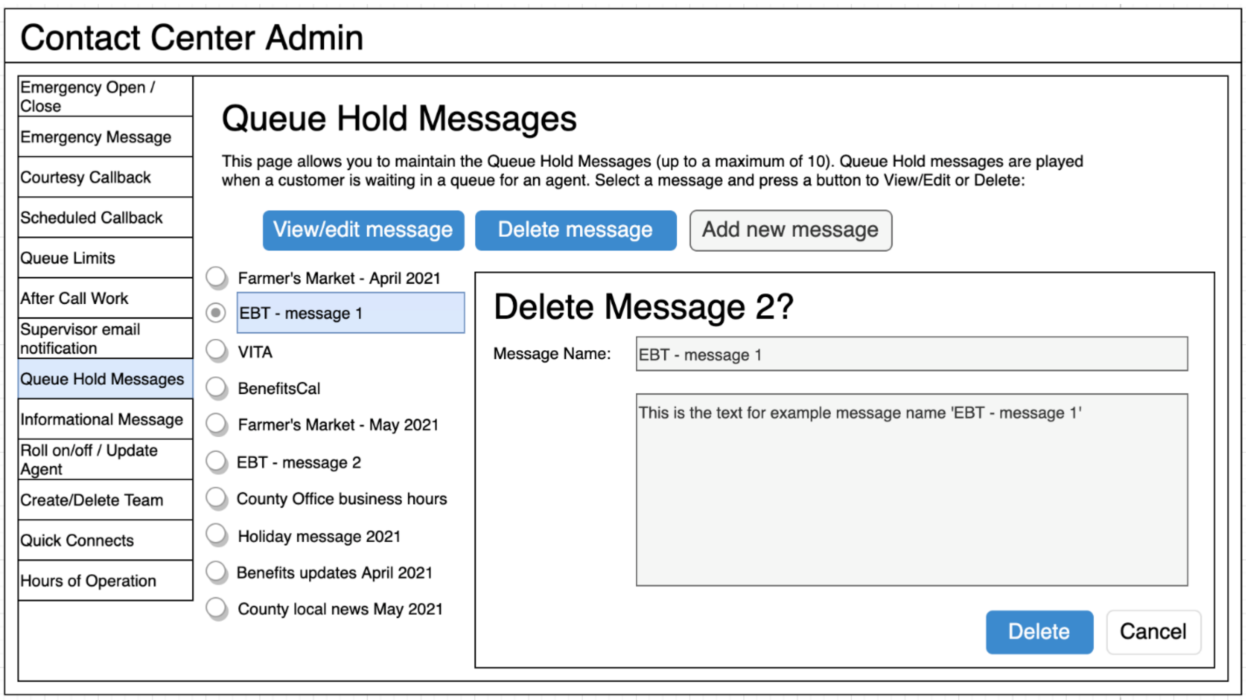


Figure 13 Queue Hold Messages - Delete Message dialog

2.4.2.10 Delete message

1. To delete a message, the user selects the message to delete by pressing the radio button beside the message and presses the 'Delete Message' button.
8. The 'Message Name' and/or the 'Message Text' fields are displayed as read-only fields, and 'Delete' and 'Cancel' buttons are displayed.
2. If the user presses the 'Delete' button, the message is deleted. The dialog is closed. The list of messages is updated to display the remaining messages.
3. If the user presses the 'Cancel' button, the dialog is closed, and no action is taken.

2.4.3 Assumptions

1. Deleting a message is a permanent deletion and deleted messages are not recoverable. The user can add back a message manually as a new message if it is deleted in error or is needed again.
2. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.5 Courtesy Callback

2.5.1 Overview

The Courtesy Callback configuration page allows the Admin user to turn this feature on or off for their County using the Administration page.

When enabled, the Admin user can configure:

- Number of minutes before the callback option is provided to the caller.
- Start and end time range for each day of the week during which the Courtesy Callback feature is enabled.

If Courtesy Callback is not offered for a specific day, the Start time and End time values are left blank.

2.5.2 Description of Changes

2.5.2.1 Courtesy Callback Disabled Page mockup

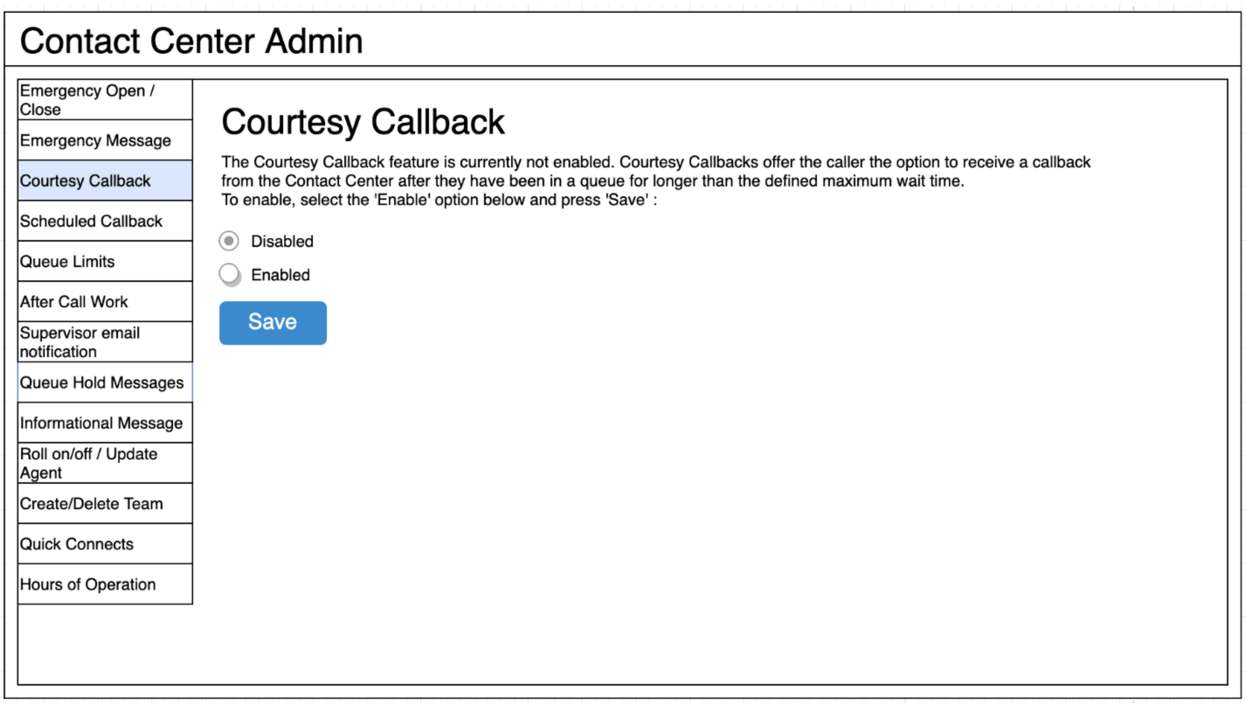


Figure 14 Courtesy Callback feature currently disabled

2.5.2.2 Courtesy Callback Disabled

If the Courtesy Callback feature is currently disabled, the only option available is to Enable the feature.

1. User clicks the 'Enabled' radio button. The Cancel button is additionally displayed.
2. If the user presses Save, the Courtesy Callback feature is enabled, and the page is updated to show the Configuration options described in the next section.
3. If the user presses the Cancel button, the change is not saved and the Courtesy Callback feature remains disabled.

2.5.2.3 Courtesy Callback Enabled: Page mockups

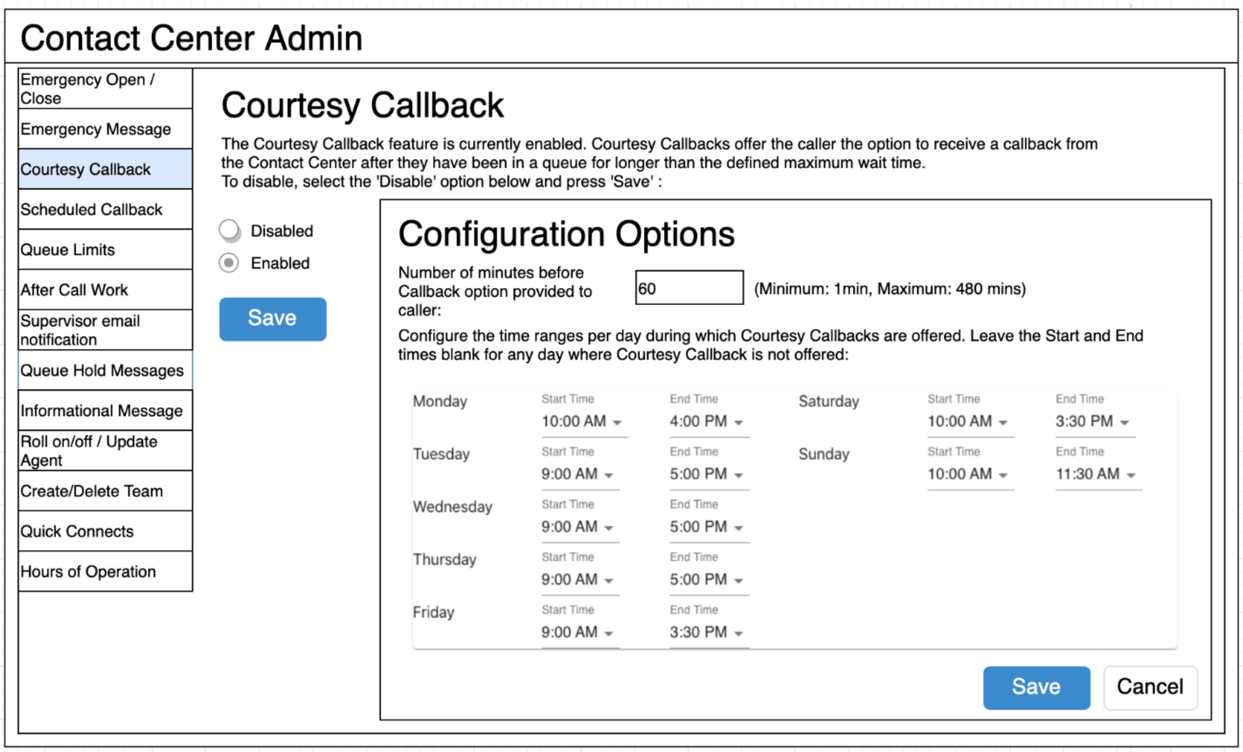


Figure 15 Courtesy Callback Enabled Page Mockup

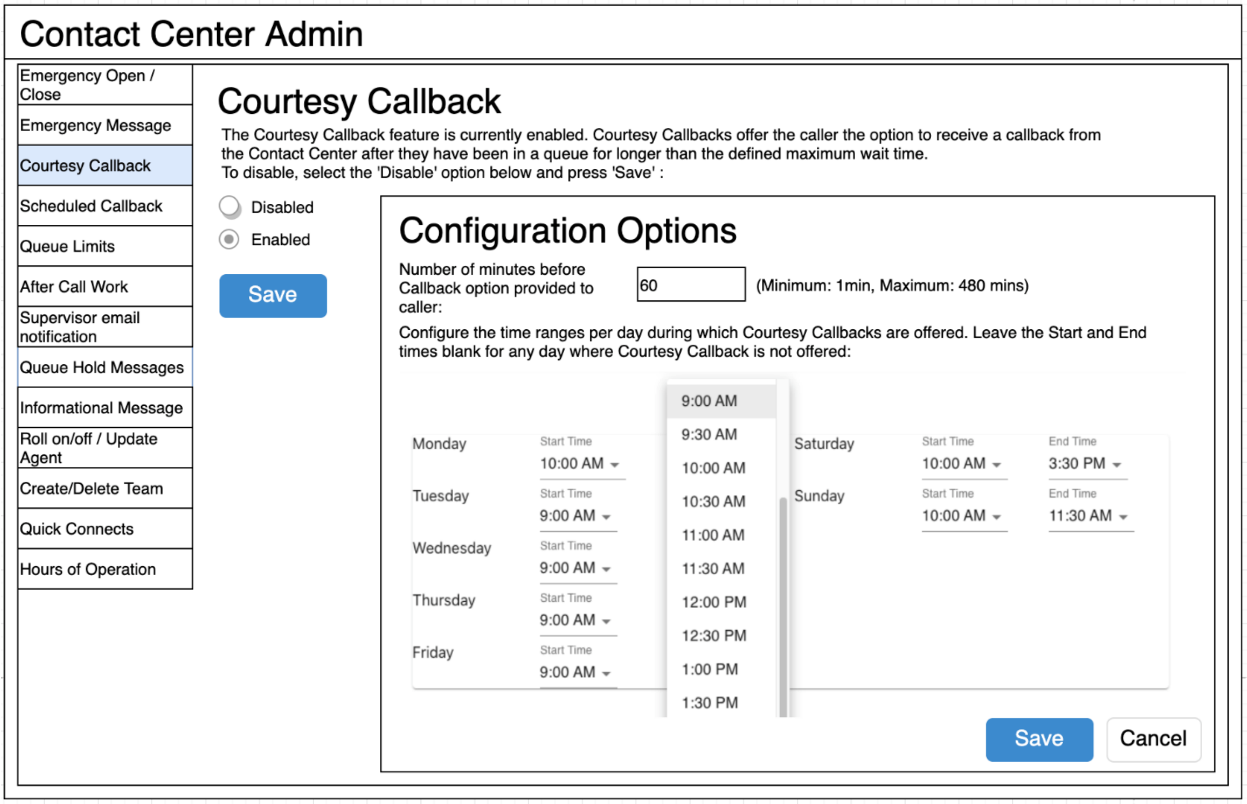


Figure 16 Courtesy Callback Enabled Page Mockup showing time selection dropdown

2.5.2.4 Courtesy Callback Enabled

If the Courtesy Callback feature is enabled, the Configuration Options dialog for this feature is also displayed. When the feature is disabled, this dialog is not displayed.

1. If the Courtesy Callback feature was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User enters a positive integer value for number of minutes before a callback is offered to the caller. The minimum value is 1 minute, and the maximum valid value is 480 minutes (8 hours).
3. If the user attempts to enter a value less than the minimum value or greater than the maximum value, the following error message is displayed beside the entry field:

   "Enter a numeric value between 1 and 480 minutes."

4. The user selects a Start Time and End time for each day of the week to define the time ranges where Courtesy Callbacks are available. The values are selected from a dropdown list (see Figure 15) showing times in 30-minute increments (for example, 9:00 AM, 9:30 AM, 10:00 AM).
5. The selected Start Time must be before the End Time, otherwise a validation error message is displayed beside the field in error:

   "The selected Start Time must be before the End Time."

6. The End Time must be at least 30 minutes after the Start Time, and the End Time must not be the same as the Start Time, otherwise the following error message is display beside the field in error:

   "The End Time must not be the same as the Start Time and must be at least 30 minutes after the Start Time."

7. Only Start Time and End Time options that are within the defined open hours for the County are displayed. Times outside of the open hours are not displayed as valid options to the user.
8. If Courtesy Callbacks are not required for a specific day, the user can leave the Start Time and End Time blank for that day.
9. If Courtesy Callbacks are enabled, at least one day must have a valid Start time and End time configured.
10. If the user presses 'Cancel', any values entered or changed are discarded and no changes are saved. The Configuration Options dialog will revert to show the currently configured values.

2.5.3 Assumptions

1. The Courtesy Callback Start and End times must be within the same business day. For example:
   a. Start time of 9 AM and End time of 5 PM is valid
   b. Start time of 4 PM and End Time if 10 AM is not valid
2. The Start Time and End Time are configurable for each day of the week. If a day is not applicable for that County (e.g. Saturday or Sunday), the Start Time and End Time can be left blank.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

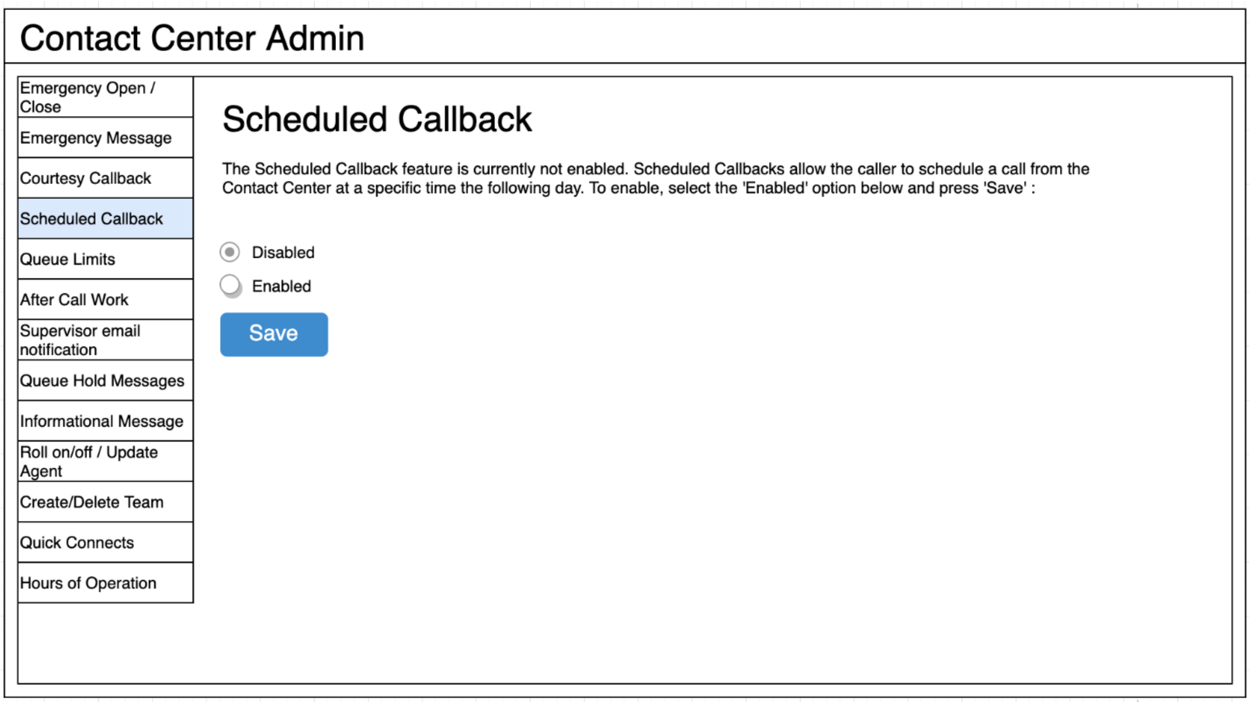
2.6 Scheduled Callback

2.6.1 Overview

The Scheduled Callback feature is enabled or disabled using the Administration page. When enabled, the Admin user can specify how many scheduled callbacks are allowed per each available timeslot. The Scheduled Callback functionality will be implemented with SCR CA-229573

2.6.2 Description of Changes

2.6.2.1 Scheduled Callback – feature disabled page mockup



2.6.2.2 Scheduled Callback – feature disabled

1. To enable the Scheduled Callback feature, user selects the 'Enabled' option and presses 'Save'.
2. The Scheduled Callback feature is enabled. The page is updated to show the Configuration Options dialog showing in the following page mockup.

2.6.2.3 Scheduled Callback – feature enabled page mockup

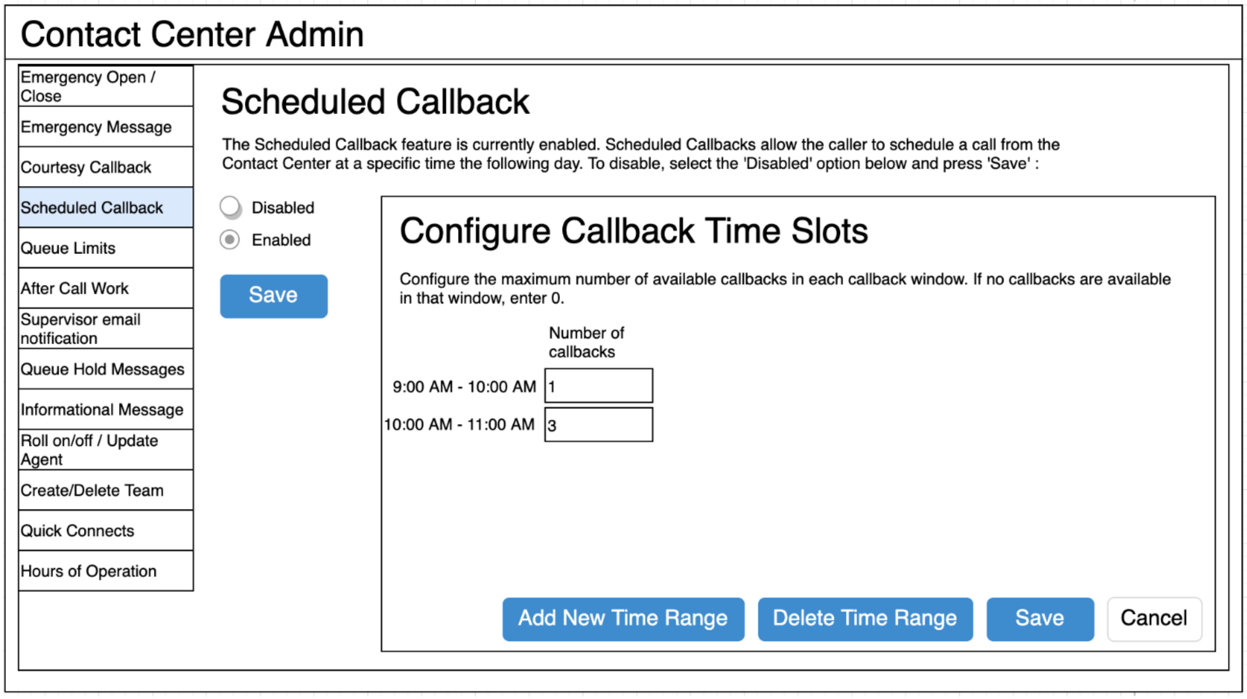


Figure 17 Scheduled Callback - feature enabled, 2 example slots defined

2.6.2.4 Scheduled Callback – feature enabled

1. If the Scheduled Callback feature is enabled, the 'Configure Callback Time Slots' dialog is displayed, showing the currently configured maximum number of callbacks per time slot.
2. If the Scheduled Callback configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
3. User enters or changes the maximum number of callbacks available per defined timeslot.
4. If 0 is entered for a given timeslot, scheduled callbacks will not be offered to callers for that timeslot.
5. The maximum number of scheduled callbacks per 1 hour time slot is 3. Valid values are 0, 1, 2 and 3.
6. If the user presses 'Save' the system validates the entered values, and if there are no validation errors the values are saved.
7. If any field has an invalid value, it is highlighted in red and an error message is displayed: "One or more timeslots have an invalid value. Please correct the errors and press Save".

8. If the user presses 'Cancel' any changes are discarded and no actions are performed. The displayed callbacks per timeslot revert to the currently configured values.

2.6.2.5 Scheduled Callback – Add new time slot page mockup

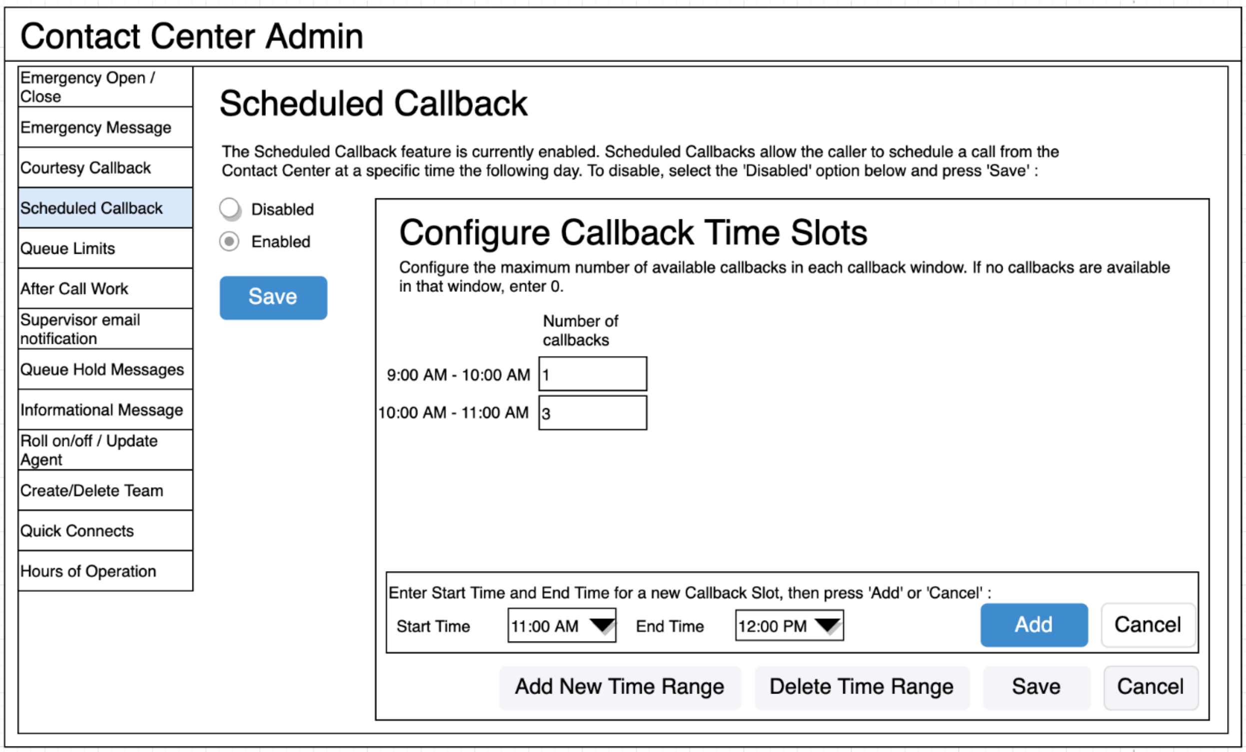


Figure 18 Scheduled Callback - Add new time slot (11:00 AM to 12:00 PM)

2.6.2.6 Scheduled Callback – New time slot added page mockup

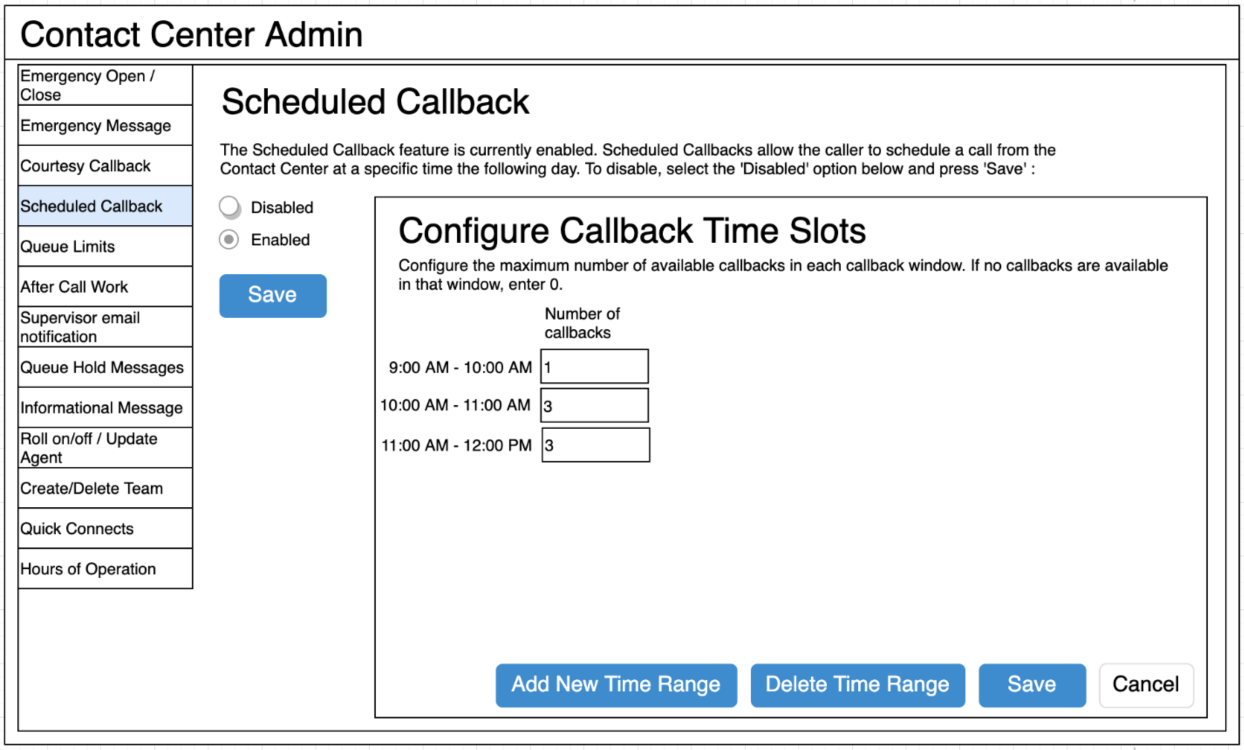


Figure 19 Scheduled Callback - new time slot added (11:00 AM to 12:00 PM))

2.6.2.7 Scheduled Callback – Add new time slot

Figure 18 shows a page mockup with 2 time slots configured (9 AM – 10 AM, and 10 AM to 11 AM), before a new time slot is added.

Figure 19 shows a page mockup after a new time slot added, 11 AM to 12 PM.

1. If the user presses the 'Add new Callback Time Range' button, the dialog to add a new time slot is displayed (as shown in Figure 17).
2. The user selects a Start Time and End Time for the new time slot using the dropdowns. The dropdown lists display available start time and end times at 30-minute increments in 12 hour format (for example, 9:00 AM, 9:30 AM, 10:00 AM, 10:30 AM)
3. If the user presses the 'Add' button, the application validates that:
    a. the Start Time is on or after the County office opening time,
    b. the End Time is before the close of business time for this County,
    c. the new time slot Start Time and End Time does not overlap with any existing time range. For example, if 9:00 AM to 10:00 AM and 10:00 AM to 11:00 AM time slots already exist and the user attempts to add a new 9:30 AM to 10:30 AM time slot, the following error message is displayed:

"The start time and end time (9:30 AM to 10:30 AM) overlaps with existing time slots. Update the start and end times to remove the overlap or press 'Cancel'"

4. If the new time slot is valid, it is created in the system. The dialog closes, and the displayed list of time slots is updated to show the newly added time slot.
5. If the user presses 'Cancel', the dialog is closed, and no changes are saved.

2.6.2.8 Scheduled Callback – Adding new time slot before existing slots - page mockup

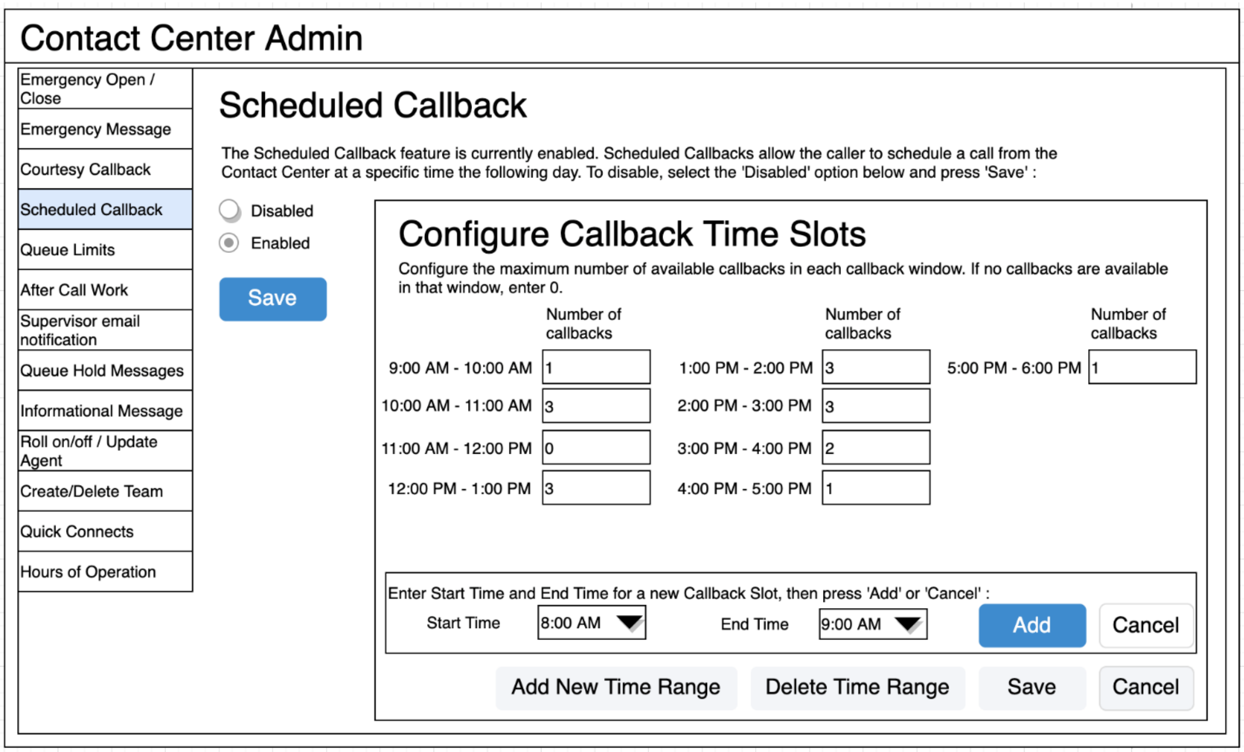


Figure 20 Scheduled Callback - before adding new slot (8:00 AM to 9:00 AM) before existing slots

2.6.2.9 Scheduled Callback – Adding new time slot before existing slots -

1. User presses the 'Add New Callback Time Range' button and selects a start and end time before the existing timeslots, for example, 8:00 AM to 9:00 AM.
2. If user presses 'Save', the new time slot is added.

3. The displayed timeslots are rearranged to appear in ascending time order. In the above example, the new 8:00 AM to 9:00 AM time slot is displayed first, and the existing time slots are updated on the page to display following the new time slot.

2.6.2.10 Scheduled Callback – New time slot added before existing slots - page mockup

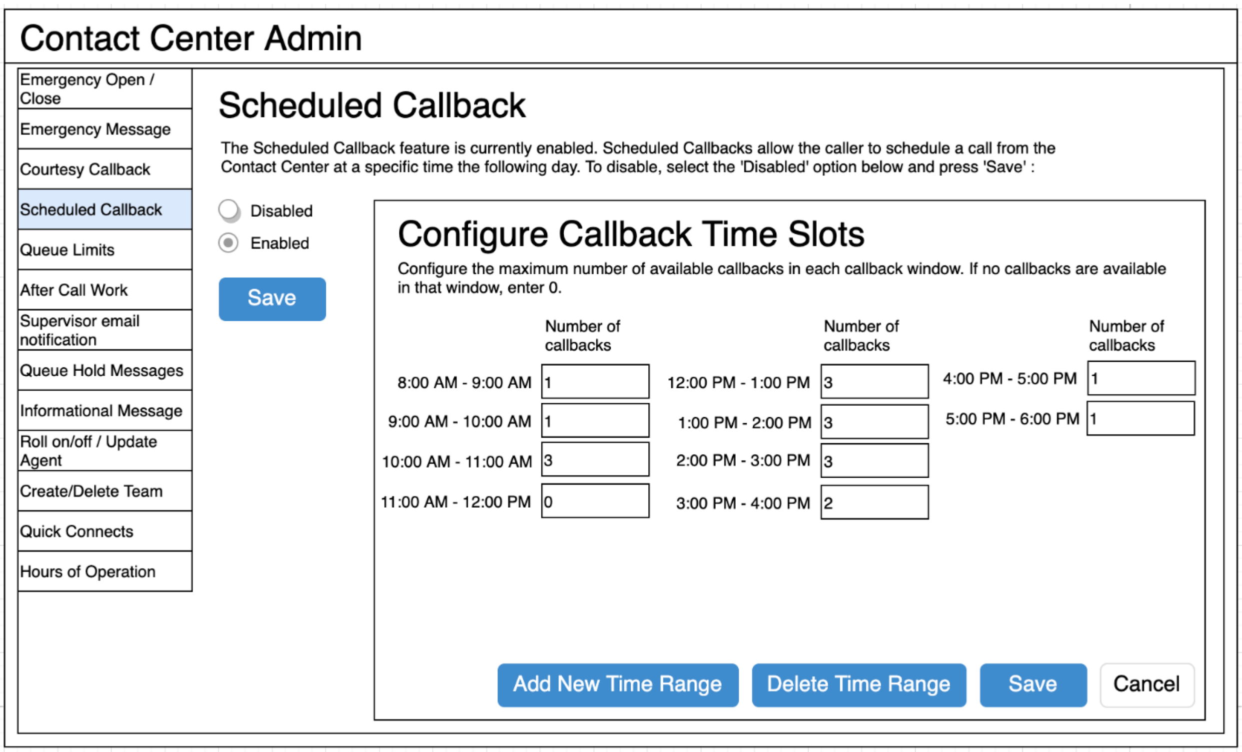


Figure 21 Scheduled Callback - new slot (8:00 AM to 9:00 AM) added before existing slots

2.6.2.11 Scheduled Callback – New time slot added before existing slots

1. Figure 21 shows a new time slot added, 8:00 AM to 9:00 AM, before the existing time slots.
2. The existing time slots are updated to display in ascending time order following the newly added time slot.

2.6.2.12 Scheduled Callback – Delete time slot - page mockup

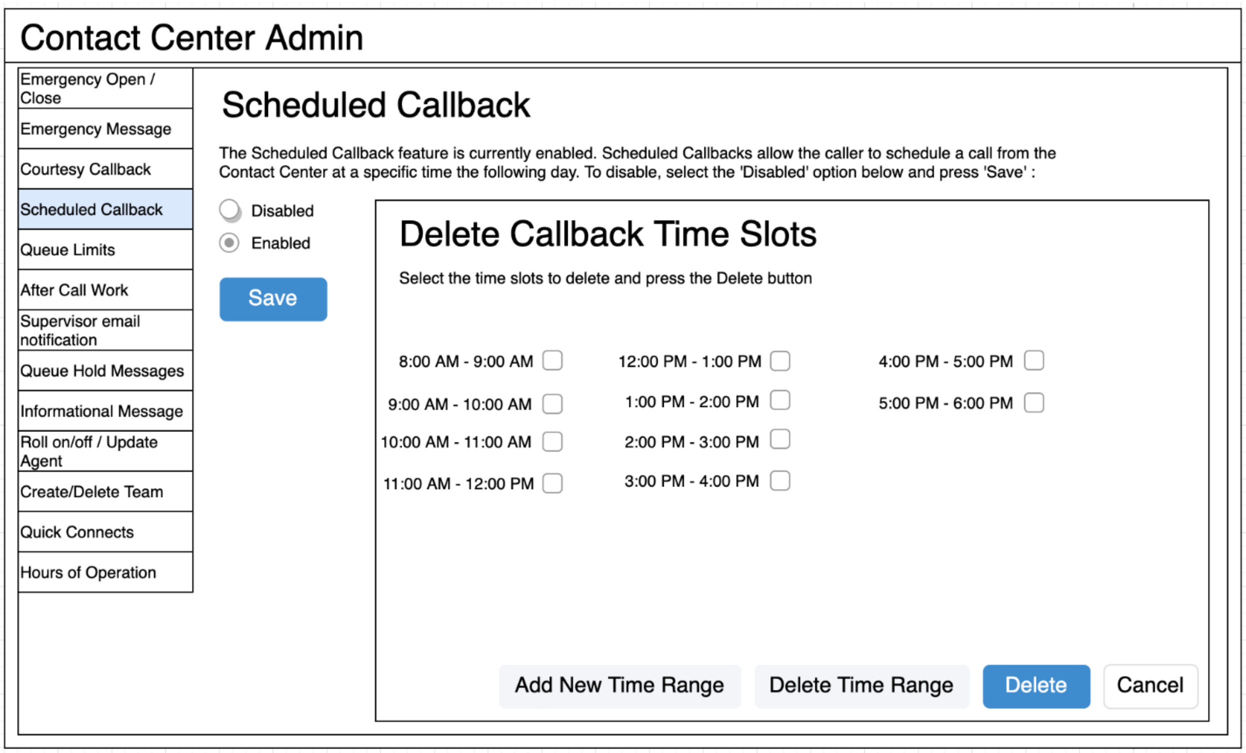


Figure 22 Scheduled Callback - delete callback time slots

2.6.2.13 Scheduled Callback – Delete time slot

1. If the user presses the 'Delete Time Range' button, the 'Delete Callback Time Slots' dialog is displayed (see Figure 21).
2. Checkboxes are displayed beside the configured time slots. (in place of the text entry fields).
3. If the user presses 'Cancel' no changes are made and the configured time slots are displayed.
4. The page flow for selecting time slots is described in the following section.

2.6.2.14 Scheduled Callback – Delete time slot, slots selected - page mockup

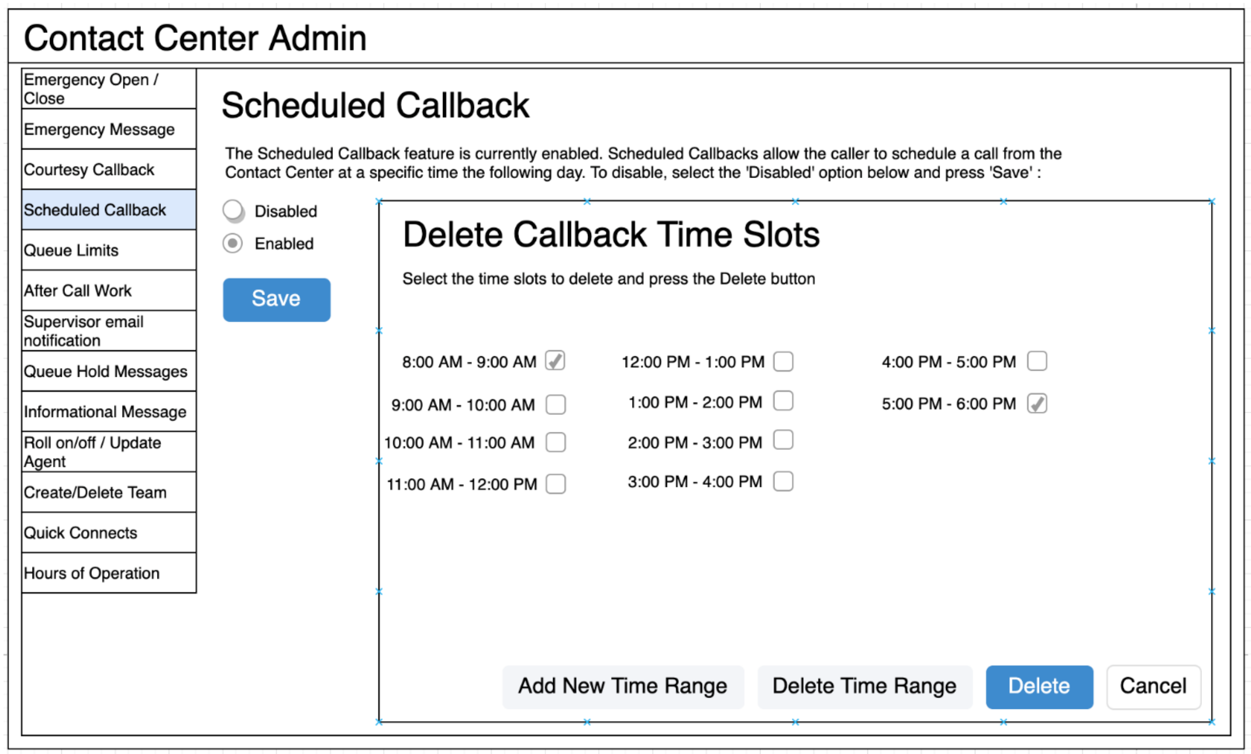


Figure 23 Scheduled Callback - delete time slots, slots selected

2.6.2.15 Scheduled Callback – Delete time slot, slots selected

1. The user clicks the checkboxes to select the time range(s) to delete.
2. One or more time range(s) can be selected.
3. In Figure 23, the 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM time slots are selected.
4. If the user presses 'Cancel', no changes are saved, and the currently configured time slots are re-displayed.
5. If the user presses 'Delete', a confirmation dialog is displayed, as shown in the following section.

