



California Statewide Automated Welfare System

Design Document

CA-215673 DDID 2323 FDS: GA GR - GR
recoverable offset batch

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	

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6/28/2021	1.0	Initial Revision	Deron Schab
7/12/2021	2.0	Added Fund Code Assumption	Deron Schab
7/13/2021	3.0	Updated base on QA comments	Deron Schab

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1 OVERVIEW

This SCR will update the GR CAPI Recovery Batch job to process General Relief (GR) Recoverable issuances for the General Assistance/General Relief (GA/GR) Managed County and the GA/GR Automated EDBC/CC County programs.

1.1 Current Design

The existing GR CAPI Recovery Batch identifies issuances that are GR or CAPI recoverable and applies the issuances to the customers' GR or CAPI Recovery Accounts. If an appropriate Recovery Account does not exist, the batch will first create a Recovery Account, then apply the issuances.

1.2 Requests

Modify the GR CAPI Recovery Batch job to identify GR Recoverable issuances for the GA/GR Managed County and the GA/GR Automated EDBC/CC County programs and use the existing logic to post the issuances to GR Recovery Accounts.

1.3 Overview of Recommendations

1. Modify the GR CAPI Recovery batch to process issuances for the GA/GR Managed County and GA/GR Automated EDBC/CC County programs.
2. Create a BPCR to add county-specific GR CAPI Recovery batch jobs.

1.4 Assumptions

1. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605, for counties that have opted into the batch job.
The scheduling SCRs mentioned above will cover the opt in/out functionality and can be verified once implemented.
2. The Los Angeles County "GR Recoverable" Recovery Accounts will not be impacted.
3. The Transaction Types populated on the Transaction Detail page for transactions posted to GR Recoverable Recovery Accounts associated with the GA/GR Managed County and GA/GR Automated EDBC/CC County programs will be the same as the existing Transaction Types used for the GA/GR LA County program.
4. If a county transitions from a GA/GR Managed County to a GA/GR Automated EDBC/CC County, then any existing GR Recoverable Recovery Accounts associated with a GA/GR Managed County program would need a new GR Recoverable Recovery Account created for the GA/GR Automated EDBC/CC County program.
5. The non-LA County CAPI program issuances will not be impacted.
6. Fund Codes will be added with SCR CA-213530.

2 RECOMMENDATIONS

2.1 Update the GR CAPI Recovery Batch

2.1.1 Overview

The existing GR CAPI Recovery Batch (PB19F207) is for Los Angeles County only, and picks up issuances with the following properties

- The status is "Issued" or "Manually Issued"
- The program is GA/GR LA County or CAPI
- The associated fund code has the GR Recoverable indicator set to yes in the system
- An overpayment is not associated with the Issuance

For each issuance picked up, the batch will find an existing GR Recoverable Recovery Account for each program person associated with the issuance program and apply the issuance amount to the Recovery Account. If a Recovery Account does not exist for the program person, one is created. If two persons are associated with the program, the Issuance Amount is split between the two Recovery Accounts. If more than two persons are associated with the program, an exception is logged, and the Issuance is not processed.

The batch will be modified to be used by all 58 counties and will pick up GR Recoverable issuances for the GA/GR Managed County and GA/GR Automated EDBC/CC County programs.

2.1.2 Description of Change

1. Update the batch logic to process issuances for GA/GR Managed County and GA/GR Automated EDBC/CC County programs.
2. Update the logic used to determine Program Persons to include the GA/GR Managed County and GA/GR Automated EDBC/CC County programs.

2.2 Batch Property Change Request (BPCR) to create a batch job for each of the 57 counties.

2.2.1 Overview

A BPCR is needed to create county-specific GR CAPI Recovery Batch jobs for each of the 57 counties requirements.

2.2.2 Description of Change

1. The BPCR will
 - a. Add batch job PBxxF207 into the system for each of the 57 counties.
 - b. Add the following batch properties and associated values for each county-specific batch:

Batch Property	Value
commitFrequency	30
countyCode	[County Code]
logCommits	TRUE
logName	GRCAPIRecoveryBatchLog
Module1	org.civ.bsd.batch.recovery.GRCAPIRecoveryBatch
VALBL_RECOV_IND	FALSE

2.2.3 Execution Frequency

Daily

2.2.4 Key Scheduling Dependencies

Predecessors: PlxxF403 and PlxxF405.

2.2.5 Counties Impacted

C-IV and CalWIN counties that opt into the functionality

2.2.6 Data Volume/Performance

1. C-IV Counties: Not available
2. CalWIN Counties: Not Available

2.2.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate the nature of the failure and determine the appropriate action. The GR CAPI Recovery Batch does not use restart data.

3 REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2323	The CONTRACTOR shall update the CalSAWS Software to provide the ability for the user to manually offset/record a transaction towards a GA/GR Recoverable/Loan account based on an activity participation (i.e. GROW activity/any job credit activities).	<p>1. The Automatic GA/GR Recoverable/Loan Account creation batch had to be modified to make it configurable for the 57 counties to opt-in/opt-out.</p> <p>After the automatic batch creates the GR Recoverable/Loan account, the user can go to the Transaction Detail page and add transactions manually to offset the account based on the activity participation. (the Transaction detail page and ability to add a transaction manually already exists in CalSAWS)</p> <p>2. An Existing Transaction Type which is available in CalSAWS will be used to record the transaction and then offset the recovery account balance.</p>	<p>1. Modified the batch job logic to pick up issuances for the GA/GR Managed County and GA/GR Automated EDBC/CC County programs.</p> <p>2. Created county specific GR CAPI Recovery Batch jobs.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227816

AB 79 TEMP 3022 60-Month Time Limit Mass
Informing Notice

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Rainier D., Priya S., Himanshu J.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/01/2021	1.0	Initial Document	Jasmine Chen

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1 OVERVIEW

Per ACL 20-113, the policy has changed to extend the CalWORKs 48-month time-on-aid limit to 60-months for all adults. Before this becomes effective May 1, 2022, all Active CalWORKs assistance units (AUs) will be mass mailed an informing notice of the policy changes.

1.1 Current Design

CalWORKs adults currently have a time-on-aid limit of 48 months. Per CA-217944 and policy changes, the time limit will be extended to 60 months effective May 1, 2022. The State created a TEMP 3022 form containing information about the policy changes of ACL 20-113.

1.2 Requests

Mass-informing notice TEMP 3022 must be sent to all CalWORKs recipients at least 90 days prior to policy changes of ACL 20-113.

1.3 Overview of Recommendations

1. Add the informing notice, TEMP 3022, into the CalSAWS system.
2. Mass mail the informing notice to all CalWORKs recipients via a batch process at least 90 days prior to policy changes stated in ACL 20-113.

1.4 Assumptions

1. Updates to the eligibility rules per ACL 20-113's policy changes are scoped in CA-217944. The associated correspondence changes are scoped in CA-224269.
2. CWDs can use TEMP 3022 as an additional tool to inform adults of the 60-month time limit at intake and at annual redetermination prior to implementation of CA-217944.
3. This SCR will only implement TEMP 3022 in English. Implementation of other threshold languages are scoped in CA-231180.

2 RECOMMENDATIONS

2.1 Correspondence: Mass Mailing of TEMP 3022

2.1.1 Overview

The CalSAWS system will add the TEMP 3022 (08/21) form and mass mail it to all active CalWORKs recipients via a one-time batch process.

State Form: TEMP 3022 (08/2021)

Programs: CalWORKs

Attached Forms: N/A

Forms Category: Form

Template Repository Visibility: All Counties

Languages: English

2.1.2 Create Form XDP

The CalSAWS system will add the TEMP 3022 (08/21) form. The header will be on the first page and the TEMP 3022 will be on the back page.

Form Header: CalSAWS Standard Header (refer to mockup)

Form Title: State Law Increases the Time Limit for CalWORKs Adults to 60 Months

Form Number: TEMP 3022

Include NA Back 9: N/A

Imaging Form Name: State Law Increase CW Adult 60 Time Limit

Imaging Document Type: CalWORKs (CW)

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Add Form Generation

Generate TEMP 3022 via batch process as a one-time mass-mailer for all Active CalWORKs AUs with a batch date at least 90 days prior to the policy changes of ACL 20-113, effective 05/01/2022.

To generate TEMP 3022 via batch process, create a DCR that does the following:

1. Find the cases that meet all the following conditions:
 - a. The program is CalWORKs.
 - b. The program status is Active.

2. Insert the following values below in the System Transaction (SYS_TRANSACTION) table for each case:

Table Field to Populate	Population for Field
Case Id	The case id associated to the current CW program.
Program Id	The program id of the current CW program.
Person Id	The person id of the primary applicant of the current CW program.
Type Code	FR
Sub Type Code	IN
Effective Date	Batch date to mass-mail the TEMP 3022

- a. The batch date to mass-mail the TEMP 3022 is tentatively 01/29/2022 and may subject to change.

2.1.4 Add Form Variable Population

There are no variables to populate for this mass informing notice.

2.1.5 Add Form Control

Add the following form control options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

2.1.6 Add Form to Template Repository

TEMP 3022 will be available in the Template Repository for all counties and will stay accessible from the Template Repository for 1 year from the batch date of when the one-time notice was sent out.

The following parameters will be required:

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

2.1.7 Add Form Print Options and Mailing Requirements

Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
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Y	Y	Y	Y	Y	Y
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Mailing Requirements:

Mail-To (Recipient): Primary Applicant of the CalWORKs AU

Mailed From (Return): CalWORKs Worker's Office/District Office

Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: None

Electronic Signature: No

Post to Self Service Portal (SSP): Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	Mockup of TEMP 3022 mass-informing notice	CA 227816_TEMP 3022_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1254	The LRS shall generate special mailings and mass notifications to specific programs, populations, or individuals, as specified by COUNTY.	The CalSAWS system will perform a one-time, mass mailing of TEMP 3022 to inform all active CalWORKs recipients of the new policy changes per ACL 20-113.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-49396

ACL 15-96 – Update NA 1281, NA 1280, NA 1279,
NA 1278 and NA 1277

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	James Tran
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/29/2021	1.0	Initial Draft	James Tran
7/16/2021	1.1	Updated Design and Mockups per Committee Comments and current existing NOA/Form templates	Tiffany Huckaby
7/30/2021	1.2	Updated per Feedback from Analysts	Tiffany Huckaby
8/24/2021	1.3	Updated per Feedback from the Committee	Tiffany Huckaby

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1 OVERVIEW

ACL 15-96 updated the Foster Care ARC Forms/NOAs: **NA1277, NA 1278, NA 1279, NA 1280, and NA 1281**. With this update, the latest version of NA 1277 and NA 1281 will be made available to the Template Repository. Forms NA 1278, NA 1279, NA 1280 and NA 1281 are currently generating from EDBC as dynamically generated NOAs. The NOAs currently generate with all possible selections listed and with the applicable selection marked via a check box. This update will change that so it will only generate the applicable selection on the NOA.