2.6.2.16 Scheduled Callback – Delete time slot – delete confirmation page mockup

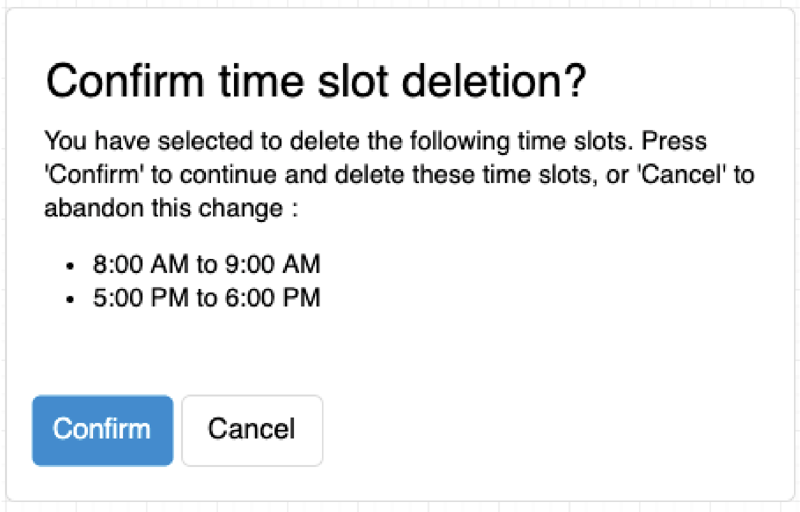


Figure 24 Scheduled Callback - Confirm time slot deletion

2.6.2.17 Scheduled Callback – Delete time slot – delete confirmation

1. If the user has selected time ranges to be deleted and presses the ‘Delete’ button, the confirmation dialog in Figure 24 is displayed.
2. The dialog lists the selected time ranges (for example, 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM).
3. If the user presses the ‘Cancel’ button, no changes are made, and the user is returned to the ‘Delete Callback Time Slots page’.
4. If the user presses ‘Confirm’ the selected Callback Time Slots are deleted from the system. The user is returned to the ‘Configure Callback Time Slots’ page, and the page is updated to display the changes (see the following section).
5. Deletion of configured time slots is permanent. If the same time slots are required again at some point in the future, they need to be manually added (following page flow steps in section 2.6.2.7).

2.6.2.18 Scheduled Callback – After time slots deleted – page mockup

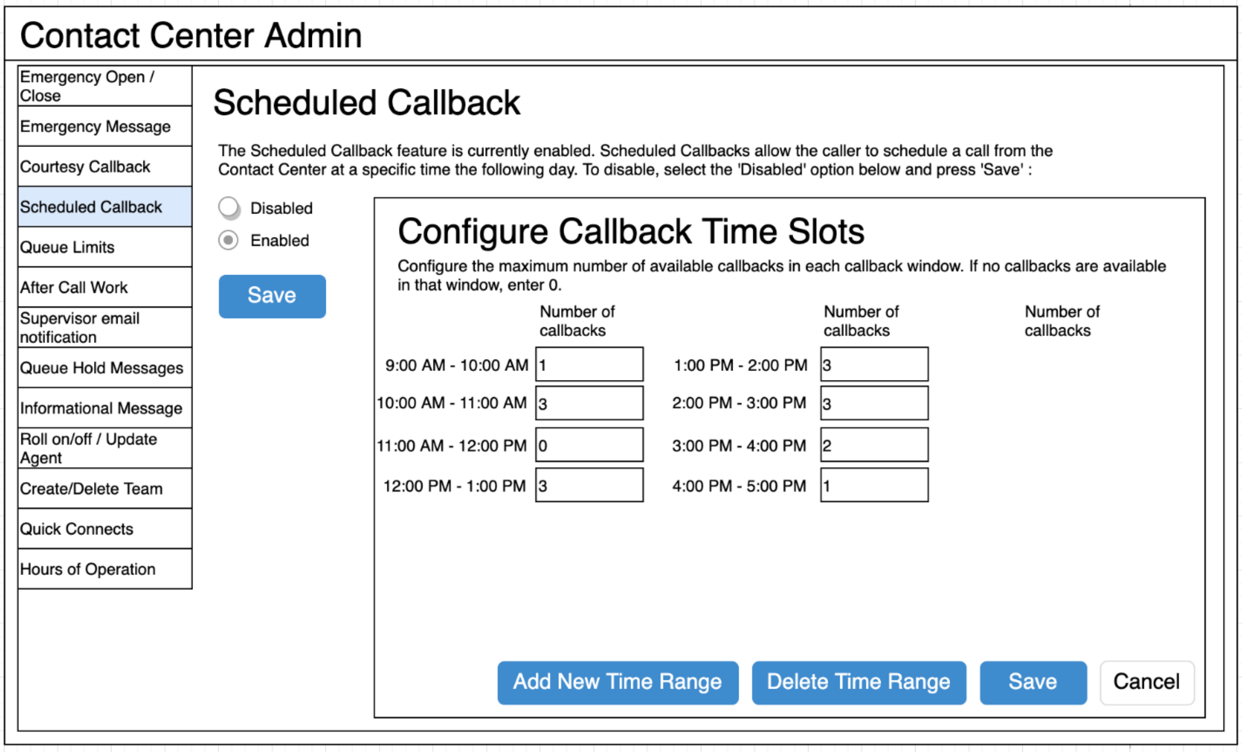


Figure 25 Scheduled Callback - after time slots deleted

2.6.2.19 Scheduled Callback – After time slots deleted

1. After the user confirms deletion of the selected time slots, the 'Configure Callback Time Slots' page is re-displayed.
2. The page mockup in Figure 24 shows the results of deleting timeslots 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM. These time slots are now no longer displayed. The remaining timeslots are rearranged to fill the available space on the page.

2.6.3 Assumptions

1. Implementation of the Scheduled Callback feature will be in SCR CA-229573
2. If callbacks are already scheduled in a time slot that is deleted, those callbacks will remain scheduled.
3. No new callbacks can be scheduled in a time slot after it is deleted.
4. This functionality is disabled for Regional Call Center (RCC) only Counties.

2.7 Queue Limits

2.7.1 Overview

The Queue Limits feature allows an Admin user to define the maximum number of calls that are allowed in each configured call queue.

Queue names are displayed in ascending alphabetical order. The page displays the queue names and maximum queue lengths for the currently defined queues for the current County. If there are more queues that can be displayed on one page, 'Previous' and 'Next' links are displayed to allow the user to page through the defined queues.

If a queue limit is changed while there are more calls in that queue than the new queue limit, the remaining calls in queue will remain in the queue. Any additional incoming calls will not be added to the queue until the number of calls in the queue is less than the new queue limit.

The page only allows the user to change the maximum queue length for currently defined queues. Note: Counties will need to contact the CalSAWS Project Team to add or remove queues or change the queue names.

2.7.2 Description of Changes

2.7.2.1 Queue Limits: Page mockup

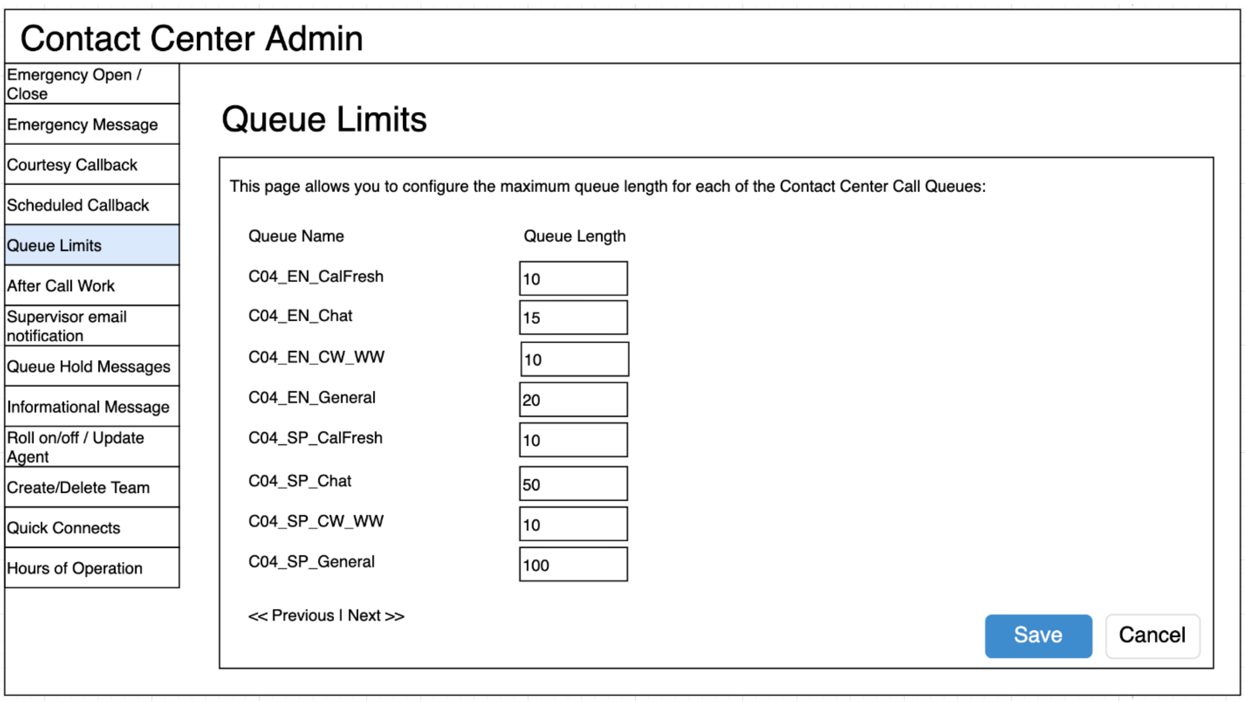


Figure 26 Queue Limits

2.7.2.2 Queue Limits

The Queue Limits page allows the user to configure the maximum number of calls per queue currently defined in the Contact Center.

1. If the Queue Limits configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. Queue names are displayed in ascending alphabetical order.
3. If there are more queues than can be displayed on a single page, pagination links to page forward ("Next") and back ("previous") are displayed at the bottom of the list.
4. If the user is on the first page of queues, the "Previous" link is inactive.
5. If there are no more queues to display, the "Next" link is inactive.
6. User changes the queue limit for 1 or more number of queues currently displayed on the page. The entered value is an positive integer, less than 1000.

7. If no queue depth limit is required for a queue, the user can leave the value blank (this indicates no limit).
8. If the user attempts to navigate away from this page by paging forward/back or choosing another menu option, they are prompted to 'Save' or 'Cancel' their changes first – a dialog with the following message is displayed:

"You have unsaved changes on this page. You must save or cancel your changes before leaving the page"

9. If the user presses 'Save' any updated queue limit values are saved.
10. If the user presses 'Cancel' any changes are discarded and no actions are taken. The page is updated to show the original values.

2.8 After Call Work Limit

2.8.1 Overview

The After Call Work (ACW) Limit feature allows an Admin user to define the maximum number of minutes an Agent is allowed to perform After Call Work.

2.8.2 Description of Changes

2.8.2.1 After Call Work Limit – page mockups

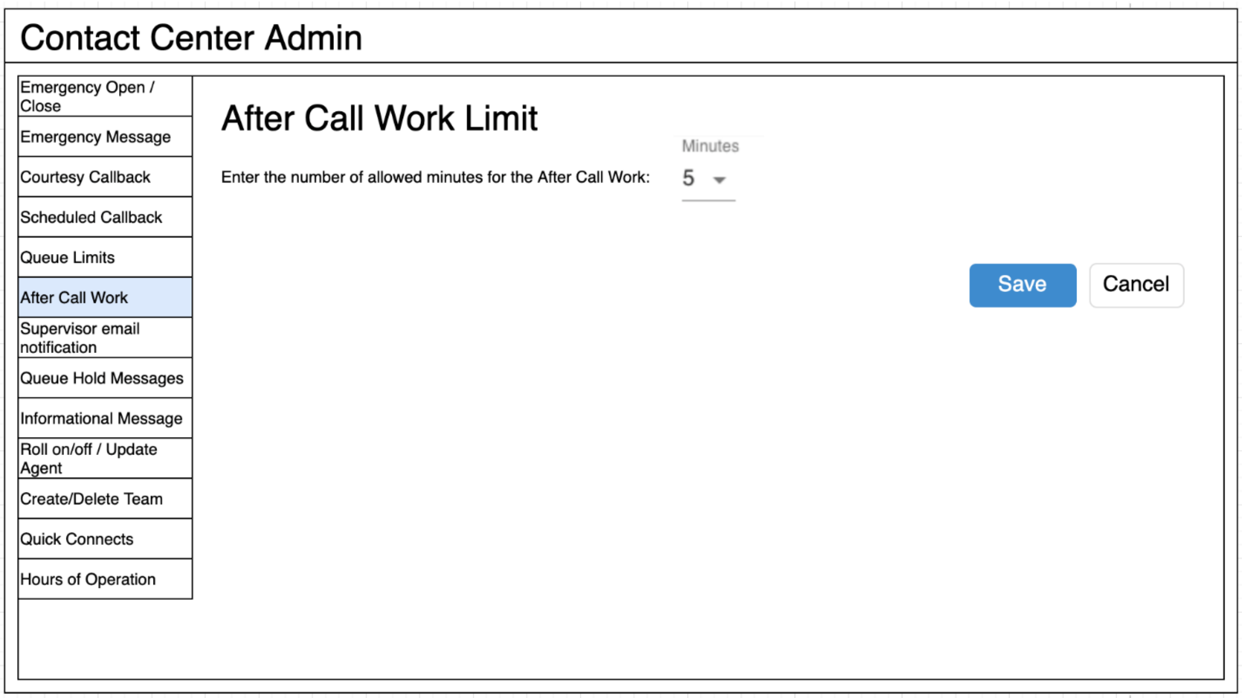


Figure 27 After Call Work Limit

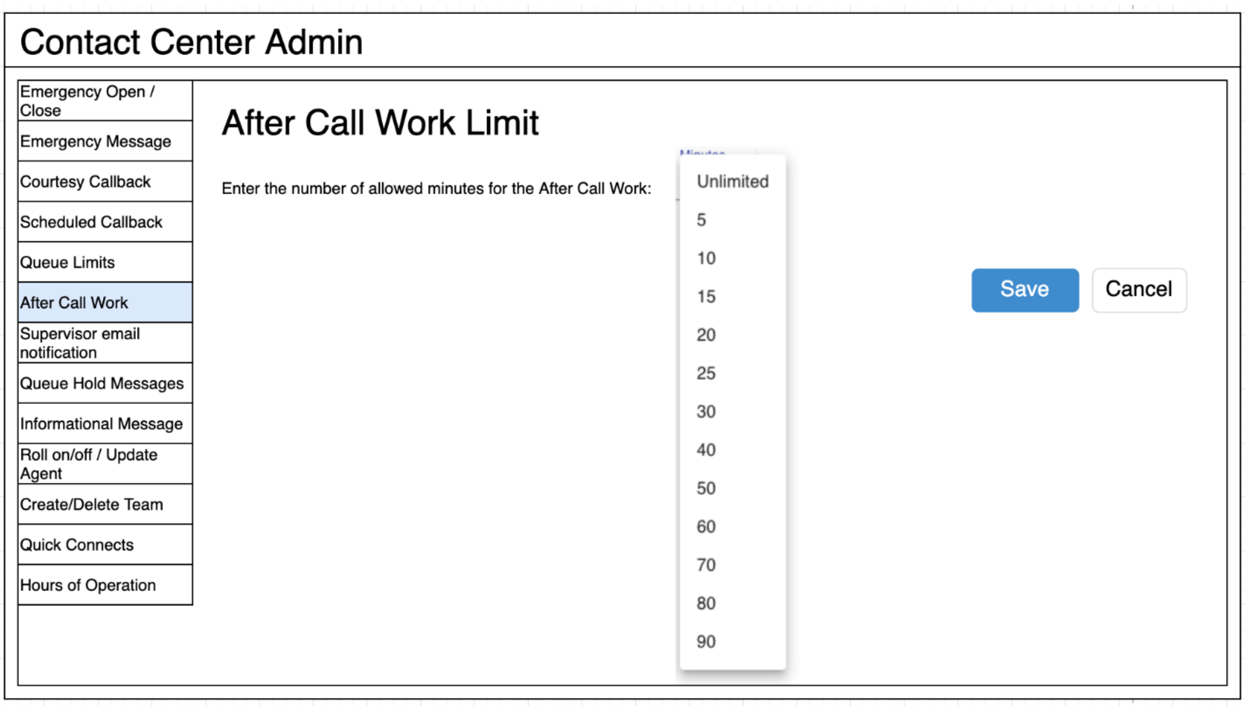


Figure 28 After Call Work Limit – dropdown list to select minutes

2.8.2.2 After Call Work Limit

1. If the After Call Work Limit configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute as elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. The user selects a new value for the After Work Call Limit from a dropdown list. Valid options are displayed in the list from Unlimited to 90 minutes in the following increments:
    a. 5-minute increments from 5 to 30 minutes,
    b. 10 minute increments from 30 to 90 minutes.
3. If 'Unlimited' is selected, this means the After Call Work Limit check is disabled.
4. If user presses the 'Save' button, the changes are saved.
5. If the user presses the "Cancel' button, any change to the value is discarded, and the current configured value is displayed.

2.9 Roll-on/Roll-off / Update Agent

2.9.1 Overview

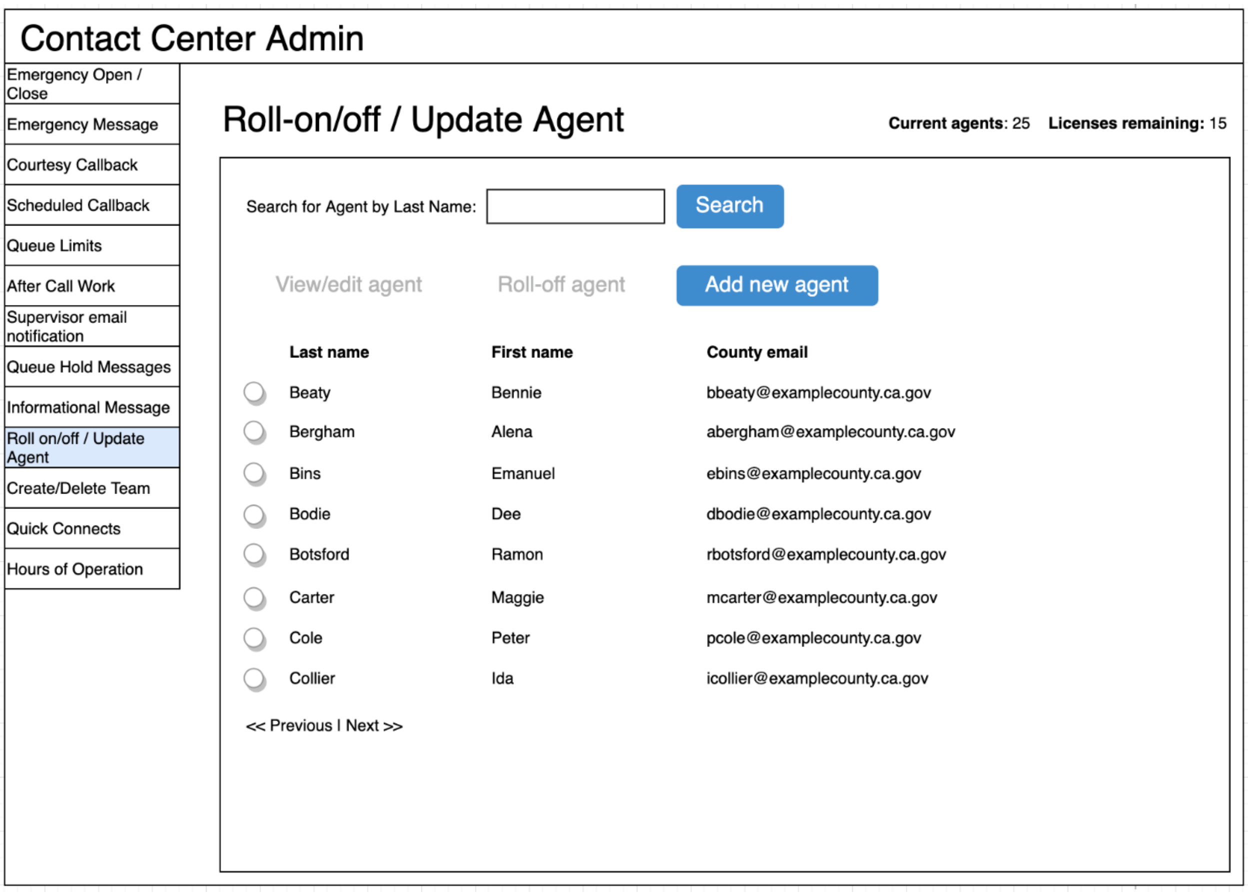
The Roll-on/Roll-off / Update Agent feature allows an Admin user to roll-on and roll-off Agents from the Contact Center. It also allows an Admin user to search for and update existing Agent details (for example, assigned Team and Routing Profile).

The Admin user can roll-on up to the maximum number of licenses available for the current county. The number of currently rolled-on Agents and the licenses remaining is displayed on the page.

When new Agents are created, existing integration with eGain and Calabrio will create new accounts in those systems when the new Agent logs on to the Contact Center for the first time.

2.9.2 Description of Changes

2.9.2.1 Roll-on/Roll-off page mockup



2.9.2.2 Roll-on/Roll-off

1. On entry to the Roll-on/Roll-off page, the list of current Agents is displayed in ascending alphabetical order by last name.
2. The number of currently rolled-on Agents is displayed in the top right of the page, along with the number of licenses remaining for the current County.
3. The page displays 10 Agents at a time. The user can paginate/browse through Agents by pressing the ‘Previous’ and ‘Next’ links.
4. If the user is already on the first page of Agents, the ‘Previous’ link is disabled.
5. If the user is on the last page of Agents, the ‘Next’ button is disabled.
6. If there are Agents before and after the current page, both ‘Previous’ and ‘Next’ links are enabled.
7. To search for a specific Agent, the user enters the Last Name of an Agent to search for and presses ‘Search’.
8. Searching with ‘like’ criteria is supported, for example, if ‘D’ is entered, Agents with Last Name starting with ‘D’ are returned and displayed in ascending alphabetical order.

9. By default, no Agents are selected in the search results when the page is first displayed.
10. When an Agent is not selected, the 'View/Edit Agent' and 'Roll-off Agent' buttons are not enabled, only the 'Add new agent' button is enabled
11. If the user presses the 'Add New Agent' button, the 'Add New Agent' dialog is displayed – see the following page mockup and page flow.

2.9.2.3 Roll-on/Roll-off – Agent selected page mockup

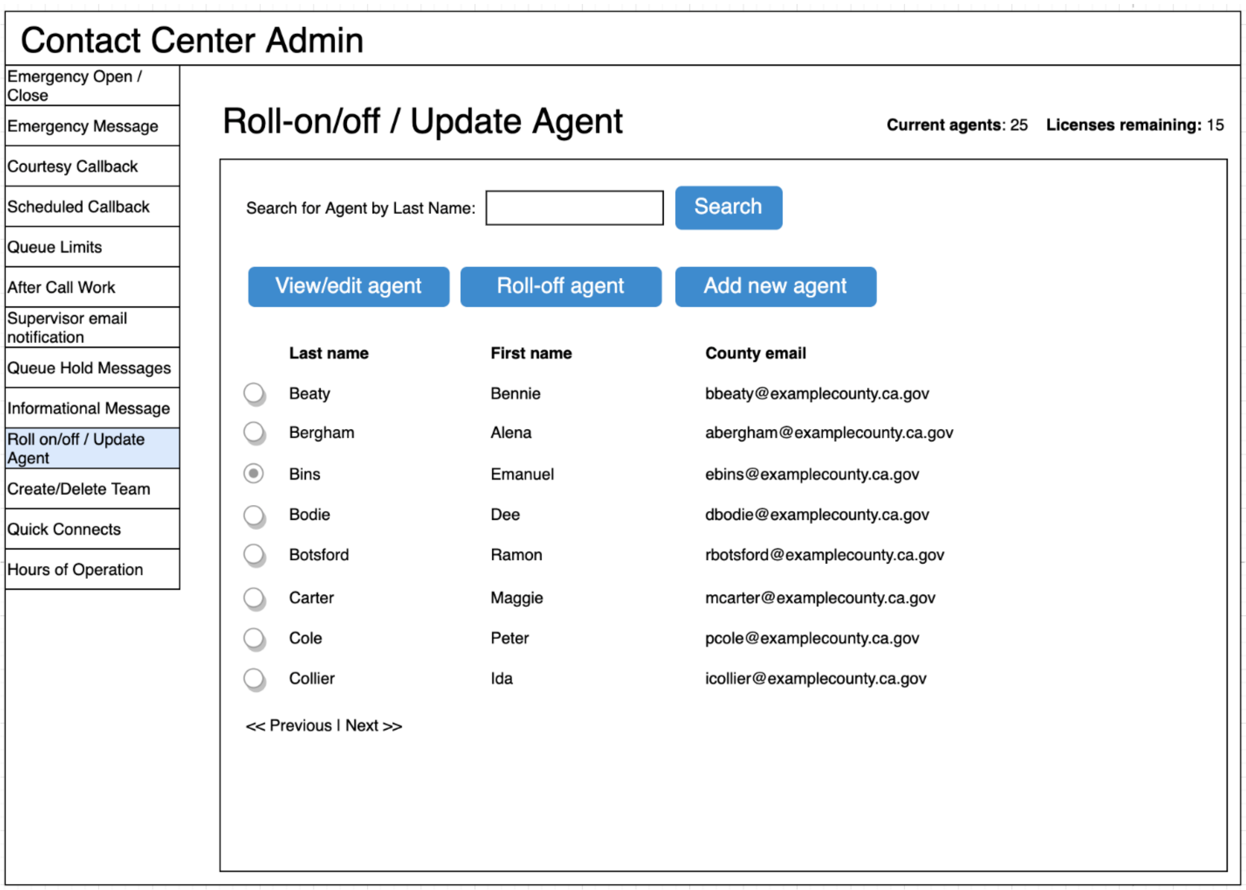


Figure 29 Roll-on / Roll-off / Update Agent

2.9.2.4 Roll-on/Roll-off – Agent selected

1. If the user selects an Agent by pressing the radio button beside an Agent Last Name, the 'View/Edit Agent' and 'Roll-off Agent' buttons are enabled.
2. If an Agent is selected and the user presses the 'View/Edit Agent' button, the 'View/Edit Agent' dialog is displayed – see the following page mockup and page flow.

3. If an Agent is selected and the user presses the ‘Roll-off Agent’ button, the ‘Roll-off Agent’ dialog is displayed – see the following page mockup and page flow.

2.9.2.5 Roll-on/Roll-off – View/Edit Agent page mockup

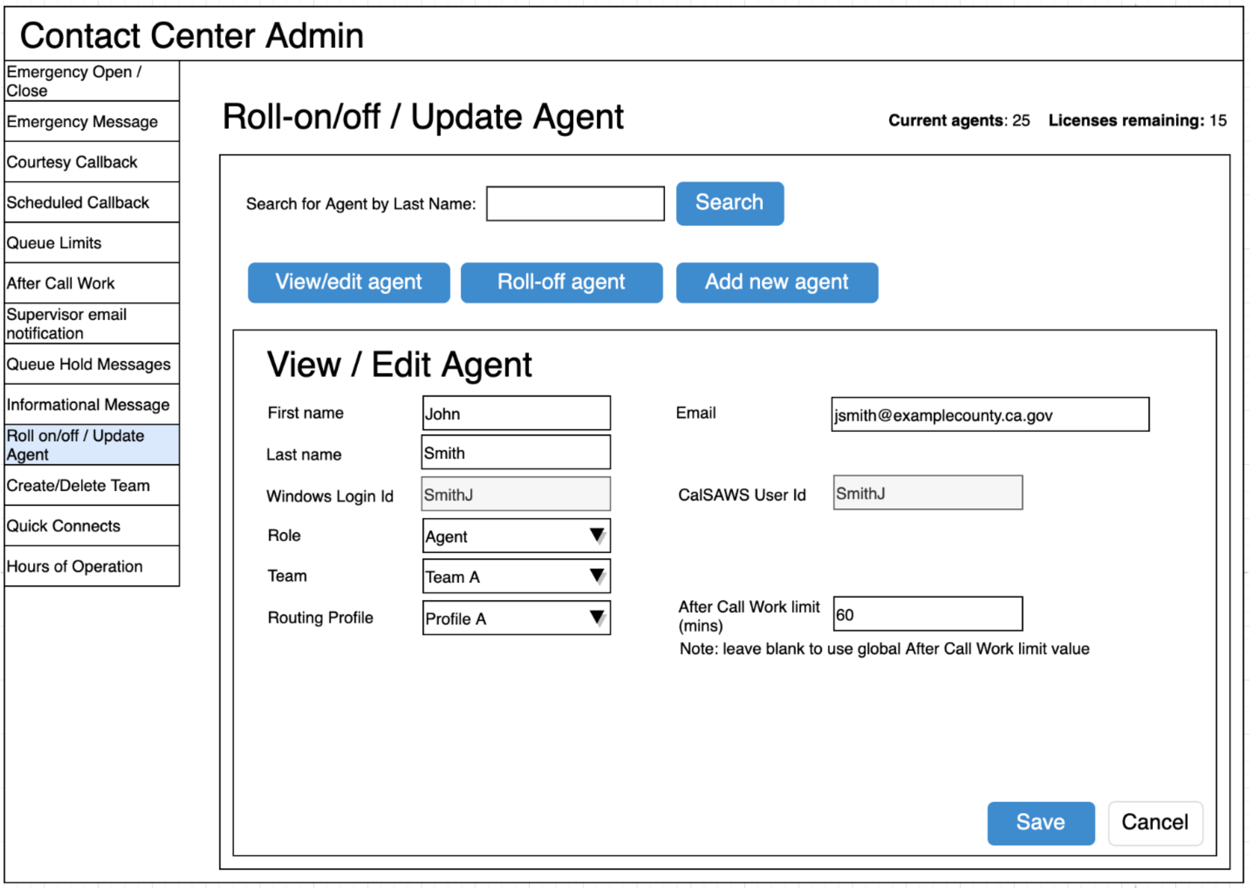


Figure 30 Roll-on / Roll-off - View/Edit Agent

2.9.2.6 Roll-on/Roll-off – View/Edit Agent

1. If the ‘View/Edit Agent’ button is pressed, the ‘View/Edit Agent’ dialog is displayed.
2. The user can edit the First Name, Last Name, Role, Team, Email, Routing Profile and After Call Work Limit fields.
3. The After Call Work Limit value specified here overrides the default/global value defined on the After Call Work page. If left blank the default/global value is used instead.
4. The Windows Login Id and CalSAWS User Id values cannot be changed, they are displayed as read-only fields. To change these values the Agent

must be rolled-off from the Contact Center, changed in the CalSAWS application, and then rolled-on to the Contact Center as a new user.

5. If the user presses the ‘Save’ button, the values are saved, and the ‘View/Edit Agent’ dialog is closed.
6. If the user presses the ‘Cancel’ button, the dialog is closed, and any changes are discarded.

2.9.2.7 Roll-on/Roll-off – Add Agent page mockup

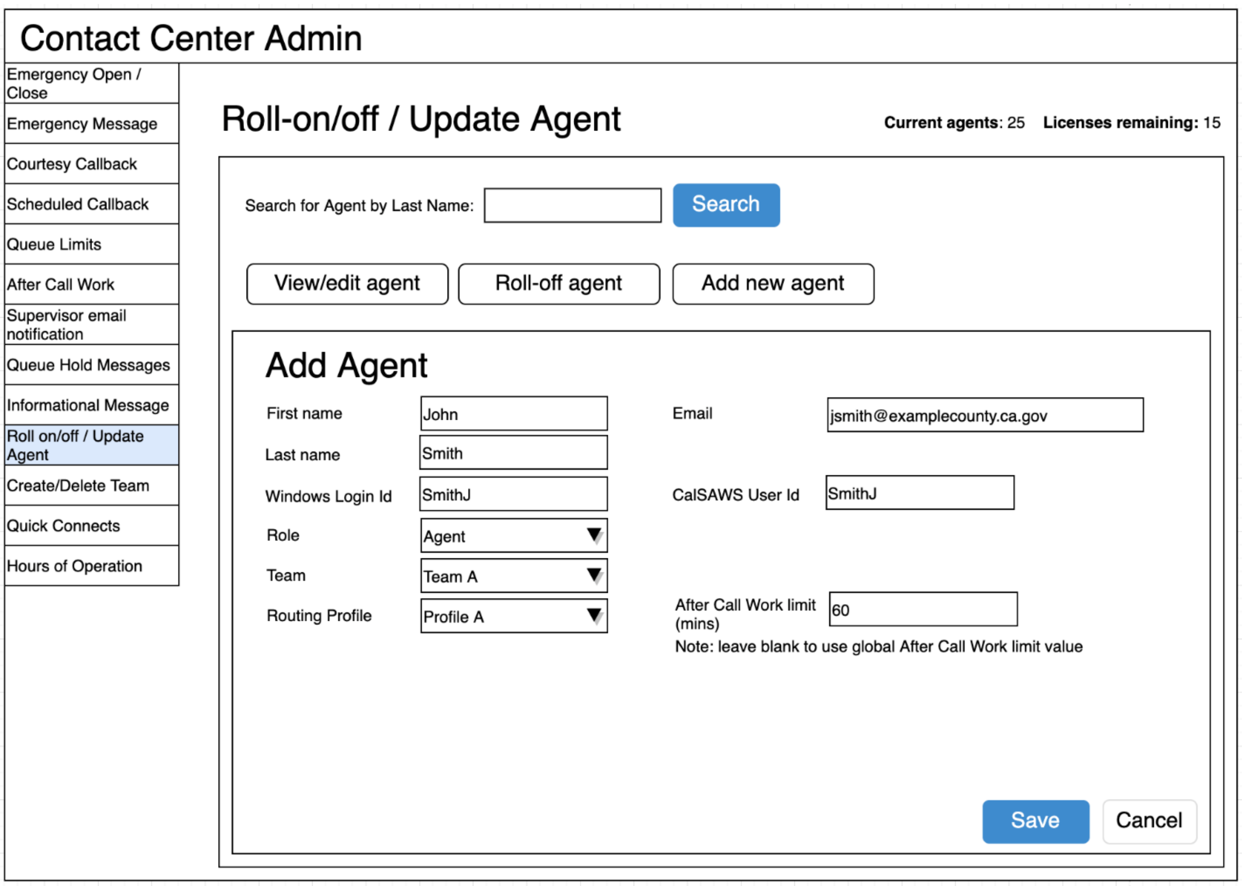


Figure 31 Roll-on / Roll-off - Add Agent

2.9.2.8 Roll-on/Roll-off – Add Agent

1. If the ‘Add New Agent’ button is pressed, the ‘Add New Agent’ dialog is displayed.
2. This page allows the user to roll-on new Agents up to the maximum number of licenses configured. The number of currently rolled-on Agents

and the number of licenses remaining is displayed in the top right of the page.

3. The user enters values for First Name, Last Name, Role (from a dropdown showing ‘Admin’ and ‘Supervisor’ values), Team (from a dropdown showing currently configured Teams) and Email fields.
4. The user enters the Agent’s current Windows Login Id and CalSAWS User Id - these cannot be changed and must match their current User Id values.
5. The system validates that the entered CalSAWS User Id is an existing User Id and that this user has not already been rolled-on as a Contact Center Agent.
6. The user enters values for Routing Profile (from a dropdown showing currently configured Routing Profiles), and After Call Work limit (in minutes).
7. The After Call Work Limit value specified here overrides the default/global value defined on the After Call Work page. If left blank the default/global value is used.
8. If the user presses the ‘Save’ button, the new Agent is created in the following applications:
    a. Contact Center Cloud
    b. Contact Center WFM
    c. Contact Center QA
    d. Contact Center Reporting

2.9.2.9 Roll-on/Roll-off – Roll-off Agent page mockup

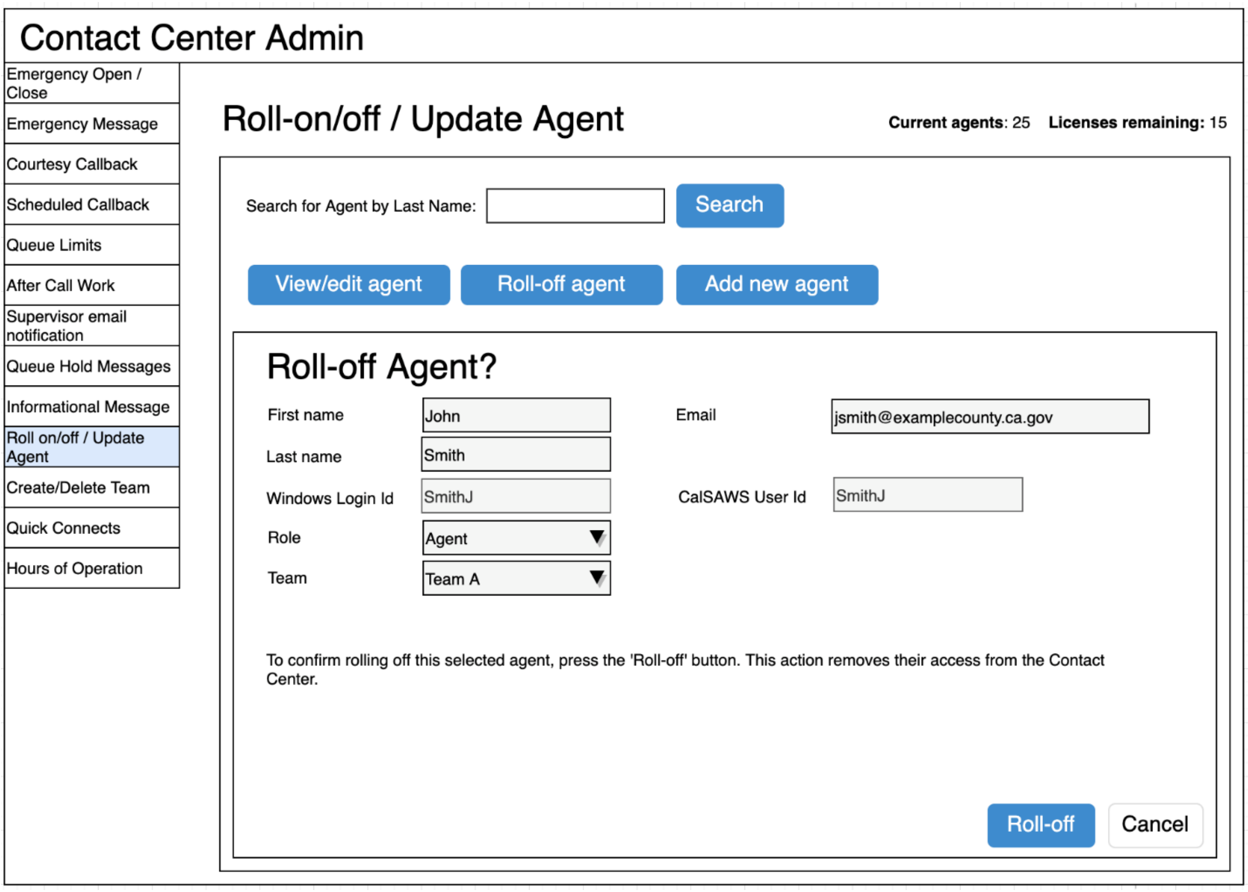


Figure 32 Roll-on/Roll-off - Delete Agent

2.9.2.10 Roll-on/Roll-off – Roll-off Agent

1. If the user selects an Agent and presses the ‘Roll-off Agent’ button, the ‘Roll-off Agent’ dialog is displayed (Figure 28).
2. The following fields are displayed as read-only to identify the Agent:
    a. First name / Last Name
    b. Email
    c. Windows Logon Id
    d. CalSAWS User Id
    e. Role
    f. Team
3. If the user presses the ‘Roll-off’ button, the Agent is removed from the Contact Center. After this point the removed user will no longer have access to the Contact Center, but any prior access and roles within the CalSAWS system remain unchanged.
4. The Roll-off Agent change is permanent. If access for an Agent needs to be restored, the Admin needs to repeat the Roll-on Agent steps as

described in section 2.9.28. Additionally, the Roll-off Agent action has the following impacts to agent and call history data reporting:

   a. Agent data is no longer available for reporting in eGain by County users. The data can be restored by CalSAWS Contact Center operations team if needed.
   b. Agent is marked as inactive and data is no longer available to Calabrio. If data is required for an inactive agent, the agent can be moved back to Active status by CalSAWS Contact Center operations team if needed.

5. If the user presses the 'Cancel' button, no changes are made. The 'Roll-off Agent' dialog is closed, and the user is returned to the main 'Roll-on / Roll-off / Update Agent' page as shown in Figure 28.

2.10 Emergency Message

2.10.1 Overview

This page allows the user to create, edit, delete and select the current Emergency Message for their County. The user can define up to 10 Emergency Messages. The currently selected message is the chosen message that plays while the Contact Center is in Emergency Closure mode (see section 2.3).

If there is no currently selected Emergency Message, a default message will play.

The default message cannot be changed or deleted and is only used when no other Emergency Messages are defined, and/or none of the custom messages are currently selected as the current message for playback during an Emergency Closure.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

The following sections describe how the Emergency Messages are created and maintained.

2.10.2 Description of Changes

2.10.2.1 Emergency Message – page mockup

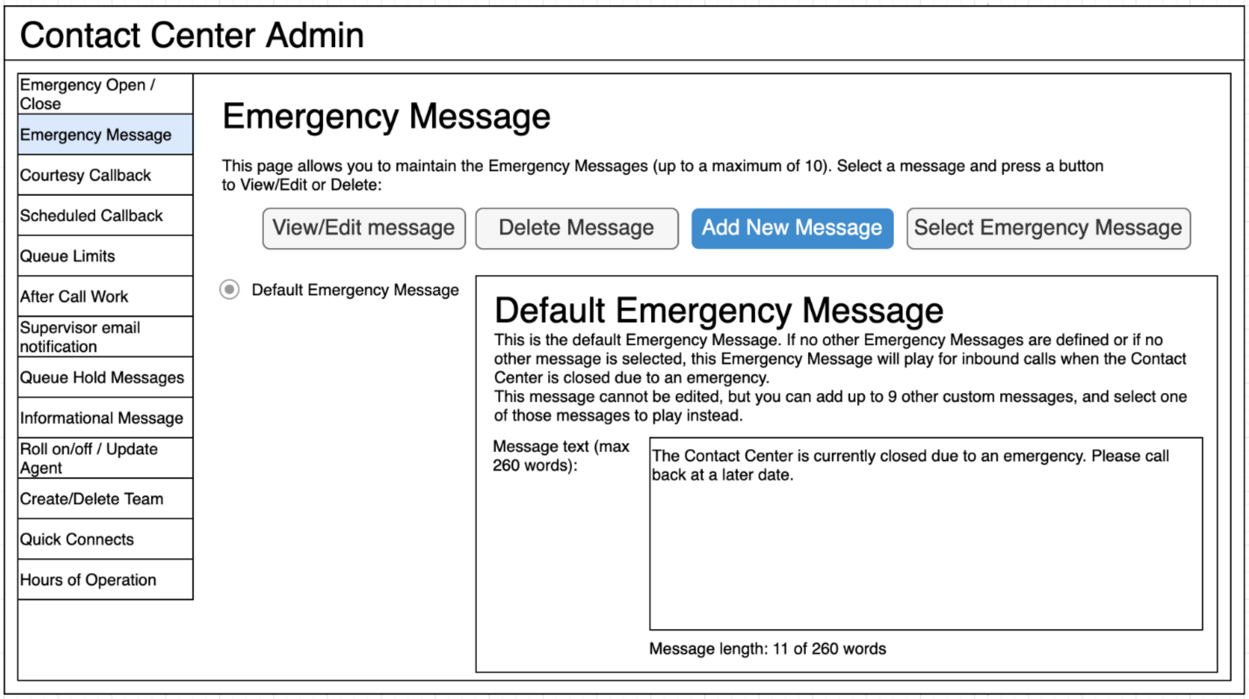


Figure 33 Emergency Message - no messages defined

2.10.2.2 Emergency Message – No messages defined

1. When there are no custom Emergency Messages defined, the only enabled button is ‘Add New Message’.
2. The default Emergency Message is selected and is shown as the current Emergency Message.
3. If the Contact Center is closed using the Emergency Open/Close feature when there are no other Emergency Messaged defined, the default message is played:

“The Contact Center is currently closed due to an emergency. Please call back at a later date.”

4. The default Emergency Message cannot be deleted or edited.
5. If user presses ‘Add New Message’, see following section for page mockup and page flow.

2.10.2.3 Emergency Message – Messages defined, no message selected page mockup

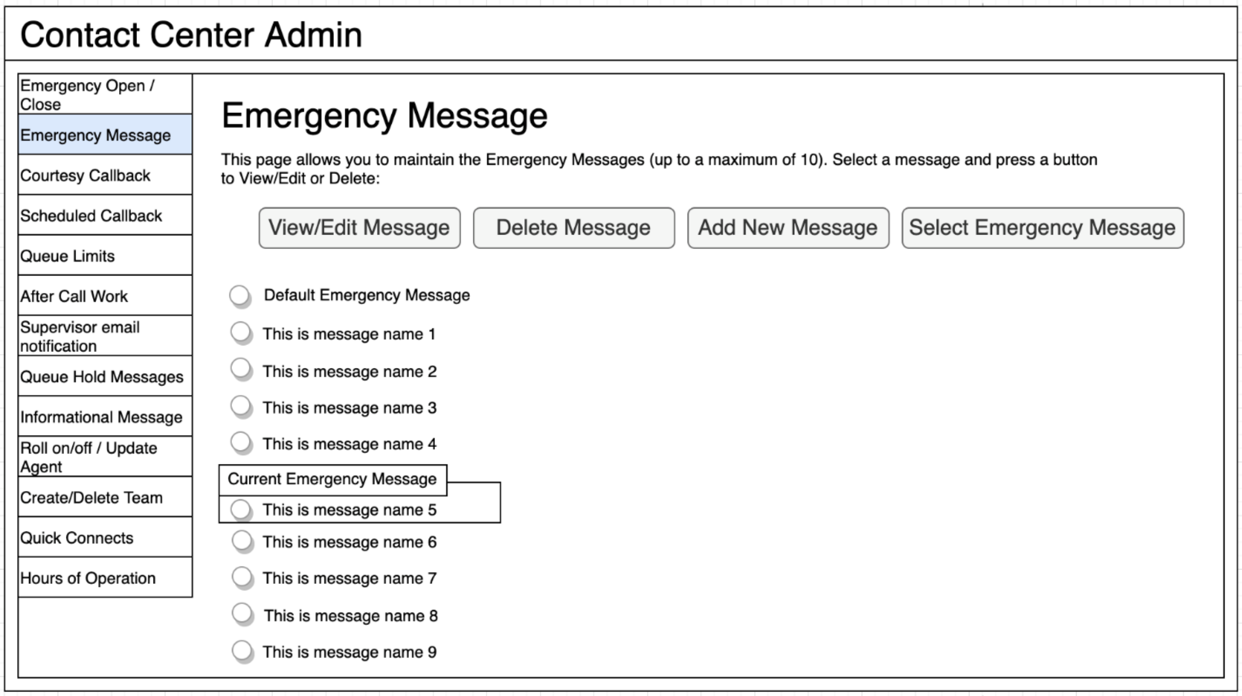


Figure 34 Emergency Message - messages defined, no selected message

2.10.2.4 Emergency Message – Messages defined

1. Up to a maximum of 10 messages can be defined. When less than 10 messages are currently defined, the 'Add new message' button is enabled.
2. The currently configured Emergency Message is highlighted.
3. When the user selects a message by pressing a radio button, the 'Edit/View Message', 'Delete Message', and 'Select Emergency Message' buttons are enabled.
4. If no message is selected, these buttons are not enabled.

2.10.2.5 Emergency Message – Messages defined, message selected page mockup

Figure 35 Emergency Message - messages defined and message selected

2.10.2.6 Emergency Message – Messages defined; message selected

In this example, a new message, 'This is a message name 3' is selected. When a message is selected the relevant buttons are enabled to show valid options.

To View/edit a message:

1. User selects a message by pressing the radio button next to the message name and presses the 'View/Edit Message' button. See next section for page mockup and flow.

To Delete a message:

1. User selects a message by pressing the radio button next to the message name and presses the 'Delete Message' button. See next section for page mockup and flow.

To Add a message:

1. User presses the 'Add New Message' button. See next section for page mockup and flow.

To select/change the currently configured Emergency Message:

1. User selects a message by pressing the radio button next to the message name and presses the 'Select Emergency Message' button. See next section for page mockup and flow.

2.10.2.7 Emergency Message – View/Edit Message page mockup : English selected language

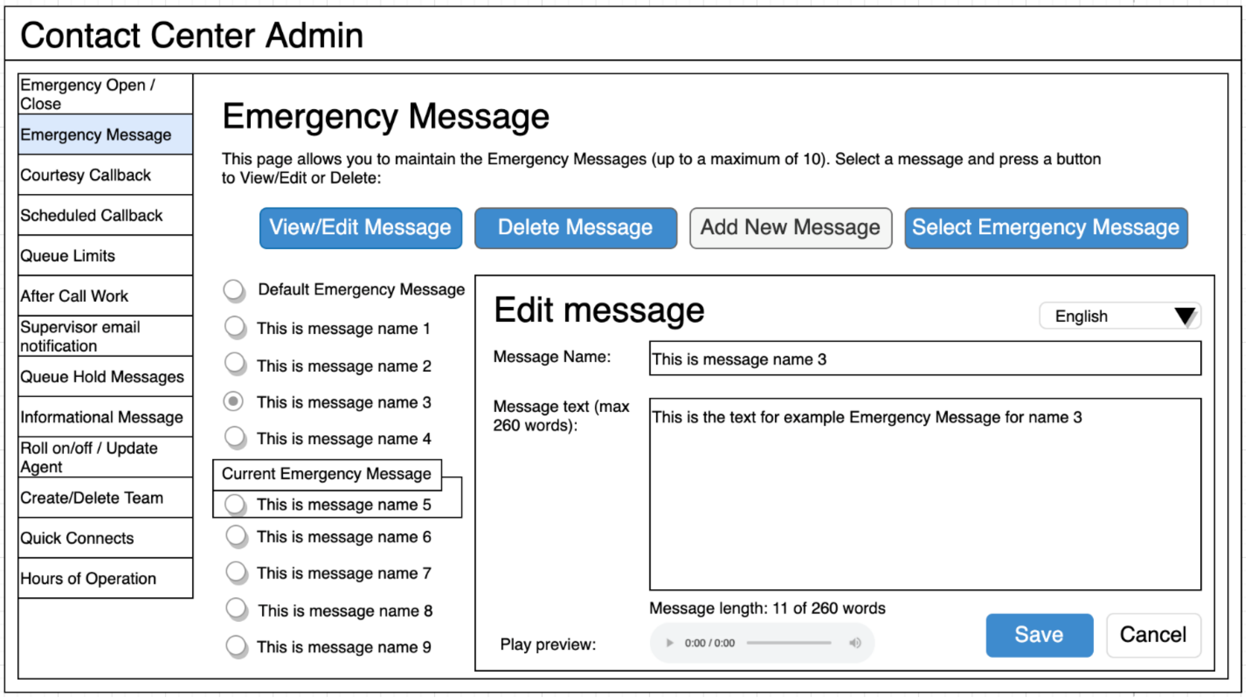


Figure 36 Emergency Message - view/edit message

2.10.2.8 Emergency Message – View/Edit Message page mockup : Language selection dropdown

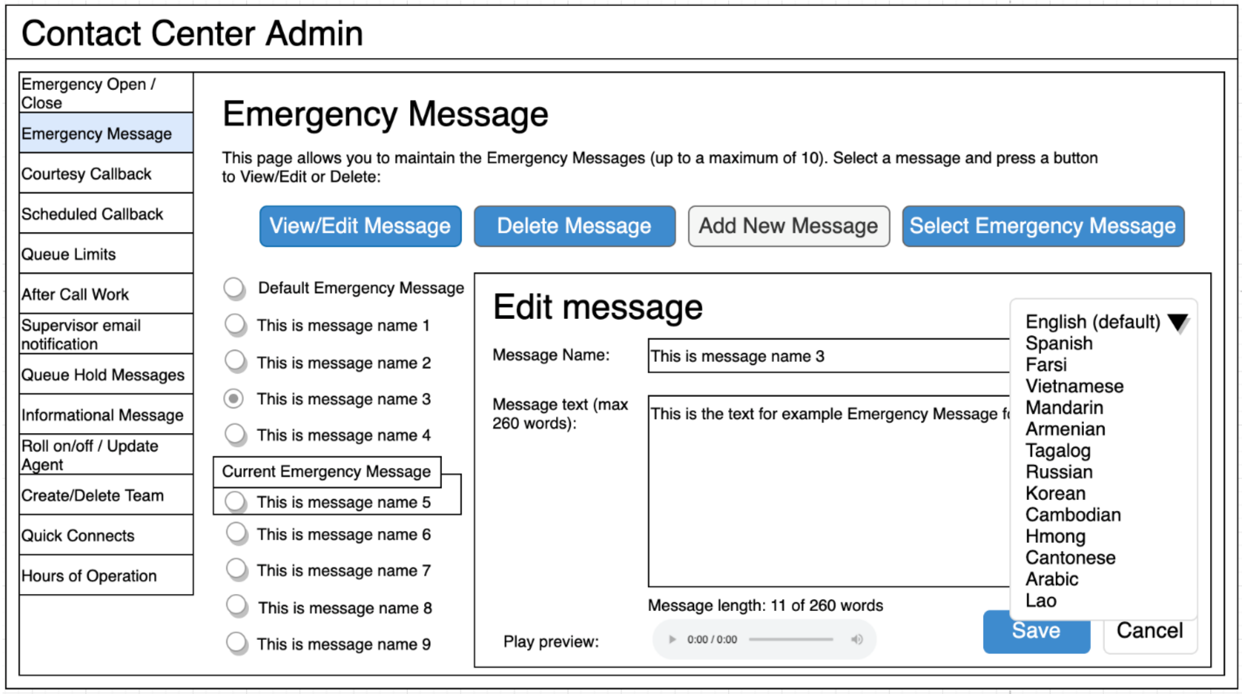


Figure 37 Emergency Message - Language selection dropdown

2.10.2.9 Emergency Message – View/Edit Message

1. User selects an Emergency Message by pressing the radio button next to the message they want to view or edit and presses the 'View/Edit Message' button. The Edit Message dialog is displayed.
2. User changes the Message Name, up to 60 alphanumeric characters.
3. User changes the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 11 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog
    h. Russian

i. Korean
j. Cambodian
k. Hmong
l. Cantonese
m. Arabic
n. Lao

6. Note that the ‘Default Emergency Message’ cannot be deleted or modified. If the user selects the ‘Default Emergency Message’ in the list and presses the ‘View/Edit’ button, the View/Edit dialog is display showing the default message text, but the ‘Save’ button is disabled.
7. To hear an audio preview of the message text, the user can press the ‘play’ button on the media control underneath the message text field. This will playback the audio for the entered text.
8. If the user presses “Save”, text changes for any of the selected languages are saved and the dialog closes.
9. If the user presses “Cancel”, the changes are discarded and the dialog closes.

2.10.2.10 Emergency Message – Delete Message page mockup

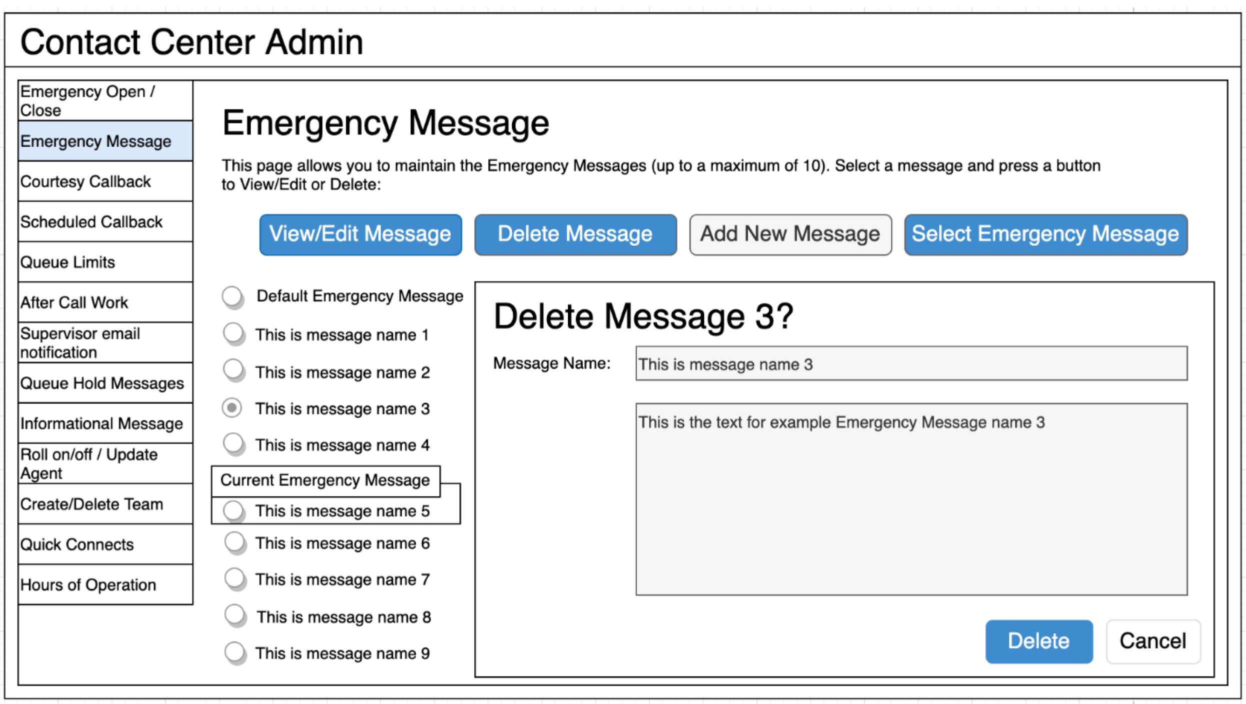


Figure 38 Emergency Message - delete message

2.10.2.11 Emergency Message – Delete Message

1. User selects an Emergency Message by pressing the radio button next to the message they want to delete and presses the 'Delete Message' button. The Delete Message dialog is displayed.
2. If the user presses the 'Delete' button the selected message is deleted. The Delete Message dialog closes. The list of configured messages is updated to display the remaining messages.
3. Deleting an Emergency Message is permanent. To add back the same message, the Admin user adds a new message following the page flow in section 2.10.2.12.
4. When a message is deleted, all language translations for that selected message are deleted at the same time.
5. Note that the 'Default Emergency Message' cannot be deleted or modified. If the user selects the 'Default Emergency Message' in the list and presses the 'Delete message' button, a warning dialog is displayed with the following error message:

   "The Default Emergency Message cannot be deleted or modified. Please select one of the other custom messages."

6. If the user presses the 'Cancel' button the Delete Message dialog is closed and no action is taken.

2.10.2.12 Emergency Message – Add New Message page mockup

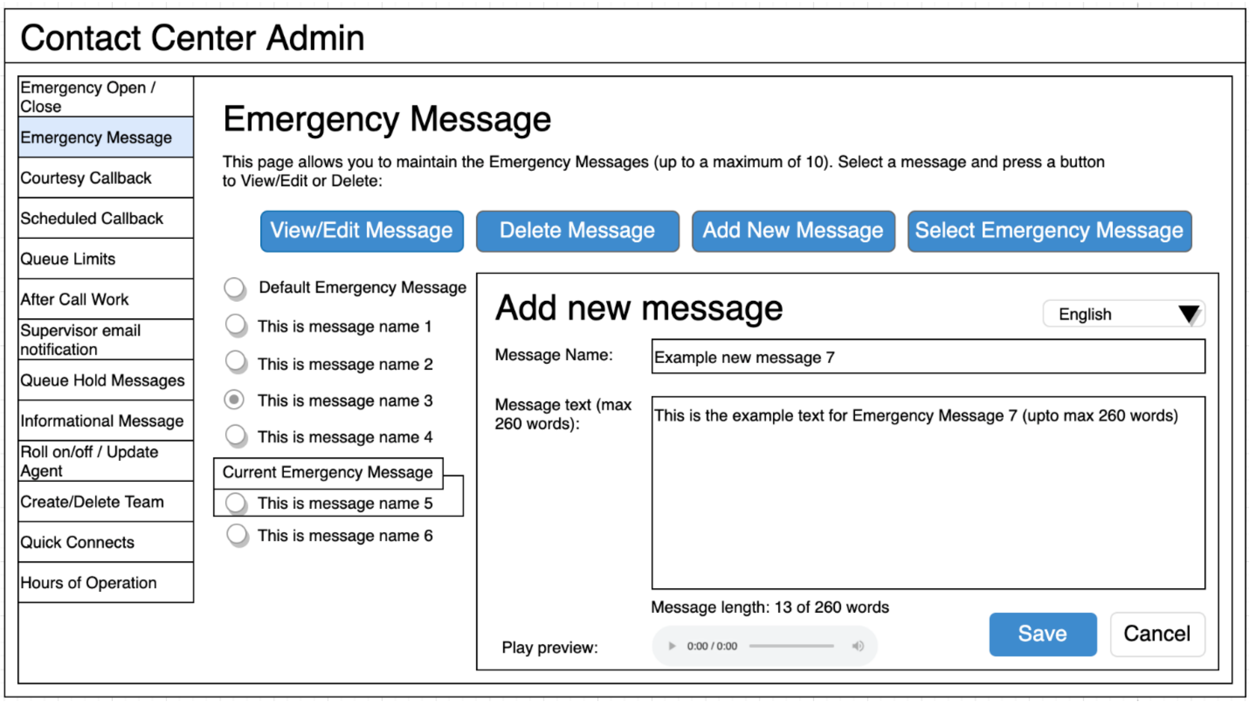


Figure 39 Emergency Message - Add new message

2.10.2.13 Emergency Message – Add New Message

If there are less than 10 Emergency Messages currently defined, the user can press the 'Add New Message' button to create a new message.

1. User presses the 'Add New Message' button. The Add New Message dialog is displayed.
2. The user enters the Message Name, up to 60 alphanumeric characters.
3. The user enters the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 13 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog

h. Russian
i. Korean
j. Cambodian
k. Hmong
l. Cantonese
m. Arabic
n. Lao

6. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses "Save", the new Message is saved and the dialog closes. The displayed list of messages is updated to show the new Message Name for the newly added message.
8. If the user presses "Cancel", the changes are discarded and the dialog closes.

2.10.2.14 Emergency Message – Select Emergency Message page mockup

Figure 40 Emergency Message - Select message

2.10.2.15 Emergency Message – Select Emergency Message

The user can only select a new Emergency Message if there is at least 1 message defined. The 'Select Emergency Message' button is enabled if there is at least 1 message defined.

If there are no Emergency Messages configured or if a message has not yet been selected as the current Emergency Message, a default message is played when the Contact Center is closed using the Emergency Open/Close feature:

"The Contact Center is currently closed due to an emergency. Please call back later."

This default message cannot be changed and is only used in the scenario as described above.

To select a current Emergency Message:

1. If the current Emergency Message was last changed more than 1 minute ago, the User is allowed to select a new message. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User selects one of the configured Emergency Messages by pressing the radio button beside a message.
3. If the user selects the currently configured Emergency Message, then 'Select Emergency Message' button is disabled.
4. If the user selects a different message than the currently configured Emergency Message, the 'Select Emergency Message' button is enabled.
5. User presses the 'Select Emergency Message' button and the Select Emergency Message dialog is displayed.
6. The dialog shows the currently configured Emergency Message and the new message selected by the user. The dialog shows two buttons, 'Confirm' and 'Cancel'.
7. If the user presses the 'Confirm' button, the selected message is configured as the new Emergency Message. The Select Emergency Message dialog is closed, the list of configured messages is updated to show the newly selected Emergency Message.
8. If the user presses the 'Cancel' button the Select Emergency Message dialog is closed and there is no change to the currently configured Emergency Message.

2.10.3 Assumptions

1. Only 1 message can be selected as the current Emergency Message.

2. The emergency message will play following the customer requesting to speak to a worker/agent when the call center is closed due to emergency. The customer will not be transferred into a queue.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.11 Informational Message

2.11.1 Overview

The Informational Message feature allows an Admin user to maintain the Informational Messages. This page allows the Admin user to view and edit messages, delete messages, add new messages, and select the current Informational Message.

The configuration page allows the Admin user to select one Informational Message as the currently enabled message.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

2.11.2 Description of Changes

2.11.2.1 Informational Message – page mockup

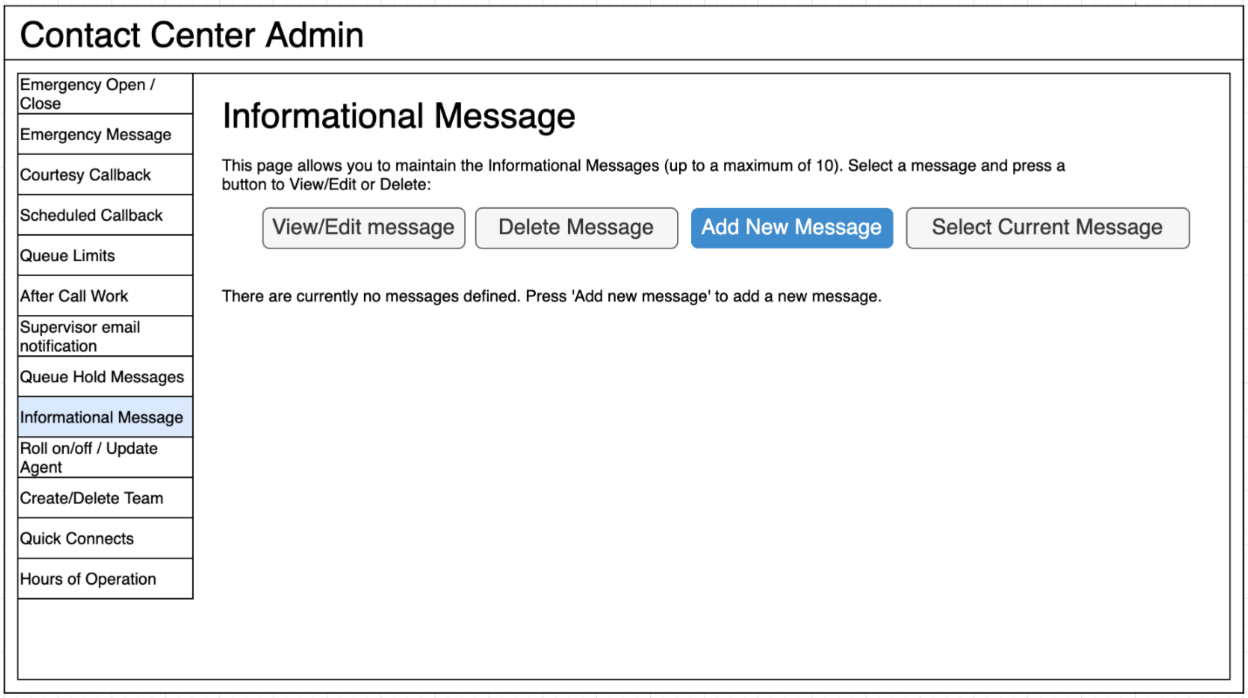


Figure 41 Informational Message - no messages defined

2.11.2.2 Informational Message – No messages defined

1. When there are no Informational Messages defined, the only enabled button is 'Add New Message'.
2. If user presses 'Add New Message', see following section for page mockup and page flow.

2.11.2.3 Informational Message – Messages defined, no message selected page mockup

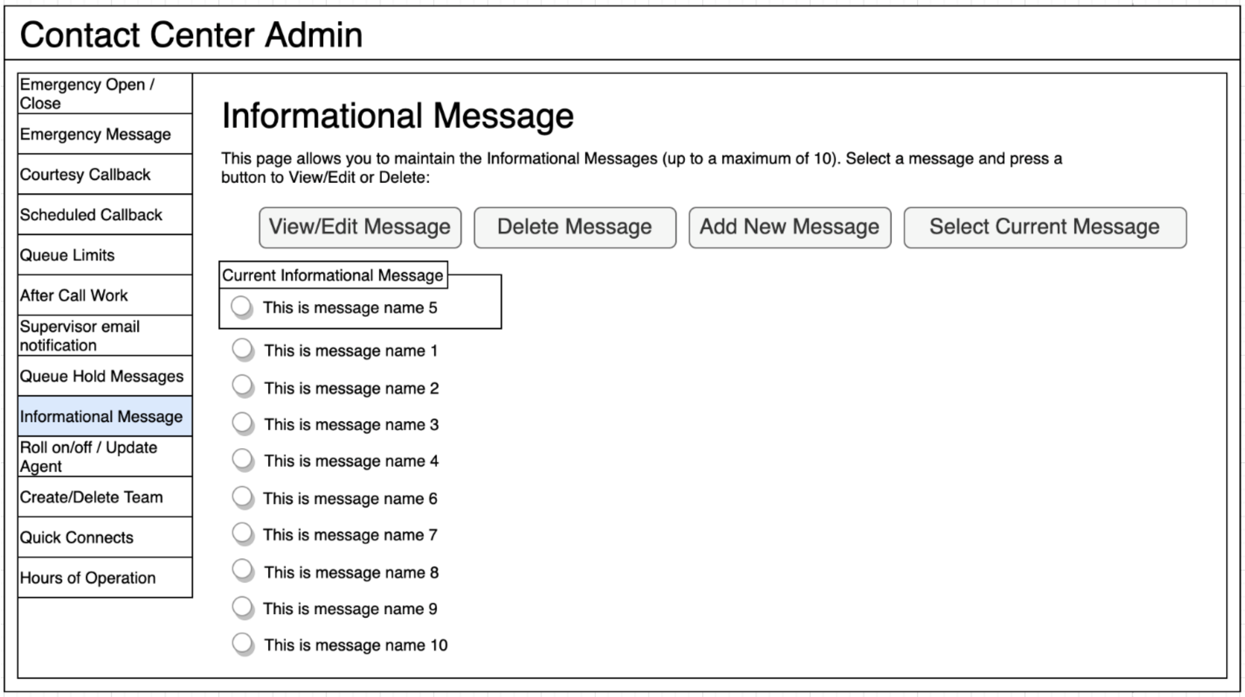


Figure 42 Informational Message - no message selected

2.11.2.4 Informational Message – Messages defined

1. Up to a maximum of 10 messages can be defined. When less than 10 messages are currently defined, the 'Add new message' button is enabled.
2. The currently configured Informational Message is highlighted.
3. When the user selects a message by pressing a radio button, the 'Edit/View Message', 'Delete Message', and 'Select Current Message' buttons are enabled.
4. If no message is selected, these buttons are not enabled.

2.11.2.5 Informational Message – Messages defined, message selected page mockup

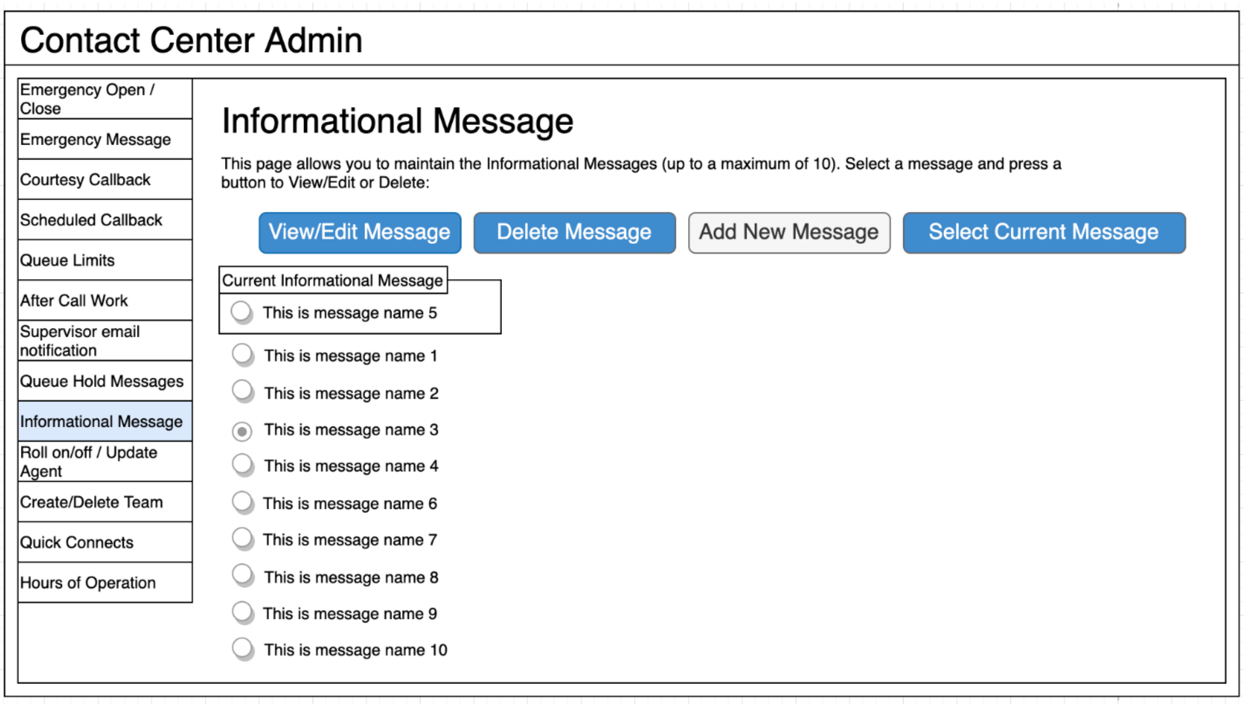


Figure 43 Informational Message - message selected

2.11.2.6 Informational Message – Messages defined, message selected

In this example, a new message, 'This is a message name 3' is selected. When a message is selected the relevant buttons are enabled to show valid options.

To View/edit a message:

1. User selects a message by pressing the radio button next to the message, and presses the 'View/edit message' button. See next section for page mockup and flow.

To Delete a message:

1. User selects a message by pressing the radio button next to the message, and presses the 'Delete message' button. See next section for page mockup and flow.

To Add a message:

1. User presses the 'Add New Message' button. See next section for page mockup and flow.

To select/change the currently configured Informational Message:

1. User selects a message by pressing the radio button next to the message, and presses the 'Select Current Message' button. See next section for page mockup and flow.

2.11.2.7 Informational Message – View/Edit Message page mockup: selected language: English

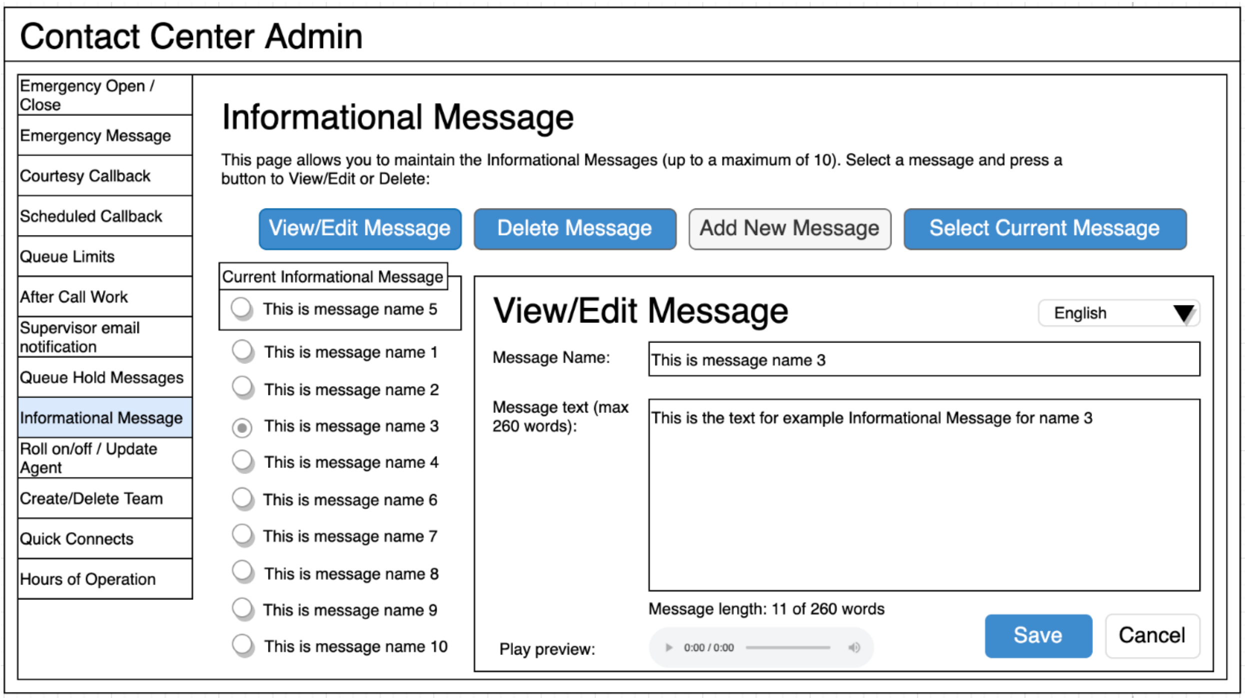


Figure 44 Informational Message - View/Edit Message

2.11.2.8 Informational Message – View/Edit Message page mockup: Language selection dropdown

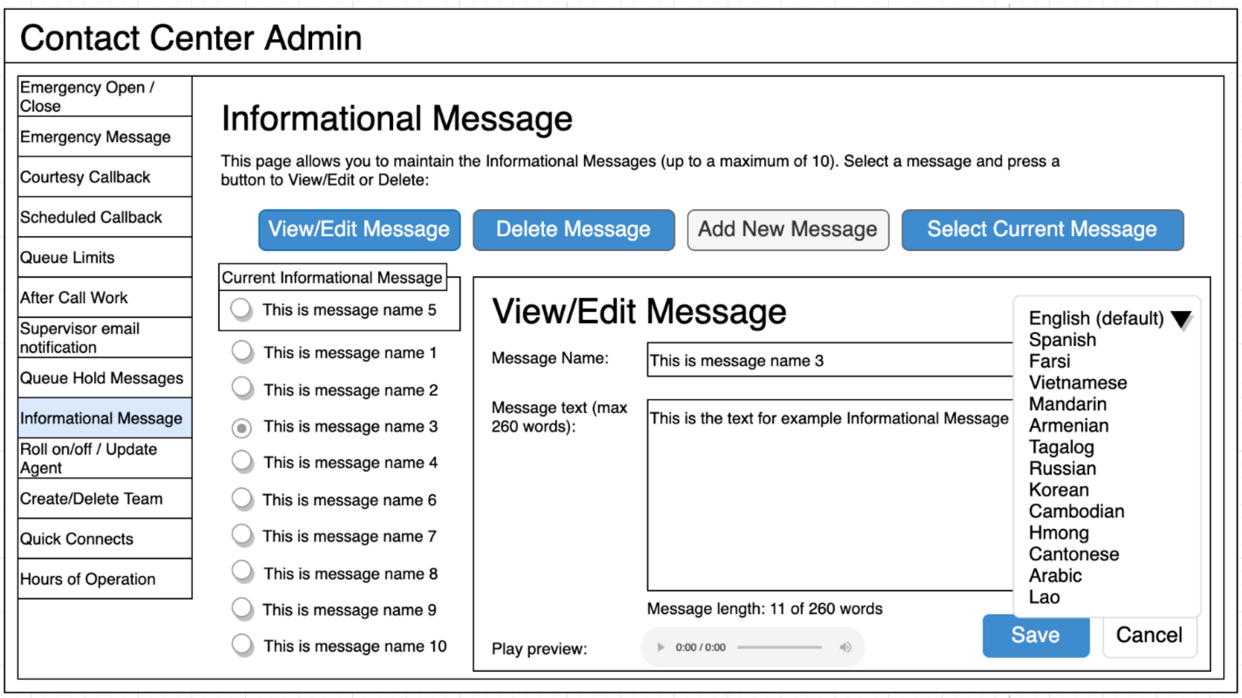


Figure 45 Informational Message - Language selection

2.11.2.9 Informational Message – View/Edit Message page mockup: selected language: Spanish

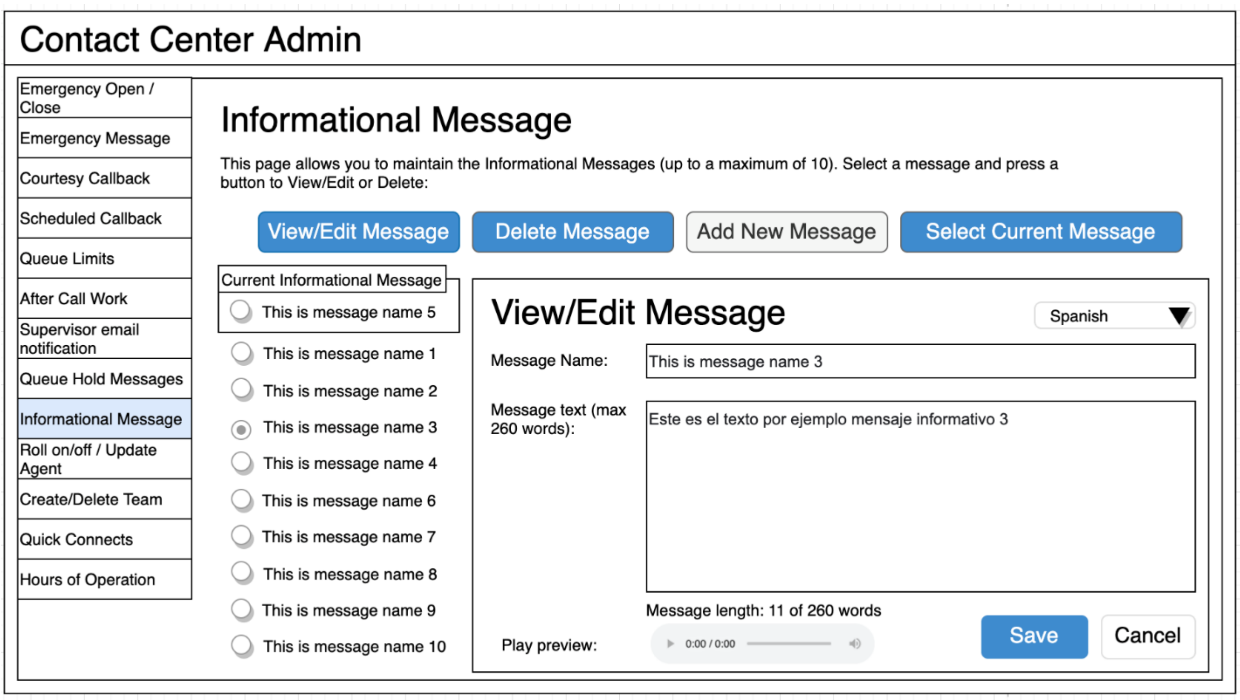


Figure 46 Informational Message - Spanish language

2.11.2.10 Informational Message – View/Edit Message

1. User selects an Informational Message by pressing the radio button next to the message to view or edit and presses the 'View/Edit Message' button. The View/Edit Message dialog is displayed.
2. User changes the Message Name, up to 60 alphanumeric characters.
3. User changes the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 11 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog

h. Russian
i. Korean
j. Cambodian
k. Hmong
l. Cantonese
m. Arabic
n. Lao

6. To hear an audio preview of the message text, the user can press the ‘play’ button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses “Save”, changes to the text for any of the languages selected from the Languages dropdown are saved and the dialog closes.
8. If the user presses “Cancel”, all changes are discarded and the dialog closes.