1.1 Current Design

The following form exists in the Template Repository but is out of date:

- **NA 1277** - NOTICE OF ACTION APPROVED RELATIVE CAREGIVER (ARC) OVERPAYMENT

The following forms exist as NOAs generated via EDBC:

- **NA 1278** - NOTICE OF ACTION – APPROVE APPROVED RELATIVE CAREGIVER (ARC) PAYMENT
- **NA 1279** - NOTICE OF ACTION - DENY APPROVED RELATIVE CAREGIVER (ARC) PAYMENT
- **NA 1280** - NOTICE OF ACTION – DISCONTINUE APPROVED RELATIVE CAREGIVER (ARC) PAYMENT

The following form is not currently available in CalSAWS:

- **NA 1281** - NOTICE OF ACTION – CHANGE APPROVED RELATIVE CAREGIVER (ARC) PAYMENT

1.2 Requests

Update the existing form in Template Repository with the latest version provided by the state for:

- **NA 1277** - NOTICE OF ACTION APPROVED RELATIVE CAREGIVER (ARC) OVERPAYMENT

Update the following corresponding ARC NOAs to only generate the applicable selections on their respective form:

- **NA 1278** - NOTICE OF ACTION – APPROVE APPROVED RELATIVE CAREGIVER (ARC) PAYMENT
- **NA 1279** - NOTICE OF ACTION - DENY APPROVED RELATIVE CAREGIVER (ARC) PAYMENT
- **NA 1280** - NOTICE OF ACTION – DISCONTINUE APPROVED RELATIVE CAREGIVER (ARC) PAYMENT

Add the following new form to the Template Repository and update the NOA for ARC Rate Changes to use the verbiage from this form:

- **NA 1281** - NOTICE OF ACTION – CHANGE APPROVED RELATIVE CAREGIVER (ARC) PAYMENT

1.3 Overview of Recommendations

- Update the **NA 1277** in Template Repository to the latest version provided in ACL 15-96.
- For the following NOAs: **NA 1278**, **NA 1279** and **NA 1280**; update them to only generate the applicable issuance type or reason(s).
 - Update the ARC Approval NOA to use dynamically generated fragment sections to generate the applicable benefit issuance type instead of a list of check boxes.
 - Create new Reason fragments for each reason that currently has checkbox population in the current ARC Denial and ARC Discontinuance NOAs. Only the applicable reason(s) will display on the NOA when generated.
- Add the latest version of **NA 1281** provided by the State to the Template Repository and also enable automation via EDBC.

1.4 Assumptions

1. Forms **NA 1277** will not be automated with this effort and will only be available in Template Repository.
2. Forms **NA 1278**, **NA 1270** and **NA 1280** will not be added to Template Repository as they are dynamically generated NOAs in CalSAWS.
3. Form **NA 1281** will both be available to the Template Repository and be dynamically generated via EDBC. The Template Repository version will match the State version however no automation will be added to the Template Repository or EDBC generated version regarding the 'Age' change reason as this has been determined to be no longer applicable ongoing.
4. If the ARC NOA does not have the required Failure Reason automated (for example, the NOAs contain an 'Other' reason for reasons not listed on the forms), then the worker will either append the NOA that generated for another applicable reason or generate a manual NOA via the Template Repository.
5. For all existing NOAs generated via EDBC, no additional Threshold Languages are being added with this effort.
6. Currently ARC is a part of the Foster Care program in CalSAWS. The changes in this SCR will not impact the Foster Care NOAs and will only impact the generation of the ARC NOAs.
7. The **NA 1279** and **NA 1280** both contain a "ARC Program Not Available for County" and "County Opts out of ARC" reason. Both the Negative Action reasons and the NOA reason checkbox generation for these reasons were turned off as part of **CA-207183** in the 19.11 release. This effort will not add generation conditions for these two reasons.

Turned off Reasons from NA 1279:

- ☐ You do not live in California.
- ☐ The child does not live in California.

Turned off Reasons from NA 1280:

- ☐ You no longer live in California.
- ☐ The child no longer lives in California.

8. The ARC NOA/Forms in this SCR will be added into Threshold Languages via SCR CA-231685.
9. CA-232562 will update the NA 1277 as well as the other impacted Forms/NOAs in CalSAWS to no longer have the 'CPS' fields as part of the Header for migration counties.

2 RECOMMENDATIONS

2.1 Update Foster Care ARC Program Overpayment Form NA 1277

2.1.1 Overview

The existing NA 1277 form in CalSAWS is out of date. With this effort, the form will be updated to the latest version provided in ACL 15-96. The English version of the form currently is only available through the Template Repository. The Spanish version will be added with this effort.

Current State Form version: NA 1277 (11/15)

Current Programs: Foster Care/ARC Program

Current Attached Form(s): NA Back 9

Current Forms Category: Form

Existing Languages: English

2.1.2 Description of Change

This recommendation will update the Foster Care form NA 1277 in the Template Repository with the most recent state version (01/16).

1. Updates to Foster Care NA 1277 Form XDP

This effort will update the English version to the most current version (01/16). This effort will also add the Spanish version to the Template Repository. The newly added Spanish version will match the English version and use the existing CalSAWS Header (Header_1).

Note: The 'CPS' field will only be displayed when there is CPS information to populate. See CA-232562 for current design.

Updated Languages: English, Spanish (new)

Imaging Form Name: ARC OP

Imaging Document Type: Notification/NOA

Form Mockups/Examples: See Supporting Document #1 for English version and Supporting Document #2 for Spanish version.

Variables Requiring Translations: N/A

2.2 Update ARC Approval NOA Action Fragment

2.2.1 Overview

This recommendation is to update the ARC Approval NOA Action Fragment. The current state of the fragment lists out all possible benefits issuance types, along with a check mark to indicate the applicable issuance type. This fragment will be updated to only generate the issuance type that is applicable. The non-applicable reasons will no longer generate. This update will also remove all check boxes in this fragment.

Action Fragment Name and ID: ARC Approval Action
FC_AP_ACTION3
(Fragment ID: 4097)

State Form/NOA: NA 1278 (11/16)

Current Program(s): Foster Care/Approved Relative Caregiving (ARC)

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages: English

2.2.2 Description of Change

1. Update the ARC Approval Action Fragment XDP

This effort is to update the ARC Approval NOA Action Fragment. Currently, the ARC Approval Action fragment lists all of the benefits issuance types and adds a check mark to the applicable benefit issuance type. This recommendation will update the issuance types to be dynamically generated sections that will display only the appropriate type.

Technical Note: The Snippet Name of the ARC Approval Reason Fragment (Fragment ID: 7455) is current named "BLANK". Rename the fragment to "Placeholder – Approval" per standards.

Updated Languages: English

NOA Mockups/Examples: See Supporting Documents #3, 4 and 5

DESCRIPTION	EXISTING TEXT	UPDATED TEXT	FORMATTING*
Static	<p>The County has approved your application, dated <FIRST_DATE> for cash aid for <NAME> under the ARC Program.</p> <p>The cash aid payment for your first month of aid is \$<FIRST_AMT>.</p> <p>Your first day of cash aid is <SECOND_DATE>. The cash aid payment for your first month of aid may only be for a part of the month. It is for the time from your first day of cash aid, shown above, through the end of the month. If nothing changes, your ongoing monthly cash aid amount will be \$<SECOND_AMT>.</p> <p>This cash aid will be issued via:</p> <p><input type="checkbox"/> The Electronic Benefit Transfer (EBT) card; or</p>	<p>The County has approved your application, dated <FIRST_DATE> for cash aid for <NAME> under the ARC Program.</p> <p>The cash aid payment for your first month of aid is \$<FIRST_AMT>.</p> <p>Your first day of cash aid is <SECOND_DATE>. The cash aid payment for your first month of aid may only be for a part of the month. It is for the time from your first day of cash aid, shown above, through the end of the month. If nothing changes, your ongoing monthly cash aid amount will be \$<SECOND_AMT>.</p> <p>This cash aid will be issued via:</p>	Arial Font Size 10

	<input type="checkbox"/> A check mailed to you; or <input type="checkbox"/> Direct deposit		
Dynamic - EBT_CARD_SECTION		The Electronic Benefit Transfer (EBT) card	Arial Font Size 10
Dynamic - CHECK_MAILED_SECTION		A check mailed to you	Arial Font Size 10
Dynamic - DIRECT_DEPOSIT_SECTION		Direct deposit	Arial Font Size 10

*This Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add the ARC Approval NOA Action Fragment Section Generation

Section	Generation Condition
EBT_CARD_SECTION	This section will generate if the Issuance Method on the EDBC Summary page is listed as EBT Card.
CHECK_MAILED_SECTION	This section will generate if the Issuance Method on the EDBC Summary page is listed as Check Mailed.
DIRECT_DEPOSIT_SECTION	This section will generate if the Issuance Method on the EDBC Summary page is listed as Direct Deposit.

2.3 Update ARC Denial NOA Action Fragment

2.3.1 Overview

This effort will update the ARC Denial NOA Action verbiage. The shared verbiage from the ARC Reason Denial fragment be moved to this Action fragment to prevent redundant verbiage from generating on the NOA when more than one reason is applicable.

Action Fragment Name and ID: ARC Denial Action

FC_DN_ACTION2

(Fragment ID: 4098)

State Form/NOA: NA 1279 (11/16)

Current Program(s): Foster Care/Approved Relative Caregiving (ARC)

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages: English

2.3.2 Description of Change

1. Update the ARC Denial NOA Action Fragment XDP

Update the ARC Denial NOA Action fragment with additional existing verbiage from the ARC Denial Reasons. The verbiage is being moved to this Action fragment in order to avoid verbiage redundancy.

Updated Languages: English

NOA Mockups/Examples: See Supporting Documents # 6, 7, 8, 9 and 10

DESCRIPTION	EXISTING TEXT	UPDATED TEXT	FORMATTING*
Static	The County has denied your application, dated <DATE>, for cash aid for <NAME> under the ARC Program. Here's why:	The County has denied your application, dated <DATE>, for cash aid for <NAME> under the ARC Program. Here's why: You are not eligible for cash aid under the ARC Program for the following reason(s):	Arial Font Size 10

*This Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2.4 Adding a New ARC Home Not Approved Denial NOA Reason

2.4.1 Overview

This recommendation is to add a new ARC Home Not Approved Denial NOA Reason Fragment with verbiage taken from one of the denial reasons listed in the current ARC Denial NOA fragment.

The current version of the ARC Denial NOA generates all denial reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Denial NOA to only generate

the applicable denial reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1279 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care/Approval Relative Caregiving (ARC)

Action Type: Denial

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.4.2 Description of Change

1. Create an ARC Denial NOA Home Not Approved Reason XDP

This effort will add a new ARC Denial NOA Reason fragment for when the recipient has been denied for the ARC program due to the home not being approved. This verbiage exists in the current version of the ARC Denial Reason fragment and will only generate when applicable. There will no longer be a check box.

NOA Mockups/Examples: See Supporting Documents #6

DESCRIPTION	TEXT	FORMATTING*
Static	Your home was not approved, and you received a Notice of Action—Denial of Home Assessment/Approval (NA 1271) from the County explaining why.	Arial Font Size 10

*This Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Fragment Generation for ARC Home Not Approved Reason

This ARC Denial Reason will generate on a NOA when all of the following conditions are true:

- The Program Status is Denied in the newly run Foster Care EDBC
- The Program is ARC
- The ARC 1 is signed

- The Program Person Status Reason is Home Facility Not Eligible (CT73_F04)
- There is not a previously existing FC EDBC

or

There is at least one previously existing FC EDBC for the same benefit month and in the most recent saved previously existing FC EDBC the program was not ARC.

or

There is at least one previously existing FC EDBC for the previous benefit month and in the most recent saved previously existing FC EDBC the program was not ARC.

Note: With this effort, this fragment will always generate along with ARC Denial Reason for Qualified For Foster Care Funding (See Section 2.6).

Action Fragment: FC_DN_ACTION2 (Fragment ID: 4098)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Denial Reason Fragments that have had their generation conditions been met. The ARC Denial NOA can generate more than one ARC Denial Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_DN_ACTION2)
2. Reason Fragment for "Home Not Approved"
 - See Recommendation 2.4
3. Reason Fragment for "Not Under California Jurisdiction"
 - See Recommendation 2.5
4. Reason Fragment for "Qualified For Foster Care Funding"
 - See Recommendation 2.6
5. Reason Fragment for "Child Ineligible Due To Age"
 - See Recommendation 2.7
6. Reason Fragment for "Other"
 - See Recommendation 2.8

3. Add Fragment Regulations

The following regulations will be added when the ARC Denial NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89, 15-20, 15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

4. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Home Not Approved

NOA Title: ARC_DN_NOA_TYPE (Fragment ID: 3135)

NOA Title Requires Translations: N

NOA Footer: NA 1279 (11/16)

NOA Footer Requires Translations: N

2.5 Adding a New ARC Not Under California Jurisdiction Denial NOA Reason

2.5.1 Overview

This effort is to add a new ARC Not Under California Jurisdiction Denial NOA Reason Fragment with verbiage taken from one of the denial reasons listed in the current ARC Denial NOA fragment.

The current version of the ARC Denial NOA generates all denial reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Denial NOA to only generate the applicable denial reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1279 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care, Approval Relative Caregiving (ARC)

Action Type: Denial

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.5.2 Description of Change

1. Create ARC Denial Not Under CA Jurisdiction Reason Fragment XDP

This effort will add a new ARC Denial NOA Reason fragment for when the recipient has been denied for the ARC program due to the child not being under California jurisdiction. This verbiage exists in the current

version of the ARC Denial Reason fragment and will only generate when applicable. There will no longer be a check box.

NOA Mockups/Examples: See Supporting Documents #7

DESCRIPTION	TEXT	FORMATTING*
Static	The child is not under the jurisdiction of the California juvenile court.	Arial Font Size 10

*This Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Generation for Denial Reason of Not Under CA Jurisdiction

This ARC Denial Reason will generate on a NOA when one of the following sets of conditions is true:

- The Program Status is Denied in a newly run Foster Care EDBC
- The Program is ARC
- The ARC 1 is signed
- The Program Person Status Reason is Jurisdiction Transfer (CT73_89)
- There is not a previously existing FC EDBC

or

There is at least one previously existing FC EDBC for the same benefit month and in the most recent saved previously existing FC EDBC the program was not ARC.

or

There is at least one previously existing FC EDBC for the previous benefit month and in the most recent saved previously existing FC EDBC the program was not ARC.

Action Fragment: FC_DN_ACTION2 (Fragment ID: 4098)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Denial Reason Fragments that have had their generation conditions been met. The ARC Denial NOA can generate more than one ARC Denial Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_DN_ACTION2)
2. Reason Fragment for "Home Not Approved"
 - See Recommendation 2.4
3. Reason Fragment for "Not Under California Jurisdiction"
 - See Recommendation 2.5

4. Reason Fragment for "Qualified For Foster Care Funding"
 - See Recommendation 2.6
5. Reason Fragment for "Child Ineligible Due To Age"
 - See Recommendation 2.7
6. Reason Fragment for "Other"
 - See Recommendation 2.8

3. Add Fragment Regulations

The following regulations will be added when the ARC Denial NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89,15-20,15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

4. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: CA Jurisdiction

NOA Title: ARC_DN_NOA_TYPE (Fragment ID: 3135)

NOA Title Requires Translations: N

NOA Footer: NA 1279 (11/16)

NOA Footer Requires Translations: N

2.6 Adding a New ARC Qualified For Foster Care Funding Denial NOA Reason

2.6.1 Overview

This effort is to add a new ARC Qualified For Foster Care Funding Denial NOA Reason fragment with verbiage taken from one of the denial reasons listed in the current ARC Denial NOA fragment.

The current version of the ARC Denial NOA generates all denial reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Denial NOA to only generate the applicable denial reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1279 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care, Approval Relative Caregiving (ARC)

Action Type: Denial

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.6.2 Description of Change

1. Create an ARC Denial Qualified for FC Fund Reason Fragment XDP

This effort will add a new ARC Denial NOA Reason fragment for when the recipient has been denied for the ARC program due to the child being qualified for Foster Care rather than ARC funds. This verbiage exists in the current version of the ARC Denial Reason fragment and will only generate when applicable. There will no longer be a check box.

NOA Mockups/Examples: See Supporting Documents #8

DESCRIPTION	TEXT	FORMATTING*
Static	The child is federally eligible under Title IV-E of the Social Security Act and qualifies for Foster Care funds (rather than ARC funds).	Arial Font Size 10

*This Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Generation for ARC Denial Reason for Qualified for Foster Care Fund

The ARC Denial Reason for Qualified for FC Fund will generate when one of the following sets of conditions is true:

1. The Program Status is Active in a newly run Foster Care EDBC and all of the following are true:
 - The ARC 1 is signed
 - The program is not ARC
 - There is not a previously existing FC EDBCor
There is at least one previously existing FC EDBC for the same benefit month and in the most recent saved previously existing FC EDBC the program did not have a FC or ARC aid code.
or

There is at least one previously existing FC EDBC for the previous benefit month and in the most recent saved previously existing FC EDBC the program did not have a FC or ARC aid code.

Note: This situation arises when the recipient is approved for Foster Care but the program does not have an ARC Program Aid code. However, since the ARC 1 signed, they will receive a Denial NOA for the ARC Program in addition to any existing Foster Care NOAs.

2. The Program Status is Denied in a newly run Foster Care EDBC and all of the following are true:

- The ARC 1 is signed
- The program is ARC
- The Program Status Reason is Home Facility Not Eligible (CT73_F04)
- There is not a previously existing FC EDBC for the current Benefit month

or

There is at least one previously existing FC EDBC for the same benefit month and in the most recent saved previously existing FC EDBC the program did not have an ARC aid code.

or

There is at least one previously existing FC EDBC for the previous benefit month and in the most recent saved previously existing FC EDBC the program did not have an ARC aid code.

Note: With this effort, this fragment will always generate along with ARC Denial Reason for Home Not Approved (See Section 2.4) when generated from this generation condition #2.

Action Fragment: FC_DN_ACTION2 (Fragment ID: 4098)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Denial Reason Fragments that have had their generation conditions been met. The ARC Denial NOA can generate more than one ARC Denial Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_DN_ACTION2)
2. Reason Fragment for "Home Not Approved"
 - See Recommendation 2.4
3. Reason Fragment for "Not Under California Jurisdiction"
 - See Recommendation 2.5
4. Reason Fragment for "Qualified For Foster Care Funding"
 - See Recommendation 2.6
5. Reason Fragment for "Child Ineligible Due To Age"

- See Recommendation 2.7
- 6. Reason Fragment for "Other"
 - See Recommendation 2.8

3. Add Fragment Regulations

The following regulations will be added when the ARC Denial NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89, 15-20, 15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

4. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Elig for FC Fund

NOA Title: ARC_DN_NOA_TYPE (Fragment ID: 3135)

NOA Title Requires Translations: N

NOA Footer: NA 1279 (11/16)

NOA Footer Requires Translations: N

2.7 Adding a New ARC Child Ineligible Due To Age Denial NOA Reason

2.7.1 Overview

This effort is to add a new ARC Child Ineligible Due To Age Denial NOA Reason Fragment with verbiage taken from one of the denial reasons listed in the current ARC Denial NOA fragment.

The current version of the ARC Denial NOA generates all denial reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Denial NOA to only generate the applicable denial reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1279 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care, Approval Relative Caregiving (ARC)

Action Type: Denial

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.7.2 Description of Change

1. Create an ARC Denial NOA Reason Fragment for Ineligible Due To Age XDP

This effort will add a new ARC Denial NOA Reason fragment for when the recipient has been denied for the ARC program due to the child being ineligible due to age. This verbiage exists in the current version of the ARC Denial Reason fragment and will only generate when applicable. There will no longer be a check box.

NOA Mockups/Examples: See Supporting Documents #9

DESCRIPTION	TEXT	FORMATTING*
Static	The child is not eligible because of age.	Arial Font Size 10

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Fragment Generation for ARC Denial Reason for Ineligible Due To Age

The ARC Denial Reason will generate on a NOA when all of the following conditions are true:

- The Program Status is Denied in the newly run Foster Care EDBC
- The ARC 1 is signed
- The program is ARC
- The Program Person Status Reason is Age (CT73_81)
- There is not a previously existing FC EDBC

or

There is at least one previously existing FC EDBC for the same benefit month and in the most recent saved previously existing FC EDBC the program did not have an ARC aid code.

or

There is at least one previously existing FC EDBC for the previous benefit month and in the most recent saved previously existing FC EDBC the program did not have an ARC aid code.

Action Fragment: FC_DN_ACTION2 (Fragment ID: 4098)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Denial Reason Fragments that have had their generation conditions been met. The ARC Denial NOA can generate more than one ARC Denial Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_DN_ACTION2)
2. Reason Fragment for "Home Not Approved"
 - See Recommendation 2.4
3. Reason Fragment for "Not Under California Jurisdiction"
 - See Recommendation 2.5
4. Reason Fragment for "Qualified For Foster Care Funding"
 - See Recommendation 2.6
5. Reason Fragment for "Child Ineligible Due To Age"
 - See Recommendation 2.7
6. Reason Fragment for "Other"
 - See Recommendation 2.8

3. Add Fragment Regulations

The following regulations will be added when the ARC Denial NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89, 15-20, 15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

4. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Ineligible Age

NOA Title: ARC_DN_NOA_TYPE (Fragment ID: 3135)

NOA Title Requires Translations: N

NOA Footer: NA 1279 (11/16)

NOA Footer Requires Translations: N

2.8 Adding a New ARC Other Reasons Denial NOA Reason

2.8.1 Overview

This effort is to add a new ARC Other Reasons Denial NOA Reason Fragment and the verbiage displayed on this fragment is only the Status Reason belonging to the Program Person.

The current version of the ARC Denial NOA generates all denial reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Denial NOA to only generate the applicable denial reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1279 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care, Approval Relative Caregiving (ARC)

Action Type: Denial

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.8.2 Description of Change

1. Create an ARC Denial NOA Reason Fragment for Other Reasons XDP

This effort will add a new ARC Denial NOA Reason fragment for when the recipient has been denied for the ARC program due to other reasons not covered by other denial reason fragments. The ARC Denial NOA is being updated to only generate the applicable denial reason. It will no longer generate denial reasons that are not applicable. The check boxes will also no longer generate on any denial reason. The variable generated for this fragment will match the variable found in the corresponding reason found in the current ARC Denial NOA Reason.

NOA Mockups/Examples: See Supporting Documents #10

DESCRIPTION	TEXT	FORMATTING*
Static	<OTHER_REASON_DESCR>.	Arial Font Size 10

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Fragment Generation for ARC Denial Reason for Other Reason

The ARC Discontinuance Reason will generate on a NOA when all of the following conditions are true:

- The Program Status is Denied in the newly run Foster Care EDBC
- The ARC 1 is signed
- The program is ARC
- There exists at least one Foster Care Program Person Status Reasons that is not already used to generate one of the other ARC Denial Reason Fragments. The Status Reasons already in use are as follows:
 - Home Facility Not Eligible (CT73_F04) (Used for Recommendation 2.4 and 2.6)
 - County Transfer (CT73_89) (Used for Recommendation 2.5)
 - Not CW Child (CT73_81) (Used for Recommendation 2.7)
- There is not a previously existing FC EDBC

or

There is at least one previously existing FC EDBC for the same benefit month and in the most recent saved previously existing FC EDBC the program did not have an ARC aid code.

or

There is at least one previously existing FC EDBC for the previous benefit month and in the most recent saved previously existing FC EDBC the program did not have an ARC aid code.

Action Fragment: FC_DN_ACTION2 (Fragment ID: 4098)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Denial Reason Fragments that have had their generation conditions been met. The ARC Denial NOA can generate more than one ARC Denial Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_DN_ACTION2)
2. Reason Fragment for "Home Not Approved"
 - See Recommendation 2.4
3. Reason Fragment for "Not Under California Jurisdiction"
 - See Recommendation 2.5
4. Reason Fragment for "Qualified For Foster Care Funding"
 - See Recommendation 2.6
5. Reason Fragment for "Child Ineligible Due To Age"
 - See Recommendation 2.7

6. Reason Fragment for "Other"
 - See Recommendation 2.8

3. Add Fragment Variable Population

Variable Name	Population	Formatting*
OTHER_REASON_DESCR	<p>Generates with the Foster Care Program Person EDBC Status Reason(s) specified for the individual being denied for the ARC program.</p> <p>For example, if a person is denied for the EDBC status reason of 'Deceased', the reason listed would be 'Deceased'.</p> <p>Only Status Reasons that are not already being used to generate one of the other ARC Denial Reason Fragment should populate in this variable. A list of Status Reasons already associated with other ARC Denial Reason Fragments can be found in the previous section (Section 2.8.2, Item 2). Those Status Reasons should be excluded from generating with this variable.</p> <p>If there are more than one Status Reason, then all Status Reasons will be listed out, separated by a comma.</p> <p>Example of one status reason: Status Reason One</p> <p>Example of two status reasons: Status Reason One, Status Reason Two</p>	Arial Font Size 10

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

Variables Requiring Translations: N/A

4. Add Fragment Regulations

The following regulations will be added when the ARC Denial NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89, 15-20, 15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

5. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Other Reasons

NOA Title: ARC_DN_NOA_TYPE (Fragment ID: 3135)

NOA Title Requires Translations: N

NOA Footer: NA 1279 (11/16)

NOA Footer Requires Translations: N

2.9 Remove existing ARC Denial NOA Reason Fragment

2.9.1 Overview

This effort will remove the ARC Denial NOA Reason Fragment. Separate Reason fragments will be added with this SCR (See Recommendations 2.4 – 2.8) for all reasons that are currently automated in the system. Since those Reason fragments will now generate in place of this one, this Reason fragment will no longer be needed and will be removed from the system.