2.11.2.11 Informational Message – Delete Message page mockup

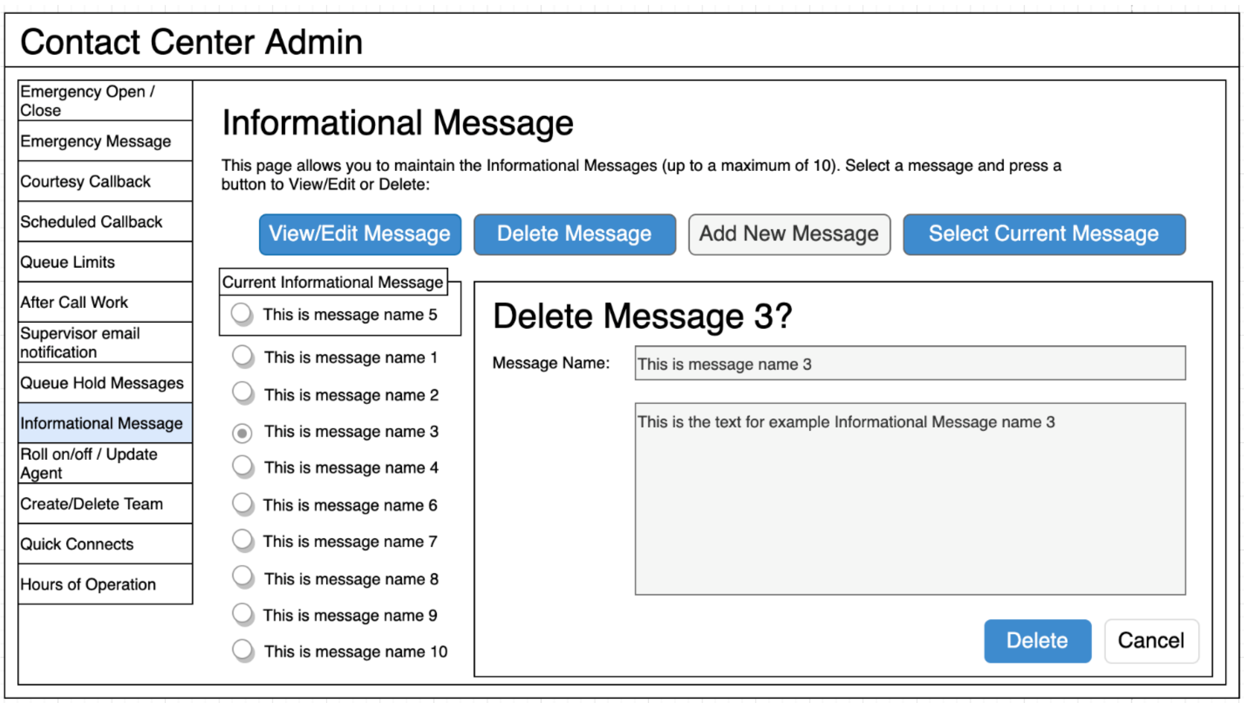


Figure 47 Informational Message - Delete Message

2.11.2.12 Informational Message – Delete Message

1. User selects an Informational Message by pressing the radio button next to the message they want to delete and presses the ‘Delete Message’ button. The Delete Message dialog is displayed.

2. If the user presses the 'Delete' button the selected message is deleted. The Delete Message dialog closes. The list of configured messages is updated to display the remaining messages.
3. Deleting an Informational Message is permanent. To add back a message the Admin user creates a new message following the page flow in section 2.11.2.12.
4. If the user presses the 'Cancel' button the Delete Message dialog is closed and no action is taken.

2.11.2.13 Informational Message – Add New Message page mockup

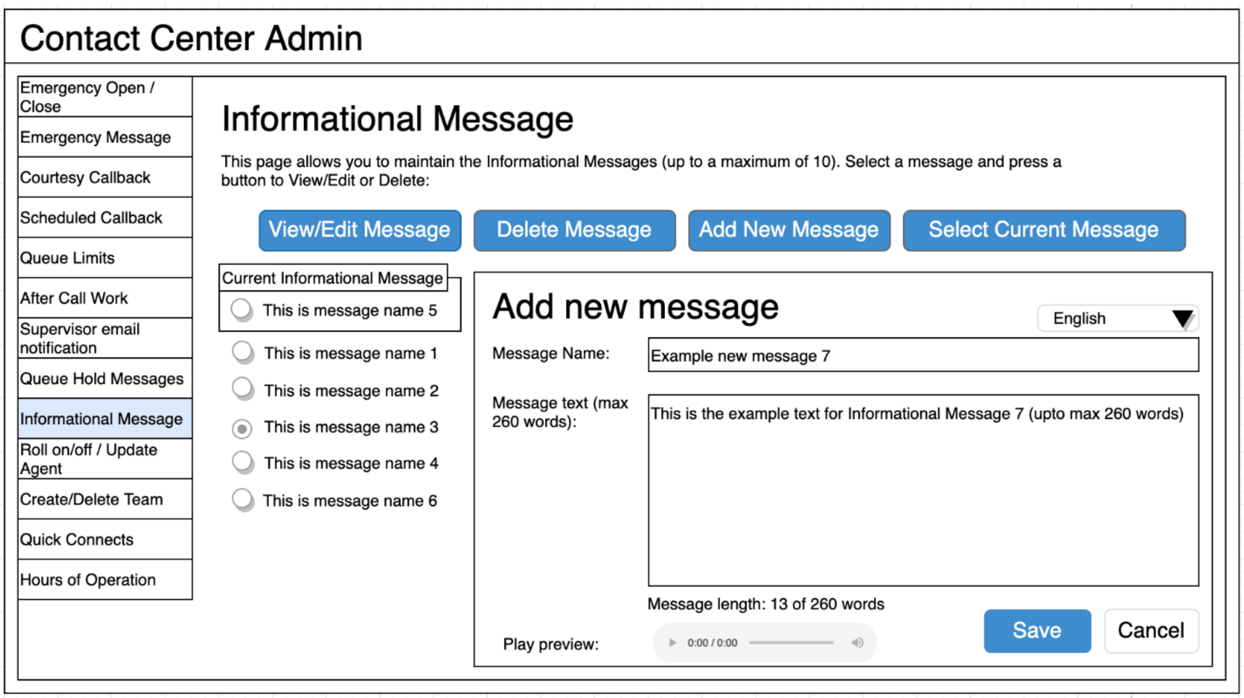


Figure 48 Informational Message - Add New Message

2.11.2.14 Informational Message – Add New Message

If there are less than 10 Informational Messages currently defined, the user can press the 'Add New Message' button to create a new message.

1. User presses the 'Add New Message' button. The Add New Message dialog is displayed.
2. The user enters the Message Name, up to 60 alphanumeric characters.
3. The user enters the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 13 of 260 words". The user is not allowed to enter more than 260 words.

4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog
    h. Russian
    i. Korean
    j. Cambodian
    k. Hmong
    l. Cantonese
    m. Arabic
    n. Lao
6. To hear an audio preview of the message text, the user can press the ‘play’ button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses “Save”, the new Message is saved and the dialog closes. The displayed list of messages is updated to show the new Message Name for the newly added message.
8. If the user presses “Cancel”, the changes are discarded and the dialog closes.

2.11.2.15 Informational Message – Select Informational Message page mockup

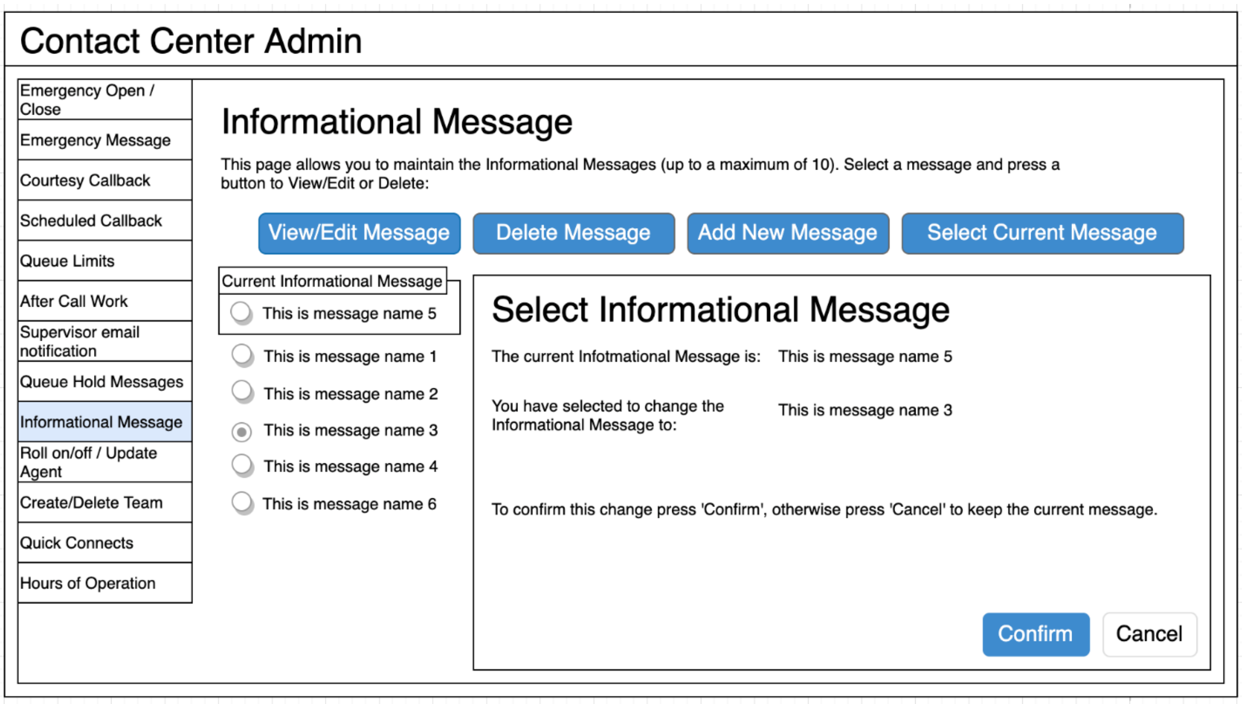


Figure 49 Informational Message - Select Message

2.11.2.16 Informational Message – Select Informational Message

The user can only select a new Informational Message if there is at least 1 configured message. The 'Select Current Message' button is only enabled if there is at least 1 message defined.

1. If the current Informational Message was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User selects one of the configured Informational Messages by pressing the radio button beside a message.
3. If the user selects the currently configured Informational Message, then 'Select Current Message' button is disabled.
4. If the user selects a different message than the currently configured Informational Message, the 'Select Informational Message' button is enabled.
5. User presses the 'Select Current Message' button and the Select Information Message dialog is displayed.

6. The dialog shows the currently configured Informational Message and the new message selected by the user. The dialog shows two buttons, 'Confirm' and 'Cancel'.
7. If the user presses the 'Confirm' button, the selected message is configured as the new Informational Message. The Select Informational Message dialog is closed, the list of configured messages is updated to show the newly selected Informational Message.
8. If the user presses the 'Cancel' button the Select Informational Message dialog is closed and there is no change to the currently configured Informational Message.

2.11.2.17 Assumptions

1. The informational message will play following language selection in the counties inbound IVR.
2. If there are no informational messages defined and/or there is no currently selected message, no informational messages are played during calls.
3. If a message is deleted, all language versions of that message (e.g. English and Spanish) are deleted at the same time.
4. If an alternative language version for a message is not needed, leaving the message text blank means there is no version of the message in that language.
5. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.12 Supervisor Email Notification

2.12.1 Overview

The Supervisor Email notification page allows an Admin user to define thresholds and notifications for Contact Center metrics. If the threshold is exceeded for a specific metric, the system sends a notification email to the specified email address(es).

The Admin user can turn on or off all notifications, or enable any combination of the notifications that apply for their County.

Enabling or disabling any of the notifications is immediately changed within the system.

2.12.2 Description of Changes

2.12.2.1 Supervisor Email Notification – all notifications off, page mockup

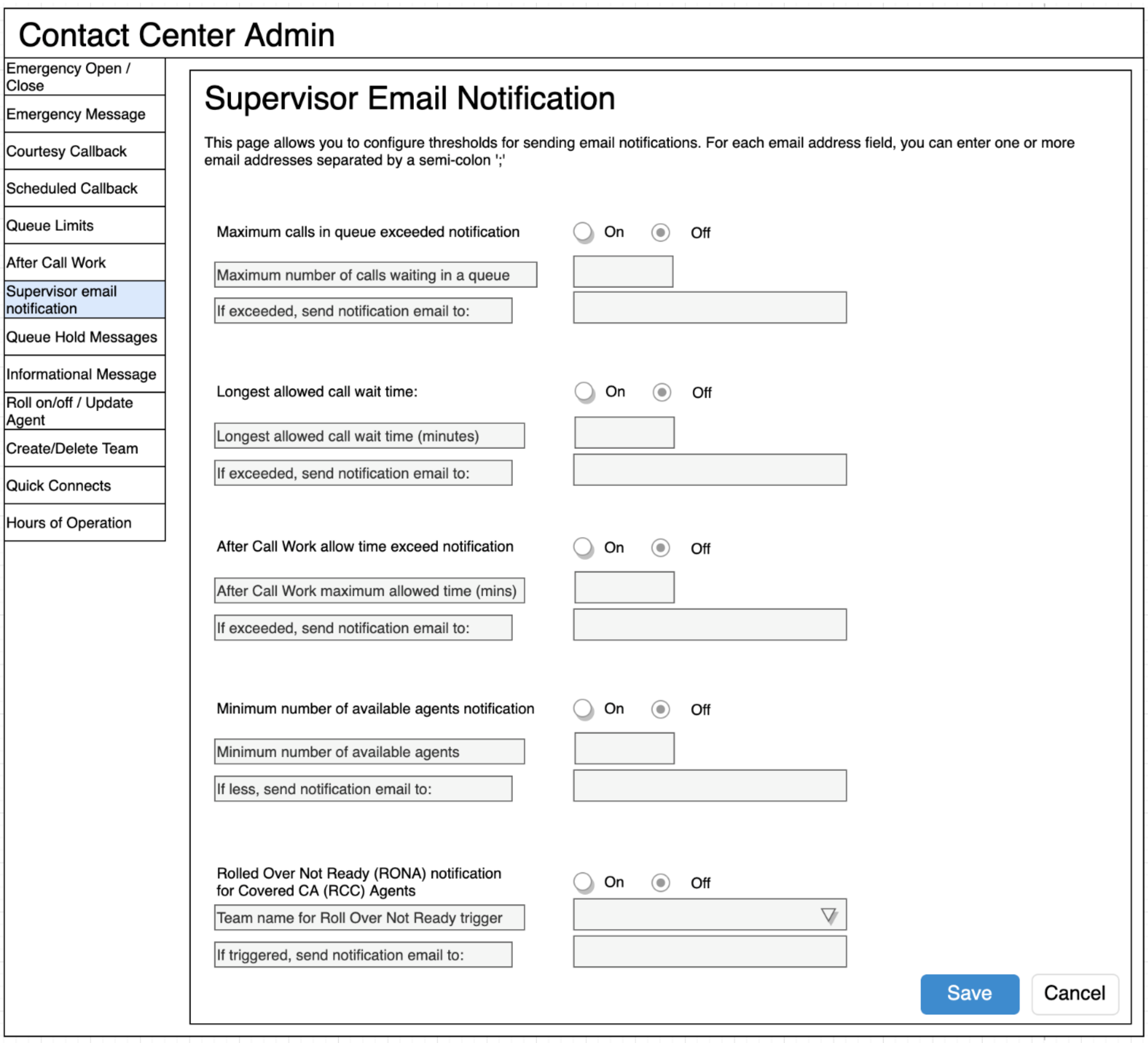


Figure 50 Supervisor Email Notification - Notifications Off

2.12.2.2 Supervisor Email Notification – all notifications off

1. User opens the Supervisor Email Notification page.
2. Configurable values for each notification are disabled unless the notification is enabled.

3. If user turns 'on' a notification, the configurable values for that notification are enabled. See details in following page mock ups and page flows.

2.12.2.3 Supervisor Email Notification – selective notifications on, page mockup

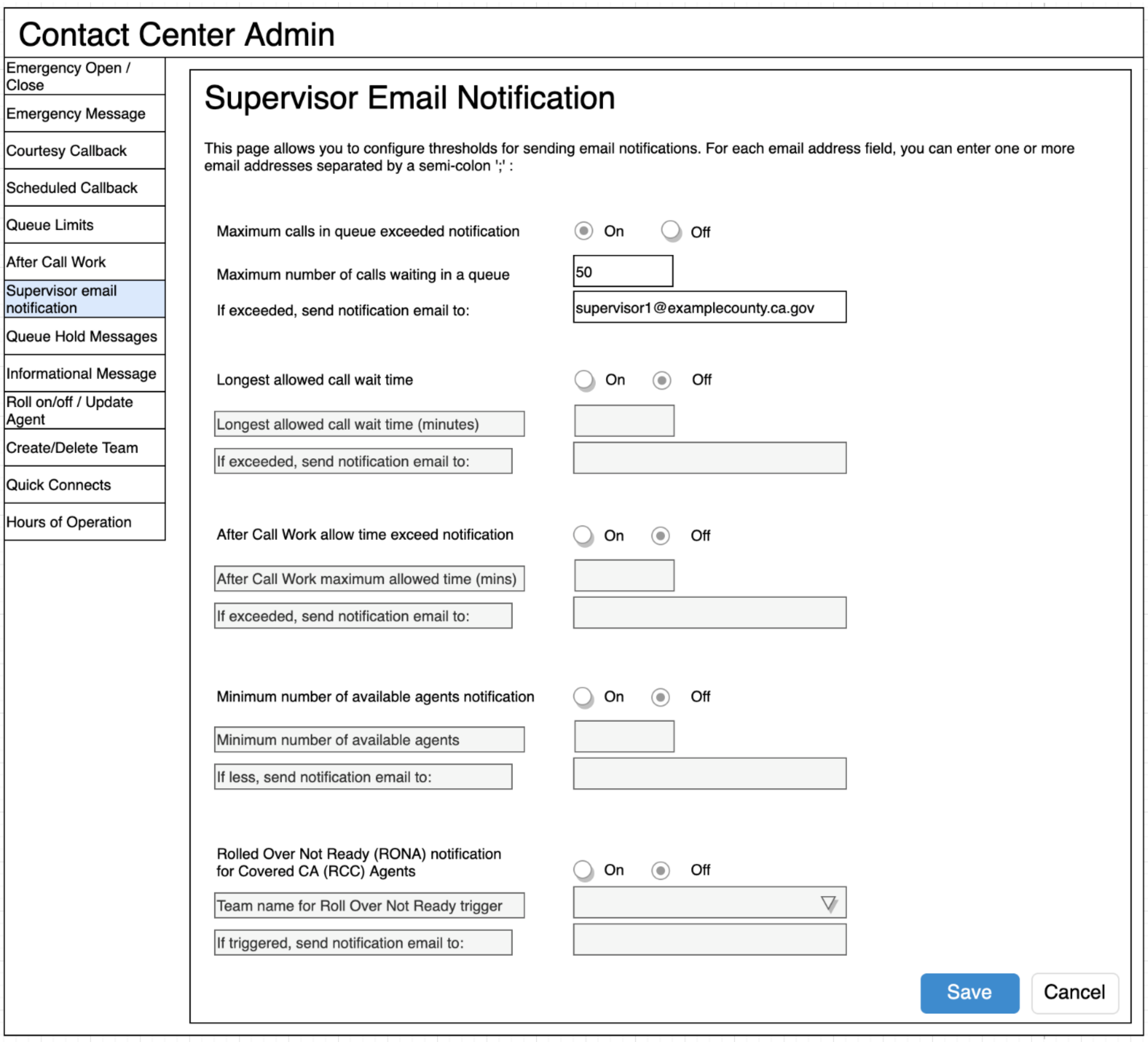


Figure 51 Supervisor Email Notification - one enabled notification

2.12.2.4 Supervisor Email Notification – selective notifications on

1. When the user enables a notification option, the configurable values are enabled.

2. The page mockup shows the 'Maximum calls in queue' notification is enabled and the 'Maximum number of calls waiting in queue' and 'If exceeded, send notification to' entry fields are enabled.
3. User enters values for 'Maximum calls in queue' and 'If exceeded, send notification to' email field. The user can enter multiple email addresses separated by a semi-colon (';'). For example: *admin1@county1.ca.gov; admin2@county1.ca.gov*

4. If other notifications are enabled, valid values and ranges are defined in the following table "Valid values for notification options"
5. If user presses 'Save', the changed values are saved.
6. If the user presses 'Cancel', all changed values are discarded. The currently configured values for enabled notifications are displayed. No actions are taken.

2.12.2.5 Supervisor Email Notification – Valid values for notification options

Configurable option / Email trigger threshold	Email trigger event	Unit type / value	Minimum valid value	Maximum valid value
Maximum number of calls waiting in queue	Number of calls in queue exceeds the specified value	Integer	1	500
Longest allowed call wait time	Any queue waiting in queue exceeds the specified value	Integer, minutes	1	480
After Call Work maximum allowed time	Any agent spending longer than specified value on 'After Call Work'	Integer, minutes	5	480
Minimum number of available agents	When number of available agents is less than the	Integer	1	500

	specified value			
Covered CA (RCC) Agents that is enabled for monitoring the 'Rolled Over Not Ready' state	If Covered CA agent in team becomes 'Rolled Over Not Ready' for then email notification is sent	Name of team	n/a	n/a

2.12.2.6 Supervisor Email Notification – all notifications enabled, page mockup

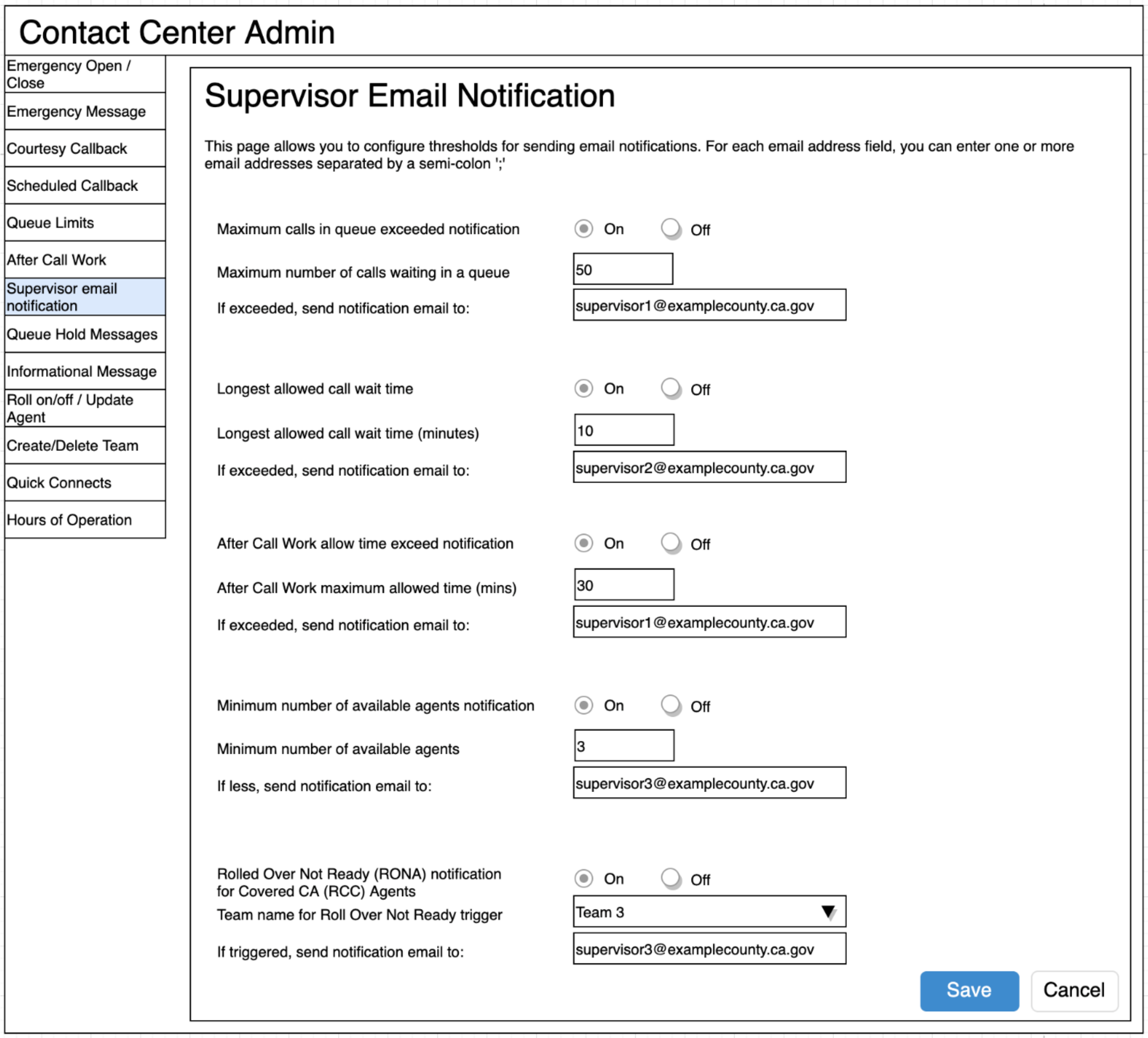


Figure 52 Supervisor Email Notification - all notifications enabled

2.12.2.7 Supervisor Email Notification – all notifications enabled

1. If all notification options are enabled, the user can enter and/or change all values for all listed notifications.
2. If user presses ‘Save’, changes are saved.
3. If the user presses ‘Cancel’ any changes are discarded. The displayed values are reverted back to their original saved values.

2.12.2.8 Notification Email Template

When a threshold is exceeded, the system sends a notification email to each listed email address for that metric.

Each email notification template is customizable for each County by the CalSAWS Contact Center operations team.

The emails sent will use the following template:

Email from: cc.support@calsaws.org
Email to: [list of contact emails for this notification type]
Subject: Contact Center Supervisor Notification: [Notification threshold name]
This is a system generated email to notify you that [Notification threshold name] was exceed at [date/time].
[Additional detail for specific threshold]

Where applicable, each notification can include an additional line of detail. For example, for the 'Maximum calls in queue' notification, an additional line of detail is included:

The Maximum Calls in Queue limit is currently 50. Queue name [example-queue-name] currently has 52 calls in queue.

2.12.2.9 Assumptions

1. The supported mechanism for sending the notification is via an email to the configured list of email addresses for each of the configured thresholds. There are no other supported alert mechanisms.
2. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.13 Create/Delete/Edit Team

2.13.1 Overview

The Create/Delete/Edit Team page allows an Admin user to create and delete teams (groups of Contact Center Agents and Admins).

Adding and removing Agents to/from teams is performed using the Roll-on/off Agent edit page (not using the Create/Delete/Edit Teams page).

2.13.2 Description of Changes

2.13.2.1 Create/Delete/Edit Team – No teams defined page mockup

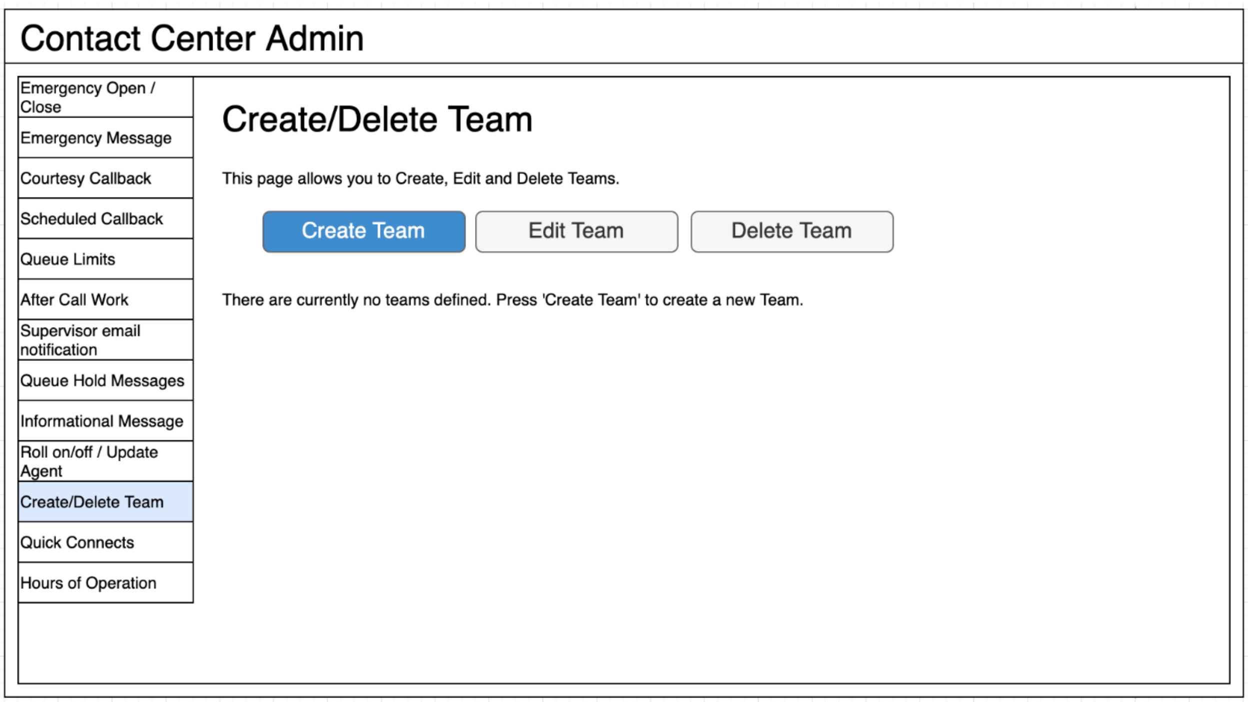


Figure 53 Create/Delete Team = no teams defined

2.13.2.2 Create/Delete/Edit Team – No teams defined

1. If there are no teams currently defined, a message is displayed "There are currently no teams defined. Press 'Create Team' to create a new team".
2. The 'Create Team' button is enabled.
3. The 'Edit Team' button is disabled.
4. The 'Delete Team' button is disabled.
5. If the user presses the 'Create Team' button, the 'Create New Team' dialog is displayed. See following section for page mockup and page flow.

2.13.2.3 Create/Delete/Edit Team – Teams defined page mockup

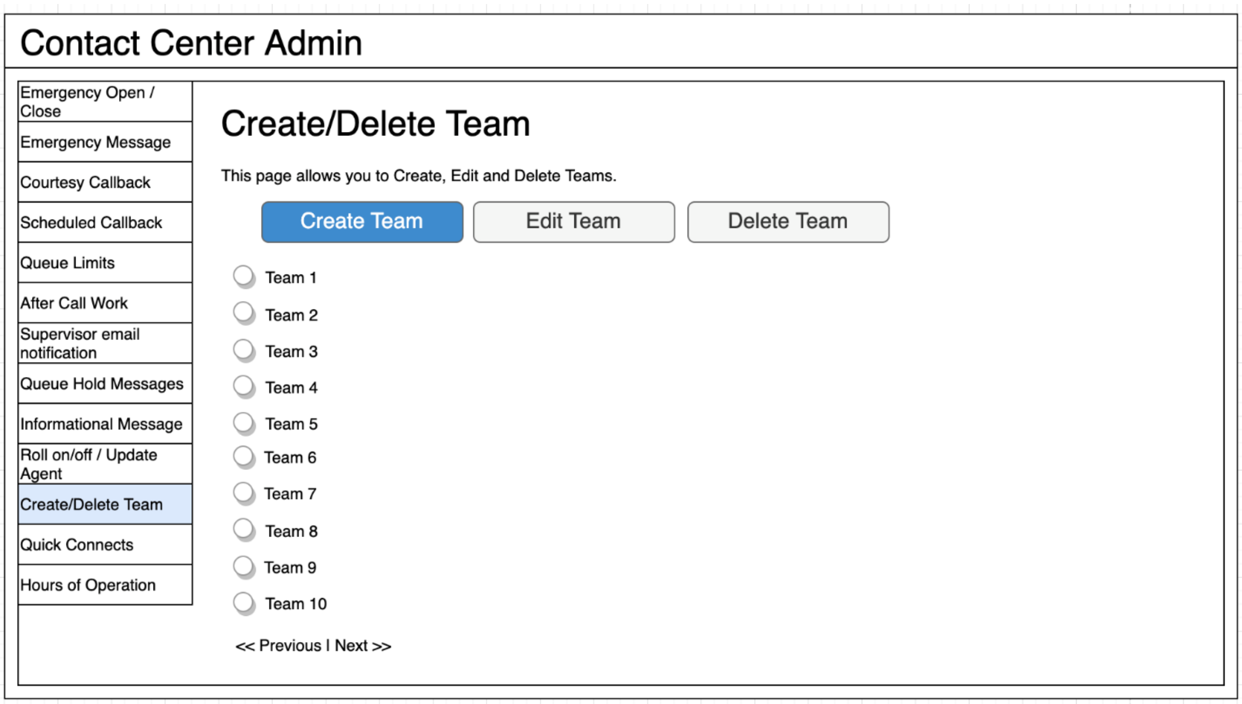


Figure 54 Create/Delete Team = teams defined

2.13.2.4 Create/Delete/Edit Team – Teams defined

1. Teams currently defined are listed on the page, up to 10 at a time.
2. The maximum number of teams per County is 250.
3. If there are more than 10 teams to display, "<< Previous" and "Next >>" pagination buttons are displayed at the bottom of the page.
4. If the user is on the first page, the "<< Previous" link is disabled.
5. If the user is on the last page, the "Next >>" link is disabled.
6. If there are teams to show before and after the current page of Teams, both links are enabled.

2.13.2.5 Create/Delete/Edit Team – Create Team page mockup

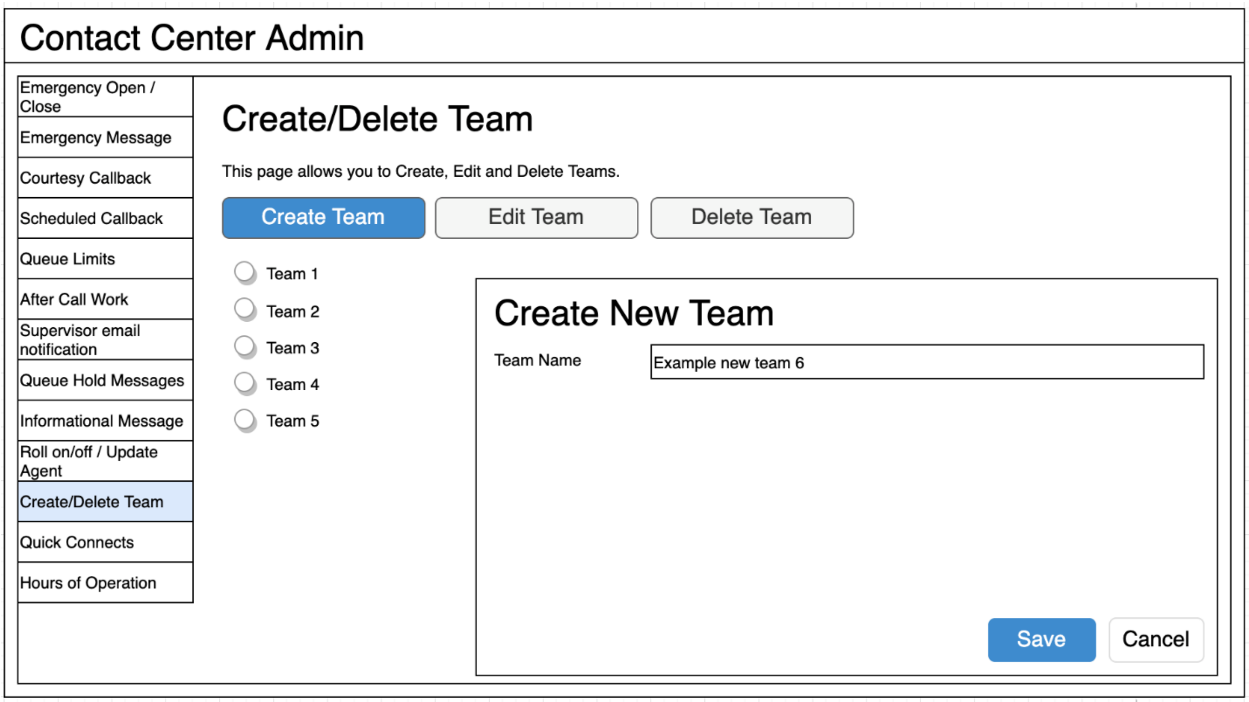


Figure 55 Create/Delete Team - Create New Team

2.13.2.6 Create/Delete/Edit Team – Create Team

1. User can add new teams up to a maximum of 250 per County.
2. If there are less than 250 teams defined for the current County and the user presses the 'Create Team' button, the Create New Team dialog is displayed,
3. User enters name for the new team, up to 60 alphanumeric characters.
4. If user presses the 'Save' button, the new team is created. The Create New Team dialog closes, and the displayed list of teams is updated to display the new team.
5. If the user pressed the 'Cancel' button, the Create New Team dialog is closed and no action is taken.

2.13.2.7 Create/Delete/Edit Team – Edit Team page mockup

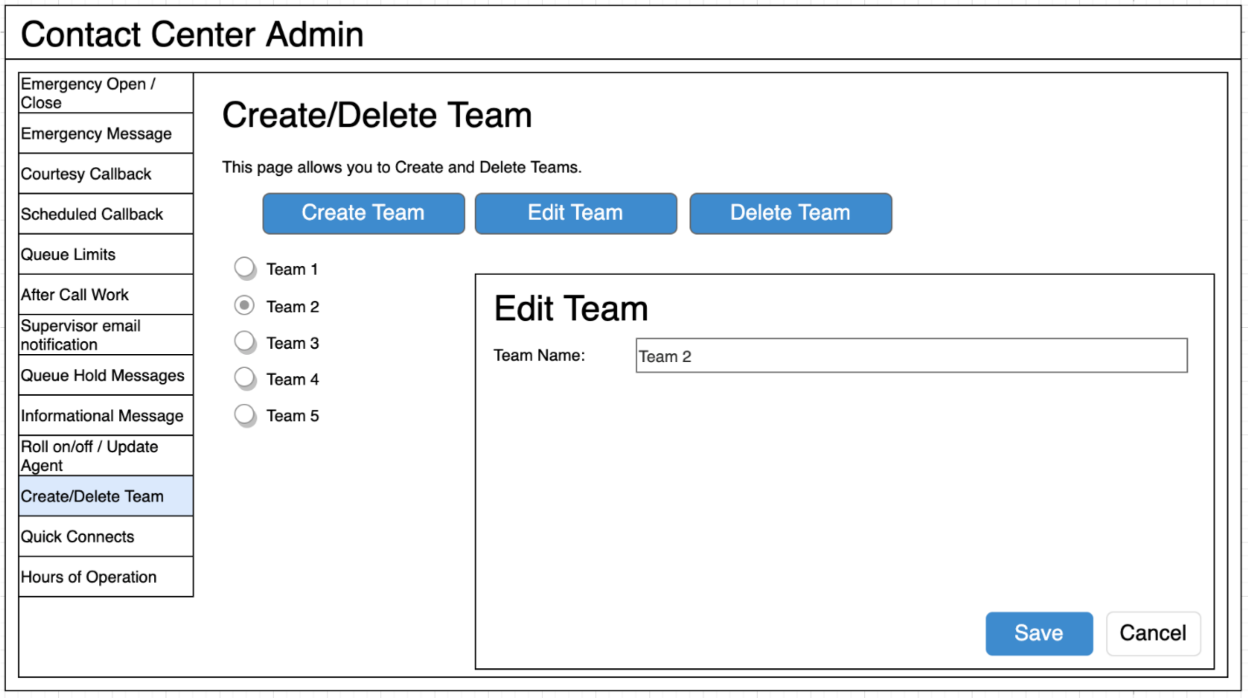


Figure 56 Create/Edit/Delete Team - Edit Team page

2.13.2.8 Create/Delete/Edit Team – Edit Team

1. If the user selects a team from the displayed list of teams and presses the 'Edit Team' button, the 'Edit Team' dialog is displayed.
2. The user can edit and change the current name for this team.
3. If the user presses the 'Save' button, any changes are saved and the dialog is closed.
4. If the user presses the 'Cancel' button, any changes are discarded and the dialog is closed.

2.13.2.9 Create/Delete/Edit Team – Delete Team page mockup

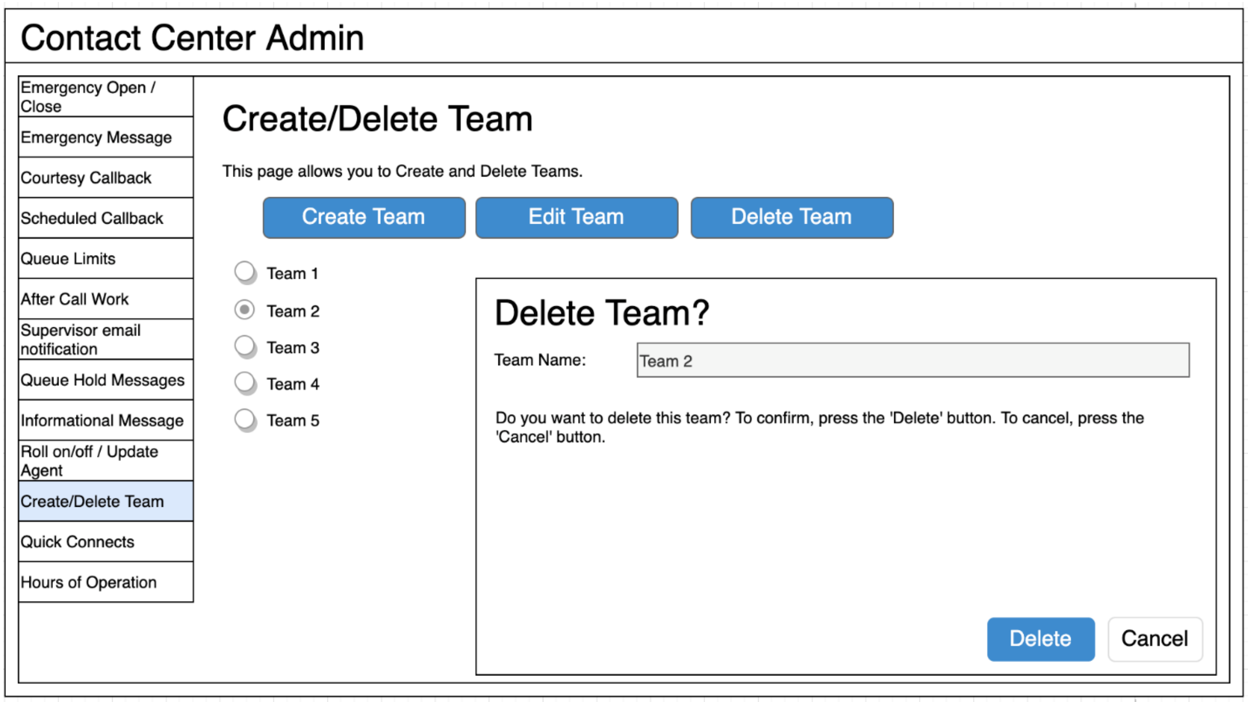


Figure 57 Create/Delete Team - Delete Team

2.13.2.10 Create/Delete/Edit Team – Delete Team

1. User selects a team to delete by pressing the radio button next to the team, and presses the 'Delete Team' button. The Delete Team dialog is displayed.
2. The Delete Team dialog asks the user to confirm deletion of the selected team.
3. If the user presses 'Delete':
    a. The team is deleted. The dialog closes and the displayed team list is updated to remove the deleted team.
    b. County staff that were assigned to the team are unassigned from the deleted team.
4. Deleting a team is permanent. To add back a team, the Admin user creates a new team following the page flow in section 2.13.2.6.