Reason Fragment Name and ID: ARC Denial Reason

FC_DN_ARC_T501

(Fragment ID: 7456)

State Form/NOA: NA 1279 (11/16)

Current NOA Template: FC_NOA_TEMPLATE (Fragment ID: 3030),

ARC_NOA_TEMPLATE (Fragment ID: 3034)

Current Program(s): Foster Care/Approved Relative Caregiver (ARC)

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: NA Back 9

Existing Languages: English

2.9.2 Description of Change

1. Remove existing ARC Denial Reason Fragment

Remove the existing ARC Denial Reason (ID: 7456) XDP from the database and code. Update generation conditions and variable population to generate and populate the new Reason fragments in Recommendations 2.4 – 2.8.

2.10 Update ARC Discontinuance NOA Action Fragment

2.10.1 Overview

This effort will update the ARC Discontinuance NOA Action verbiage. The shared verbiage from the ARC Reason Discontinuance Fragment be moved to this Action fragment to prevent redundant verbiage from generating on the NOA when more than one reason is applicable.

Action Fragment Name and ID: ARC Discontinuance Action

FC_TN_ACTION3

(Fragment ID: 4099)

State Form/NOA: NA 1280 (11/16)

Current Program(s): Foster Care/Approved Relative Caregiving (ARC)

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages: English

2.10.2 Description of Change

1. Update the ARC Discontinuance NOA Action Fragment XDP

Update the ARC Discontinuance NOA Action fragment with additional verbiage. The verbiage is being moved to this Action fragment in order to avoid verbiage redundancy when more than one reason is applicable.

Updated Languages: English

NOA Mockups/Examples: See Supporting Documents #11, 12, 13, 14 and 15

DESCRIPTION	EXISTING TEXT	UPDATED TEXT	FORMATTING*
Static	As of <DATE>, the County is stopping your cash aid for <NAME> under the ARC Program. Here's why:	As of <DATE>, the County is stopping your cash aid for <NAME> under the ARC Program. Here's why: You are no longer eligible for cash aid under the ARC Program for the following reason(s):	Arial Font Size 10

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2.11 Adding a New ARC Child No Longer Placed With You Discontinuance NOA Reason

2.11.1 Overview

This effort is to add a new ARC Child No Longer Placed With You Discontinuance NOA Reason Fragment with verbiage taken from one of the discontinuance reasons listed in the current ARC Discontinuance NOA fragment.

The current version of the ARC Discontinuance NOA generates all discontinuance reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Discontinuance NOA to only generate the applicable discontinuance reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1280 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care, Approval Relative Caregiving (ARC)

Action Type: Discontinuance

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.11.2 Description of Change

1. Create an ARC Discontinuance NOA Reason Fragment for Child No Longer With You XDP

This effort will add a new ARC Discontinuance NOA Reason fragment for when the recipient has been discontinued from the ARC program due to the child no longer being placed with the recipient. This verbiage exists in the current version of the ARC Discontinuance Reason fragment and will now only generate when applicable. There will no longer be a check box.

NOA Mockups/Examples: See Supporting Documents #11

DESCRIPTION	TEXT	FORMATTING*
Static	The child is no longer placed with you.	Arial Font Size 10

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Fragment Generation for ARC Discontinuance Reason for Child No Longer With You

The ARC Discontinuance Reason will generate on a NOA when all of the following conditions are true:

- The Program Status is Discontinued in the newly run Foster Care EDBC
- The program person status reason is No Longer In Care (CT73_F06)
or
The Program Person Status Reason is Child Not In Placement (CT73_WI)
- There is at least one existing Foster Care EDBC for the current Benefit month and in the most recent saved Foster Care EDBC of the existing Foster Care EDBC's there was an ARC aid code
or
there is not a previously existing Foster Care EDBC for the current Benefit month and there is at least one Foster Care EDBC for the previous month and in the most recent saved Foster Care EDBC for the previous month there was an ARC aid code

Action Fragment: FC_TN_ACTION3 (Fragment ID: 4099)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Discontinuance Reason Fragments that have had their generation conditions been met. The ARC Discontinuance NOA can generate more than one ARC Discontinuance Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_TN_ACTION3)
2. Reason Fragment for "Child No Longer With You"
 - See Recommendation 2.11
3. Reason Fragment for "Home No Longer Approved"
 - See Recommendation 2.12
4. Reason Fragment for "No Longer Under California Jurisdiction"
 - See Recommendation 2.13
5. Reason Fragment for "Child Ineligible Due To Age"
 - See Recommendation 2.14
6. Reason Fragment for "Other"
 - See Recommendation 2.15

3. Add Fragment Regulations

The following regulations will be added when the ARC Denial NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89, 15-20, 15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

4. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Child No Longer With You

NOA Title: ARC_TN_NOA_TYPE (Fragment ID: 3136)

NOA Title Requires Translations: N

NOA Footer: NA 1280 (11/16)

NOA Footer Requires Translations: N

2.12 Adding a New ARC Home No Longer Approved Discontinuance NOA Reason

2.12.1 Overview

This effort is to add a new ARC Home No Longer Approved Discontinuance NOA Reason Fragment with verbiage taken from one of the discontinuance reasons listed in the current ARC Discontinuance NOA fragment.

The current version of the ARC Discontinuance NOA generates all discontinuance reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Discontinuance NOA to only generate the applicable discontinuance reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1280 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care, Approval Relative Caregiving (ARC)

Action Type: Discontinuance

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.12.2 Description of Change

1. Create an ARC Discontinuance NOA Reason Fragment for Home No Longer Approved XDP

This effort will add a new ARC Discontinuance NOA Reason fragment for when the recipient has been discontinued from the ARC program due to the home being no longer approved. This verbiage exists in the current version of the ARC Discontinuance Reason fragment and now will only generate when applicable. There will no longer be a check box.

NOA Mockups/Examples: See Supporting Documents #12

DESCRIPTION	TEXT	FORMATTING*
Static	Your home is no longer approved, and you received a Notice of Action—Denial of Home	Arial Font Size 10

	Assessment/Approval (NA 1271) from the County explaining why.	
--	---	--

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Fragment Generation for ARC Discontinuance Reason for Home No Longer Approved

The ARC Discontinuance Reason will generate on a NOA when all of the following conditions are true:

- The Program Status is Discontinued in the newly run Foster Care EDBC
- The Program Person Status Reason is Home Facility Not Eligible (CT73_F04)
- There is at least one existing Foster Care EDBC for the current Benefit month and in the most recent saved Foster Care EDBC of the existing Foster Care EDBCs for that month there was an ARC aid code
or
There is not a previously existing Foster Care EDBC for the current Benefit month and there is at least one Foster Care EDBC for the previous month and in the most recent saved Foster Care EDBC for the previous month there was an ARC aid code

Action Fragment: FC_TN_ACTION3 (Fragment ID: 4099)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Discontinuance Reason Fragments that have had their generation conditions been met. The ARC Discontinuance NOA can generate more than one ARC Discontinuance Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_TN_ACTION3)
2. Reason Fragment for "Child No Longer With You"
 - See Recommendation 2.11
3. Reason Fragment for "Home No Longer Approved"
 - See Recommendation 2.12
4. Reason Fragment for "No Longer Under California Jurisdiction"
 - See Recommendation 2.13
5. Reason Fragment for "Child Ineligible Due To Age"
 - See Recommendation 2.14
6. Reason Fragment for "Other"
 - See Recommendation 2.15

3. Add Fragment Regulations

The following regulations will be added when the ARC Denial NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89,15-20,15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

4. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Home No Longer Approved

NOA Title: ARC_TN_NOA_TYPE (Fragment ID: 3136)

NOA Title Requires Translations: N

NOA Footer: NA 1280 (11/16)

NOA Footer Requires Translations: N

2.13 Adding a New ARC No Longer Under California Jurisdiction Discontinuance NOA Reason

2.13.1 Overview

This effort is to add a new ARC No Longer Under California Jurisdiction Discontinuance NOA Reason Fragment with verbiage taken from one of the discontinuance reasons listed in the current ARC Discontinuance NOA fragment.

The current version of the ARC Discontinuance NOA generates all discontinuance reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Discontinuance NOA to only generate the applicable discontinuance reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1280 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care, Approval Relative Caregiving (ARC)

Action Type: Discontinuance

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.13.2 Description of Change

1. Create an ARC Discontinuance NOA Reason Fragment for No Longer Under California Jurisdiction XDP

This effort will add a new ARC Discontinuance NOA Reason fragment for when the recipient has been discontinued from the ARC program due to the child no longer being under the jurisdiction of the California juvenile court. This verbiage exists in the current version of the ARC Discontinuance Reason fragment and will only generate when applicable. There will no longer be a check box.

NOA Mockups/Examples: See Supporting Documents #13

DESCRIPTION	TEXT	FORMATTING*
Static	The child is no longer under the jurisdiction of the California juvenile court.	Arial Font Size 10

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Fragment Generation for ARC Discontinuance Reason for No Longer Under California Jurisdiction

The ARC Discontinuance Reason will generate on a NOA when all of the following conditions are true:

- The Program Status is Discontinued in the newly run Foster Care EDBC
- The Program Person Status Reason is Jurisdiction Transfer (CT73_89)
- There is at least one existing Foster Care EDBC for the current Benefit month and in the most recent saved Foster Care EDBC of the existing Foster Care EDBCs for that month there was an ARC aid code
or
There is not a previously existing Foster Care EDBC for the current Benefit month and there is at least one Foster Care EDBC for the previous month and in the most recent saved Foster Care EDBC for the previous month there was an ARC aid code

Action Fragment: FC_TN_ACTION3 (Fragment ID: 4099)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Discontinuance Reason Fragments that have had their generation conditions been met. The ARC Discontinuance NOA can generate more

than one ARC Discontinuance Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_TN_ACTION3)
2. Reason Fragment for "Child No Longer With You"
 - See Recommendation 2.11
3. Reason Fragment for "Home No Longer Approved"
 - See Recommendation 2.12
4. Reason Fragment for "No Longer Under California Jurisdiction"
 - See Recommendation 2.13
5. Reason Fragment for "Child Ineligible Due To Age"
 - See Recommendation 2.14
6. Reason Fragment for "Other"
 - See Recommendation 2.15

3. Add Fragment Regulations

The following regulations will be added when the ARC Discontinuance NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89, 15-20, 15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

4. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Not Under CA Jurisdiction

NOA Title: ARC_TN_NOA_TYPE (Fragment ID: 3136)

NOA Title Requires Translations: N

NOA Footer: NA 1280 (11/16)

NOA Footer Requires Translations: N

2.14 Adding a New ARC Child Ineligible Due To Age Discontinuance NOA Reason

2.14.1 Overview

This effort is to add a new ARC Child Ineligible Due To Age Discontinuance NOA Reason Fragment with verbiage taken from one of the

discontinuance reasons listed in the current ARC Discontinuance NOA fragment.

The current version of the ARC Discontinuance NOA generates all discontinuance reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Discontinuance NOA to only generate the applicable discontinuance reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1280 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care, Approval Relative Caregiving (ARC)

Action Type: Discontinuance

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.14.2 Description of Change

1. Create an ARC Discontinuance NOA Reason Fragment for Child Ineligible Due To Age XDP

This effort will add a new ARC Discontinuance NOA Reason fragment for when the recipient has been discontinued from the ARC program due to the child no longer being eligible due to age. This verbiage exists in the current version of the ARC Discontinuance Reason fragment and will only generate when applicable. There will no longer be a check box.

NOA Mockups/Examples: See Supporting Documents #14

DESCRIPTION	TEXT	FORMATTING*
Static	The child is not eligible because of age.	Arial Font Size 10

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Fragment Generation for ARC Discontinuance Reason for Child Ineligible Due To Age

The ARC Discontinuance Reason will generate on a NOA when all of the following conditions are true:

- The Program Status is Discontinued in the newly run Foster Care EDBC
- The Program Person Status Reason and it is Age (CT73_81)
- There is at least one existing Foster Care EDBC for the current Benefit month and in the most recent saved Foster Care EDBC of the existing Foster Care EDBCs for that month there was an ARC aid code or
There is not a previously existing Foster Care EDBC for the current Benefit month and there is at least one Foster Care EDBC for the previous month and in the most recent saved Foster Care EDBC for the previous month there was an ARC aid code

Action Fragment: FC_TN_ACTION3 (Fragment ID: 4099)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Discontinuance Reason Fragments that have had their generation conditions been met. The ARC Discontinuance NOA can generate more than one ARC Discontinuance Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_TN_ACTION3)
2. Reason Fragment for "Child No Longer With You"
 - See Recommendation 2.11
3. Reason Fragment for "Home No Longer Approved"
 - See Recommendation 2.12
4. Reason Fragment for "No Longer Under California Jurisdiction"
 - See Recommendation 2.13
5. Reason Fragment for "Child Ineligible Due To Age"
 - See Recommendation 2.14
6. Reason Fragment for "Other"
 - See Recommendation 2.15

3. Add Fragment Regulations

The following regulations will be added when the ARC Discontinuance NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89, 15-20, 15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

4. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Child Ineligible Due To Age

NOA Title: ARC_TN_NOA_TYPE (Fragment ID: 3136)

NOA Title Requires Translations: N

NOA Footer: NA 1280 (11/16)

NOA Footer Requires Translations: N

2.15 Adding a New ARC Other Reasons Discontinuance NOA Reason

2.15.1 Overview

This effort is to add a new Other Reasons Discontinuance NOA Reason Fragment and the verbiage displayed on this fragment is only the Status Reason belonging to the Program Person.

The current version of the ARC Discontinuance NOA generates all discontinuance reasons and marks the checkbox that corresponds with the applicable reason. The efforts of this SCR will update the ARC Discontinuance NOA to only generate the applicable discontinuance reason without a check box. The non-applicable reasons will no longer generate.

State Form/NOA: NA 1280 (11/16)

NOA Template: ARC_NOA_TEMPLATE (Fragment ID: 3034)

Programs: Foster Care/Approval Relative Caregiving (ARC)

Action Type: Discontinuance

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: NA Back 9

Languages: English

2.15.2 Description of Change

1. Create an ARC Discontinuance NOA Reason Fragment for Other Reasons XDP

This effort will add a new ARC Discontinuance NOA Reason fragment for when the recipient has been discontinued from the ARC program due to other reasons not covered by other discontinuance reason fragments.

The variable generated for this fragment will match the variable found in the corresponding reason found in the current ARC Denial NOA Reason. There will no longer be a check box.

NOA Mockups/Examples: See Supporting Documents #15

DESCRIPTION	TEXT	FORMATTING*
Static	<OTHER_REASON_DESCRIPTION>.	Arial Font Size 10

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Fragment Generation for ARC Discontinued Reason for Other Reason

The ARC Discontinuance Reason will generate on a NOA when all of the following conditions are true:

- The Program Status is Discontinued in the newly run Foster Care EDBC
- There exists at least one Foster Care Program Person Status Reasons that is not already used to generate one of the other ARC Discontinuance Reason Fragments. The Status Reasons already in use are as follows:
 - No Longer In Care (CT73_F06) (Used in Recommendation 2.11)
 - Child Not In Placement (CT73_WI) (Used in Recommendation 2.11)
 - Home Facility Not Eligible (CT73_F04) (Used In Recommendation 2.12)
 - FC County Transfer (CT73_89) (Used in Recommendation 2.13)
 - Not CW Child (CT73_81) (Used in Recommendation 2.14)
- There is at least one existing Foster Care EDBC for the current Benefit month and in the most recent saved Foster Care EDBC of the existing Foster Care EDBCs for that month there was an ARC aid code
or
There is not a previously existing Foster Care EDBC for the current Benefit month and there is at least one Foster Care EDBC for the previous month and in the most recent saved Foster Care EDBC for the previous month there was an ARC aid code

Action Fragment: FC_TN_ACTION3 (Fragment ID: 4099)

Message Fragment: None

Ordering on NOA: The Action Fragment will generate first, followed by all ARC Discontinuance Reason Fragments that have had their generation conditions been met. The ARC Discontinuance NOA can generate more

than one ARC Discontinuance Reason Fragments per NOA. Assuming their respective generation conditions are met, the fragments should generate in the following order:

1. Action Fragment (FC_TN_ACTION3)
2. Reason Fragment for "Child No Longer With You"
 - See Recommendation 2.11
3. Reason Fragment for "Home No Longer Approved"
 - See Recommendation 2.12
4. Reason Fragment for "No Longer Under California Jurisdiction"
 - See Recommendation 2.13
5. Reason Fragment for "Child Ineligible Due To Age"
 - See Recommendation 2.14
6. Reason Fragment for "Other"
 - See Recommendation 2.15

3. Add Fragment Variable Population

Variable Name	Population	Formatting*
OTHER_REASON_DESCRIPTION	<p>Generates with the Foster Care Program Person Status Reason(s) specified for the individual being discontinued from the ARC program.</p> <p>Only Status Reasons that are not already being used to generate one of the other ARC Discontinuance Reason Fragment should populate in this variable. A list of Status Reasons already associated with other ARC Discontinuance Reason Fragments can be found in the previous section (Section 2.15.2, Item 2). Those Status Reasons should be excluded from generating with this variable.</p> <p>If there are more than one Status Reason, then all Status Reasons will be listed out, separated by a comma.</p> <p>Example of one status reason: Doesn't Meet Program Req.</p>	Arial Font Size 10

	Example of two status reasons: Doesn't Meet Program Req., On Aid in Another Case	
--	--	--

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

Variables Requiring Translations: N/A

4. Add Fragment Regulations

The following regulations will be added when the ARC Discontinuance NOA Reason Fragment is generated on the NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89, 15-20, 15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version.

5. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Child Ineligible Due To Age

NOA Title: ARC_TN_NOA_TYPE (Fragment ID: 3136)

NOA Title Requires Translations: N

NOA Footer: NA 1280 (11/16)

NOA Footer Requires Translations: N

2.16 Remove the existing ARC Discontinuance NOA Reason Fragment

2.16.1 Overview

This effort will remove the ARC Discontinuance NOA Reason Fragment. Separate Reason fragments will be added with this SCR (See Recommendations 2.11 – 2.15) for all reasons that are currently automated in the system. Since those Reason fragments will now generate in place of this one, this Reason fragment will no longer be needed and will be removed from the system.

Reason Fragment Name and ID: ARC Discontinuance Reason

FC_TN_ARC_T502
(Fragment ID: 7457)

State Form/NOA: NA 1280 (11/16)

Current NOA Template: FC_NOA_TEMPLATE (Fragment ID: 3030),
ARC_NOA_TEMPLATE (Fragment ID: 3034)

Current Program(s): Foster Care/Approved Relative Caregiver (ARC)

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: NA Back 9

Existing Languages: English

2.16.2 Description of Change

1. Remove existing ARC Discontinuance Reason Fragment

Remove the existing ARC Discontinuance Reason (ID: 7457) XDP from the database and code. Update generation conditions and variable population to generate and populate the new Reason fragments in Recommendations 2.11 – 2.15.

2.17 Adding new ARC Form NA 1281

2.17.1 Overview

This effort is to add the NA 1281 Change ARC form to the template repository. This form is being added to the Template Repository to be generated by the worker for reasons not currently available in the system.

Note: The Template Repository NA 1281 will match the State version which includes the 'age' reason. There will be no automation around this reason in Template Repository and the NA 1281 that generates from EDBC (see Recommendation 2.18) will not include automation around the 'age' reason as it has been determined to no longer be applicable.

State Form: NA 1281 (11/16)

Programs: Approved Relative Caregiving (ARC)

Attached Forms: Y, NA Back 9

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: English

2.17.2 Description of Change

1. Create Form XDP

Add the NA 1281 (11/16) XDP in English.

Form Header: Standard Header (Header_1)

Form Title (Document List Page Displayed Name): ARC Change

Form Number: NA 1281 (11/16)

Include NA Back 9: Y

Imaging Form Name: ARC Benefit Change NOA

Imaging Document Type: Notification/NOA

Form Mockups/Examples: See Supporting Documents #17

2. Add Form Variable Population

Populate the Change ARC form with the following variables:

Variable Name	Population	Formatting	Editable*, Field Type	Template Repository Population	Populates with Form Generation
DATE	Default populates with the System's date. Example: '04/01/2021'	Arial Font Size 10 (mm/dd/yyyy)	Y, Date Field	Y	N, only available in Template Repository
NAME	Default populates the name of the ARC Program's Primary Applicant. Example: 'Jane Doe'	Arial Font Size 10	Y, Text Field	Y	N, only available in Template Repository
PRIOR_AMT	Blank field editable by the worker.	Arial Font Size 10	Y, Numeric Field	N	N, only available in Template Repository

	Example: '\$707.00'	(\$#,###.##)			
NEW_AMT	Blank field editable by the worker. Example: '\$545.00'	Arial Font Size 10 (\$#,###.##)	Y, Numeric Field	N	N, only available in Template Repository
RSN_DESCR	Blank field editable by the worker.	Arial Font Size 10	Y, Text Field	N	N, only available in Template Repository

* 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

3. Add Barcode

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Note: Customers with electronic communications will still receive a paper copy of this correspondence in the mail so that they are also provided a return envelope.

4. Add Form to Template Repository

Add the form NA 1281 to the Template Repository with the following Document Parameters:

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

5. Add Form Print Options and Mailing Requirements

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

Mailing Requirements:

Mail-To (Recipient): Participant

Mailed From (Return): Program Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Envelope

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N

Post to SSP: Y

2.18 Update Foster Care Rate Change Reasons for the ARC Program

2.18.1 Overview

This effort will update the existing Rate Change NOA Fragments to generate on the ARC Change NOA instead of the FC Change NOA when the program is ARC.

Reason Fragment Name and ID: Foster Care Rate Change

FC_CH_COLA_RSN

Fragment ID: 7619

State Form/NOA: 'NOA 290 Rate Change (11/09) AFDC-FC' for FC

Current NOA Template: FC_NOA_TEMPLATE (Fragment ID: 3030)

Current Program(s): Foster Care

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: Y, NA Back 9

Existing Languages: English

2.18.2 Description of Change

1. Updates to Fragment Generation:

Update the Reason Fragment to generate on the appropriate ARC Template and with the ARC NOA Fragments when generated for ARC. All existing generation and Action/Message/ Fragments for Foster Care will remain unchanged.

NOA Mockups/Examples: See Supporting Documents #17

New NOA Template: Yes,

For ARC: ARC_NOA_TEMPLATE (Fragment ID: 3034)

New Program Generation: Yes, ARC

Action Fragment:

For ARC: FC_CH_ACTION2 (Fragment ID: 4100)

Note: The ARC Action Fragment is currently only available in English. Threshold will be added with CA-231685.

Message Fragment:

For ARC: None

Ordering on NOA: The reasons fragment will generate immediately following the associated Action Fragment listed above for ARC NOAs.