2.14 Quick Connects

2.14.1 Overview

The Quick Connects page allows the Admin user to maintain the list of available Quick Connects for their County.

To use a Quick Connect, it must be associated with a queue. This page also allows the user to assign and remove Quick Connects from one or more queues.

2.14.2 Description of Changes

Add a new panel to the Administration page that allows the Admin user to list, add, edit and delete available Quick Connects.

2.14.2.1 Quick Connects – no Quick Connects defined mockup

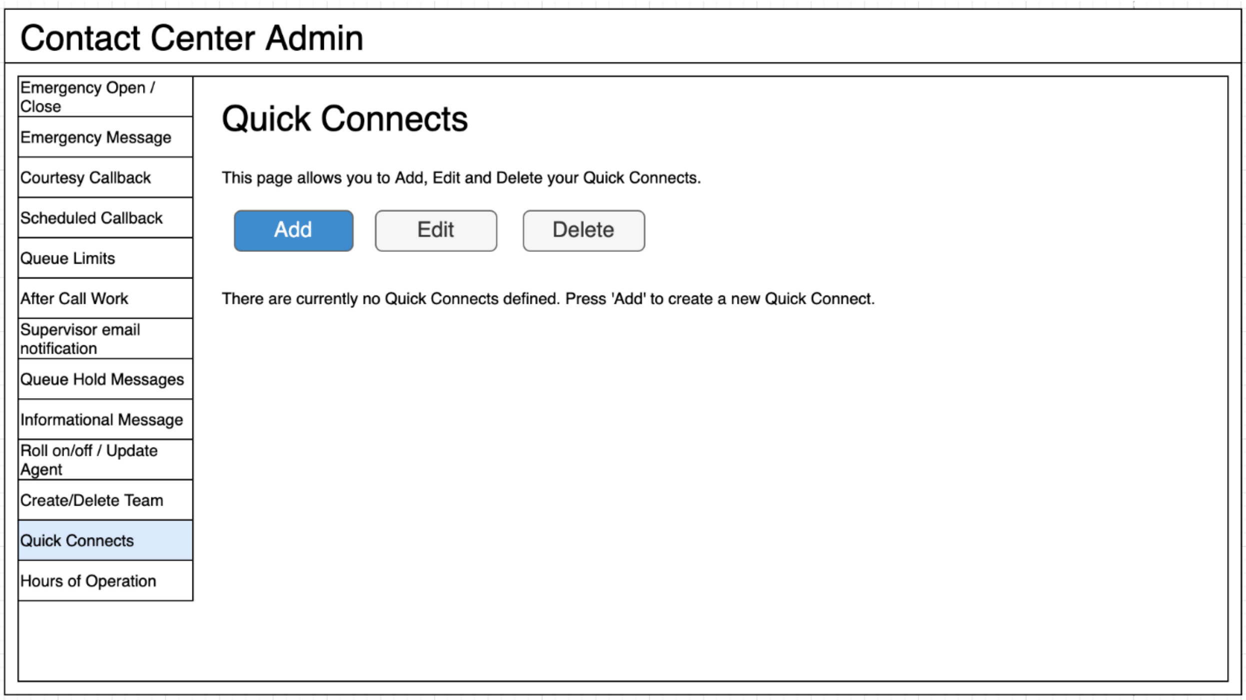


Figure 58 Quick Connects: No connects defined mockup

2.14.2.2 Quick Connects – No Quick Connects defined

1. If there are no Quick Connects currently defined, a message is displayed "There are currently no Quick Connects defined. Press 'Add' to create a new Quick Connect".
2. The 'Add' button is enabled.
3. The 'Edit' button is disabled.
4. The 'Delete' button is disabled.
5. If the user presses the 'Add' button, the 'Add New Quick Connect' dialog is displayed. See following sections for page mockup and page flow.

2.14.2.3 Quick Connects – Quick Connects defined mockup

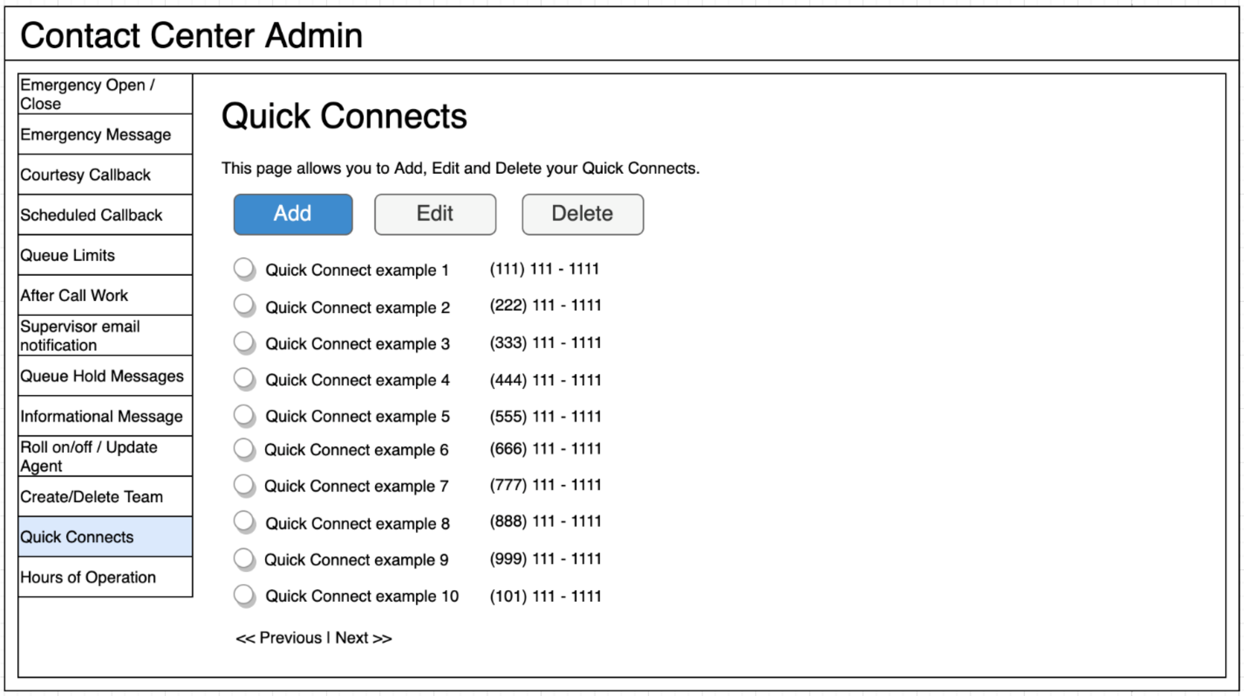


Figure 59 Quick Connects: Quick Connects defined mockup

2.14.2.4 Quick Connects – Quick Connects defined

1. Currently defined Quick Connects are listed on the page, up to 10 at a time.
2. Quick Connects are displayed in alphabetical ascending order by the Name.
3. The maximum number of Quick Connects per County is 100.
4. If there are more than 10 Quick Connects to display, "<< Previous" and "Next >>" pagination buttons are displayed at the bottom of the page.
5. If the user is on the first page, the "<< Previous" link is disabled.
6. If the user is on the last page, the "Next >>" link is disabled.
7. If there are Quick Connects to show before and after the current page of Teams, both links are enabled.

2.14.2.5 Quick Connects – add new Quick Connect mockup showing Quick Connect type

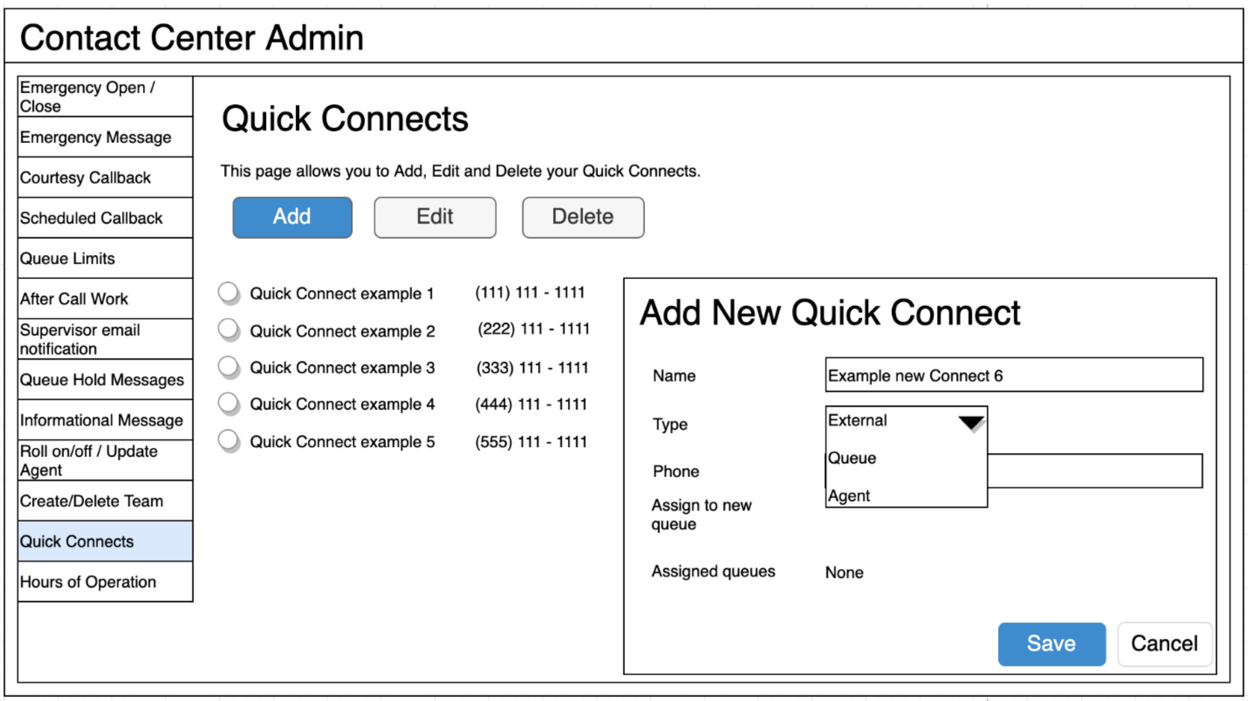


Figure 60 Quick Connects: Add new Quick Connect type dropdown menu

2.14.2.6 Quick Connects – add new Quick Connect - External type mockup

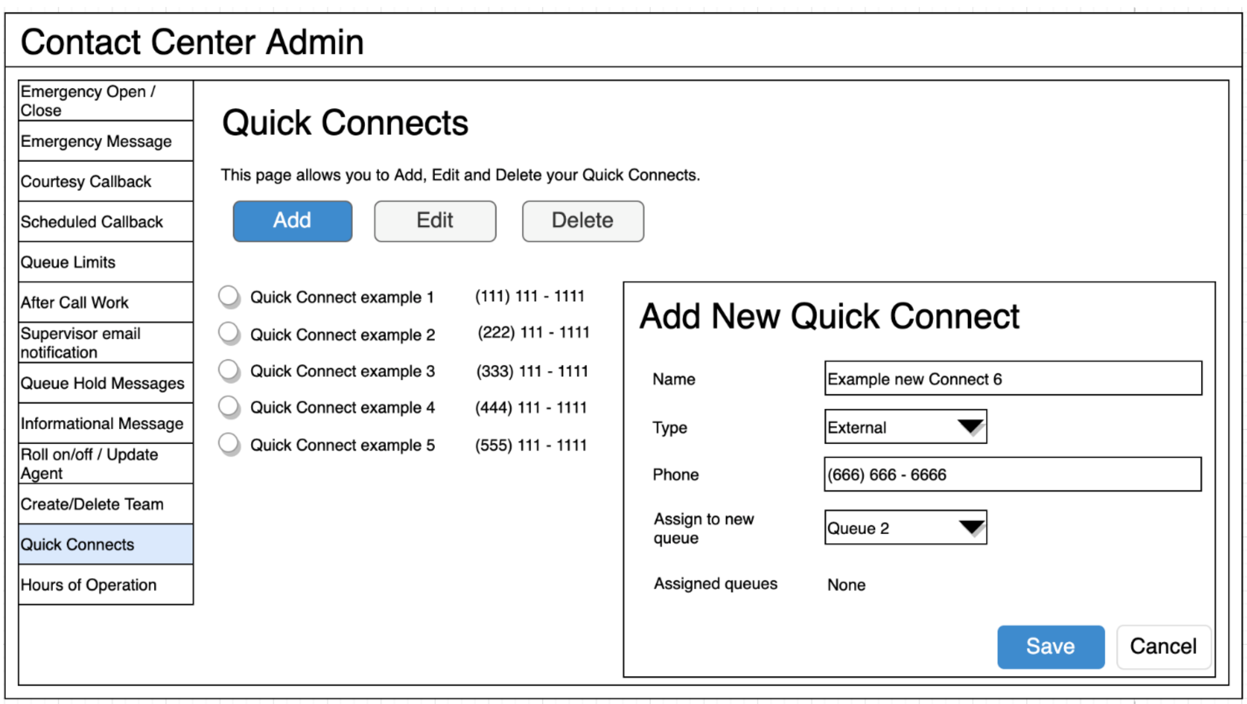


Figure 61 Quick Connects: Add new Quick Connect - External type

2.14.2.7 Quick Connects – add new Quick Connect - Queue type mockup

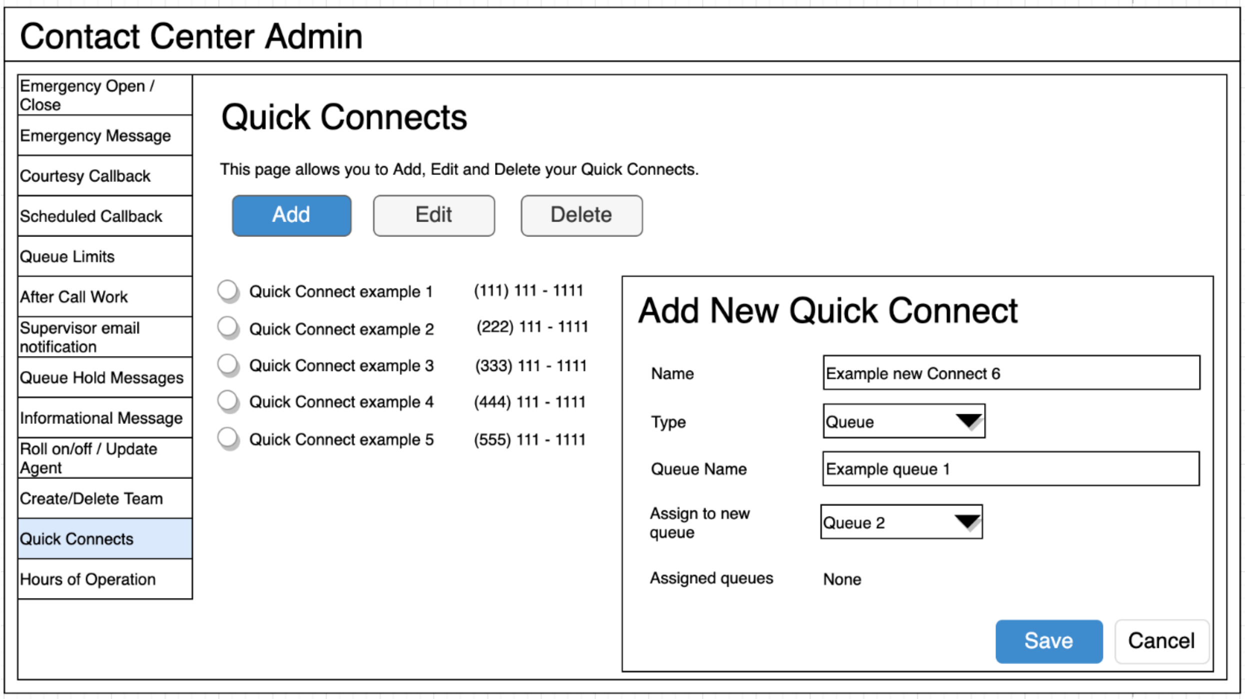


Figure 62 Quick Connects: Add new Quick Connect - Queue type

2.14.2.7 Quick Connects – add new Quick Connect - Agent type mockup

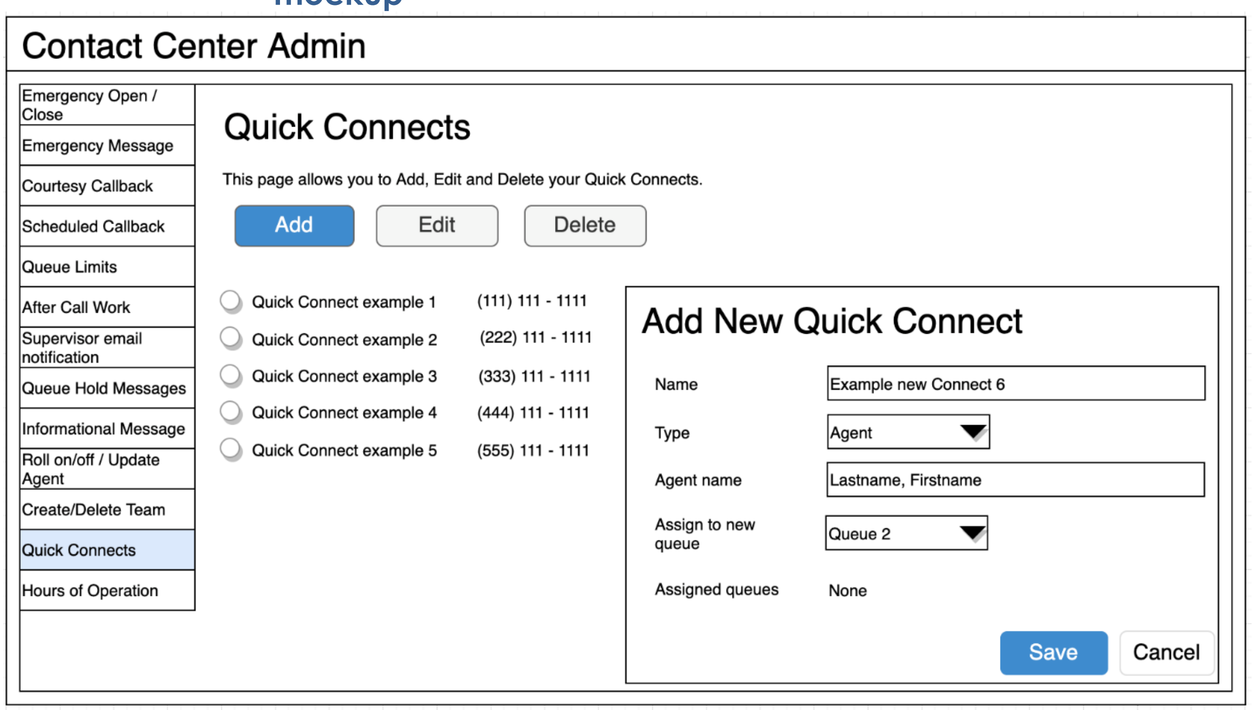


Figure 63 Quick Connects: Add new Quck Connect - Agent type

2.14.2.8 Quick Connects – add new Quick Connect – assign to new queue mockup

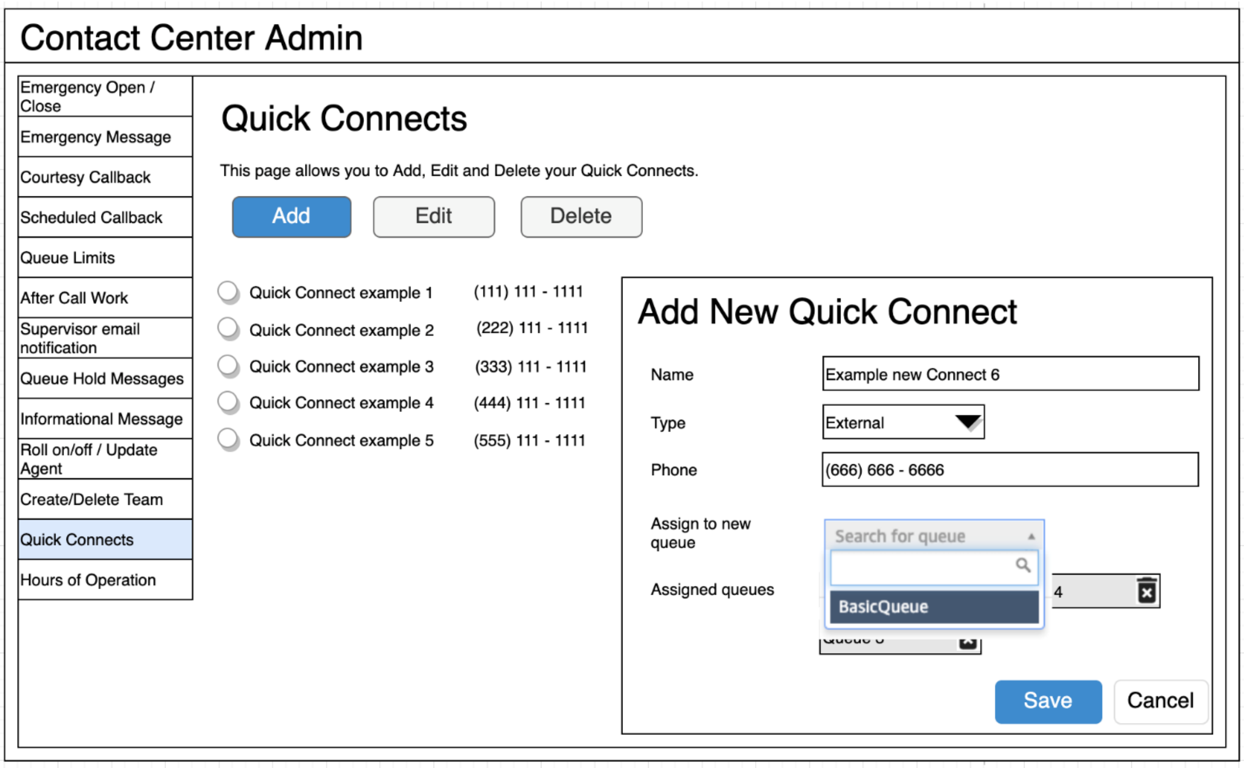


Figure 64 Quick Connects - assign to new queue mockup

2.14.2.9 Quick Connects – add new Quick Connect

1. User can add new Quick Connects up to a maximum of 100 per County.
2. If there are less than 100 Quick Connects defined for the current County and the user presses the 'Add' button, the Add New Quick Connect dialog is displayed.
3. User enters name for the new Quick Connect, up to 60 alphanumeric characters.
4. There are 3 types of Quick Connect that can be defined. The Admin user selects the Quick Connect type with the 'Type' dropdown that shows the 3 options:
   a. External: to transfer a caller to another phone number
   b. Agent: to call another Agent within the Contact Center
   c. Queue: to transfer the caller to a specific queue.
5. If the user selects 'External' type, the following input options are displayed (shown in Figure 61)
   a. Phone – the phone number to transfer the caller to

   b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
6. If the user selects ‘Queue’ type, the following input options are displayed (shown in Figure 62)
   a. Queue Name – the Queue Name callers are transferred to when this Quick Connect is used
   b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
7. If the user selects ‘Agent’ type, the following input options are displayed (shown in Figure 63)
   a. Agent Name – the Agent the caller is transferred to when this Quick Connect is used
   b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
8. The ‘Assign to new Queue’ field is a searchable dropdown list. The displayed list of queues is filtered by the characters typed into the field. For example, if the user types ‘A’ the displayed list is updated to list Queue Names beginning with ‘A’.
9. When a Queue Name is selected from the list it is displayed in the list of associated queue names underneath the field.
10. If user presses the ‘Save’ button, the new Quick Connect is created. The Add New Quick Connect dialog closes, and the displayed list of Quick Connects is updated to display the newly added Quick Connect.
11. If the user pressed the ‘Cancel’ button, the Add New Quick Connect dialog is closed and no action is taken.

Each Quick Connect must be assigned to a queue. When Agents using the Enhanced CCP select to transfer a call using a Quick Connect, they are shown a list of Quick Connects assigned to the current queue they are working. Selecting the Quick Connect will then transfer the caller to either the external number, a queue, or another Agent, depending on the Quick Connect type.

2.14.2.9 Quick Connects – edit Quick Connect mockup

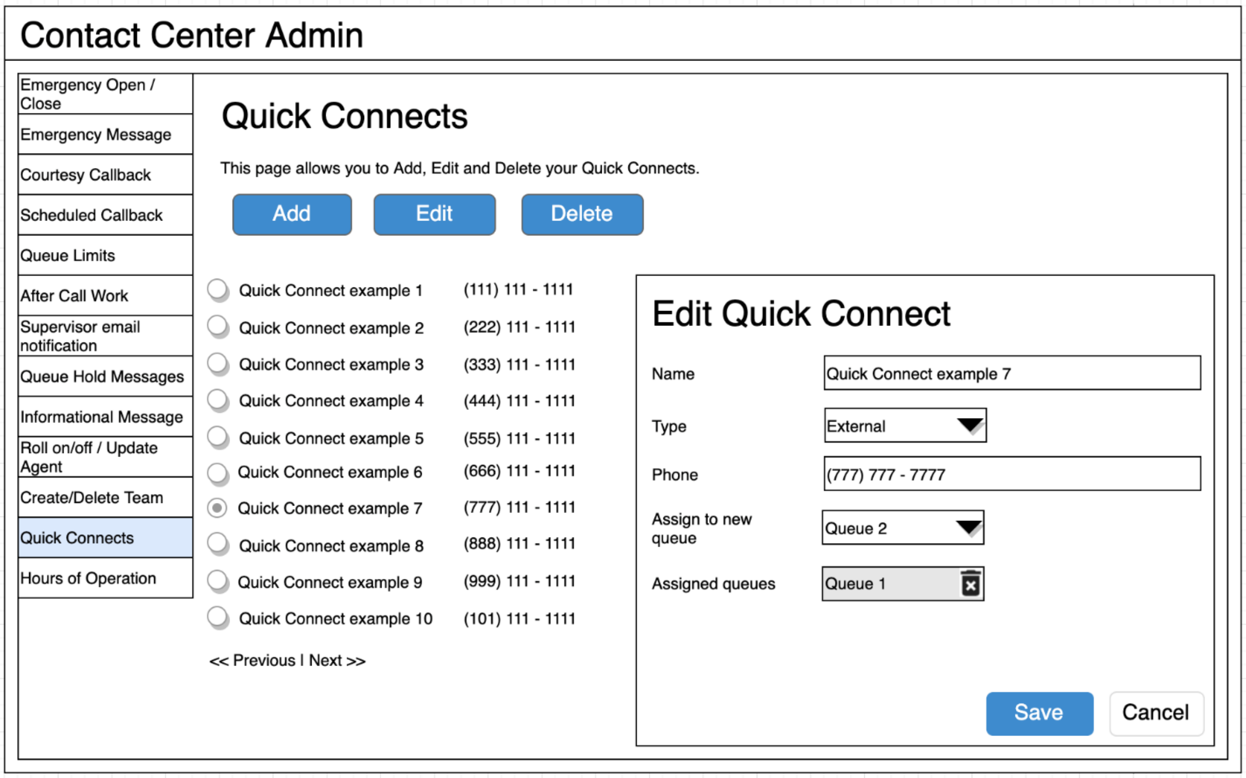


Figure 65 Quick Connects: Edit Quick Connect mockup

2.14.2.11 Quick Connects – edit Quick Connect

1. If the user selects a Quick Connect from the displayed list of Quick Connects and presses the 'Edit' button, the 'Edit Quick Connect' dialog is displayed.
2. The user can edit and change the current name and the Quick Connect type. If the Quick Connect type is changed, the displayed fields are updated to display the relevant fields for that type (as described in the Add New Quick Connect section).
3. The user can add and remove the Queues this Quick Connect is assigned to by selecting new Queues from the dropdown. To remove the association with a queue, the user presses the 'X' icon beside the queue name to delete the association to that queue.
4. If the user presses the 'Save' button, any changes are saved and the dialog is closed.
5. If the user presses the 'Cancel' button, any changes are discarded and the dialog is closed.

2.14.2.10 Quick Connects – delete Quick Connect mockup

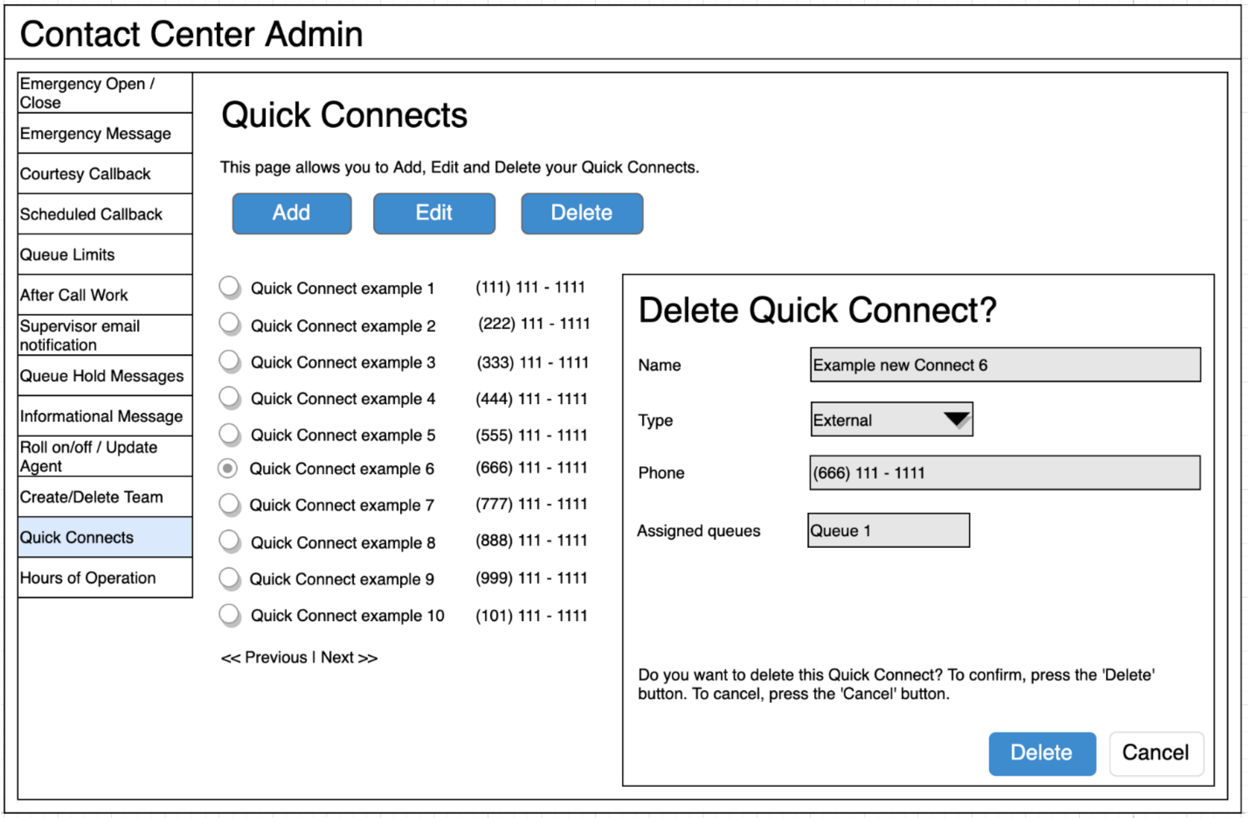


Figure 66 Quick Connects: delete Quick Connect mockup

2.14.2.13 Quick Connects – delete Quick Connect

1. User selects a Quick Connect to delete by pressing the radio button next to the name, and presses the 'Delete' button. The Delete Quick Connect dialog is displayed.
2. The Delete Quick Connect dialog asks the user to confirm deletion of the selected Quick Connect.
3. If the user presses 'Delete':
   a) The Quick Connect is deleted. The dialog closes and the displayed list is updated to remove the deleted Quick Connect.
4. Deleting a Quick Connect is permanent. To add back a Quick Connect, the Admin user can add a new Quick Connect following the page flow in section 2.14.2.6.

2.14.3 Assumptions

1. The maximum number of Quick Connects per County (per AWS Connect instance) is currently limited to a maximum of 100. This is an AWS Connect limitation.
2. This functionality will be enabled for RCC

2.15 Display Office Hours

2.15.2 Overview

This page displays the currently configured Hours of Operation for the current user's County. The page displays four tabs the include times and dates for:

- Contact Center office hours
- Holidays
- RCC office hours
- RCC holidays

2.15.3 Description of Changes

Add a new panel to the Admin Page that displays the currently configured Hours of Operation.

This page is display only; the values cannot be changed.

2.15.3.9 Hours of Operation mockup: Office hours

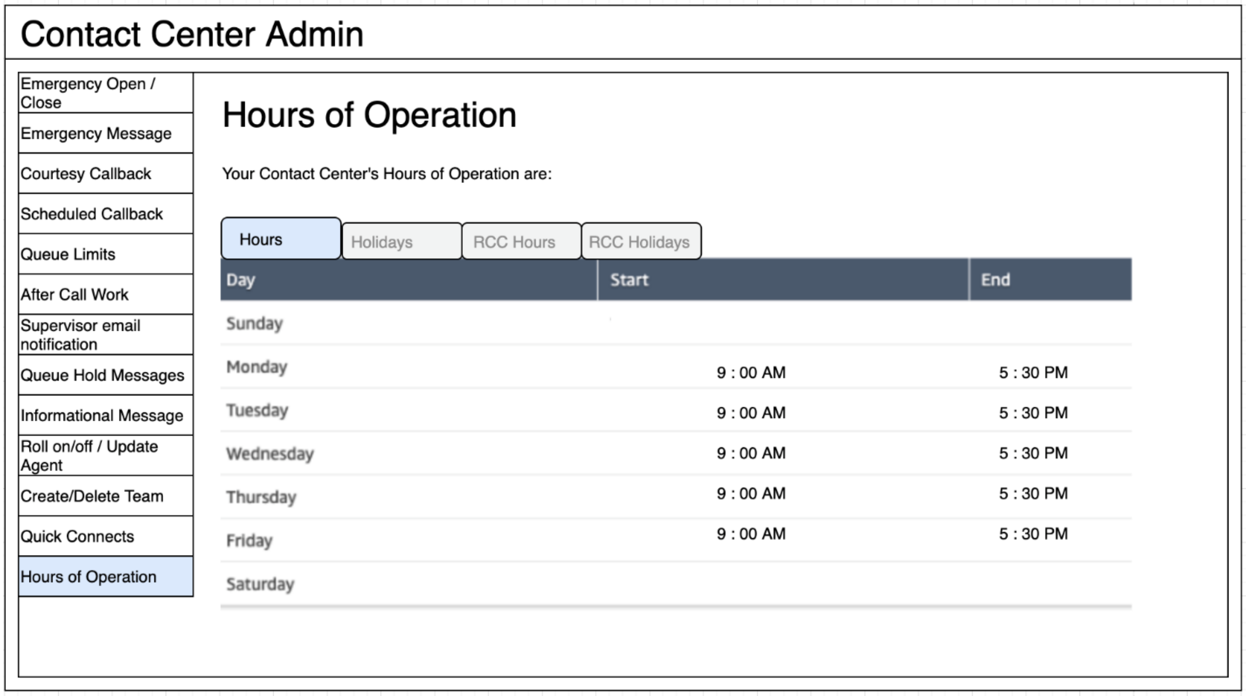


Figure 67 Hours of Operation mockup

2.15.3.10 Hours of Operation

The Hours of Operation panel on the Admin page displays currently configured Hours of Operation for each day of the week.

If the Contact Center is closed for a specific day, the Start and End times are shown as blank.

2.15.3.11 Hours of Operation mockup: Holidays

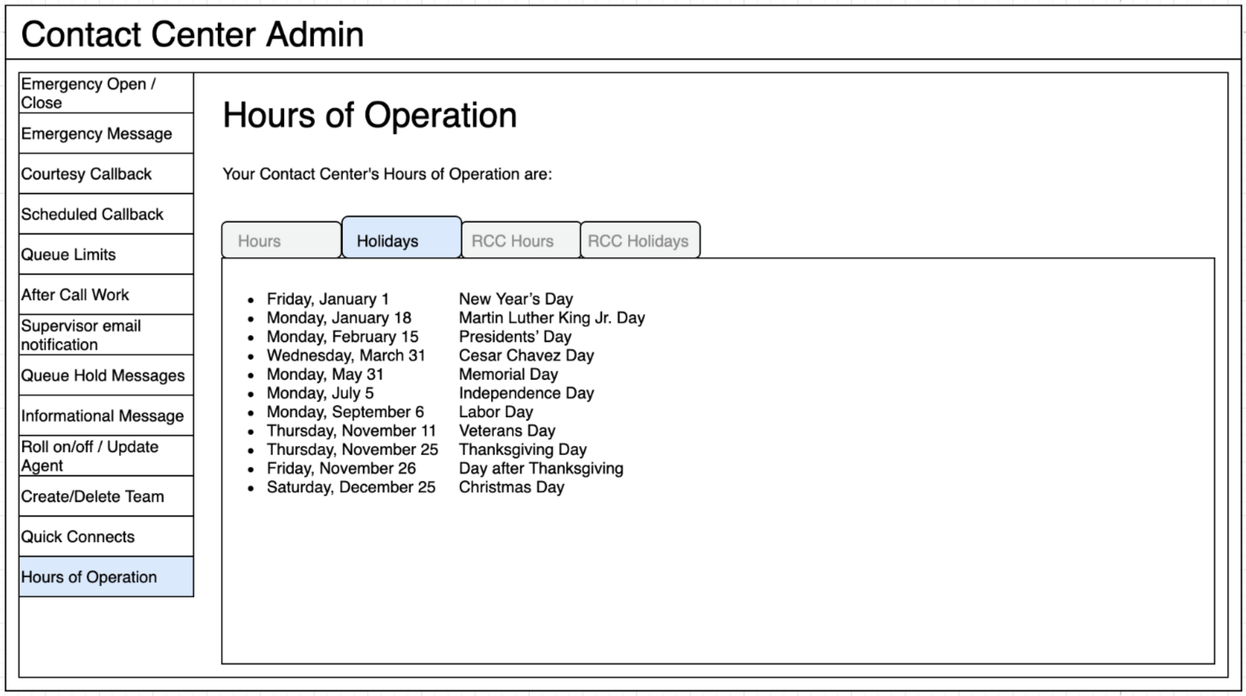


Figure 68 Hours of Operation: Holidays

2.15.3.12 Hours of Operation: Holidays

The holidays tab shows the county holiday dates observed for the current calendar year.

2.15.3.13 Hours of Operation mockup: RCC Hours

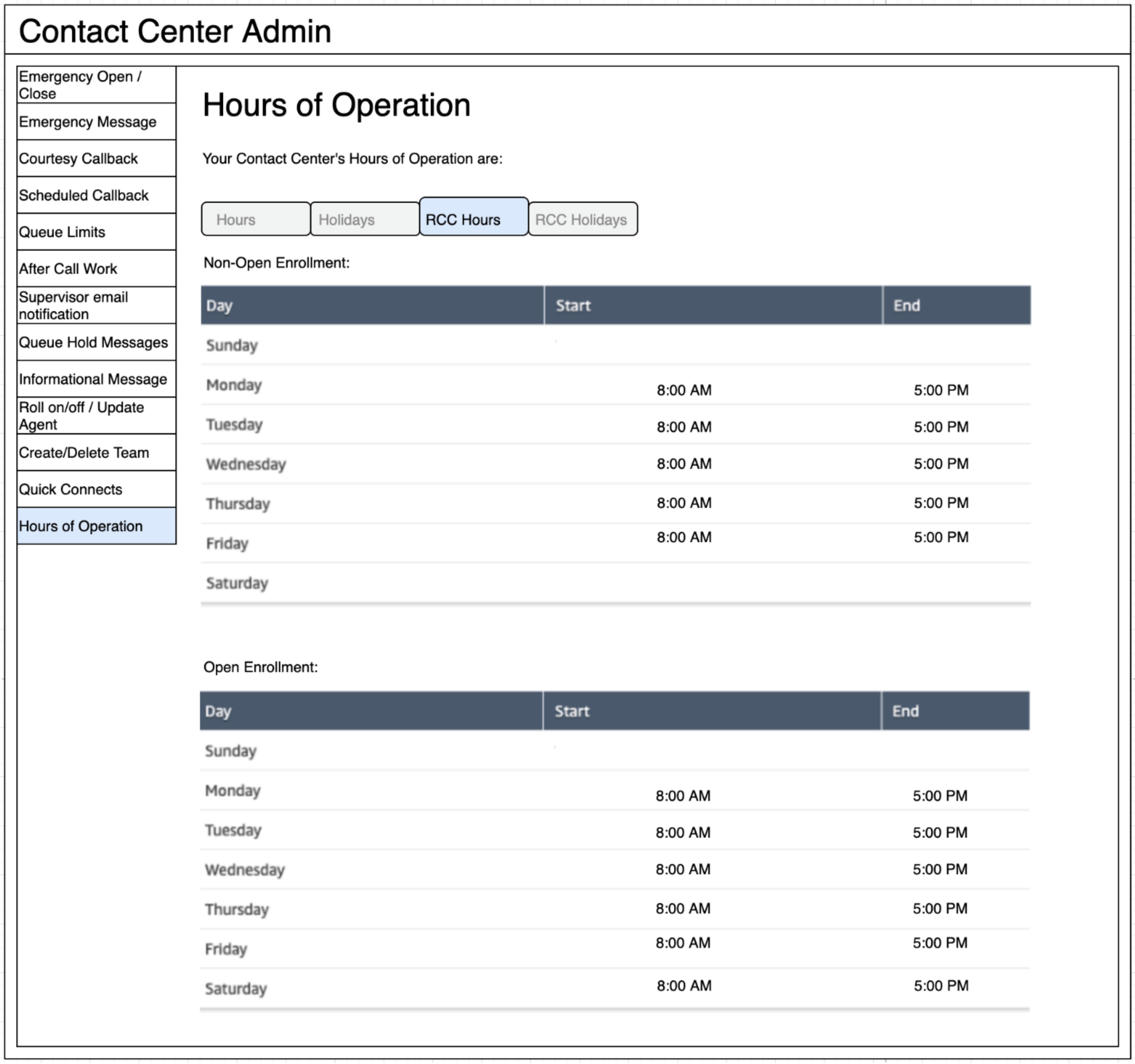


Figure 69 Hours of Operation: RCC Hours

2.15.3.14 Hours of Operation: RCC Hours

The RCC hours tab shows the office hours for Regional Call Centers, for during Open Enrollment and non-Open Enrollment.