2. Update Fragment Regulations

The following regulations will be added when the Rate Change Fragment generates on a ARC Change NOA:

New Regulations:

WIC Section 11461.3, SB 855 (Chapter 29, Statutes of 2014); Section 58 of Chapter 20 of the Statutes of 2015; ACIN I-42-14; ACL 14-89,15-20,15-20-E, 15-83, and 16-92; and CFL 14-15-45, 14-15-52, 14-15-58, 15-16-07, and 15-16-24.

Note: These regulations have been updated to match the Regulations provided on the newest State version. Regulations that generate for FC will not be impacted with this change.

3. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: Rate Change

NOA Title: Create the following new NOA Title for ARC Change NOA:

Line	Text	Font
1	NOTICE OF ACTION – CHANGE	Arial Bold Font Size 12
2	APPROVED RELATIVE CAREGIVER	Arial Bold Font Size 12
3	(ARC) PAYMENT	Arial Bold Font Size 12

NOA Title Requires Translations: N

NOA Footer: NA 1281 (11/16)

NOA Footer Requires Translations: N

2.19 Update ARC Approval NOA Message

2.19.1 Overview

Currently the ARC Approval Message generates with verbiage regarding EBT, however the recipient may be receiving Direct Deposit or Check instead. This effort will update the Message that generate to only display the EBT section when the recipient will be given benefits through EBT.

Message Fragment Name and ID: FC_AP_MESSAGE1, ID: 5085

State Form/NOA: NA 1278 (11/16)

Current Program(s): ARC

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No, this will only ever generate once on a NOA when applicable

Existing Languages: English

2.19.2 Description of Change

1. Update Fragment XDP

Update the ARC Approval Message XDP to separate the EBT verbiage into a dynamically generated section.

Updated Languages: English

NOA Mockups/Examples: See Supporting Documents #3, 4, and 5

Description	Existing Text	Formatting*
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Dynamic Section (EBT_MSG)	EBT: Keep your EBT card if you use EBT, even if your aid is terminated. Please do not throw your card away. If your ARC cash aid will be issued on a new EBT card, you will receive the new EBT card within 10 business days for this case. If your family currently receives CalWORKs or other benefits on an EBT card, and the child's county of court jurisdiction is the same as the child's county of residence, the child's ARC payments will be consolidated onto the family's existing EBT card. If the child is a nonminor dependent, he/she will receive his/her own EBT card.	Arial Font size 10
Static Section	<p>Medi-Cal: This notice DOES NOT change or stop Medi-Cal benefits. Keep using your plastic Benefits Identification Card(s). You will get another notice telling you about any changes to your health benefits.</p> <p>CalFresh: This notice DOES NOT stop or change your CalFresh benefits. You will get a separate notice telling you about any changes to your CalFresh benefits.</p>	Arial Font size 10

*This particular Fragment is currently only available in English and at such time we add additional languages they will follow the project standards for that language.

2. Add Fragment Section Generation

Add generation conditions to the new Dynamic Section in the ARC Message Fragment.

Section	Generation Conditions
EBT_MSG	This section will generate if the Issuance Method on the EDBC Summary page is listed as EBT Card.

3 SUPPORTING DOCUMENTS

Note: All Dynamic NOA Examples are provided for a visual idea of positioning, population formatting, and possible surrounding Fragments. They may include test data (fake names, dates, etc.) for population that may not be true values in production (addresses, income limits, etc.). Any SCRs that are in progress or being completed after the Examples were created are not included within the Examples. The NOA/Form

Examples below do not include the NA Back 9, however the most current system version of the NA Back 9 will generate with all NOA/Forms per the Design Recommendations.

Number	Functional Area	Description	Attachment
1	Form	Updated state version of NA 1277 in English.	See "NA 1277 - ARC Overpayment Mockup (EN).pdf"
2	Form	Updated state version of NA 1277 in Spanish.	See "NA 1277 - ARC Overpayment Mockup (SP).pdf"
3	NOA	Mockup of NA 1278 for Issuance Type "EBT Card"	See "NA 1278 - ARC Approval Mockup - EBT Card.pdf"
4	NOA	Mockup of NA 1278 for Issuance Type "Check Mailed"	See "NA 1278 - ARC Approval Mockup - Check Mailed.pdf"
5	NOA	Mockup of NA 1278 for Issuance Type "Direct Deposit"	See "NA 1278 - ARC Approval Mockup - Direct Deposit.pdf"
6	NOA	Mockup for NA 1279 for Reason "Home Not Approved"	See "NA 1279 - ARC Denial Mockup - Home Not Approved.pdf"
7	NOA	Mockup for NA 1279 for Reason "Child Not Under California Jurisdiction"	See "NA 1279 - ARC Denial Mockup - Child Not Under California Jurisdiction.pdf"
8	NOA	Mockup for NA 1279 for Reason "Qualify for Foster Care Funds"	See "NA 1279 - ARC Denial Mockup - Qualify for Foster Care Funds.pdf"
9	NOA	Mockup for NA 1279 for Reason "Ineligible Due To Age"	See "NA 1279 - ARC Denial Mockup - Ineligible Due To Age.pdf"
10	NOA	Mockup for NA 1279 for Reason "Other"	See "NA 1279 - ARC Denial Mockup - Other.pdf"
11	NOA	Mockup for NA 1280 for Reason "No Longer Placed With You"	See "NA 1280 - ARC Disc Mockup - No Longer Placed With You.pdf"

12	NOA	Mockup for NA 1280 for Reason "Home No Longer Approved"	See "NA 1280 - ARC Disc Mockup - Home No Longer Approved.pdf"
13	NOA	Mockup for NA 1280 for Reason "Child No Longer Under California Jurisdiction"	See "NA 1280 - ARC Disc Mockup - Child No Longer Under California Jurisdiction.pdf"
14	NOA	Mockup for NA 1280 for Reason "Ineligible Due To Age"	See "NA 1280 - ARC Disc Mockup - Ineligible Due To Age.pdf"
15	NOA	Mockup for NA 1280 for Reason "Other"	See "NA 1280 - ARC Disc Mockup - Other.pdf"
16	Form	Mockup for NA 1281 Form	See "NA 1281 FORM Example.pdf"
17	NOA	Mockup for NA 1281 for "Rate Change"	See "NA 1281 - ARC Change Mockup (NOA).pdf"

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.16 CAR-1220	The LRS shall include standard electronic templates for all notices, NOAs, forms, letters, stuffers, and flyers that can be easily maintained by non-technical COUNTY-specified Users.	This SCR ensures that CalSAWS has the latest versions of these forms.

5 APPENDIX

5.1 ARC NOA Generation:

Below are the general conditions that generate an ARC NOA. Existing FC NOAs will generate as applicable. ARC Denial and Discontinuance NOAs will generate based on the failure reason, see Recommendations 2.4 through 2.8 for Denial Reason requirements and Recommendations 2.11 through 2.16 for Discontinuance Reason requirements.

Scenario	Month 1 EDBC	Month 2 EDBC	NOA Result
Run EDBC for first month and approve benefits.	ARC Aid Code = No ARC 1 is signed = Yes		ARC Denial NOA
Run EDBC for first month and approve benefits.	ARC Aid Code = Yes		ARC Approval NOA
Run EDBC for first month and denies the program.	ARC 1 is signed = Yes EDBC Denies the program.		ARC Denial NOA
Run EDBC for second month and Aid Code changes from FC to ARC.	ARC Aid Code = No	ARC Aid Code = Yes	ARC Approval NOA
Run EDBC for second month and Aid Code changes from ARC to FC.	ARC Aid Code = Yes	ARC Aid Code = No	ARC Discontinuance NOA
Run EDBC for second month and program is discontinued.	ARC Aid Code = Yes	EDBC Discontinues the program	ARC Discontinuance NOA

Scenario	Month 1 Original EDBC	Month 1 Rerun EDBC	NOA Result
Rerun EDBC and change from FC to ARC Aid Code.	ARC Aid Code = No	ARC Aid Code = Yes	ARC Approval NOA
Rerun EDBC and change from ARC Aid Code to FC Aid Code.	ARC Aid Code = Yes	ARC Aid Code = No	ARC Discontinuance NOA



California Statewide Automated Welfare System

Design Document

CA-215077

DDID 2621: Add CW 105 - Pregnancy
Verification (09/20) in Russian language

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/09/2021	0.1	Initial Draft	Maria Jensen
08/26/2021	0.2	Updated based on DEL comments	Raj Devidi

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1 OVERVIEW

SCR CA-215076 added the CW 105 - Pregnancy Verification (09/20) State form to the CalSAWS system in English and Spanish only.

This SCR will add the CW 105 - Pregnancy Verification (09/20) form to CalSAWS in the Russian threshold language.

New SCR CA-231858 will add CW 105 - Pregnancy Verification (09/20) form to CalSAWS in remaining threshold languages.

1.1 Current Design

Currently the CW 105 State form is implemented in the CalSAWS system in English and Spanish with the version date of 09/20.

1.2 Requests

1. Implement State Form CW 105 - Pregnancy Verification (09/20) in the CalSAWS system for all 58 counties in Russian threshold language.

1.3 Overview of Recommendations

Add State Form CW 105 - Pregnancy Verification (09/20) in the Russian threshold language.

1.4 Assumptions

1. This form replaces the VER 105 - Pregnancy Verification.
2. The CW 105 form will have as header the SAWS standard header.

2 RECOMMENDATIONS

2.1 Add Form CW 105 - Pregnancy Verification in Russian language

2.1.1 Overview

This SCR will add the State form CW 105 - Pregnancy Verification (revision 09/20) to the CalSAWS system in the Russian language.

State Form: CW 105 (09/20)

Programs: CalWORKs

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: Russian

2.1.2 Create Form CW 105 XDP in Russian language

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

Form Header: CalSAWS Standard Header #1

Form Title (Document List Page Displayed Name): Pregnancy Verification

Template Description: This form is used by counties to document the verification of pregnancy for CalWORKs Customers.

Form Number: CW 105

Include NA Back 9: No

Imaging Form Name: Pregnancy Verification

Imaging Document Type: Medical Reports/Records

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

2. Add Form CW 105 to the Template Repository in the Russian language for all 58 counties.

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

3. The Print Options and Mailing Requirements for Form CW 105 will carry over to the Russian language.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CW 105 Russian Language	CW_105_Russian.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2621	The CONTRACTOR shall add State Form CW 105 - Pregnancy Verification to the CalSAWS Software.	<ol style="list-style-type: none">1. Estimate is for migrating the form in English and Spanish.2. Spanish translations will be provided by the Consortium.3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.	With SCR CA-215077, form CW 105 - Pregnancy Verification will be added to the CalSAWS system in Russian threshold language.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219846 ACL 21-XX AAP CNI Rate Increase for
2021 Year

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	S Meenavalli
	Reviewed By	Ritu Chinya, Jason F, Paul G

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/01/2021	1.0	Initial Design	S Meenavalli
8/10/2021	1.1	Update the design with C-IV Counties Rates	S Meenavalli

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1 OVERVIEW

This document details the changes necessary in CalSAWS to implement the adjusted schedules of rates that reflect the California Necessities Index (CNI) increase of 2.11% for Fiscal Year (FY) 2021-22 for Adoption Assistance Program (AAP) Cases.

In C-IV, AAP is a manual EDBC process and no impact of this change for C-IV Counties. But, the C-IV County rates in CalSAWS need to be updated due to the fact that C-IV migration is scheduled.

This document reflects the CNI increase to be applied to Adoption Homes applicable to AAP cases effective July 1, 2021.

The one-time batch run details related to the CNI COLA Rate increase for AAP Cases can be found under the SCR CA-219851 for CalSAWS System.

1.1 Current Design

Currently CalSAWS uses the CNI rates of FY 2010-21 that are being effective from July 1, 2020.

1.2 Requests

As per the ACL 21-XX, the new CNI rate increase for the FY 2021-22 will be implemented in CalSAWS for AAP Program effective July 1, 2021.