2.15.3.15 Hours of Operation mockup: RCC Holidays

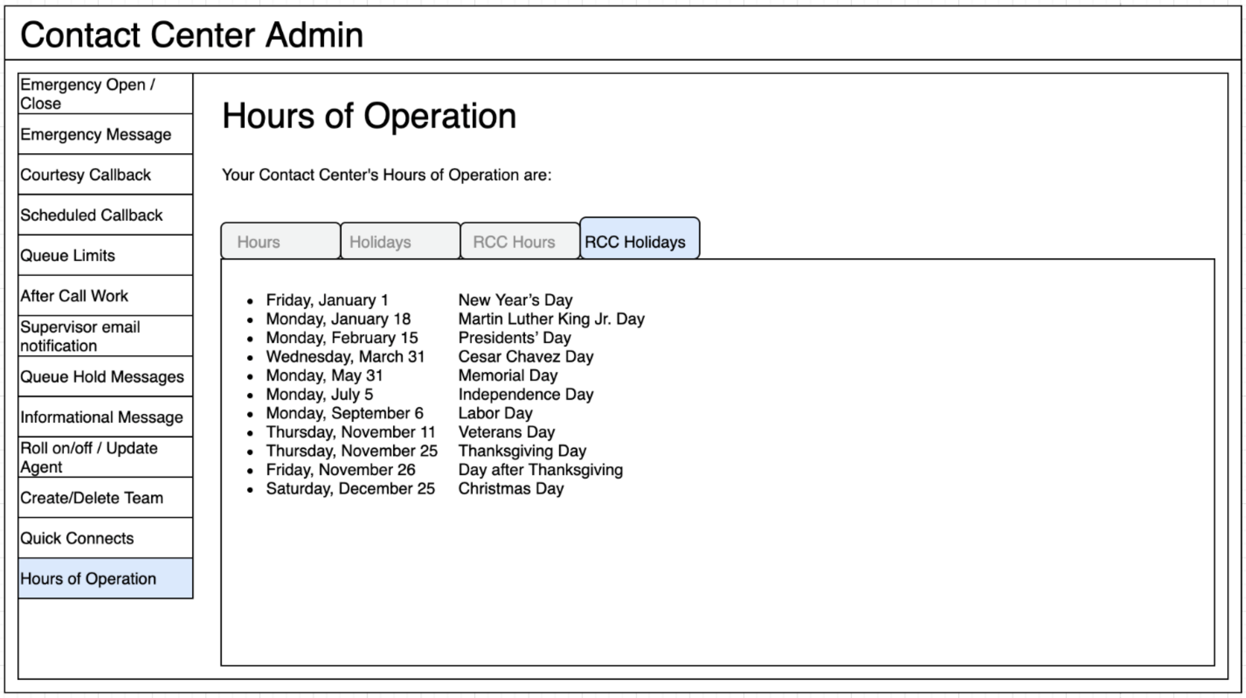


Figure 70Hours of Operation: RCC Holidays

2.15.3.16 Hours of Operation: RCC Holidays

The RCC Holidays tab shows holiday dates for the Regional Call Centers.

2.15.4 Assumptions

1. AWS Connect currently only supports APIs to retrieve Hours of Operation but not to update, therefore this page is only display only. Normal Contact Center Operations processes will be used to request a change to the current hours.
2. This page is enabled for RCC

2.16 Configuration Change Audit

2.16.2 Overview

The Administration pages allow an Admin user to change important configuration options for the Contact Center. Each time any of these features are changed, the changes are logged to an Audit database to ensure there is an audit trail.

This feature is included for each of the Administration page features described in the previous sections.

2.16.3 Description of Changes

1. Build a shared service that logs Administration page configuration changes to a single database.
2. Each time a user makes a change, for example, uses the Emergency Open/Close page to perform an Emergency Close or Open, the following fields are logged to the Audit database:
    a. CalSAWS User Id for user who made the change
    b. Date/timestamp of change
    c. Type of Change
    d. Changed value

Valid combinations of Type of Change and Changed Value are:

Type of Change	Changed Value – valid options	Additional values
Emergency Open/Close	Open Close	None
Queue Hold Message	Message added Message deleted Message edited	Message id
Courtesy Callback	Enabled Disabled Minutes changed Time slot range changed	None
Scheduled Callback	Enabled Disabled Time slot added Time slot deleted Callbacks changed	None
Queue Limits	Queue length changed	None
After Call Work Limit	Limit changed	None
Roll-on / Roll-off	Search performed Agent updated Roll-on agent Roll-off agent	Search value Agent id
Emergency Message	Message added Message deleted	Message id

	Message edited Current message changed	
Informational Message	Message added Message deleted Message edited Current message changed	Message id
Supervisor Email Notification	Notification enabled Notification disabled Notification email changed	Changed email address
Create/Delete Team	Create new team Edit team name Delete team	Team id
Quick Connects	Add new Quick Connection Edit Quick Connect Delete Quick Connect	Quick Connect id / name

3. SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1		Contact Center Functional Design Session for Administration Page	Revised CC FDS_Administration Page.docx
2			
3			
4			

4. REQUIREMENTS

4.14 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2222	The CONTRACTOR shall configure the Customer Service Center solution to allow supervisors to configure triggers which send them an email notification when certain supervisor-specified conditions (e.g., ten calls waiting) are met. Supervisor-specified conditions are as follows: - Number of calls waiting in queue - Longest wait time for a call in a queue - After Call Work state time limit for an agent - Number of agents available to take calls - Agent Rolled Over Not Ready (RONA) state This is County configurable through the administration page.	Section 2.12: Supervisor Email Notification configuration through Administration page
2284	The CONTRACTOR shall configure the Customer Service Center solution to allow a customer to request a scheduled callback if calling outside of the counties configured hours of operation or if the max queue limit has been reached in the queue. This is County configurable through the administration page.	Section 2.6: Scheduled Callback configuration through Administration page Section 2.7: Queue Limit configuration through Administration page
2169/2291	The CONTRACTOR shall provide operational configurability, multi-tenant access to Counties for additional support of functionality within CalSAWS. Multi-tenant access is defined in the following: The Counties will be responsible for the management of the following:	Agent Routing Profiles: - Section 2.9: Routing profile is configured for an Agent as part of Roll-on Resource roll-on/roll-off - Section 2.9

	- Work force management - Agent routing profiles - Use of the reporting solution - Resource roll-on/roll-off - Create/Delete/Edit Teams CalSAWS will be responsible for the management of the following: - IVR changes - Direct database access - IVR build - Adding/removing queues The Counties and CalSAWS will both have the ability to independently access the following: - Emergency closure - Queue hold messages - Office hour changes - Queue limits - After call work time limit - Informational messages - Emergency messages - Supervisor email notifications - Remote closure of the county Customer Service Center - Amazon Quick Connects	Create/Delete/Edit Teams - Section 2.13 Create / Delete Team Independently access the following: Emergency closure - Section 2.3 Queue hold messages - Section 2.4 Office hour changes - Section 2.15Administration page Queue limits - Section 2.7 After call work time limit - Section 2.8 Informational messages - Section 2.11 Emergency messages - Section 2.10 Supervisor email notifications - Section 2.12 Remote closure of the county - Section 2.3 Amazon Quick Connects - Section 2.14Administration page
2687	The CONTRACTOR shall configure the CalSAWS Application to have a Customer Service Center Administration Page. This page will	Sections 2.1.2.2 – 2.1.2.4: Administration page Security

	have a separate security right associated to it. There is one level of security permissions to the administration page.	
2688	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to roll on and roll off Customer Service Center workers and change the following fields of a Customer Service Center worker: - First Name - Last Name - County Email Address - Windows Login ID - Team - Role	Section 2.9: Roll-on/off / Update Agent through Administration page
2689	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to close and open due to an emergency.	Section 2.3: Emergency Closure through Administration page
2690	The CONTRACTOR shall configure a call center administration page within CalSAWS to give call center staff members the ability to insert their own custom queue hold messages (messages that are played to the customer as they wait in a queue to speak with an agent) into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved and played. The following languages will be supported through this functionality: - English - Spanish	Custom Queue Hold Messages - Section 2.4

	- Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao	
2691	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to change the hours that Courtesy Call Back is offered to the customer.	Section 2.5: Courtesy Callback configuration through Administration page
2692	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to change the number of minutes a customer needs to wait in queue before Courtesy Call Back is offered to the customer.	Section 2.5: Courtesy Callback configuration through Administration page
2693	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to adjust the limit on the number of calls allowed per queue at the Customer Service Center. Different queues can have different limits.	Section 2.7: Queue Limits configuration through Administration page
2694	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center	Section 2.8: After Call Work Limit configuration through Administration page

	staff members the ability to control the amount of time an agent can be in the "After Call Work" state after ending a call before being automatically put back in to the "Ready" state to receive a new call.	
2695	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give staff members with the appropriate security the ability to insert a custom emergency message into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved. Only one message can be enabled to play from the bank of saved messages at a time. The following languages will be supported through this functionality: - English - Spanish - Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao This message plays when the customer selects to speak to a worker during normal operating hours and the Customer Service Center is closed.	Section 2.10: Emergency Message configuration through Administration page

2696	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give staff members with the appropriate security the ability to insert a custom informational message into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved. Only one message can be enabled to play from the bank of saved messages at a time. The following languages will be supported through this functionality: - English - Spanish - Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao This message plays after language selection in the IVR.	Section 2.11: Informational Message configuration through Administration page

5.14 Emergency Open/Close Status – Data Model

Data element	Type	Example values
County Code	Number	19
Emergency Closure Status	String	Open, Closed
Last Update	Date	2021-03-01T09:00:00

5.15 Queue Hold Message Data Model

Data Element Name	Type	Example Values
countyId	Integer	19
messageId	Integer	1 … 10
messageName	String	Name of the message
messageText	String	The text for the Queue Hold message

5.16 Courtesy Callback Data Model

Data Element Name	Type	Example Value
countyId	Integer	19
courtesyCallbackEnabled	Boolean	True | false

5.17 Courtesy Callback Configuration Data Model

Data Element Name	Type	Example Value
countyId	Integer	19
minutesBeforeCallbackOffered	Integer	30
mondayStartTime	String	09:00:00
mondayEndTime	String	17:00:00
tuesdayStartTime	String	09:00:00
tuesdayEndTime	String	17:00:00
wednesdayStartTime	String	09:00:00
wednesdayEndTime	String	17:00:00
thursdayStartTime	String	09:00:00

thursdayEndTime	String	17:00:00
fridayStartTime	String	09:00:00
fridayEndTime	String	12:00:00

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226837 | DDID 2705, 2706, 2707, 2708, 2709, 2710, 2711, 2712, 2713, 2714, 2715

CalSAWS Inbound IVR

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Dheeraj Muralidara
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/18/2021	V0.1	Draft	

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1 OVERVIEW

The CalSAWS Interactive Voice Response (IVR) system will use the Amazon Connect platform for customers to call in to the County Contact Center. Currently, a customer can call into the IVR and obtain general information. Unauthenticated customers or non-primary applicants are routed to an agent. Meanwhile customers that are successfully authenticated and are primary applicants, can perform the following actions: obtain benefit program information, select a form to request, check on the status for a submitted documentation, and change their IVR PIN.

1.1 Current Design

The existing C-IV functionality migrated to CalSAWS with (SCR CA-207026). The CalSAWS Amazon Connect Contact Center Solution communicates with the CalSAWS application Database for self-service information.

1.2 Requests

Create Los Angeles and CalWIN counties individual call flows in the Amazon Connect environment.

1.3 Overview of Recommendations

1. Inbound IVR to include a customized call flow for each county that includes prompts, menus, queues, program selection, and call transfers supported for supported languages listed below:
    a. English
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Tagalog
    g. Russian
    h. Korean
    i. Cambodian
    j. Hmong
    k. Arabic
    l. Lao
    m. Cantonese
    n. Armenian
    o. Portuguese
2. Inbound IVR to include customer authentication via phone number and SSN, phone number and DOB, and voice print authentication.
3. Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts.
4. Inbound IVR self-service information for the CalWORKs and CalFresh programs.
5. Inbound IVR self-service information for the Medi-Cal program.
6. Inbound IVR self-service information for the Welfare-to-Work (WTW) programs.

7. Inbound IVR to allow the customer to select previously generated/sent forms to be re mailed.
8. Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case.
9. Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.
10. Inbound IVR to allow the customer to enter their zip code and request office hours and address.
11. Route calls to workers based on language and program selected by the customer in the IVR

1.4 Assumptions

1. Any re-mailing of documents will go to the same address as the original documents were mailed to.
2. Individual county call flows will be determined during individual county sessions
3. LA County and CalWIN county Inbound IVRs will go live with their individual county SCRs at a later date.

2 RECOMMENDATIONS

2.1 Inbound IVR Call Flow

2.1.1 Overview

The inbound IVR call flow is customized for all contact center counties including Los Angeles and the CalWIN counties. All inbound IVR call flows contain self-service menu options and the ability to speak to a worker/agent. Self-service menus are limited to customers that complete the authentication process.

2.1.2 Description of Changes

The verbiage for different languages supported in the inbound IVR will be translated and recorded by professional voice talent. Supported Languages:

- English (default)
- Spanish
- Farsi
- Vietnamese
- Mandarin
- Tagalog
- Russian
- Korean
- Cambodian
- Hmong
- Arabic

- Lao
- Cantonese
- Armenian
- Portuguese

Create self-service options, menus and prompts for Los Angeles and the CalWIN counties.

Note: Individual call flows will be customized including queues and call transfer options during the individual county sessions.

For callers who are successfully authenticated in the IVR, the system plays the self-service options if the caller is a primary applicant. One of the self-service options included provides benefit information for CalWORKs, CalFresh, Medi-Cal and Welfare to Work (WTW) programs. This information is provided dynamically based on the customers active programs.

2.1.2.1 Self-Service Option for CalWORKs and CalFresh Programs

For the CalWORKs Program and CalFresh Program, the IVR will play back the following:

- Program Status
- Total Amount issued for this month and next month.
- The system will notify the customer if benefits are on hold.
- IVR plays back both the current and upcoming benefits for CalWORKs and CalFresh programs.
- The Held status is only set when a worker manually updates an issuance and selects the 'Held' status.
- It means the customer hasn't received the benefit because the county is holding on to the warrant/check.

Callers can also check the document status of their CalWORKs status report, CalFresh Status Report, CalWORKs, and CalFresh Redetermination Packet.

Commented [DA1]: Please make sure the bullet points and text line up with bullet points and text shown below so formatting is the same.

2.1.2.2 Self-Service Option for the Medi-Cal Program

For the Medi-Cal program, the IVR will play back the following:

- Program Type (Medi-Cal Service Benefit)
- Program Status
- Share of cost information for each eligible member aided

Callers can also check the document status of their Medi-Cal Redetermination Packet

2.1.2.3 Self-Service Option for Welfare-to-Work (WTW) Program

For the Welfare to Work program, the IVR will play back the following:

- Program Status
- WTW reimbursement amount for each person participating in the program
- Sanction Status/Reason

2.1.2.4 Self-Service Option for Forms

The system gives the caller a dynamic set of options based on which forms are relevant to their case. They may select a form to request, based on the options available in this dynamic menu: Semi-annual report (SAR7), Transitional Medi-Cal Status report, or Verification of Benefits. The forms can be re-sent to the originally mailed address.

2.1.2.5 Self-Service Option to Request New IVR PIN

The system gives the customer the ability to change their IVR PIN. IVR PINs, such as 111111 or 123456, or non-numeric IVR PINs are not acceptable. Customers must input the same IVR PIN twice and they must match. Changes to the IVR PIN immediately take effect.

In the existing C-IV functionality, customers have a 4-digit IVR PIN that will be migrated to CalSAWS. When a new IVR PIN number is requested or generated, the system will mail a letter to the customer with a new 6-digit IVR PIN number.

2.1.2.6 Self-Service Option to Request Office Information

Callers will be prompted to enter their zip code into the IVR and the IVR will play back their County office hours and address.

2.2 Inbound IVR Authentication

2.2.1 Overview

Customers use authentication methods in the inbound IVR to access self service features. SSN/DOB/Phone Number combinations are some of the more widely used authentication methods. Additional methods of authentication include the use of an IVR PIN and/or Voice Print Authentication.

1. Phone number and SSN or DOB and IVR PIN
2. Voice print authentication

2.2.2 Description of Changes

During voice print authentication, the system asks the caller to speak their passphrase, "my voice is my password, please verify me." The passphrase is streamed to a Voice Biometric Security server to compare the passphrase with previously enrolled voice prints. On a successful match, the caller will be routed to the self-service options. Voice Authenticate is included in SCR CA-226843.

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

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

Note: Customers issued a 4-digit IVR PIN in C-IV will be able to authenticate using their existing PIN. All IVR PINs generated in CalSAWS will be 6 digits. When a customer resets their existing 4-digit PIN migrated from C-IV the new PIN will be 6 digits.

If a caller selects to login with their social security number (SSN) and Date of Birth (DOB), the system matches the SSN and DOB combination before routing to the self-service options. Unauthenticated callers will be routed to the program menu.

2.3 Route to An Agent

2.3.1 Overview

If the caller decides to speak to a worker, the call is routed to a worker based on the program and language selected in the IVR.

2.3.2 Description of Changes

Calls are routed based on routing profiles and queues available in the county. Customers may be offered Courtesy Callback or Scheduled Callback based on the county administration of these features. Administration page features are included in SCR CA-226672

2.3.2.1 Courtesy Callback

The Courtesy Callback feature reduces the time callers must wait in queue. The feature allows the system to offer callers the option to be called back by the system when it is the caller's turn to speak to an available agent.

This option can be limited to callers who meet certain criteria. For example, callers with the possibility of being in queue for more than X minutes.

If the caller decides to be called back by the system, they will input their phone number. When the system determines that an agent is available, then a call is placed back to the caller.

2.3.2.2 Scheduled Callback

The "Scheduled Callback" feature is one where a customer will call the CalSAWS Call Center for a specific county and be placed into a queue. The system will then check if the call center is either closed or if it has reached the maximum limit of customers waiting in queue. In these cases, the customer will be offered callbacks for the next day at specified times. The Scheduled Callback functionality will be implemented with SCR CA-229573

3 SUPPORTING DOCUMENTS

[NOTE: do not attach/embed files into the design doc, list here by filename only. The files will be attached to the Jira ticket alongside this design doc]

Number	Functional Area	Description	Attachment
1	AWS Inbound IVR Detailed Call Flow	Visio diagram represents inbound call flow, AWS inbound IVR Detailed Call Flow.pdf	

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2705	The CONTRACTOR shall configure the CalSAWS inbound IVR to have a customized call flow for each county including the following: - prompts - menus - queues	Section 2.1.2

	- program selection - call transfers All flows include all self-service features. The following languages will be supported in the CalSAWS inbound IVR: - English - Spanish - Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao	
2706	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to authenticate themselves in the IVR using one of the following options: - Social Security Number and date of birth - case number and PIN - voice print authentication	Section 2.2
2707	The CONTRACTOR shall configure the CalSAWS Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts for the following programs: - CalWORKs - CalFresh - Welfare to Work The CONTRACTOR shall configure the self-service program menu to give customers the ability to receive active or inactive status for Medi-Cal.	Section 2.1.2
2708	The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the CalWORKs and CalFresh programs as stated below: - Program Status - Total Amount received for this month - If benefits are on hold, the system will notify the customer	Section 2.1.2.1

	- If benefits are not on hold, the customer will be notified for what they are eligible to receive in the upcoming month.	
2709	The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Medi-Cal program as stated below: - Medi-Cal Program Type - Status - Share of Cost - Medi-Cal Service Benefit	Section 2.1.2.2
2710	The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Welfare-to-Work (WTW) programs as stated below: - Upcoming Activities - WTW Reimbursement Amount - Sanction Status/Reason	Section 2.1.2.3
2711	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to select previously generated/sent forms to be mailed. The form list will be dynamically provided to the customer based on forms relevant to their case. The following forms can be re-sent: -Semi-annual report -Transitional Medi-Cal Status report -Passport to services form	Section 2.1.2.4
2712	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case. They may select a form to get the status of the form based on the options available in this dynamic menu: - CalWORKs status report - CalWORKs or CalFresh Redetermination packet - CalFresh status report - CalFresh Redetermination packet - Transitional Medi-Cal status report - Medi-Cal Redetermination packet	Section 2.1.2.1 and 2.1.2.2

2713	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to change their IVR PIN. Changing the IVR PIN is real-time.	Section 2.1.2.5
2714	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.	Section 2.1.2.5
2715	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to enter their zip code and request office hours and address.	Section 2.1.2.6

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226843: DDID 2701,2706 | Voice Authentication Additional Languages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eduardo Santos and Dheeraj Muralidara
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/06/2020	0.1	Initial Draft	

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1 OVERVIEW

Voice Biometrics is an authentication process utilizing natural voice patterns. This form of authentication eliminates the need for PINs and passwords, thereby improving the rate of calls being pre-authenticated in the Integrated Voice Response (IVR) before being serviced by Case Workers or the Self Service IVR. Through the IVR flow, the customer may choose to record their voices for future authentication.

1.1 Current Design

The existing C-IV functionality migrated to CalSAWS in SCR CA-220977 uses Voice Biometrics as one of the methods of authentication using the customer's voice print. This technology is supported by Nuance Security Suite for Voice Authentication. This enables the customer to authenticate when they are prompted to say a predetermined phrase like "My voice is my password, please verify me". The current CalSAWS implementation of Voice Authentication supports the following:

- Enrollment: A User is fully authenticated in Contact Flow by using a combination of case number and IVR PIN or an SSN and Date of Birth. An IVR authentication will return a BVP indicator attribute ("Y" or "N"). This indicator determines whether or not the user has enrolled in Voice Biometrics. If BVP = N, then we offer the path to enroll and the customer enters the enrollment contact flow. Through a series of iterations, we attempt to collect three successful audio inputs. Three good voice inputs are sufficient for creating a voice print in Nuance.

- Verification: The caller's phone number, SSN or Case Number is collected in IVR. One of these credentials is used to query for the User's BVP Indicator. If BVP = Y, then we offer the path to verify and the user enters the verification contact flow. We collect the user's audio input which is compared to the existing voice print stored on the Nuance server. If there is a match, then the user is authenticated.

1.2 Requests

The current IVR platform will be enhanced to allow customers to save their voice print passwords in multiple languages.

1.3 Overview of Recommendations

1. Enable Voice Authentication to support the following languages:
    a. Farsi
    b. Vietnamese
    c. Mandarin
    d. Tagalog
    e. Russian
    f. Korean
    g. Cambodian

h. Hmong
i. Arabic
j. Lao
k. Cantonese I
l. Armenian
m. Portuguese

1.4 Assumptions

1. Counties are responsible for providing voice recordings (125 male voice recordings and 125 female voice recordings) for each language passphrase.
2. Voice Biometrics vendor (Nuance) will support all of the listed languages.
3. The predefined passphrase that the Counties will use for the voice authentication functionality is "my voice is my password, please verify me."

2 RECOMMENDATIONS

This section outlines recommendations to update to meet the requirements:

2.1 Multi-language enrollment and authentication

2.1.1 Overview

The current IVR platform will be enhanced to allow customers to save their voice print passwords in multiple languages.

2.1.2 Description of Changes

1. The existing voice biometric solution will be configured to accommodate new counties and multiple language support.
2. Set up background model for each language.
   a. Vendor requires us to collect samples of voice recordings from a variety of speakers. Doing this provides a good representation of the environment and speakers.
   b. All the collected voice samples are calibrated to create respective language background model (BGM).
3. Enrollment and Verification will be based on the language selected by the caller at the beginning of the IVR flow (language menu).
4. The predefined passphrase for the voice authentication functionality is "my voice is my password, please verify me."
5. Customers that call the County's IVR System will be prompted with an option to provide voice input by saying the predefined passphrase.
   a. If the customer selects to continue with enrollment, the system will process the customer's statement of that passphrase.

b. Once the system has processed the customer's passphrase, the customer will be prompted to authenticate by stating that same predefined passphrase each subsequent time that customer calls the IVR.

2.2 Reporting

We will provide counties with standard email reports monthly. Counties will provide the email address to which the reports will be sent. The standard email reports include:

1. The number of customers that have opted into the voice authentication functionality in the past month.
2. The number of attempts to authenticate via the voice authentication functionality and, of those attempts, the number of successful authentications in the past month.
3. Total number of Rejected Attempts in the past month.
4. Failed Verification attempts due to audio issues in the past month.
5. Failed Verification attempts due to wrong passphrase in the past month.
6. Failed Enrollment attempts due to wrong passphrase in the past month.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2701	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow a customer to enroll and capture their voice print for voice authentication.		Section 2.1
DDID 2706	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to authenticate themselves in the IVR using one of the following options: - Social Security Number and date of birth		Partially met in section 2.1. Remainder of requirement related to social security number/date of birth and Case number/PIN authentication methods will be met in subsequent SCR.

	- case number and PIN - voice print authentication		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227063 - DDID 2703: Contact Center Web Chat and Click-to-Call

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/17/2021	0.1	Initial Draft	Alex Hatfalvi

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1 OVERVIEW

This design is for Web Chat and Click-to-Call. Web Chat allows customers to communicate with agents through Amazon Connect based chat messaging. Customers initiate a web chat session from BenefitsCal (CalSAWS Self Service Portal).

Click-to-Call allows the user to request a phone call with an agent. Customers complete an online form that places their call request in a queue. This feature is accessed by customers using BenefitsCal.

Both Web Chat and Click-to-Call are optional features for CalSAWS Contact Center counties and require the county to opt-in to have these features enabled. The link for Click-to-Call and Web Chat is only available to customers on BenefitsCal if the county has enabled these features.

1.1 Current Design

SCR CA-207026 migrated the existing C-IV Web Chat and Click-to-Call functionality into CalSAWS and BenefitsCal for those counties that have opted-in to the functionality.

The existing Web Chat utilizes Amazon Web Services (AWS) Connect chat between portal customer and agent. Customers initiate a chat from BenefitsCal after entering their name, phone number, and a question. The chat will connect the customer to an agent in the customer's county after an availability check is completed.

For Click-to-Call, the customer has the option to click a 'Call Me' link once they have logged into their portal account. The link opens a form requesting the customer's name and phone number. After an availability check the user's contact information is placed into the Amazon Connect Callback Queue. Once the number reaches the end of the queue AWS connect will send the call to the agent to be accepted. Once the call is accepted, a call to the user is made and if user accepts then the user and agent are connected.

Note: For both Web Chat and Click-to-Call, the system will do an availability check to see if the current time is outside of Call Center hours, a holiday or if there is an emergency office closure after the form is submitted.

1.2 Requests

Enable Web Chat and Click-to-Call (Call Me) for the additional Contact Center counties (Los Angeles and CalWIN counties).

1.3 Overview of Recommendations

1. Enable Web Chat for additional contact center counties that opt-in and integrate this feature into the Enhanced Call Control Panel.

2. Enable Click-to-Call for additional contact center counties that opt-in and enable callback queues for each county.

1.4 Assumptions

1. Web Chat functionality is only available for CalSAWS Contact Center counties.
2. Web Chat and Click-to-Call are not enabled by default. Counties will need to opt into these features to enable the functionality and allow customers to see the links on BenefitsCal.
3. Customers must login to their BenefitsCal account to access the Web Chat link or Click-to-Call link.
4. LA County and CalWIN counties Webchat and Click to call will be implemented with their county specific SCR at a later date.

2 RECOMMENDATIONS

2.1 Web Chat

2.1.1 Overview

Web Chat will be enabled for additional contact center counties that opt-in to the functionality. Agents will handle Web Chat contacts through the new Enhanced Contact Control Panel (CCP). The Web Chat functionality will be enabled to allow agents to chat with up to two customers at a time.

2.1.2 Description of Change

The current version of Web Chat is integrated with the Default CCP and will be replaced by the Web Chat feature included in the Enhanced CCP. The Web Chat functionality will be enabled in each specified County's Amazon Connect Instance for counties that opt-in to this functionality.

2.1.3 Agent Experience

Agents access Web Chat via the Enhanced CCP with their CalSAWS login credentials. A chat tab will be available in the CCP Menu on the right side of the screen for agents with chat routing profiles assigned. Web Chat will enable agents to transfer chats to another chat queue using the "transfer" button.

Agents can Accept or Reject a chat when in an available status with a pop-up and an audible 'incoming call' notification. Agents can have up to two (2) active chats at a time. If the agent is already in an active chat, the agent will receive a message to accept or reject an additional chat. When an agent receives the first incoming chat an audible 'incoming call' notification is played in the Enhanced CCP, and if there is an additional second incoming chat, the agent will hear an additional audible 'incoming call' notification and the option to accept or reject the incoming chat.

Figure 2.1.3.1: Chat tab on CCP Menu

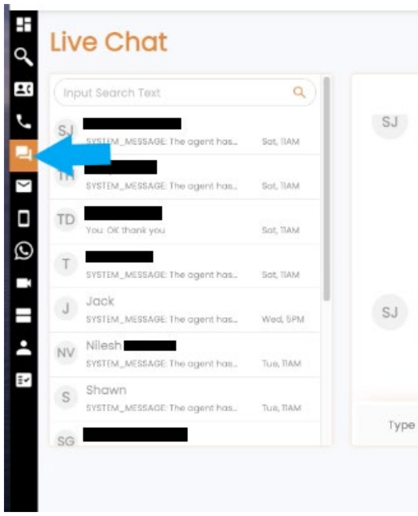


Figure 2.1.3.2: Active Chat with additional Chat Request

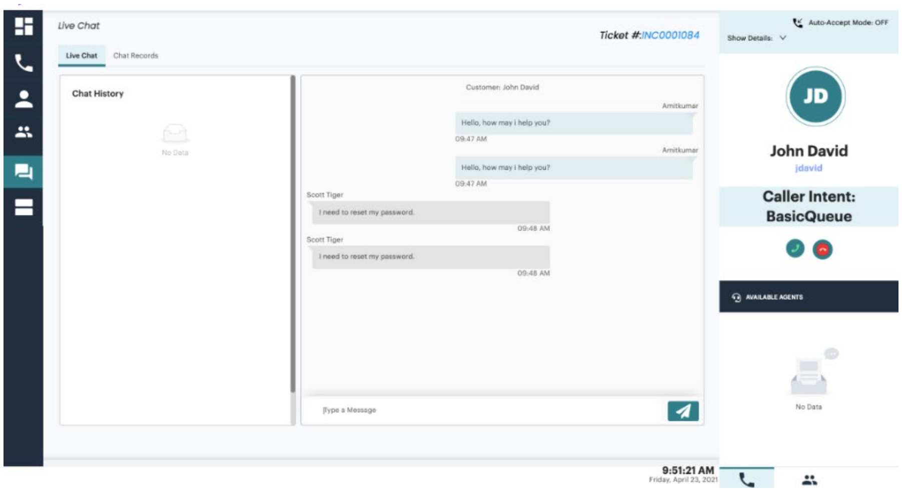
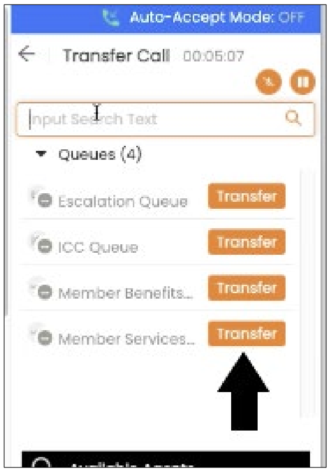
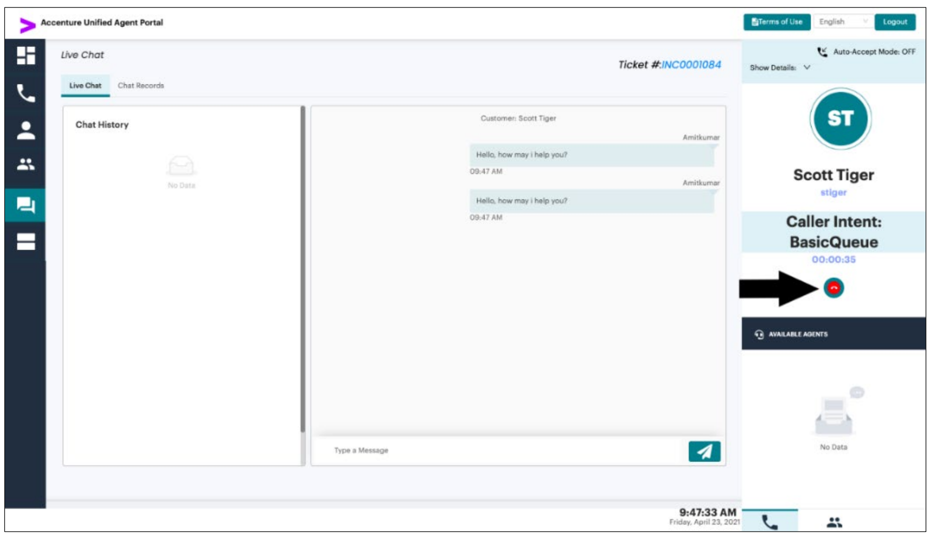


Figure 2.1.3.3: Chat Transfer button





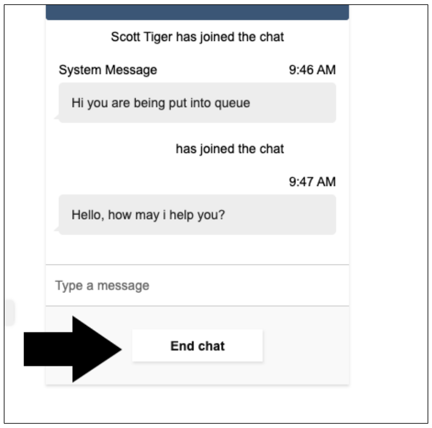
2.1.4 Customer Experience

Customers access Web Chat through a link on the BenefitsCal website. Customers are prompted to enter the following before a chat is initiated:

1. Name – This is a required field
2. Phone Number – This is a required field
3. "Your Question" text box – This is an optional field
4. No additional validation is completed on the fields.

Once a chat session is connected, the customer will be able to interact with the agent. The Customer can end the chat by clicking the "End Chat" button or by closing the window.

Figure 2.1.4.1: Customer Chat Window



2.2 Click-to-Call

2.2.1 Overview

Click-to-Call application will be migrated from C4Yourself to the CalSAWS Statewide system.

2.2.2 Description of Change

The link for Click-to-Call will be enabled for LA and CalWIN counties if they opt-in for this feature. The link is displayed in BenefitsCal for enabled counties. When a customer completes the steps to initiate a call, the call will be placed in the call back queue for handling when an agent becomes available.

Note: Calls initiated via Click-to-Call are recorded same as any other inbound/outbound call.

2.2.4 Customer Experience

When a customer clicks the "Call Me" link from the BenefitsCal website, they are presented a popup with the Name and Phone Number box. The customer is required to enter their phone number in the field. Once the customer has entered their Name and Phone number, they will click the submit button.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

DDID 2703	The CONTRACTOR shall configure the Customer Service Center solution to provide customers with an option to communicate with a case worker using web chat functionality that is initiated from the Statewide Portal. Counties will have the option to opt in or out of this functionality.	WebChat and Click-to-Call are not enabled by default counties will need to opt into these features to enable the functionality	Covered in Section 2.1

n

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227064 | DDID 2727 Customer Service Center Work-from-home Modifications

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Kevin Hooke
	Reviewed By	Charles Heo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/04/2021	0.1	Initial Draft	Kevin Hooke

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1 OVERVIEW

1.1 Current Design

Multiple approaches are currently available to county staff that enable Call Center Agents to work remotely. Currently available approaches include:

- County provided VPN connection: allows Agents to connect to County and CalSAWS systems from a personal or County provided computer.
- Remote desktop access: allows Agents to access County and CalSAWS systems by remotely connecting to a computer in a County office location.
- AWS AppStream: allows agents to access the AWS AppStream application remotely and securely using their web browser.

These approaches allow a County Worker to access:

- The CalSAWS web-based system via a web browser
- The Default Contact Control Panel (CCP) via a web browser
- The Custom CCP application as an application installed on a managed desktop accessed via Remote Desktop.

1.2 Requests

Configure the Contact Center solution to enable staff members to work remotely.

1.3 Overview of Recommendations

1. Integrate Contact Center applications with the CalSAWS Identity Provider to enable Single Sign On (SSO).
2. Configure the solution to allow the Enhanced CCP (SCR CA-226844) and Admin Page (SCR CA-226672) to integrate with the existing remote work solutions currently used by each County (as described in Section 1.1)

1.4 Assumptions

1. The Enhanced CCP (SCR CA-226844) will replace the existing Default CCP for remote work and the Custom CCP for office work. The Enhanced CCP is a single solution that enables County Workers to use the same application regardless of where they are working (in a County office or remote).
2. To provide Remote access to the Enhanced CCP application, the Enhanced CCP will be configured to use the CalSAWS Identity Provider for Single-Sign On (SCR CA-226844).
3. This SCR does not change the current remote access approaches (described in Section 1.1) used by County Workers to access:
   a) The CalSAWS Application
   b) eGain
   c) Calabrio

4. The Enhanced CCP web application is only supported using the latest three versions of Google Chrome or Mozilla Firefox browsers on Microsoft Windows and Apple MacOS.
5. Supervisor screen recording/monitoring in the Enhanced CCP application has a minimum internet bandwidth requirement of 2 Mbps. It is assumed Agents will have at least 2 Mbps bandwidth to use all the provided features of the Enhanced CCP.
6. For the best audio quality and user experience, it is assumed that the Enhanced CCP will be used in a web browser on the user's local computer and not accessed remotely (e.g., it should not be accessed via a Remote Desktop connection to a computer in a physically remote location).
7. Public internet access is required to access the Enhanced CCP application.

2 RECOMMENDATIONS

2.1 Integrate Enhanced CCP with existing Work From Home Solutions

2.1.1 Overview

The Enhanced CCP is a new web application that is self-contained and deployed separately, outside of the existing CalSAWS system. The application is accessed using a URL in their web browser (replacing the desktop icon used for the Custom CCP).

The Enhanced CCP application is hosted using AWS CloudFront, which is a Content Delivery Network (CDN) with multiple, highly available and scalable server locations throughout California.

To access the Enhanced CCP, users must have a connection to the public internet and must be authenticated with the CalSAWS Identity Provider.

2.1.2 Description of Changes

2.1.2.1 Enable access to Enhanced CCP when using VPN to access CalSAWS

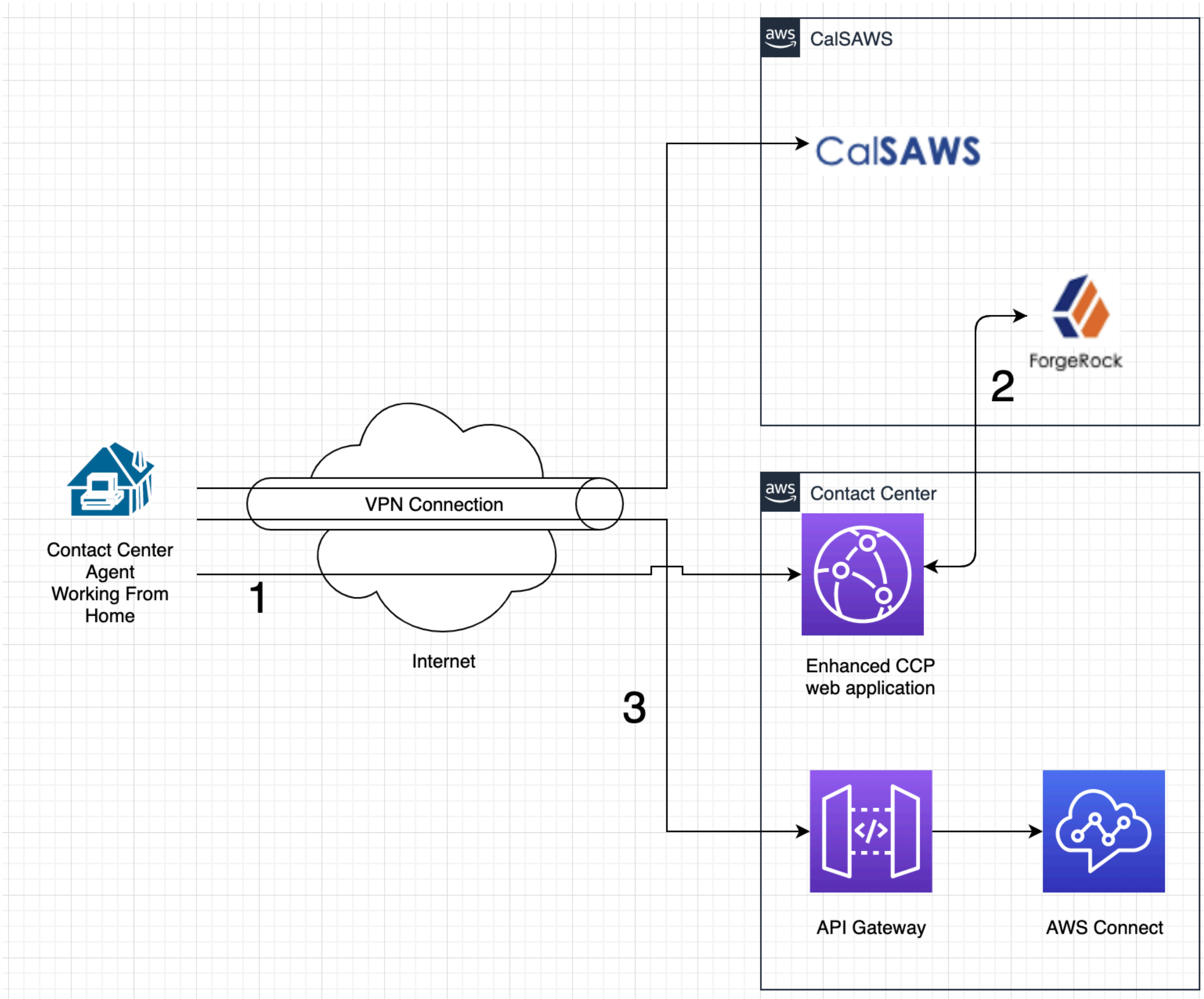

Figure 1 Access to Enhanced CCP from home

For Contact Center Agents accessing CalSAWS remotely using a VPN connection, implement the following changes to support Work From Home access to the Enhanced CCP:

1. Enable access to the Enhanced CCP application via the public internet, while continuing to access CalSAWS via their VPN connection at the same time.
2. Enable integration between Enhanced CCP application and the CalSAWS Identity Provider to authenticate access to the Enhanced CCP.
3. Enable the Enhanced CCP application running in a browser on the Agent's personal computer to integrate with Contact Center features via a VPN connection and AWS API Gateway.

Accessing CalSAWS via a VPN connection is the only solution that supports CalSAWS 'screen pops' because the web browser accessing the Enhanced CCP and the web browser accessing CalSAWS are on the same physical computer (this feature is not supported with Remote Desktop or AppStream access described in the following sections).