1.3 Overview of Recommendations

- The Code detail tables that reflect the AAP CNI rates will be updated for all the applicable placement types.
- Update the hard coded begin and end dates for the AAP COLA fragment to be generated for this COLA run.
- Update regulations on the AAP NOA to remove the 2020 ACL reference.

1.4 Assumptions

1. Under this SCR, Eligibility is only updating the amounts and effective dates of CNI rates in the Code Tables.
2. COLA Rates in the code detail table updates is the scope of this SCR.
3. No changes will be made to Rate determination logic in this SCR
4. AAP Placement Provider lists referred in this SCR can be found at the end of design document.
5. D, F1 thru F4 under LOC2 thru LOC4 rates will not be updated based on feedback from LA County stating that CWS/CMS system will not have the option to select these rate types.
6. As part of the SCR **CA-209430** – Add Adoption Assistance Program (AAP) Rates for All California Counties, the C-IV county rates are also available in the CalSAWS.

7. Under this SCR, there will be no impact to Fiscal such as creating issuances and then sending those issuances to the Auditor Controller in a separate COLA file.
8. Batch EDBC will continue to use the run reason "DCFS Annual COLA" for the Fiscal COLA payment file.
9. Batch EDBC will have a run reason for every month of COLA run.
10. No additional Threshold Languages will be added for the AAP NOA for this effort.
11. Regression test AAP COLA rate change NOA to check the population of the fiscal year the Fiscal year 2021 – 2022(language below).
 - The California Necessities Index (CNI) has increased for Fiscal Year 2021 – 2022

2 RECOMMENDATIONS

The CNI rates will be updated in CalSAWS code tables for all the applicable placement types for AAP Program Cases.

2.1 Eligibility Rate Changes: AAP Rate Details

2.1.1 Rates for initial AAP agreements signed 10/1/1992 to 12/31/2007 and adoption finalized before 05/27/2011 – Table A

Update the AAP rates in CalSAWS for initial AAP agreements signed on or after October 1, 1992 through December 31, 2007 where the adoption was finalized before May 27, 2011 by end-dating the rate/code table records that began 07/01/20 with an end date of 06/30/2021. Insert new rate/code table records effective 07/01/2021 with the following rates:

LA County Rates:

Age	0-4	5-8	9-11	12-14	15 & Over
Basic	\$587	\$638	\$691	\$753	\$826
D Rate	\$1,326	\$1,318	\$1,322	\$1,339	\$1,361
F1 Rate	\$938	\$927	\$933	\$949	\$969
F2 Rate	\$1,077	\$1,068	\$1,073	\$1,090	\$1,109
F3 Rate	\$1,326	\$1,318	\$1,322	\$1,339	\$1,361
F4 Rate	\$1,537	\$1,526	\$1,532	\$1,550	\$1,566

Non-LA County Rates:

Age	0-4	5-8	9-11	12-14	15 -21
Rate	\$587	\$638	\$683	\$753	\$826
Orange	\$587	\$638	\$683	\$869	\$869
Santa Clara	\$587	\$638	\$691	\$753	\$826

Age/County	0-4	5-6	7-12	13-21
Marin	\$587	\$638	\$734	\$835

Note: Rate is row applied to all counties that are not listed above

Note: Rate row is related to the rates applicable to all counties that are not listed above.

2.1.2 Rates for initial AAP agreements signed 1/1/2008 to 5/27/2011 and adoption finalized before 05/27/2011 – Table B

Update the AAP rates in CalSAWS for initial AAP agreements signed on or after January 1, 2008 through May 27, 2011 where the adoption was finalized on or before May 27, 2011 by end-dating the rate/code table records that began 07/01/2020 with an end date of 06/30/2021. Insert new rate/code table records effective 07/01/2021 with the following rates:

LA County Rates:

Age	0-4	5-8	9-11	12-14	15 & Over
Basic	\$616	\$670	\$724	\$790	\$867
D Rate	\$1,392	\$1,384	\$1,387	\$1,405	\$1,429
F1 Rate	\$985	\$973	\$978	\$996	\$1,017
F2 Rate	\$1,131	\$1,122	\$1,125	\$1,144	\$1,164
F3 Rate	\$1,392	\$1,384	\$1,387	\$1,405	\$1,429
F4 Rate	\$1,614	\$1,602	\$1,607	\$1,627	\$1,644

Non-LA County Rates:

Age	0-4	5-8	9-11	12-14	15 -21
-----	-----	-----	------	-------	--------

Rate	\$616	\$670	\$717	\$790	\$867
Orange	\$616	\$670	\$717	\$909	\$909
Santa Clara	\$616	\$670	\$724	\$790	\$867

Age/County	0-4	5-6	7-12	13-21
Marin	\$632	\$670	\$772	\$877

Note: Rate row is related to the rates applicable to all counties that are not listed above.

2.1.3 Rates for initial AAP agreements signed and adoption finalized on or after 5/27/2011 to 12/31/2016 – Table C

Update the AAP rates in CalSAWS for initial AAP agreements signed and adoption finalized on or after May 27, 2011 through December 31, 2016 by end-dating the rate/code table records that began 07/01/2020 with an end date of 06/30/2021. Insert new rate/code table records effective 07/01/2021 with the following rates:

All County Rates (Including LA County):

Age	0-4	5-8	9-11	12-14	15 & Over
Basic	\$842	\$910	\$959	\$1,004	\$1,052

LA County D, F1 thru F4 Rates:

Age	0-4	5-8	9-11	12-14	15 & Over
D Rate	\$1,618	\$1,624	\$1,622	\$1,619	\$1,614
F1 Rate	\$1,211	\$1,213	\$1,213	\$1,210	\$1,202
F2 Rate	\$1,357	\$1,362	\$1,360	\$1,358	\$1,349
F3 Rate	\$1,618	\$1,624	\$1,622	\$1,619	\$1,614
F4 Rate	\$1,840	\$1,842	\$1,842	\$1,841	\$1,829

2.1.4 Rates for initial AAP agreements signed on or after 01/01/2017 (Age Based Rate value selection)

Update the AAP rates in CalSAWS for initial AAP agreements signed on or after January 01, 2017 by end-dating the rate/code table records that began 07/01/2020 with an end date of 06/30/2021. Insert new rate/code table records effective 07/01/2021 with the following rates:

Note: These are for cases that have an agreement sign date on or after January 01, 2017 but the worker has selected age-based rates in the AAP placement page. Even though the selected rate type is age-based by the user in CalSAWS, all the rate values are updated to the Basic Level LOC rate value in the database.

All County Rates (Including LA County):

Age	0-4, 5-8, 9-11, 12-14, 15 & Over
Basic	\$1,059

LA County D, F1 thru F4 Rates:

Age	0-4, 5-8, 9-11, 12-14, 15 & Over
D Rate	\$1,660
F1 Rate	\$1,250
F2 Rate	\$1,400
F3 Rate	\$1,660
F4 Rate	\$1,880

2.1.5 Rates for initial AAP agreements signed on or after 01/01/2017 (LOC Rates)

Update the AAP rates in CalSAWS for initial AAP agreements signed on or after January 01, 2017 by end-dating the rate/code table records that began 07/01/2020 with an end date of 06/30/2021. Insert new rate/code table records effective 07/01/2021 with the following rates:

All County Rates (Including LA County):

Level of Care	Basic Level Rate	LOC2	LOC3	LOC4
Basic	\$1,059	\$1,177	\$1,298	\$1,416

The D, F1 thru F4 LOC1 (Basic Level) rates only apply for initial AAP agreements signed on or after January 01, 2017 by end-dating the rate/code table records that began 07/01/2020 with an end date of 06/30/2021. Insert new rate/code table records effective 07/01/2021 with the following rates:

LA County D, F1 thru F4 Rates:

Level of Care	Basic Level Rate
D Rate	\$1,660
F1 Rate	\$1,250
F2 Rate	\$1,400
F3 Rate	\$1,660
F4 Rate	\$1,880

Technical Note: LOC CCR Rates in CT536 are common for all FC/KG and AAP programs.

2.2 NOA Rule/Regulation update

2.2.1 Overview

The existing AAP COLA reason fragment logic will be updated in CalSAWS for the AAP COLA to be generated by this change.

The AAP COLA rate change NOA references the ACL from the year 2020. The regulations should be updated to remove last year's ACL reference.

Existing Regulations in the Fragment: Rules: These rules apply: SENATE BILL (SB) 1013, CHAPTER 35, STATUTES OF 2012; ASSEMBLY BILL (AB) 403, CHAPTER 773, STATUTES OF 2015; AB 1997, CHAPTER 612, STATUTES OF 2016; WELFARE AND INSTITUTIONS CODE (WIC) SECTIONS 11364, 11387, 11453, 11460, 11461 ,11461(d)(2)(A), 11462, 11463, 11464, 18254, 18358.30; ACL NO. 20-68.

AAP COLA Reason Name: AA_CH_RATE_INCREASE_P009 (Reason ID: 6032)

2.2.2 Regulation update

Update the hard-coded CNI begin date from July 1st, 2020 to July 1st, 2021 and CNI end date from October 31st, 2020 to CNI Batch run month end date i.e. October 31st 2021.

Update the ACL in the regulations for AAP COLA rate change NOA from ACL. 20-68 to ACL. 21-XX. Updated regulation is listed below.

Updated Regulations in the Fragment: Rules: These rules apply: SENATE BILL (SB) 1013, CHAPTER 35, STATUTES OF 2012; ASSEMBLY BILL (AB) 403, CHAPTER 773, STATUTES OF 2015; AB 1997, CHAPTER 612, STATUTES OF 2016;

WELFARE AND INSTITUTIONS CODE (WIC) SECTIONS 11364, 11387, 11453, 11460, 11461 ,11461(d)(2)(A), 11462, 11463, 11464, 18254, 18358.30.

3 SUPPORTING DOCUMENTS

None

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.1.2	The LRS shall include an automated method for implementing mass updates triggered by policy changes or mass participant financial changes, including Social Security or Veterans benefits cost of living adjustments (COLAs).	The new CNI Rates released by the County will be updated in the system. These new COLA rates will be used to determine the eligibility benefits.

5 MIGRATION IMPACTS

None

6 OUTREACH

None

7 APPENDIX

AAP Placement Providers:

1. Adoptive Homes
2. Foster Family Agency
3. Foster Family Home
4. Group Home
5. Legal Guardian
6. Nonrelative Extended Family Member Home
7. Out of State Residential Treatment Facilities
8. Relative Home
9. Small Family Home
10. Specialized Foster Family Home
11. Supervised Independent Living

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-219851

ACL 21-97 AAP CNI Rate Increase for Year 2021 -
Batch EDBC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	S Meenavalli
	Reviewed By	Ritu Chinya, Jason F, Paul G

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/20/2021	1.0	Initial Document	S Meenavalli
9/1/2021	1.1	Added a recommendation for list in the outreach section	Nithya Chereddy

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1 OVERVIEW

Per ACL 21-97, the new AAP CNI rate increase for the FY 2021-22 will be implemented effective July 1, 2021.

1.1 Current Design

Currently CalSAWS use the AAP CNI rates of FY 2020-21 that are effective from July 1, 2020.

1.2 Requests

As per the ACL 21-97, the new AAP CNI rate increase for the FY 2021-22 will be implemented in CalSAWS effective July 1, 2021.

1.3 Overview of Recommendations

1. Run Batch EDBC for AAP to apply the new CNI rate increase.
2. A DCR will suppress the AAP2.

1.4 Assumptions

1. Batch EDBC will not discontinue AAP Cases and will be "exception" out.
2. Batch EDBC will have a run reason of COLA run for every month from 07/2021 through the come-up month.
3. Under this SCR, there will be no impact / changes to Fiscal such as creating the issuances and then sending those issuances to the Auditor Controller in a separate COLA file.
4. In CalSAWS, each eCAPS file has the limit of 16K unique cases to send it to Auditor Controller.
5. A regular change NOA will be generated for the impacted cases if a NOA exists for the benefit change reason.
6. Existing batch logic skips programs with an overridden EDBC, Manual EDBC, a pending program, or a pending person for AAP.