2.1.2.2 Enable access to Enhanced CCP when using a County Office Remote Desktop to access CalSAWS

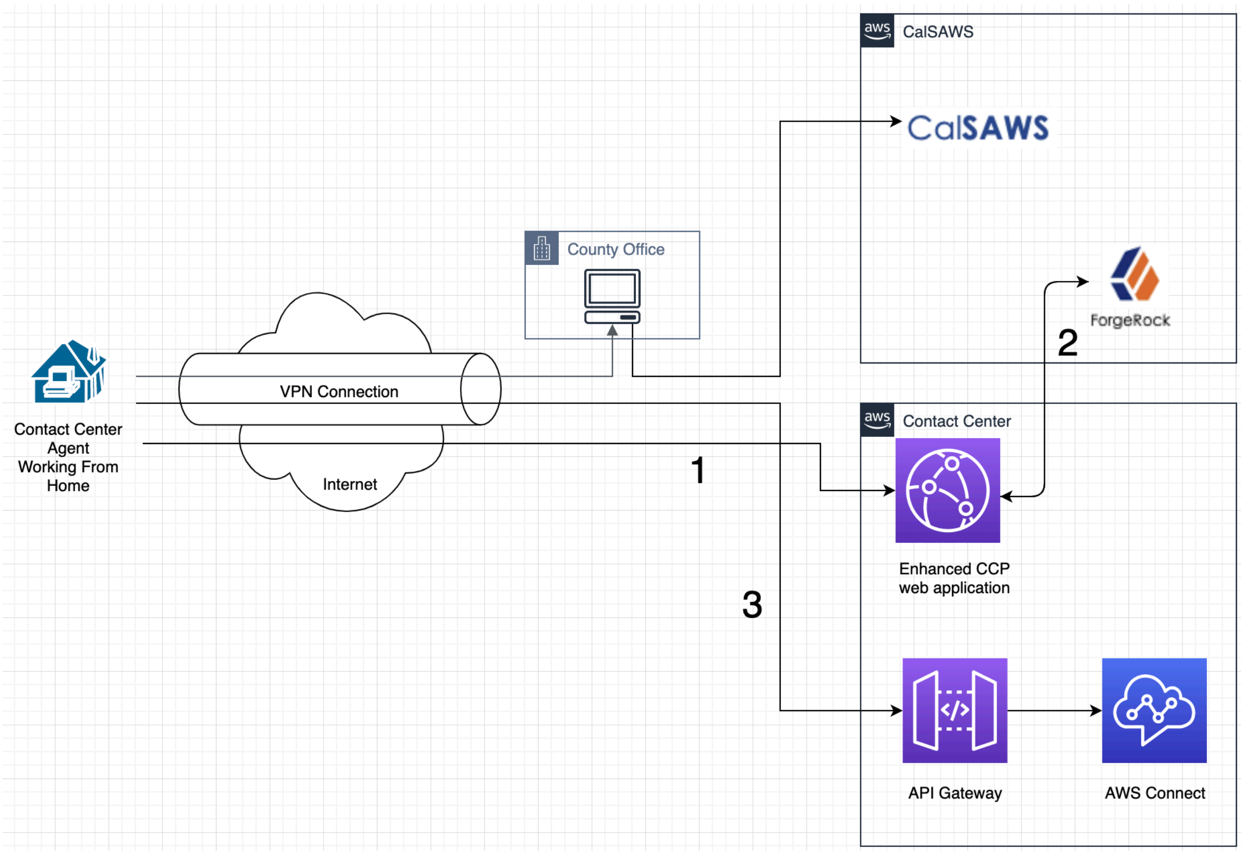

Figure 2 Accessing Enhanced CCP while Working From Home while also using a Remote Desktop Computer

For Contact Center Agents accessing CalSAWS via a Remote Desktop connection (for example, a desktop computer provided in their County Office), implement the following changes to support Work From Home access to the Enhanced CCP:

1. Enable access to the Enhanced CCP application via the public internet, while continuing to access their Remote Desktop at the same time.
2. Enable integration between Enhanced CCP application and the CalSAWS Identity Provider to authenticate access to the Enhanced CCP.

3. Enable the Enhanced CCP application running in a browser on the Agent's own computer in their home to integrate with Contact Center features via a VPN connection and AWS API Gateway.

Note: This approach does not support CalSAWS 'screen pops' because the Enhanced CCP and the web browser the Agent is using to access CalSAWS are on two physically different computers.

2.1.2.3 Enable access to Enhanced CCP when using AWS AppStream to access CalSAWS

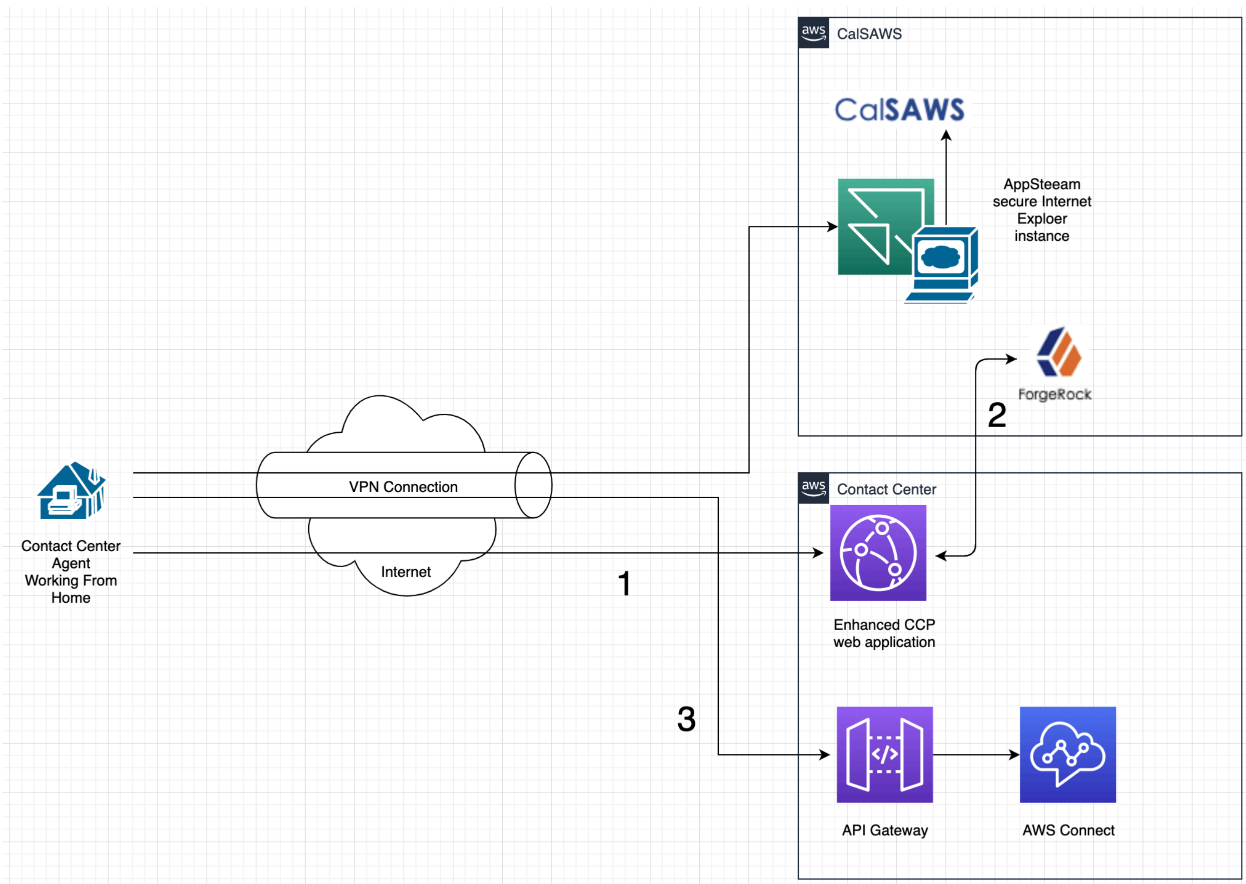

Figure 3 Accessing Enhanced CCP while Working From Home when using AppStream access to CalSAWS

For County users that access CalSAWS via a hosted web browser using AWS AppStream, implement the following changes to support Work From Home access to the Enhanced CCP:

1. Enable access to the Enhanced CCP application via the public internet, while continuing to access CalSAWS and other systems using AppStream at the same time.
2. Enable integration between Enhanced CCP application and the CalSAWS Identity Provider to authenticate access to the Enhanced CCP.

3. Enable the Enhanced CCP application running in a browser on the Agent's own computer in their home to integrate with Contact Center features via a VPN connection and AWS API Gateway.

This approach does not support CalSAWS 'screen pops' because the Enhanced CCP is accessed directly from the user's device and the web browser the Agent is using to access CalSAWS is accessed through AppStream. Since this approach is using two different browser instances on two different computers it's not possible to support this feature.

2.1.2.4 Summary of Supported Features for each Solution

Solution	CalSAWS access	CalSAWS Screen Pops
Enhanced CCP using VPN to access CalSAWS	Yes	Yes
Enhanced CCP using Remote Desktop to access CalSAWS	Yes	No
Enhanced CCP using AppStream to access CalSAWS	Yes	No

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
None	-	-	-

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2727	The CONTRACTOR shall configure the Customer Service Center solution to include the ability for Customer Service Center staff members to work remotely.	To support using the Enhanced CCP application while working from home, the Agents must have a minimum internet bandwidth available, as listed in the assumption's sections in this document.	As described in Section 2.

5 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227468: Update IEVS PVS Interface When Validating UIB/DIB/RSDI benefits

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Carlos Zepeda, Joel Acevedo, Dana Petersen, Balakumar Murthy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/6/2021	1.0	Initial version	Jennifer Muna

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2.1.6 Data Volume/Performance 6
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2.1.8 Failure Procedure/Operational Instructions 7
3 Requirements 7
3.1 Project Requirements 7
4 Migration Impacts .... **Error! Bookmark not defined.**

1 OVERVIEW

The Payment Verification System (PVS) is an IEVS Recipient system that provides information on State Unemployment Insurance, State Disability Insurance, and Retirement, Survivors, and Disability Insurance. This SCR outlines the necessary updates to the IEVS PVS interface when validating insurance benefit information.

1.1 Current Design

The IEVS PVS interface receives PVS abstracts that provides information on recipients that receive or are entitled to receive Unemployment Insurance Benefits (UIB), Disability Insurance Benefits (DIB), and Retirement, Survivors, and Disability Insurance (RSDI). The IEVS PVS interface will perform a comparison to determine if there is a discrepancy in the income reported by the customer and the benefit amount within the abstract. CalSAWS has two separate logics when validating UIB/DIB and RSDI benefits.

<u>UIB and DIB validation</u>

Currently in CalSAWS, when validating the UIB/DIB income benefit information of a participant from the PVS abstract, the system only considers income records with a weekly frequency. The records will proceed through the automated IEVS process to determine if there is a discrepancy between the reported income in the system and the weekly benefit amount in the abstract.

<u>RSDI validation</u>

Currently in CalSAWS, when validating the RSDI income benefit information of a participant from the PVS abstract, the system only considers income records with a monthly frequency. The records will proceed through the automated IEVS process to determine if there is a discrepancy between the reported income in the system and the premium benefit amount in the abstract.

In contrast, the C-IV IEVS PVS interface considers income records with different frequencies (i.e., Every other week, Monthly, Annually, etc.) and performs a calculation of the income amount based on the frequency of the income record. The calculated amount is then used in validating the participant’s reported income to the benefit amount in the PVS abstract. This C-IV logic does not exist in CalSAWS.

1.2 Requests

Update the IEVS PVS Validator to implement C-IV's IEVS PVS logic when validating UIB/DIB/RSDI benefits into CalSAWS. When processing PVS abstracts the logic should also be considering the different income frequencies and calculating the appropriate income amount.

1.3 Overview of Recommendations

1. Update the IEVS PVS Validator job to consider the income frequency for UIB/DIB/RSDI when comparing the income amount.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Update IEVS PVS Validator

2.1.1 Overview

CalSAWS will update the IEVS PVS Validator (PI00C405) logic to adopt C-IV's logic when validating UIB/DIB/RSDI insurance benefits. Batch will calculate a recipients income record based on the income frequency and compare the result to the benefit amount on the abstract. This section outlines the necessary modifications to the IEVS PVS Validator when validating UIB/DIB/RSDI income.

2.1.2 Description of Change

1. Update PVS Validator logic to calculate the weekly amount when validating the UIB/DIB benefit based on the frequency of the income record.
   Note: Calculation to determining UIB/DIB weekly benefit amount are as follows:
   a. If income frequency is Weekly (CT199_02), then compare the reported amount to the UIB/DIB weekly benefit amount.
   b. If income frequency is Every Other Week (CT199_03), then divide reported amount by 2 and compare the reported amount to the UIB/DIB weekly benefit amount.
   c. If income frequency Twice a Month (CT199_04), then divide reported amount by 2.167 and compare the reported amount to the UIB/DIB weekly benefit amount.
   d. If income frequency is Monthly (CT199_05), then divide reported amount by 4.333 and compare the reported amount to the UIB/DIB weekly benefit amount.
   e. If income frequency is Annually (CT199_09) or Annual Contract (CT199_AC), then divide reported amount by 52 and compare the reported amount to the UIB/DIB weekly benefit amount.
   f. If income frequency is Quarterly (CT199_06), then divide reported amount by 13 and compare the reported amount to the UIB/DIB weekly benefit amount.
   g. If income frequency is Semi Annually (CT199_07), then divide reported amount by 26 and compare the reported amount to the UIB/DIB weekly benefit amount.

2. Update PVS Validator logic to calculate the premium amount when validating the RSDI benefit based on the frequency of the income record.

   Note: Calculations to determine RSDI premium amount are as follows:

   a. If income frequency is Weekly (CT199_02), then multiply reported amount by 4.333 and compare the reported amount to the premium amount.
   b. If income frequency is Every Other Week (CT199_03), then multiply reported amount by 2.167 and compare the reported amount to the premium amount.
   c. If income frequency is Twice a Month (CT199_04), then multiply reported amount by 2 and compare the reported amount to the premium amount.
   d. If income frequency is Monthly (CT199_05), then compare the reported amount to the premium amount.
   e. If income frequency is Annually (CT199_09) or Annual Contract (CT199_AC), then divide reported amount by 12 and compare the reported amount to the premium amount.
   f. If income frequency is Quarterly (CT199_06), then divide reported amount by 3 and compare the reported amount to the premium amount.
   g. If income frequency is Semi Annually (CT199_07), then divide reported amount by 6 and compare the reported amount to the premium amount.

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change

2.1.5 Counties Impacted

All Counties.

2.1.6 Data Volume/Performance

N/A

2.1.7 Interface Partner

IEVS

2.1.8 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.4	The LRS shall match LRS Data from external interfaces to an applicant s or participant s case record and update the LRS database when appropriate.	Update CalSAWS IEVS PVS Validator to calculate the weekly income for UIB/DIB and premium amount for RSDI benefits based on the frequency of a recipient's income record when validating benefit information.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-228023 – DDID 2704 Post Call Survey

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/20/2021	0.1	Initial Draft	Alex Hatfalvi

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2.1.3 Customized County Questions and Results 5
2.1.4 Reporting 6
2.1.5 Opt-in 6
3 Requirements 7
3.1 Project Requirements 7

1 OVERVIEW

The automated Post-Call Survey collects feedback on call quality and experiences from callers after interactions with agents have ended. Post-Call Survey is offered to all inbound callers and courtesy call back callers once the agent disconnects.

1.1 Current Design

The existing Post-Call Survey option was migrated to CalSAWS with SCR CA-207026. The Post-Call Survey uses AWS Connect to transfer customers to the Post-Call Survey IVR (Contact Flow) when the agent disconnects the call. The Contact Flow retrieves up to five (5) County specific questions from the system. Questions are formatted for customers to answer “yes/no”, or “rate on scale” to allow the customer to input a number as their answer to each survey question.

The Contact Flow stores the answers to each of these questions for the weekly report that includes details about the customer, the agent they interacted with, and timestamp. Reports are compiled in a CSV file type and automatically sent via email as an attachment to a designated county contact.

1.2 Requests

The CONTRACTOR shall configure the Customer Service Center solution to offer a Post-Call Survey at the end of the call to gather customer feedback for Los Angeles and CalWIN Counties.

1.3 Overview of Recommendations

1. Enable existing Amazon Connect contact flows for additional Contact Center counties (CalWIN and Los Angeles Counties) to provide a Post-Call Survey on completion of each call.

1.4 Assumptions

1. Post-Call Survey feature will be disabled unless the Contact Center county opts in. Opt-in/out decisions will be determined during individual county sessions.
2. The Post-Call Survey is customized by county and will be configured with the questions approved by the county.
3. Post-Call Survey questions must be formatted to allow for “Yes/No” or a “rate on scale” to allow customer to enter a number as their response.
4. LA County and CalWIN County Post Call Survey will be implemented with their County Specific SCR at a later date.

2 RECOMMENDATIONS

This section outlines recommendations to enable the Post-Call Survey for the additional CalSAWS contact center counties (CalWIN and Los Angeles Counties).

2.1 Enable Post-Call Survey for Additional Counties

2.1.1 Overview

Existing Amazon Connect Post-Call Survey contact flows were migrated as part of SCR CA-207026 for the C-IV counties that currently have this functionality enabled. The additional contact center counties will need to be enabled to allow customers to complete the Post-Call Survey and provide counties with the weekly report.

2.1.2 Question Repository Configuration

Configure the county code in the contact flow to get the correct county specific questions from the database table.

Note: Importing the contact flow and changing the county code are done during deployment. Adding and changing questions to the repository table is a deploy time activity.

2.1.3 Customized County Questions and Results

Each contact center county will provide up to five (5) customized questions to be included in the Post-Call Survey for an individual county. Post-Call Surveys will be available in the following languages based on the customer language selection in the IVR:

1. English
2. Spanish
3. Farsi
4. Vietnamese
5. Mandarin
6. Armenian
7. Tagalog
8. Russian
9. Korean
10. Cambodian
11. Hmong
12. Cantonese
13. Arabic
14. Lao

Note: Translations for the Post-Call Survey questions will follow the existing CalSAWS translation process.

Post-Call Survey results are stored in anS3 bucket. The Post-Call Survey results will be stored for all questions completed by the customer. The customer does not have to complete all configured questions. Results are stored for 90 days.

2.1.4 Reporting

Weekly Post-Call Survey results are provided to individual counties through email with the report attached in a CSV format. The report will contain the following information that is stored once the customer completes the survey:

1. Customer ID
2. Case number
3. Has the customer Authenticated
4. Agent's name
5. Agent's ID
6. Time that the call came to IVR
7. Date and time the question was asked
8. Question number starting at 1 and going up to 5
9. Text of the question that was asked to the customer
10. Number and text of answer that the customer chose
11. Customer's language (see 2.1.3 for list of languages)
12. Customer's phone number
13. Date and time customer answered question
14. Reason call ended (exit reason)

Note: County will provide specific email address/county contact for report distribution prior to individual county go-live. See Figure 1 in the Appendix for an example of the Post Call Survey report.

2.1.5 Opt-in

Contact Center Counties will be required to opt-in to the Post-Call Survey functionality to enable the functionality for customers. To enable the Post-Call survey a phone number needs to be assigned to the contact flow so that customers can be transferred to the survey at the end of the call.

Note: If a county chooses to opt-in to the functionality, it will be documented in the individual county contact center configuration SCRs.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2704	The CONTRACTOR shall configure the Customer Service Center solution to offer a Post-Call Survey at the end of the call to gather customer feedback. Counties will have the option to opt in or out of this functionality. The Post-Call Survey can have a minimum of 1 and a maximum of 5 questions. Questions will be in the "yes/no", or "rate on scale" format to allow the customer to input only number as their answer	Post-call Survey feature will be disabled unless the contact center county opts in.	This described in section 2.1

4 APPENDIX

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	ID	Case_Numbe	Authenti	AgentNan	Initial_AgtID	IVR_Call_Start	Q_Time	Q_Numbe	Question	Answer	Lang	Caller	Answer_Time	Exit_Reason
2	affaccf8-546b-4adb-aaf7-6efbc375b609				jenifer.l@c36		May 17 2021 11:38:30 AM	1	How satisfied were you with	4-Very Unsatisfied	EN	19093722891	May 17 2021 11:37:52 AM	
3	3a28f9b1-3acd-459b-b3dd-9bf4aa9ca016				joe.va@c36		May 17 2021 11:22:38 AM	1	How satisfied were you with	3-Unsatisfied	EN	17605084690	May 17 2021 11:21:46 AM	
4	3a28f9b1-3acd-459b-b3dd-9bf4aa9ca016				joe.va@c36		May 17 2021 11:22:48 AM	2	Was the worker friendly and	1-Yes	EN	17605084690	May 17 2021 11:21:46 AM	
5	3a28f9b1-3acd-459b-b3dd-9bf4aa9ca016				joe.va@c36		May 17 2021 11:22:57 AM	3	Was the worker able to help	1-Yes	EN	17605084690	May 17 2021 11:21:46 AM	
6	3a28f9b1-3acd-459b-b3dd-9bf4aa9ca016				joe.va@c36		May 17 2021 11:23:13 AM	4	How satisfied were you with	4-Very Unsatisfied	EN	17605084690	May 17 2021 11:21:46 AM	
7	3a28f9b1-3acd-459b-b3dd-9bf4aa9ca016				joe.va@c36		May 17 2021 11:23:31 AM	5	How would you rate the over	5-Very Poor	EN	17605084690	May 17 2021 11:21:46 AM	
8	a30fa478-6202-415d-8680-33ab14258327				susan.d@c36		May 17 2021 9:01:50 AM	1	How satisfied were you with	3-Unsatisfied	EN	17607185297	May 17 2021 9:01:12 AM	
9	a30fa478-6202-415d-8680-33ab14258327				susan.d@c36		May 17 2021 9:02:19 AM	2	Was the worker friendly and	1-Yes	EN	17607185297	May 17 2021 9:01:12 AM	
10	a30fa478-6202-415d-8680-33ab14258327				susan.d@c36		May 17 2021 9:02:29 AM	3	Was the worker able to help	2-No	EN	17607185297	May 17 2021 9:01:12 AM	
11														

Figure 1 Example content for the Post Call Survey report

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-230251

Migrate Web Chat and Click to Call to BenefitsCal Portal.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester
	Reviewed By	Michael T. Wright, Raji Sanuvala, Danielle Benoit, Darcy Alexander, and Logan Pratt

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/2/2021	.1	Initial Revision	Jared Kuester

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2.1.2 Description of Change 4

2.1.3 Agent Experience .... **Error! Bookmark not defined.**

2.2 C4Yourself.com .... **Error! Bookmark not defined.**

2.2.1 Overview .... **Error! Bookmark not defined.**

2.2.2 Description of Change .... **Error! Bookmark not defined.**

2.2.3 Customer Experience .... **Error! Bookmark not defined.**

2.2.4 Page Location .... **Error! Bookmark not defined.**

2.3 Custom CCP .... **Error! Bookmark not defined.**

2.3.1 Overview .... **Error! Bookmark not defined.**

2.3.2 Description of Change .... **Error! Bookmark not defined.**

3 Supporting Documents 8

4 Requirements .... **Error! Bookmark not defined.**

4.1 Project Requirements .... **Error! Bookmark not defined.**

4.2 Migration Requirements .... **Error! Bookmark not defined.**

5 Migration Impacts .... **Error! Bookmark not defined.**

6 Outreach .... **Error! Bookmark not defined.**

7 Appendix 9

1 OVERVIEW

1.1 Current Design

Web Chat and Click to Call functionality is available in the C4Youself portal.

1.2 Requests

Update the Web Chat and Click to Call user interface to match the BenefitsCal portal.

1.3 Overview of Recommendations

1. Update the Web Chat User Interface (UI) to match the BenefitsCal look and feel.
2. Update the Click to Call User Interface (UI) to match the BenefitsCal look and feel.
3. Move the Click to Call functionality from the C4Youself portal to an Amazon S3 bucket.

1.4 Assumptions

1. All Web Chat functionality will carry over to the BenefitsCal portal.
2. The Web Chat and Click to Call solution will utilize existing queues.
3. The Amazon Connect Web Chat solution is currently only assessable through the Default CCP.
    a. It will be available in the Enhanced CCP with SCR CA-226844.
4. Web Chat functionality applies to Marin, Monterey, San Bernardino, and Yuba counties only.

2 RECOMMENDATIONS

2.1 Update the Web Chat UI to match the BenefitsCal look and feel

2.1.1 Overview

Update the look and feel of the Web Chat. This includes the logo, the color pallet and shape of the buttons.

2.1.2 Description of Change

1. Update Header to Blue 200 (#114664)
2. Update lower Header section to Teal 200 (#0B9DA2)
3. Update the logo to the BenefitsCal logo.
4. Add the title "Live Chat" at the top left of the page.

5. Add in the message “Let us know how we can help you and we’ll connect you with a representative.”.
6. Update the “Your Question” label to “Please explain”.
7. Labels for the Name, Phone Number, and Please Explain should be updated to be above the fields, left aligned.
8. Change the Start Chat button to Coral 200 (#FF5542)
9. Add a horizontal line between the Start Chat button and Cancel link.
10. Remove the Cancel button and replace it with a URL link.

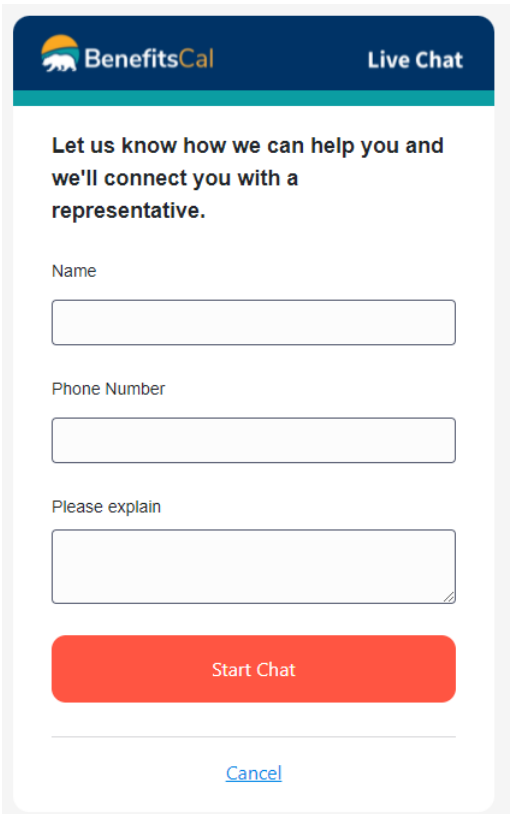

Figure 2.1.1 – Live Chat UI

2.2 Update the Click to Call UI to match the BenefitsCal look and feel

2.2.1 Overview

Update the look and feel of the Click to Call. This includes the logo, the color pallet and shape of the buttons.

2.2.2 Description of Change

1. Update Header to Blue 200 (#114664)
2. Update lower Header section to Teal 200 (#0B9DA2)
3. Update the logo to the BenefitsCal logo.

4. Add the title “Call Me” at the top left of the page.
5. Add in the message “Let us know how to contact you and we’ll give you a call.”.
6. Labels for the First Name, Last Name, and Phone Number should be updated to be above the fields, left aligned.
7. Change the Submit button to Coral 200 (#FF5542)
8. Move the Submit button underneath the Phone Number and match the width of the button to the Phone Number field.
9. Add a horizontal line between the Submit button and Cancel link.
10. Remove the Close button and replace it with a URL link labeled “Cancel”.

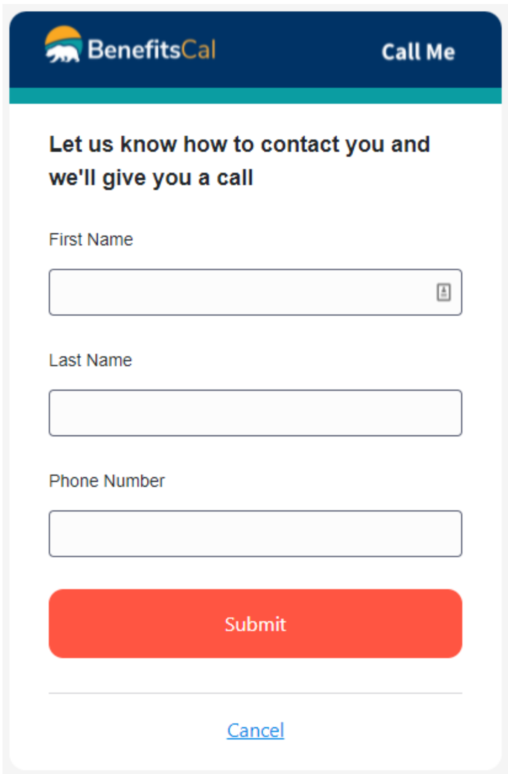

Figure 2.2.1 – Click to Call UI

2.3 Move the Click to Call functionality from the C4Youself portal to an Amazon S3 bucket

2.3.1 Overview

The Click to Call functionality is moving from the C4Youself servers to an Amazon S3 bucket. This is required as part of the migration to the BenefitsCal portal.

2.3.2 Description of Change

1. Move the html code from the C4Youself server to an S3 bucket.
2. Create a new URL in the existing Amazon Connect Cloud Front.
    a. System Test URL: https://callme.ctcdev.aws.calsaws.net/callme.html?countyCode=36&languageCode=en
    b. Production URL: https://callme.ctcprod.aws.calsaws.net/callme.html?countyCode=36&languageCode=en

3 SUPPORTING DOCUMENTS

Number	Description	Attachment
01	Benefits Cal UI Specs provided by the Benefits Cal team.	Call Me UI Specs.pdf

4 APPENDIX

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-231234 – DDID 2718 FDS CSC: Task for Cancelling an Appointment in Outbound IVR

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester, Farhat Ulain
	Reviewed By	Dheeraj Muralidara, Darcy Alexander, Logan Pratt, Matt Lower

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/11/2021	0.1	Initial Draft	Jared Kuester

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2.2.3 Task Creation Response .... **Error! Bookmark not defined.**
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1 OVERVIEW

The automated outbound appointment reminder campaign allows customers to cancel an upcoming appointment that they're not able to attend. When an appointment is canceled, a new task will be created for the worker that the appointment was with.

1.1 Current Design

The existing outbound campaigns allow the customer to cancel their appointment, but a task isn't created automatically. If the user currently cancels their appointment, an e-mail is sent to the worker and a journal entry is made in the case.

Commented [DA1]: Can be enter an assumption that this functionality will remain or does this replace that functionality?

Commented [JK2R1]: added an assuption

1.2 Requests

The CONTRACTOR shall configure the CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.

1.3 Overview of Recommendations

1. Create a Task when the customer cancels their appointment through the outbound reminder campaign.

1.4 Assumptions

1. This task can be enabled or disabled through the Administration Page. See SCR CA- 226672 for details.
2. Current e-mail and journaling functionality will remain in place.
3. After an appointment is cancelled successfully, the customer will hear the same message that's played today.

2 RECOMMENDATIONS

This section outlines recommendations to enable automated task creation for outbound call reminders when customers cancel their appointment.

2.1 Task for Cancelling an Appointment

2.1.1 Overview

Automated outbound reminder calls were deployed to all counties with SCR CA-226207, but automated task generation wasn't included. When customers cancel their appointments from the automated outbound campaign reminders, workers need to be notified of this change. Currently they receive an e-mail, but a task will ensure that the worker knows that they need to reschedule that appointment with the customer to ensure there's no impact to their benefits.

2.1.2 Task Type

1. Create a System task type for each of the 58 counties that will be created when a customer cancels their appointment through outbound IVR call.
2. The task type will have the following elements:
   i. Name: Appointment Cancelled From Outbound IVR
   ii. Category: CSC
   iii. Priority: Medium
   iv. Available Online: No
   v. Available for Automation: No
   vi. Expire Tasks: Yes
   vii. Expiration Period: 30 days
   viii. Expiration Type: After Task Creation
   ix. Newly Assigned Indicator: 5 days
3. The Long Description of the Task will be formatted as "An appointment for case {case number} at {date} {time} has been cancelled."

   Note: This Task Type is considered a "System Task" and will not be editable on the Task Type Detail page.

2.1.3 Task Creation

1. Create a new lambda that the outbound IVR contact flow will interact with to send a new API request to create a new task with the task type defined in Section 2.1.2. This lambda will need to send the following data to create the task using the Task API (for more information about the Task Creation API please see SCR CA-214755 section 2.4.).

   i. case_num (required)
   ii. worker_num (required)
   iii. bank_num (required)
   iv. pgm (CT 18) (required)
   v. task_cat_code (CT 10350) (required)
   vi. task_type_name (required)
   vii. due_date (required)
   viii. lang_code (CT 145)
   ix. long_description

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2718	The CONTRACTOR shall configure the CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.	The automated task creation will be defaulted to not enabled.	Create task when customer cancels an appointment.

4 APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-231735

Add The BenefitsCal Renewals Dashboard Link in CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Susanna Martinez
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/05/2021	1.0	Initial Document	Susanna Martinez

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2.1.3 Description of Changes 6
2.1.4 Page Location 6
2.1.5 Security Updates 7
3 Supporting Documents 7
4 Requirements 8
4.1 Project Requirements 8

1 OVERVIEW

BenefitsCal is a new website that has replaced C4Yourself, YourBenefitsNow, and MyBenefitsCalWIN, to provide one unified experience for all Californians, everywhere. A new BenefitsCal dashboard has been created and will require a means of accessing the new BenefitsCal dashboard in the CalSAWS system. A dashboard link for the new Renewals dashboard will need to be added to the Business Intelligence Report Search page under the BenefitsCal navigation option.

1.1 Current Design

There is no dashboard link from where to access the BenefitsCal Renewals dashboard.

1.2 Requests

Add the Renewals dashboard link to the CalSAWS system under the BenefitsCal navigation option in the Business Intelligence Report Search page on the left sidebar.

1.3 Overview of Recommendations

1. Add the Renewals dashboard link to the CalSAWS system under the BenefitsCal navigation option in the Business Intelligence Report Search page on the left sidebar.

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 urls to the dashboards.
2. This dashboard will be available within the existing CalSAWS Qlik application environment.
3. The Renewals dashboard is set to be available on October 10^{th} and will be deployed under the production release schedule that best aligns with this October 10^{th} date.
4. Any additional or new BenefitsCal dashboard links will be added via a separate SCR to align with the correct production release schedule.
5. County Helpdesk will be responsible for adding users to the BenefitsCal Consumer security group and role in order for users to have access to the BenefitsCal dashboards.

2 RECOMMENDATIONS

2.1 Reports – Business Intelligence Report Search Page

2.1.1 Overview

The Renewals dashboard link will be added under the BenefitsCal navigation option in the Business Intelligence Report Search page on the left sidebar. This dashboard link will navigate users to the BenefitsCal Renewals dashboard located at the CalSAWS Qlik environment.

2.1.2 Business Intelligence Report Search Page Mockup

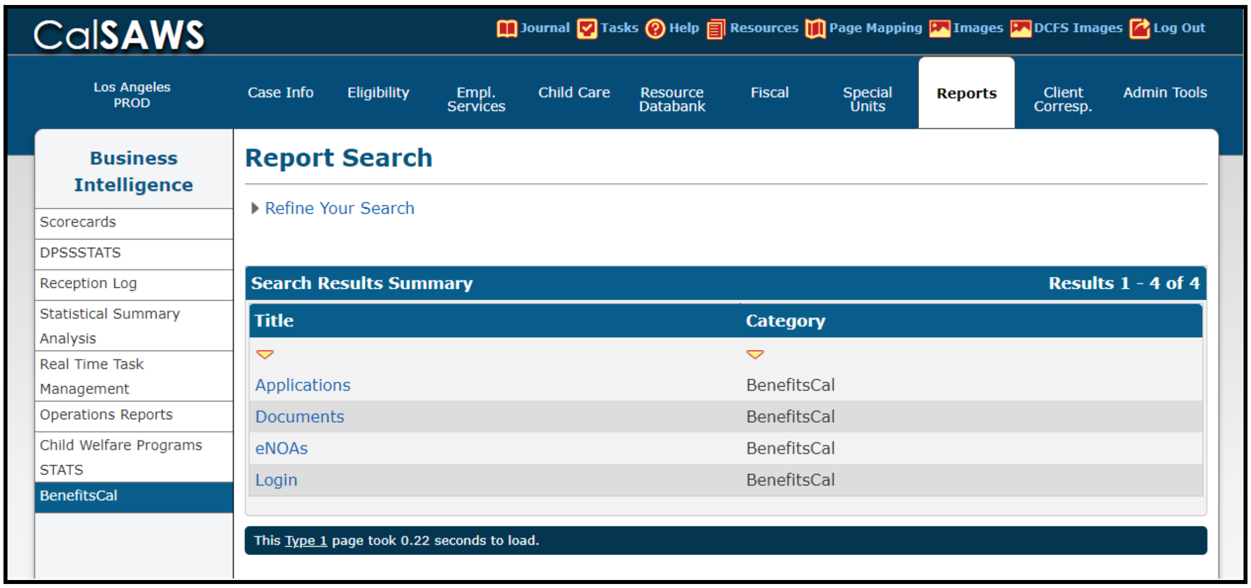

Figure 2.1.2.1 – Business Intelligence Report Search Page Current Design Mockup Without Renewals Dashboard Link Following SCR CA-230686 Changes

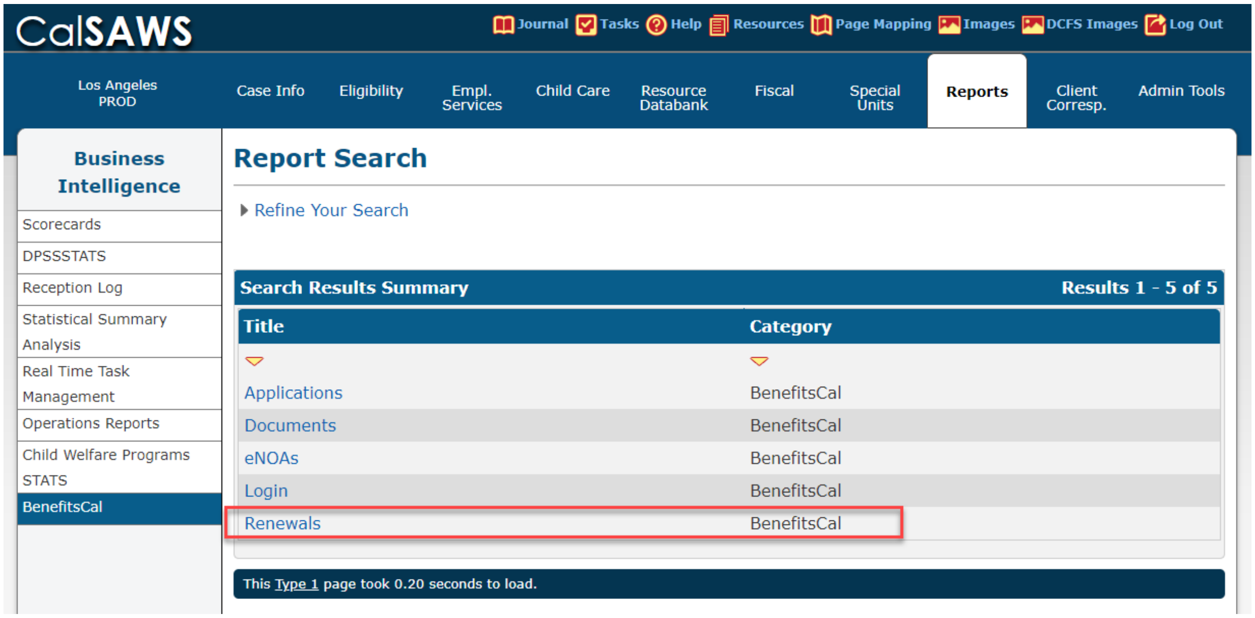

Figure 2.1.2.2 – Business Intelligence Report Search Page New Design Mockup With Renewals Dashboard Link

2.1.3 Description of Changes

1. Under the BenefitsCal navigation option add the Renewals dashboard link that will be accessible on the Business Intelligence Report Search page

Title	Category
Renewals	BenefitsCal

2.1.4 Page Location

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

2.1.5 Security Updates

The Renewals dashboard under the BenefitsCal navigation option will require the following security right and group in order to be accessed. This security right and group already exists and was created under SCR CA-230686.

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.	• View Only • BenefitsCal Consumer Role

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
N/A	N/A	N/A	N/A

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.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA 231745 Appointments API - Updates for multiple persons associated to appointments

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Dana Petersen

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/10/2021	1.0	Initial Draft	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

The Appointments API is used to return, create, and update county specific appointment data. GET, POST, and PUT operations return a single person id associated to the appointment.

CalSAWS core system functionality supports multiple person associations to appointments.

1.2 Requests

When more than one person is associated to an appointment that is being retrieved or modified by the Appointments API, update the return object to include multiple person ID objects.

1.3 Overview of Recommendations

1. Modify the appointment API to return multiple people if available.
2. Add a new response that is retuned if the search criteria is valid but there is no information available to return.

1.4 Assumptions

1. Results returned will be paginated to 20 values by default.
2. Limit parameter will allow a maximum of 250 values. Requesting a larger value will result in a 400 error response.
3. Results are limited to county level data. Except in the case of a third party application been given 00 access.
4. Code Table values in the appendix are subject to change.
5. Requests and Responses will use Code Table values as described in the appendix.
6. Offset and limits will apply only if paginated results are available.
7. Offset beyond the max available will return a 404 error.
8. Offset and limits will only apply to the root element
9. Sorting and ordering only applies to the root element.
10. Null or empty values will not be returned in the response objects.
11. Requests sent with improper data types will result in 400 error with a stack trace.

2 RECOMMENDATIONS

2.1 Appointments API

2.1.1 Overview

When more than one person is associated to an appointment that is being retrieved or modified by the Appointments API, update the return object to include multiple person ID objects.

2.1.2 Description of Changes

1. Modify the Appointment API to include a list of Person ID values instead of only one person ID.
2. Add a 204 (success, No Content) response code if the provided request parameters are valid but NOT associated to any returned appointments. A 404 error code will still be sent if the request parameter(s) are not found in CalSAWS.

2.1.3 Request

1. No Changes.

2.1.4 Request Body

2. No Changes.

2.1.5 Response

See technical specification for additional details.

2.1.6 Headers

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

X-County-Code: This header is added to all requests by the application gateway. The county code header is used to limit returned values to be specific to the county. In the special situation where an application is given a county code of 00 during onboarding, the calling application will have to provide county code as an additional request parameter. See 2.1.2.

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

2.1.7 Error Messages

The Appointment API will return error messages in the following Scenarios:

1. Bad request. body/parameter {parameter name} is invalid. {Reason}
2. Authorization information is missing or invalid.
3. Bad request. Request body/parameter {parameter name} was not found.
4. Request Timeout.
5. Internal Server Error.
6. Forbidden.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	API	Detailed Endpoint document	appointments.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2342	The CONTRACTOR shall create a service allowing 58 Counties to retrieve, update, and create appointments utilizing a CalSAWS API. The service will allow the 58 Counties to do the following: 1) Search for scheduled appointments by EBT card number, case number, Document ID, person information and appointment type, worker number, date and status. The	The API complexity accounts for including the ability to read, write, and update appointments. It also includes the ability to search for appointments utilizing a variety of parameters.	Create appointments API

	service will return a list of appointments based on the search parameters provided by the user. When searching by date or status a worker number, case number, or person information will be required. 2) Allow users to update the status of an appointment and create new appointments based on identified worker availability from a separate worker schedule API. This API will update and create appointments when called utilizing required data elements as specified by the CalSAWS Software.		

5 APPENDIX

This section contains the code table (CT) values that are currently used in the system. API users can use and expect these values as specified in the technical design

CT 22: status/stat_code
Canceled
Completed
No Show
Rescheduled
Scheduled
Showed

CT 291: type
Cal-Learn
Counselor Meeting
General Appointment
Group Meeting
GROW
Home Visit
IEVS Interview
Intake Interview
Meeting with Worker
Preventative Fraud Interview

CT 291: type
Provider
QC Case Review
Re-Evaluation CW/CF Interview
Re-Evaluation Interview
Telephone CW/CF RE Interview
Telephone Interview
WTW/REP
YBN Appointment

CT 10113: subType
2nd Telephone Interview Recertification
Appraisal Appointment
Assign Next Activity Appointment
Cal-Learn Non-Compliance Cause Determination
Cal-Learn Orientation
Case Management Appointment
Client Requested
Cure Sanction
DCFS Referral
Direct Rent
Exemption Expired Appointment
Fingerprinting
General Appointment
GR B&C Appointment
GR Case Manager
GR Denial Complaint
GR Employment Specialist
GR Hearings
GR JSTP Appointment
GR Medical
Group
GROW Hearing
Home Call
IFDS Appointment
Intake-follow-up Appointment
Issuance see Cashier
Issuance see Worker
Meeting
Mental Health Worker
MSUDRP Assessment

CT 10113: subType
NHR Appointment
Non-Compliance Cause Determination
Non-Compliance Home Visit
Other
Other Non-client
Out of County EBT Transaction
Out of State EBT Transaction
Post Time Limit
PVS Appointment
Reaffirmation Group
Reaffirmation Non-Group
Reaffirmation Second Appt.
Return GROW 85
Return Job Development
Sanction Home Visit
Screening & Intake Appointment
Screening Only
Second Parent
SSI 2nd Advocacy Mandatory
SSI Advocacy Follow-Up
SSI Advocacy Mandatory
SSI Advocacy Voluntary
SSIAP NSA with Worker
Telephone Interview Intake
Telephone Interview Recertification
Testing
Time Limit Review
Training
Verification Return
VIP Appointment
YBN Application Appointment

CT 23 : statRsn
Batch Initiated
Client Initiated
Interrupted
Rescheduled
Worker Initiated

Type Code : Sub Type Code mapping

Type Code	Sub Type Code
Cal-Learn	Cal-Learn Non-Compliance Cause Determination
Cal-Learn	Cal-Learn Orientation
GROW	Case Management Appointment
GROW	GROW Hearing
GROW	Return GROW 85
GROW	Return Job Development
General Appointment	2nd Telephone Interview Recertification
General Appointment	Client Requested
General Appointment	Direct Rent
General Appointment	Fingerprinting
General Appointment	GR B&C Appointment
General Appointment	GR Case Manager
General Appointment	GR Denial Complaint
General Appointment	GR Employment Specialist
General Appointment	GR Hearings
General Appointment	GR JSTP Appointment
General Appointment	Group
General Appointment	Home Call
General Appointment	IFDS Appointment
General Appointment	Intake-follow-up Appointment
General Appointment	Issuance see Cashier
General Appointment	Issuance see Worker
General Appointment	Meeting
General Appointment	Mental Health Worker
General Appointment	NHR Appointment
General Appointment	Other
General Appointment	Other Non-client
General Appointment	Out of County EBT Transaction
General Appointment	Out of State EBT Transaction
General Appointment	PVS Appointment
General Appointment	Reaffirmation Group
General Appointment	Reaffirmation Non-Group
General Appointment	Reaffirmation Second Appt.
General Appointment	SSI 2nd Advocacy Mandatory
General Appointment	SSI Advocacy Follow-Up
General Appointment	SSI Advocacy Mandatory
General Appointment	SSI Advocacy Voluntary
General Appointment	SSIAP NSA with Worker
General Appointment	Screening & Intake Appointment
General Appointment	Screening Only

Type Code	Sub Type Code
General Appointment	Telephone Interview Intake
General Appointment	Telephone Interview Recertification
General Appointment	Testing
General Appointment	Training
General Appointment	VIP Appointment
General Appointment	Verification Return
General Appointment	YBN Application Appointment
Provider	GR Medical
Provider	MSUDRP Assessment
WTW/REP	Appraisal Appointment
WTW/REP	Cure Sanction
WTW/REP	General Appointment
WTW/REP	Non-Compliance Cause Determination
WTW/REP	Non-Compliance Home Visit
WTW/REP	Sanction Home Visit
WTW/REP	Time Limit Review

Stat: statRsn Mapping

Appointment Status Code	Appointment Status Reason Code
Canceled	Client Initiated
Canceled	Worker Initiated
Rescheduled	Client Initiated
Rescheduled	Interrupted
Rescheduled	Rescheduled
Rescheduled	Worker Initiated
Scheduled	Batch Initiated
Scheduled	Client Initiated
Scheduled	Worker Initiated

CT 285: Attendance
Canceled
No Showed
Pending
Rescheduled
Showed

CT 15: County Codes

CountyCode	County name
01	Alameda
02	Alpine
03	Amador
04	Butte
05	Calaveras
06	Colusa
07	Contra Costa
08	Del Norte
09	El Dorado
10	Fresno
11	Glenn
12	Humboldt
13	Imperial
14	Inyo
15	Kern
16	Kings
17	Lake
18	Lassen
19	Los Angeles
20	Madera
21	Marin
22	Mariposa
23	Mendocino
24	Merced
25	Modoc
26	Mono
27	Monterey
28	Napa
29	Nevada
30	Orange
31	Placer
32	Plumas
33	Riverside
34	Sacramento
35	San Benito
36	San Bernardino
37	San Diego
38	San Francisco
39	San Joaquin
40	San Luis Obispo

41	San Mateo
42	Santa Barbara
43	Santa Clara
44	Santa Cruz
45	Shasta
46	Sierra
47	Siskiyou
48	Solano
49	Sonoma
50	Stanislaus
51	Sutter
52	Tehama
53	Trinity
54	Tulare
55	Tuolumne
56	Ventura
57	Yolo
58	Yuba

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-231914

Adding The BenefitsCal Periodic Report Dashboard in CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Susanna Martinez
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/05/2021	1.0	Initial Document	Susanna Martinez

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4.1 Project Requirements 8

1 OVERVIEW

BenefitsCal is a new website that has replaced C4Yourself, YourBenefitsNow, and MyBenefitsCalWIN, to provide one unified experience for all Californians, everywhere. A new BenefitsCal dashboard has been created and will require a means of accessing the new BenefitsCal dashboard in the CalSAWS system. A dashboard link for the new Periodic Reports dashboard will need to be added to the Business Intelligence Report Search page under the BenefitsCal navigation option.

1.1 Current Design

There is no dashboard link from where to access the BenefitsCal Periodic Reports dashboard.

1.2 Requests

Add the Periodic Reports dashboard link to the CalSAWS system under the BenefitsCal navigation option in the Business Intelligence Report Search page on the left sidebar.

1.3 Overview of Recommendations

1. Add the Periodic Reports dashboard link to the CalSAWS system under the BenefitsCal navigation option in the Business Intelligence Report Search page on the left sidebar.

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 urls to the dashboards.
2. This dashboard will be available within the existing CalSAWS Qlik application environment.
3. The Periodic Reports dashboard is set to be available on October 24th and will be deployed under the production release schedule that best aligns with this October 24th date.
4. Any additional or new BenefitsCal dashboard links will be added via a separate SCR to align with the correct production release schedule.
5. County Helpdesk will be responsible for adding users to the BenefitsCal Consumer security group and role in order for users to have access to the BenefitsCal dashboards.

2 RECOMMENDATIONS

2.1 Reports – Business Intelligence Report Search Page

2.1.1 Overview

The Periodic Reports dashboard link will be added under the BenefitsCal navigation option in the Business Intelligence Report Search page on the left sidebar. This dashboard link will navigate users to the BenefitsCal Periodic Reports dashboard located at the CalSAWS Qlik environment.

2.1.2 Business Intelligence Report Search Page Mockup

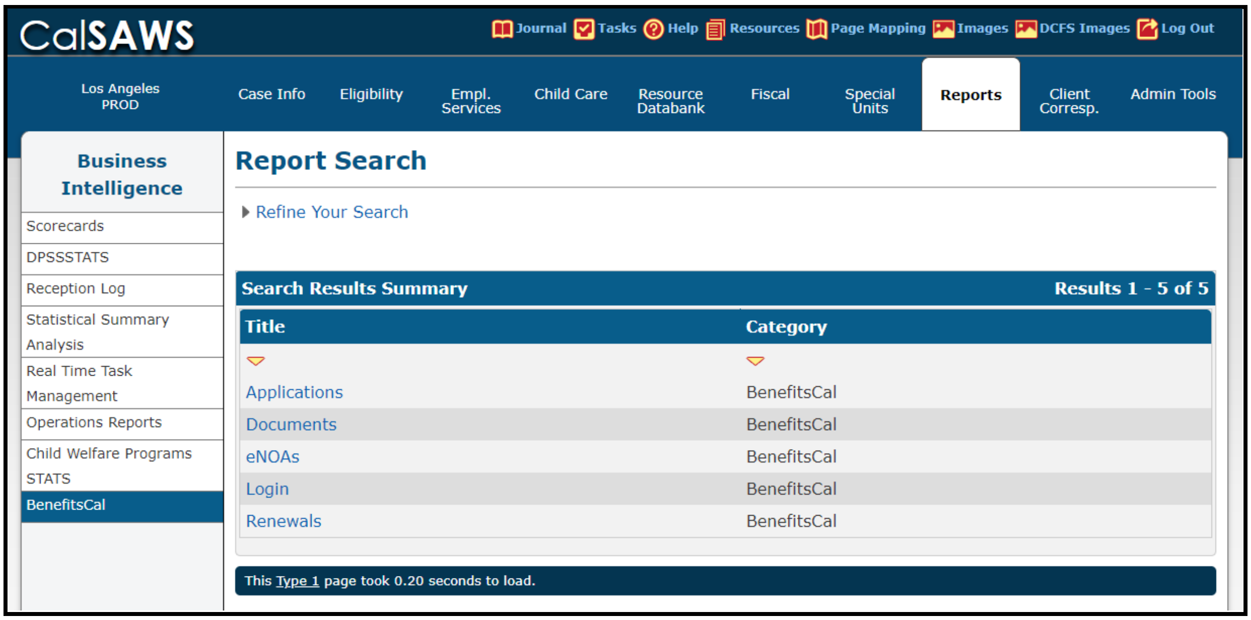

Figure 2.1.2.1 – Business Intelligence Report Search Page Current Design Mockup Without Periodic Reports Dashboard Link Following SCR CA-231735 Changes

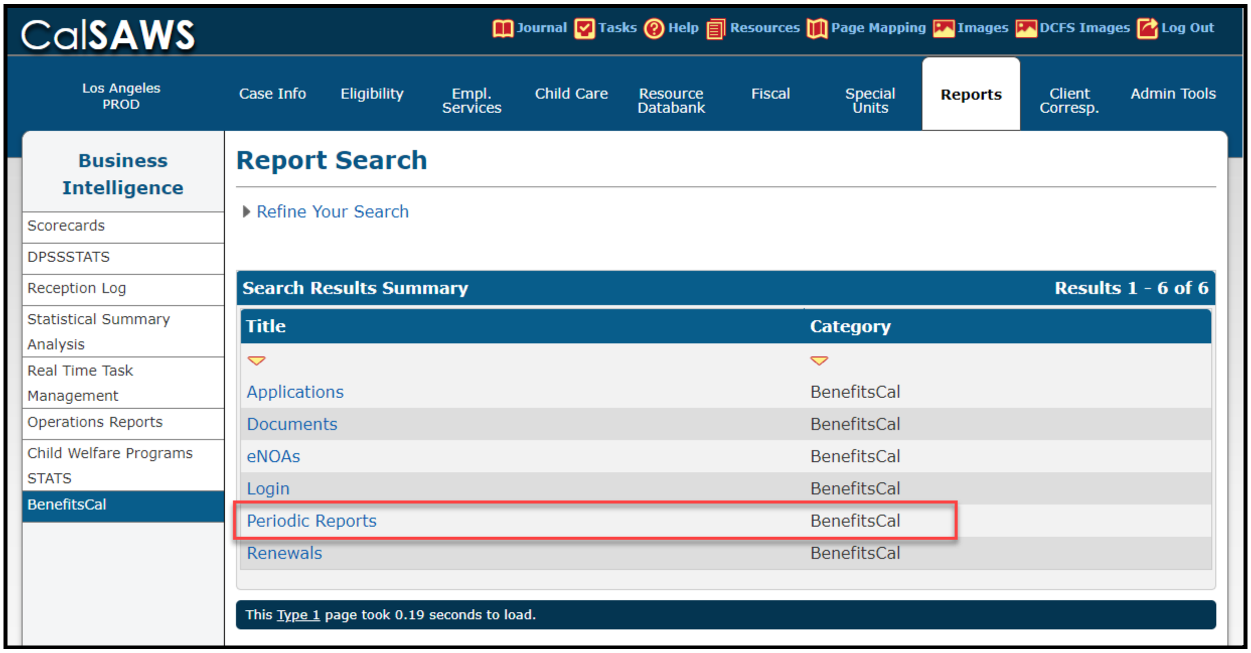

Figure 2.1.2.2 – Business Intelligence Report Search Page New Design Mockup With Periodic Reports Dashboard Link

2.1.3 Description of Changes

1. Under the BenefitsCal navigation option add the Periodic Reports dashboard link that will be accessible on the Business Intelligence Report Search page

Title	Category
Periodic Reports	BenefitsCal

2.1.4 Page Location

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

2.1.5 Security Updates

The Periodic Reports dashboard under the BenefitsCal navigation option will require the following security right and group in order to be accessed. This security right and group already exists and was created under SCR CA-230686.

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.	• View Only • BenefitsCal Consumer Role

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
N/A	N/A	N/A	N/A

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-232524

DDID 2670: Add GEN 202 - Verification of Employment/Earnings (5/21) in threshold languages

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/01/2021	0.1	Initial Draft	Raj Devidi

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1 OVERVIEW

SCR CA-215170 added the GEN 202 – Verification of Employment/Earnings (5/21) State form to the CalSAWS system in English and Spanish only.

SCR CA-215171 updated the GEN 202 – Verification of Employment/Earnings (5/21) State form in the CalSAWS system in English and Spanish with the latest state version.

This SCR will add the GEN 202 – Verification of Employment/Earnings (05/21) form to CalSAWS in the remaining supported threshold languages.

1.1 Current Design

Currently the GEN 202 State form is implemented in the CalSAWS system in English and Spanish with the version date of 5/21.

1.2 Requests

1. Implement State Form GEN 202 - Verifications of Employment/Earnings (5/21) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

2. Update the CALTEXT number on CSF 171 form.

1.3 Overview of Recommendations

1. Add State Form GEN 202 - Verifications of Employment/Earnings (5/21) in the 11 supported threshold languages.

2. Update the CALTEXT number from 62315 to 72422 on CSF 171 form in English and Spanish.

1.4 Assumptions

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

2 RECOMMENDATIONS

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

2.1.1 Overview

This SCR will add the State form GEN 202 – Verification of Employment/Earnings (revision 5/21) to the CalSAWS system in the remaining threshold languages.

State Form: GEN 202 (5/21)

Programs: All

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages:

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

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

2.1.2 Create Form GEN 202 XDPs in threshold languages

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

   Form Header: CalSAWS Standard Header in Threshold Language on page 1, BRM Header in Threshold Language on page 2
   Form Title (Document List Page Displayed Name): Verification of Employment/Earnings
   Template Description: This form is used by counties to gather employment information when a new job is reported.
   Form Number: GEN 202
   Include NA Back 9: No
   Imaging Form Name: Verif of Employment/Earning
   Imaging Document Type: Income
   Form Mockups/Examples: See Supporting Document #1 for PDF Mockups

2. Add Form GEN 202 to the Template Repository in the rest of the threshold languages for all 58 counties.

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

3. No change to the following barcode options to the GEN 202 form for all languages:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

4. Current Print Options and Mailing Requirements for Form GEN 202 will carry over to the rest of the threshold languages.

5. The Variable Population for Form GEN 202 will carry over to the rest of the threshold languages.

2.2 Update the CALTEXT number on CSF 171 form

2.2.1 Overview

This SCR will update the CALTEXT number on CSF 171 form in English and Spanish languages.

2.2.2 Description of change

Update the CALTEXT number from 62315 to 72422 on CSF 171 form in English and Spanish languages.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	GEN 202 Threshold Languages	GEN_202_Arabic.pdf GEN_202_Armenian.pdf GEN_202_Cambodian.pdf GEN_202_Chinese.pdf GEN_202_Farsi.pdf GEN_202_Hmong.pdf GEN_202_Korean.pdf GEN_202_Lao.pdf GEN_202_Russian.pdf GEN_202_Tagalog.pdf GEN_202_Vietnamese.pdf
2	Correspondence	CSF 171	CSF171_EN.pdf CSF171_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2670	The CONTRACTOR shall add State Form GEN 202 - Verification of Employment/Earning to the CalSAWS Software. The CONTRACTOR shall relabel the button and update the trigger on the IEVS pages to generate the GEN 202 instead of the PA 2419, and hide the PA 2419 in the Template Repository for all counties.	1. Estimate is for adding the State Form in the threshold languages. 2. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 3. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	With SCR CA-232524, form GEN 202 - Verification of Employment/Earnings will be added to the CalSAWS system in the 11 supported threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-232545 Multi program task creation via Task API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/23/2021	0.1	Initial Draft	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

The Task API allows external partners to find, create and update Tasks. The Task API is unable to create a task if there are multiple instances of a program on a case. This happens for Medi-Cal and employment service programs (WTW, Cal-Learn, GROW).

1.2 Requests

Update the Task API to create tasks when there are multiple instances of a program.

1.3 Overview of Recommendations

Update the Task API to create a task for every instance of a program if there are multiple instances of the requested program on a case.

1.4 Assumptions

1. A task will be created with the same task data for all instances of the program.

2 RECOMMENDATIONS

2.1 Task API – Create Task

2.1.1 Overview

This API will allow for the creation of task data in CalSAWS.

2.1.2 Description of Changes

Create a task for each occurrence of a program on the given case.

For example: If a case has 3 instances of Medi-Cal associated to it, and the request was to create a task for the MC programs. Then 3 tasks will be created, one for each Medi-Cal instance.

The tasks created will be identical.

The response object will be updated to an array and return all the task ids that were created.

2.1.3 Request Body

No change.

2.1.4 Response

See supporting document **tasks.html** for technical specification

2.1.5 Headers

No change.

2.2 Error Messages

The Task API will return error messages in the following Scenarios:

1. Bad request. body/parameter {parameter name} is invalid. {Reason}
2. Authorization information is missing or invalid.
3. Bad request. Request body/parameter {parameter name} was not found.
4. Request Timeout.
5. Internal Server Error.

2.3 Automated Regression Test

2.3.1 Overview

Update the existing automated regression test scripts to verify the new response layout for the Create Task request.

Create new automated regression test scripts to verify successful task creation when multiple instances of the requested program exist on the same case.

2.3.2 Description of Changes

1. Update the existing automated scripts that submit Create Task requests through the task API and expected a success (code 201) response, to extract the response details in the new format (ex., as the first element of an array).
2. Create new automated scripts to submit Create Task valid requests for a case and program combination where multiple matching records exist (ex., a case with multiple Medi-Cal or Welfare to Work programs). Verify that the API response includes a task for each applicable program, and that a task was created for each of these programs

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	API	Detailed Endpoint document	tasks.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
CAR-2700 3.5.4	The LRS shall include the appropriate API's necessary for integrating third-party tools.		Update the Task API

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-232786 Update Task API to use pgmId for task creation

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Lawrence Samy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/27/2021	0.1	Initial Draft	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

The Task API allows external partners to find, create and update Tasks. The Task API will create multiple tasks if there are multiple instances of a program on a case. This happens for Medi-Cal and employment service programs (WTW, Cal-Learn, GROW). The task API uses program name as a required field to create tasks.

1.2 Requests

Update the Task API to use program Id to create tasks.

1.3 Overview of Recommendations

Update the Task API to create only one task based on the pgmId.

1.4 Assumptions

1. A task can be created for a program with any status.
2. This change only affects the POST operation to create a task.

2 RECOMMENDATIONS

2.1 Task API – Create Task

2.1.1 Overview

This API will allow for the creation of task data in CalSAWS.

2.1.2 Description of Changes

Change the pgm input field on the POST endpoint to be pgmId.

The program Id sent in the request must be associated to the case that is also sent in the request.

Modify the create logic to create a task for only the specified program Id.

Modify the response object to return only one object (the task that was created).

Modify the response object to return the pgmId used to create the task.

2.1.3 Request Body

See supporting document **tasks.html** for technical specification.

2.1.4 Response

See supporting document **tasks.html** for technical specification.

2.1.5 Headers

No change.

2.2 Error Messages

The Task API will return error messages in the following Scenarios:

1. Bad request. body/parameter {parameter name} is invalid. {Reason}
2. Authorization information is missing or invalid.
3. Bad request. Request body/parameter {parameter name} was not found.
4. Request Timeout.
5. Internal Server Error.

2.3 Automated Regression Test

2.3.1 Overview

Update the existing automated regression test scripts to submit requests using the new 'pgmId' field and no 'pgm' field, and to verify the new response layout for the Create Task request.

2.3.2 Description of Changes

Update the existing automated scripts that submit Create Task requests through the task API and expect a success (code 201) response, to now:

1. Include a specific 'pgmId' value in the request rather than the 'pgm' text value.
2. Verify that a single set of task details are returned in the response, rather than an array.
   Note: Scripts that previously expected multiple task records to be created and returned will need to be modified accordingly, to confirm that only a single task is created for each successful request.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	API	Detailed Endpoint document	tasks.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
CAR-3345	The CONTRACTOR shall create a service for the 58 Counties that returns, updates, and creates tasks utilizing a CalSAWS API. This service will return a list of tasks for a specific	The API complexity accounts for including the ability to read, write, and update tasks. It also includes the ability to search	Update the Task API

	case. Additional filters for task type, task status, program, and due date will be available when returning tasks. This API will update and create tasks when called utilizing required data elements as specified by the CalSAWS system.	for tasks utilizing a variety of parameters.	

CalSAWS

California Statewide Automated Welfare System

CA-226207: DDID 2219, 2268, 2716, 2717, 2718, 2728, 2258: CalSAWS Outbound IVR

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Dheeraj Muralidara
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/17/2021	V0.1	Draft	Dheeraj Muralidara

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1 OVERVIEW

The CalSAWS Interactive Voice Response (IVR) system will use the Amazon Connect platform to contact customers via phone calls for automated outbound IVR calls. These automated outbound IVR calls provide information for appointment reminders and document reminders. Based on the information in the system, automatic calls are sent to customers that have opted to receive these calls. Customers can contact their county to opt-in to this service. Workers initiate the opt-in process from the Contact Detail page in the CalSAWS Application. Outbound IVR calls include appointment reminders, missing 'SAR7' documents and 'Balderas' reminders.

1.1 Current Design

The CalSAWS Outbound IVR Appointment Reminder and Outbound IVR Missing Document Reminder are C-IV functionalities migrated with SCR CA-207026. Data from CalSAWS is transferred to the Contact Center system via a text file and stored in an AWS S3 bucket. The batch jobs associated to this data transfer for the 'Missing Balderas Reminder Outbound campaigns' (POxxM304), and 'Missing SAR7 Reminder Outbound campaigns' (POxxM302) were migrated by SCR CA-218722.

1.2 Requests

Update migrated C-IV Outbound IVR Campaigns (SCR CA-226207) to include additional changes to support all 58 counties according to the requirements gathered during the Contact Center Functional Design Sessions.

1.3 Overview of Recommendations

Update the existing Outbound IVR batch job process to support 58 counties and include the following:

1) Enhance the Amazon Outbound API calls to support additional call volume.
2) Configure the Outbound IVR to support additional languages:
    a. Farsi
    b. Vietnamese
    c. Mandarin
    d. Tagalog
    e. Russian
    f. Korean
    g. Cambodian
    h. Hmong
    i. Arabic
    j. Lao
    k. Cantonese
    l. Armenian
    m. Portuguese
3) Enable the Contact Detail page to allow all counties to opt-in and/or opt-out customers for Outbound IVR Campaigns.

4) Configure the Outbound IVR Caller ID to display the CalSAWS IVR phone number associated to the county in which the customer's program is associated.
5) Configure the Appointment Reminder Outbound IVR calls to:
    a. Include appointment reminders for the following appointment types:
        i. Meeting with worker
        ii. Group meeting
        iii. Telephone interview
        iv. Re-evaluation interview
        v. Telephone CW/CF Re-Evaluation interview
    b. Provide the customer an option to confirm, cancel or reschedule the appointment.
    c. Create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.
    d. Transfer the caller to a queue or to a designated county number when a customer selects to reschedule their appointment.
6) Configure the Missing SAR 7 and Balderas Reminder Outbound IVR calls to provide the customer the option to have the missing document be re-sent:
    a. Resend generated document to address originally mailed.
    b. Create ability to electronically send if the customer has opted into e-notification for BenefitsCal.

1.4 Assumptions

1. The existing C-IV Outbound IVR Campaigns will be implemented into CalSAWS with SCR CA-226207. The recommendations in this SCR will enhance the migrated functionality and enable it for the 58 counties.
2. Outbound Call scheduling will match the existing Campaign schedules i.e. Tuesday – Saturday, 8AM-6PM.
3. Caller ID IVR Phone numbers will be assigned to CalWIN and Los Angeles Counties during a later phase. C-IV Counties will maintain their existing IVR phone numbers.
4. Ability to turn on or turn off task generation for appointments canceled through outbound IVR is configured by counties through the automated actions pages.
5. Task generation for appointments canceled through the outbound IVR will default to "off" for all counties. Counties will need to turn on task generation through automated actions if task generation is needed.
6. AWS will support the custom caller ID model for Outbound IVR Caller ID.

2 RECOMMENDATIONS

This section outlines recommendations to update the existing batch jobs to enable Outbound IVR for all 58 counties and additional updates to meet the requirements:

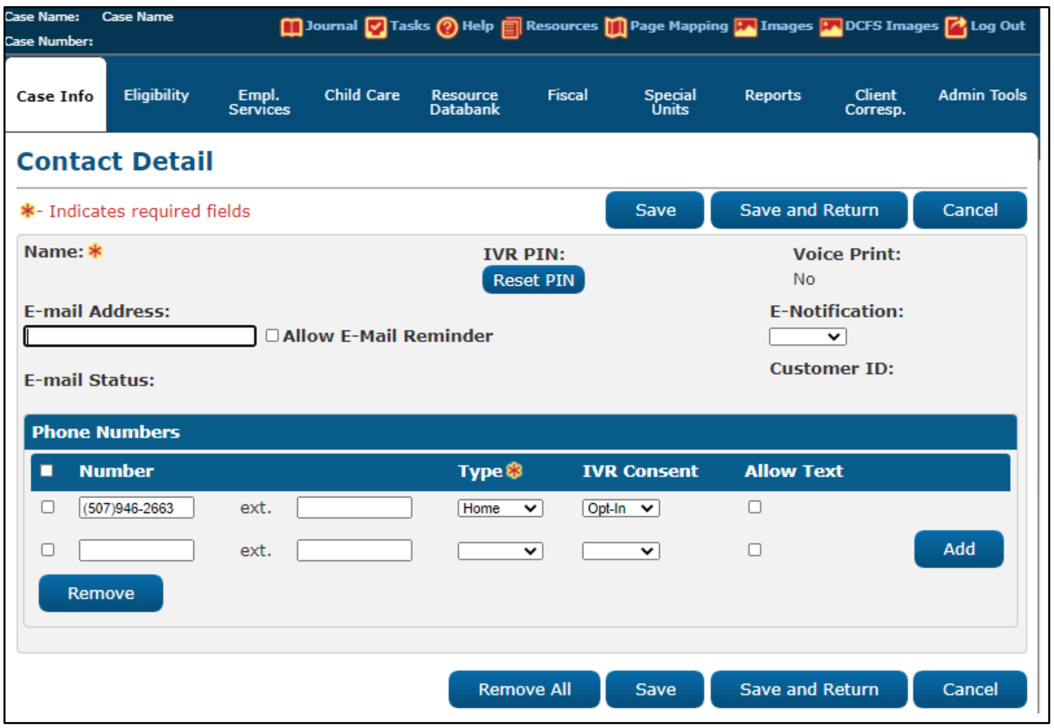
2.1 Update Outbound IVR to enable for all 58 Counties

The existing C-IV batch jobs migrated to CalSAWS with SCR CA-218722 and Amazon Outbound APIs will be configured for the additional 19 counties (Los Angeles County and 18 CalWIN Counties).

- Update 'Missing Balderas Reminder Outbound campaigns' (POxxM304)
- Update 'Missing SAR7 Reminder Outbound campaigns' (POxxM302)

Enhance Amazon Outbound APIs to be optimized for additional outbound call volume associated to all 58 counties.

The Contact Detail page in the CalSAWS application to allow workers to initiate the Outbound IVR Call opt-in/opt-out process for all counties. Note: This functionality is already in CalSAWS and will be available to all 58 counties.



2.2 Update Language Supported in Outbound IVR

2.2.1 Overview

CalSAWS Outbound IVR calls are currently supported in 2 languages: English and Spanish.

2.2.2 Additional Languages

Update all Outbound IVR calls to support the following additional languages:

a. Farsi

b. Vietnamese
c. Mandarin
d. Tagalog
e. Russian
f. Korean
g. Cambodian
h. Hmong
i. Arabic
j. Lao
k. Cantonese
l. Armenian
m. Portuguese

The batch job (SCR-226207) will be updated to include the above listed languages. The verbiage for different languages will be recorded by professional voice talent. The verbiage translation will be done by a separate third-party vendor and confirmed prior to professional voice recording. The language in which the customer receives the outbound IVR call will be determined by the language code from the batch job County Caller ID

Outbound IVR will be set up to display the phone number for that county's CalSAWS IVR on the caller ID of the outbound call to facilitate customers calling back.

Note: All 39 C-IV Counties will display the existing IVR phone number as the caller ID number for outbound IVR calls.

Los Angeles County and CalWIN County caller ID numbers will be determined at a later time.

2.3 Outbound IVR - Appointment Reminders

2.3.1 Overview

The Outbound IVR – Appointment Reminders will be enabled for all 58 counties.

For Appointment Reminders, currently the batch job finds a customer's appointment date between the appointment high and appointment low dates.

- Appointment low date is defined as the next business day + 1 day from the batch date.
- Appointment high date is defined as 3 business days + 1 day from the batch date.

Appointment types include Meeting with Worker, Group Meeting, Telephone Interview, Re-Evaluation Interview and Telephone CW/CF Re-Evaluation Interview.

Appointments must be in a status of "scheduled" or "rescheduled".

Based on the appointment ID the batch job had returned, the caller is played back the appointment information including the appointment type, date and the duration. The customer has an option to confirm or cancel.

- If the customer confirms the appointment, the outbound IVR updates the system and the call is released with the corresponding outbound call status.
    - Appointment page is updated with a status of 'Confirmed'.
- If the customer decides to cancel the appointment, the customer will be prompted to authenticate by entering case number and IVR PIN.
    - Appointment page is updated with "Cancelled" status
    - Journal entry is created
    - Email is sent to worker

All outbound IVR calls are documented in the Customer Contact History page.

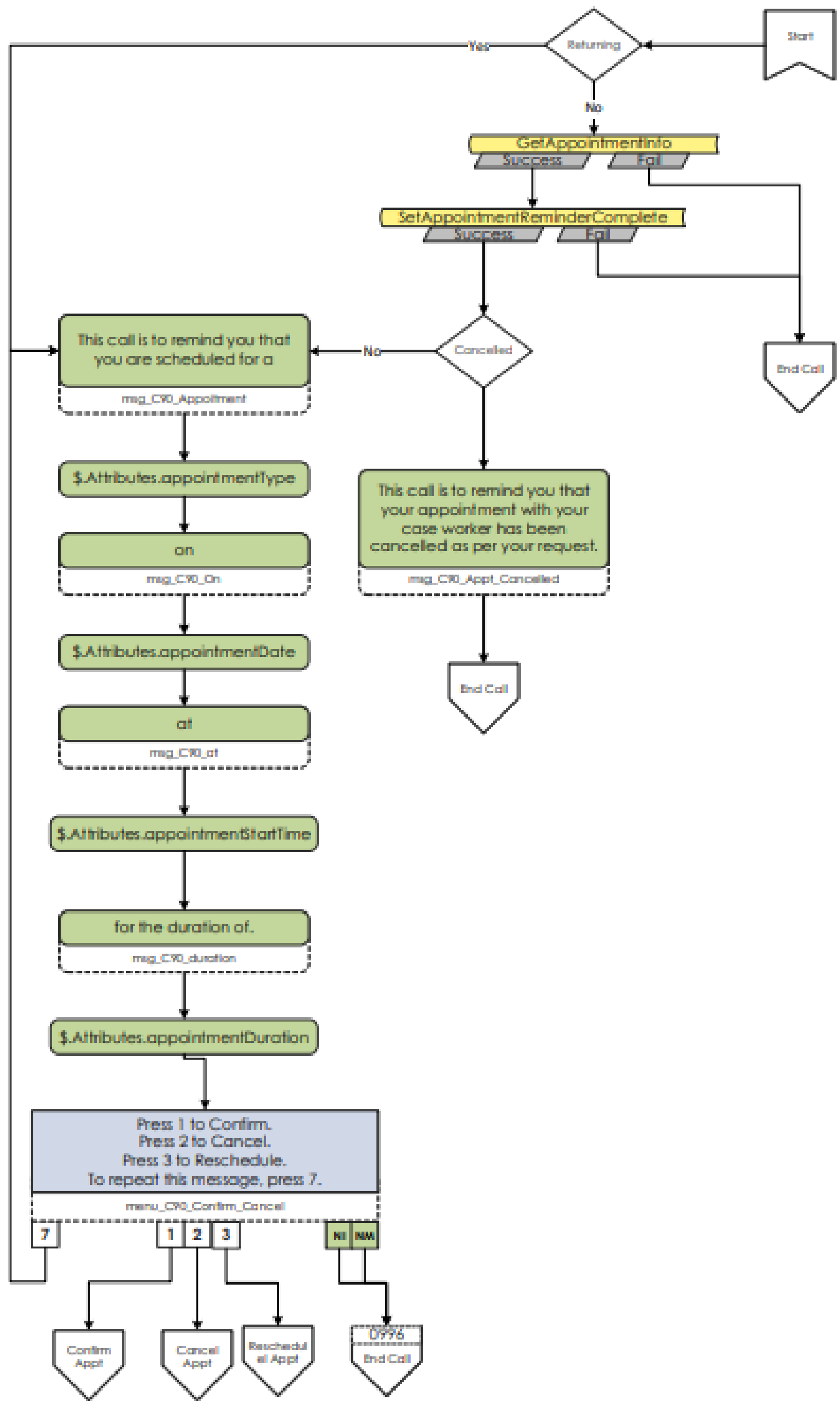
Note: This is existing C-IV outbound IVR functionality migrated to CalSAWS in SCR CA-226207.

2.3.2 Task for Cancel Appointment

Update CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR call. This functionality will be included in a separate design effort.

2.3.3 Transfer Reschedule Appointment Calls

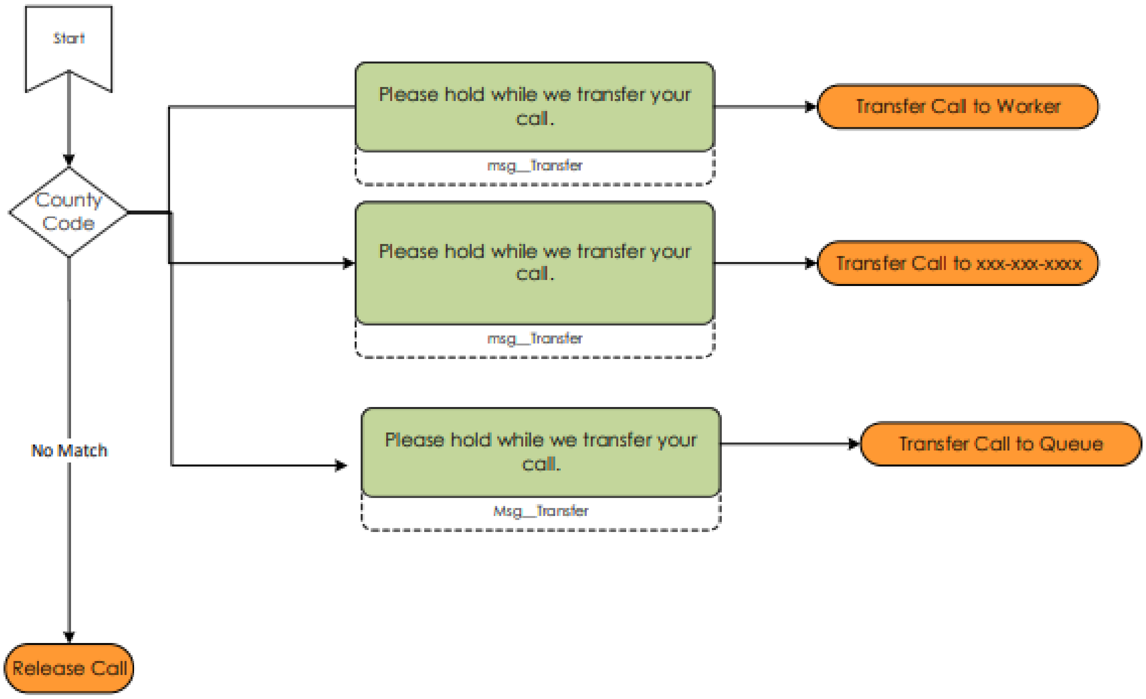
Add option to reschedule the appointment during an Outbound IVR appointment reminder call.



If a customer selects to reschedule an appointment, the call will be transferred in the following manner:

- In a CalSAWS Contact Center County – Call is transferred to contact center queue for agent to complete rescheduling appointment or call is transferred to external phone number. Note: Individual county configuration for rescheduling transfer will be determined during individual county call flow design sessions prior to county go-live.

- In a Non-CalSAWS Contact Center County – Call is transferred to external number configured for all worker transfers.



2.4 Outbound IVR - Missing Document Reminders

2.4.1 Overview

The Outbound IVR – Missing Document Reminders will be enabled for all 58 counties.

For Missing Document Reminders, the batch job finds a SAR 7 document that has a 'doc_date' that is in between the batch date and the batch date + 1day. There are two (2) missing document reminders.

- SAR 7 Reminder – This is triggered by the generation of the NA 960X SAR
- Balderas Reminder – this is triggered byM40 181C SAR

Both missing document reminders provide the customer the document name, document due date and provide the customer the options request the form be re-sent.

If the caller selects the option to request the form, the system will determine the form type on file that will be offered and will resend the system generated form.

Note: the system will not generate a new form. The request form is sent to address associated when original form was generated.

All outbound IVR calls are documented in the Customer Contact History page.

Note: This is existing C-IV outbound IVR functionality migrated to CalSAWS in SCR CA-226207.

2.4.2 Mail forms electronically

Create ability to electronically send if the customer has opted into e-notification for BenefitsCal. This functionality will be included in a separate design effort.

2.5 Outbound Call Status and Reporting

A nightly batch job receives a CSV file from Amazon, processes the file and journals the records. The CSV file contains information pertaining to the status of outbound calls.

Outbound Call Status Definitions

Call Status Result Code	Call Status Short Description	Call Status Long Description
8	Customer phone did not answer	Customer phone did not answer
10	Customer answered and was connected	Customer answered and was connected
24	Number successfully contacted but reached the wrong person	Number successfully contacted but reached the wrong person
29	Not able to Connect to Customer phone.	Not able to connect to customer phone.
30	Customer connected and confirmed appointment.	Customer connected and confirmed appointment.
31	Customer connected and attempted to confirm appointment.	Customer connected and attempted to confirm appointment due to error.
32	Customer connected and canceled appointment.	Customer connected and canceled appointment.
33	Customer connected and attempted to cancel appointment.	Customer connected and attempted to cancel appointment but failed to authenticate.

34	Customer connected and successfully requested document.	Customer connected and successfully requested document be resent to their address on file.
35	Customer connected and requested document to be re-sent, but failed.	Customer connected and requested document to be re-sent but failed due to an error.

The CalSAWS system generates an inbound/outbound call report which provides information regarding call type and whether or not the call was answered by the customer. Users must subscribe within CalSAWS to receive this report. Users subscribed to access this report on the CalSAWS application can generate this report at any time. Reports are generated per request. Any user within the IVR Report security group can access this report.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	AWS Outbound Campaigns Detailed Call Flow	Visio diagram represents outbound call flow, AWS Outbound Campaigns Detailed Call Flow.pdf	
2			
3			
4			

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2219	The CONTRACTOR shall configure the Customer Service Center solution to allow counties to update the customers opt in and/or opt out status for the outbound IVR Campaigns through the CalSAWS Application.	Section 2.1
2268	The CONTRACTOR shall configure the CalSAWS outbound IVR to display the phone number for that county's CalSAWS IVR on the caller ID of the outbound call to facilitate customers calling back.	Section 2.2.2
2716	The CONTRACTOR shall configure the CalSAWS Outbound IVR solution to include document reminders for missing SAR7's in the outbound IVR Campaigns. Upon answering the call, the customer can request to have their SAR7 resent to them.	Section 2.4
2717	The CONTRACTOR shall configure the CalSAWS Outbound IVR solution to have appointment reminders that include meeting with worker, group meeting, telephone interview, re-evaluation interview, telephone CW/CF Re-Evaluation Interview. The customer must have an appointment status that is "scheduled" or "rescheduled." Upon receiving the appointment reminder, the customer can confirm or cancel the appointment.	Section 2.3
2718	The CONTRACTOR shall configure the CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.	Section 2.3.2
2728	The following languages will be supported in the CalSAWS Outbound IVR: - English - Spanish - Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao	Section 2.2.2

2258	The CONTRACTOR shall configure the CalSAWS Application to include an Inbound/Outbound Call Report which provides the following information: - Date - Case Number - Case Name - Person Name - Language - Worker - Answered/ Unsuccessful - Type	Section 2.5

4.2 Migration Requirements

Not Applicable.

5 MIGRATION IMPACTS

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