2 RECOMMENDATIONS

Batch EDBC will run for AAP to apply the new CNI rate increase.

2.1 Run Batch EDBC for AAP

2.1.1 Overview

AAP Batch EDBC will run for the benefit month of 07/2021 to high date.

2.1.2 Description of Changes

1. Batch Operations:

Run batch EDBC for active AAP programs starting with the month of 07/2021 through come-up month including past RE due date cases in CalSAWS system.

- a. Batch EDBC will run with the run reason "CWS Annual COLA"
- b. Batch EDBC records will have a run type code of 'Single Program'
- c. Batch EDBC will not be triggered on programs with a Non-standard rate in effect in the benefit month
- d. Batch EDBC will insert the below Journal entry for AAP programs:
Short Description: Batch EDBC ran for [month, year]
Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: AAP COLA

2.1.3 Programs Impacted

AAP

2.1.4 Performance Impacts

N/A

2.2 Client Correspondence DCRs

2.2.1 Overview

This effort is to suppress the AAP2 for AAP Program and to put the AAP COLA NOAs on hold.

2.2.2 Description of Change

- 1. Create a DCR to suppress AAP2 for AAP program.
- 2. Run the DCR operationally to hold the AAP COLA NOAs (AAP COLA fragment - AA_CH_RATE_INCREASE_P009). NOAs that are on hold will have the status 'Print Error' until they are released.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.1.2	The CalSAWS shall include an automated method for implementing mass updates triggered by policy changes or mass participant financial changes, including Social Security or Veterans benefits cost of living adjustments (COLAs).	The new CNI Rates released by the County will be updated in the system. These new COLA rates will be used to determine the eligibility benefits.
2.16.4.1	The CalSAWS shall include the ability to process a mass update that includes eligibility and benefits with an effective date of any prior month, the current month, or future month(s).	The Batch EDBC process will be run and determine eligibility using the new CNI Rates.

4 OUTREACH

4.1 Lists

Generate lists to aid the counties after batch EDBC completes.

All lists will have the standard list columns to display on the listings.

Standard Columns:

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

Exception List: Below are the case listing details for case exceptions (skipped, unprocessed, discontinued, etc.) in CalSAWS system with the standard columns after the batch.

1. **List Name:** List of cases with Non Standard Rate - [Program Name]

Note: For [Program Name] input AAP.

List Criteria: List of AAP programs with a Non Standard Rate.

Additional Column(s): Rate column

2. **List Name:** List of cases Discontinued by the Batch EDBC
List Criteria: List of AAP programs discontinued by the batch EDBC.
Additional Column(s): Program, EDBC Month, Discontinued Reason
3. **List Name:** List of [Program Name] with Read-Only
Note: For [Program Name] input AAP
List Criteria: List of AAP programs which resulted in Read-Only EDBC.
Additional Column(s): Reason, EDBC Month
4. **List Name:** List of unprocessed programs skipped in the COLA batch run with skip reasons
List Criteria: List of AAP unprocessed programs skipped in the COLA batch run with the skip reasons like Override, Manual EDBC, Read Only EDBC, No Worker Assigned etc.
Additional Column(s): Program, EDBC Month, Not Processed Reason

Informational List: Below are the case listing details for informational purpose only and can be reviewed if required but batch EDBC will run on these cases as part of the COLA batch.

5. **List Name:** List of [Program Name] cases with RE Date in the past
Note: For [Program Name] input AAP.
List Criteria: List of AAP programs where the incomplete RE has a due date in the past.
Additional Column(s): RE Due Date
6. **List Name:** List of Cases with at least one overridden EDBC for COLA Months
List Criteria:
 - There is at least one overridden EDBC effective for the current or the Prior Benefit month
 - Batch EDBC is run for the COLA month(s) (07/2021 to 10/2021)
 - Program is AAP**Note:** The case information will display only once on the list even if more than one month may be impacted.

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CA-219851

5 APPENDIX

None

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-220120

Update CF EDBC Allotment Logic for
Households that received Disaster Supplements
or Emergency Allotments in the Same Benefit
Month

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sridhar Mullapudi, Sidhant Garg
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/10/2020	1.0	Initial Draft	Sridhar Mullapudi, Sidhant Garg

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1 OVERVIEW

1.1 Current Design

When disaster CalFresh supplements are issued for EDBC with 'Disaster CF Supplements' run reason subsequent EDBCs run for that benefit month will result in a read only EDBC with reason 'Received Disaster Benefits' if the household size remains the same.

Issuances issued as 'Emergency Allotment' due to COVID-19 are not considered in the previous potential benefit calculation logic when EDBC is recalculated again for the same benefit month. When emergency allotments are issued for EDBC with run reason 'Emergency Allotment' run reason, households will receive up to max allotment for the household size. When regular CF EDBC is run after the emergency allotment issuance, it is possible for the household to receive additional CF supplemental benefits.

1.2 Requests

1. Update the EDBC logic to not make the household read only with reason 'Received Disaster Benefits'
2. Update the previous potential benefit calculation logic for CalFresh program to include issuances that are categorized as Emergency allotment or disaster CalFresh supplements.
3. Update EDBC logic to not provide additional CF benefits or overissuances for the household that have already received emergency allotments or disaster CalFresh supplements up to their max allotment.

1.3 Overview of Recommendations

1. Update EDBC summary page to include a new line item in allotment section to display the augmentation amount.
2. Update EDBC logic to not mark the household as read only with reason 'Received Disaster Benefits'
4. Update EDBC logic to not provide additional CF benefits or overissuances for the same household that have already received emergency allotments or disaster CalFresh supplements up to their max allotment.
3. Update the previous potential benefit calculation logic for CalFresh program to include issuances that are categorized as Emergency allotment or Supplemental Disaster Benefit.

1.4 Assumptions

None

2 RECOMMENDATIONS

2.1 Update CalFresh EDBC Summary Page

2.1.1 Overview

Add new line item in CalFresh EDBC summary page in allotment section to display the augmentation amount when all the conditions are met for a household that received a disaster CalFresh supplement or EA allotment for the same benefit month.

2.1.2 CalFresh EDBC Summary Page Mockup

Allotment	Regular	
Full Month Allotment	\$	380.00
Dates to Prorate		01-31
Allotment	\$	380.00
Combined Allotment	\$	380.00
CFAP Amount	\$	0.00
Overridden CFAP Amount	\$	
Final Allotment	\$	380.00
Overridden Allotment	\$	
Previous Potential Benefit Allotment	-	<u>430.00</u>
Augmentation	+	50.00
Overissuance Adjustment Amount	-	<u>0.00</u>
Authorized Amount	=	0.00

Figure 2.1.1 – Mockup Name

2.1.3 Description of Changes

1. Add new line item on CalFresh EDBC summary page that will display the 'Augmentation' amount
2. This line item will only be displayed when all the conditions are satisfied:
 - a. The CalFresh program is active

- b. The CalFresh program has a disaster supplement or EA allotment for the same benefit month the current EDBC summary page is displaying.
- c. There is no change in HH size since the Disaster supplement or EA allotment were issued.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: EDBC Results**

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

Add page mapping for the new fields

2.1.7 Page Usage/Data Volume Impacts

No expected impacts to page usage or data volume impacts

2.2 Update CalFresh EDBC Read Only Rules

2.2.1 Overview

When regular CF EDBC is re run for the same benefit month after a disaster supplement or EA allotment has been issued, remove the EDBC logic that results in a read only EDBC since the household received maximum allotment for the household.

2.2.2 Description of Changes

1. Update CalFresh EDBC rules to not make the EDBC read only with reason 'Received Disaster Supplement'

2.2.3 Programs Impacted

CalFresh

2.2.4 Performance Impacts

None

2.3 Update CalFresh EDBC determination Logic

2.3.1 Overview

Update CF EDBC logic to set indicator to identify if there was a household size change from the household that received a disaster supplements or emergency allotments. This indicator will be used by the Fiscal logic to determine the CalFresh allotments for households that received disaster supplements or emergency allotments for the same benefit month.

2.3.2 Description of Changes

1. Update CalFresh EDBC logic to set indicator if there is a change in household size from the time the household received disaster supplement or EA for the same benefit month EDBC is being run for.
2. Update the previous potential benefit calculation logic for CalFresh program to include issuances that are categorized as Emergency allotment or Supplemental Disaster Benefit.
3. Add the logic to calculate the new Augmentation field. This logic would only be called when there is **no change in the Household size.** This new field would be the sum of :
 - a. Previous Potential Benefit for the benefit month (this includes EA or Disaster supplement Issuances in a month)
 - b. Potential Benefit for the benefit month

NOTE:

- 1.No impacts/changes to existing functionality of CalSAWS system to create recovery account when a household becomes Ineligible.

EA or Disaster Supplement	Household change	Changes to Rules
Yes	N	Include EA/DCF in Previous Potential, Show Augmentation calculation
Yes	Yes	Include EA/DCF in Previous Potential

Please refer to the scenarios in Section 3 for few examples.

4. The following soft validation messages will be displayed to the user on the EDBC List page when the user is trying to 'Save and Continue' the accepted EDBC. These validations will not prevent the user from saving the EDBC.

Message:

The Household size changed after the household received the emergency allotment for the benefit month. Please review the EDBC results and manually generate supplements/overissuances as appropriate.

Condition:

When all the following conditions are met:

- CalFresh program EDBC is being run
- Household received emergency allotment for the benefit month.
- The household size changed since the emergency allotment was issued.

NOTE: The validation will only be available to the user when saving the EDBC after accepting. The validation will not be available to supervisor if supervisor authorization is required.

2.3.3 Programs Impacted

CalFresh

2.3.4 Performance Impacts

None

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	EDBC Allotment	Allotment section mockups detailing the different scenarios for allotment calculations	CA-220120 -Allotment Section Mockups.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.21	The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes.	New eligibility logic for Disaster CalFresh program.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-225639

Update on Delivery of Asset Verification Reports

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala, Connor O'Donnell
	Reviewed By	Dana Petersen

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/14/2021	1.0	Initial Revision	Vallari Bathala Connor O'Donnell

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1 OVERVIEW

The IEV417 created in SCR 208130 replaced the previous asset verification reports which were delivered via secure email to the counties by DHCS. The IEV417 flat file is delivered to The Systems through SFTP (Secure File Transfer protocol) to be imported into The Systems. MEDIL I21-03 informs counties of updates to the delivery schedule of the enhanced asset verification reports. Each week counties receive an Asset Verification Report in the form of an Excel spreadsheet. This SCR will implement changes for The Systems to receive the Asset Verification Data through a flat fixed length file (IEV417) and display this data within the application.

1.1 Current Design

An Asset Verification Program (AVP) IEV417 flat file is currently delivered through a SFTP (Secure File Transfer protocol) to the counties by DHCS. This flat file is delivered once a month during the last two weeks of each month.

1.2 Requests

A new IEV417 flat file be sent weekly and integrated within the existing monthly at-renewal file. The weekly file will be delivered to The Systems through SFTP to be imported into The Systems.

1.3 Overview of Recommendations

1. Update fields on the Asset Verification List page to account for 'Type' and the new method of searching via date.
2. Add the 'File Date' and 'Type' field to the Asset Verification Detail page
3. Update the child pages of the Asset Verification Detail page (Financial Institution Balance Inquiry, Real Property Inquiry, Aircraft Detail, Watercraft Detail) with the 'Case Number', 'SSN', 'Possible Person Matches', 'Status', 'Type', and 'File Date' fields. These fields will display the same way as they appear at the top of the Asset Verification Detail page.
4. Create a new Inbound FTP Batch job in each system to import the weekly IEV417 flat file into the respective systems.
5. Create a new Asset Verification Inbound Reader job to read the weekly IEV417 data file and import the file into The Systems.

1.4 Assumptions

1. The layout of the weekly files will be identical to the monthly files implemented by CA-208130.

2 RECOMMENDATIONS

2.1 Asset Verification List Page

2.1.1 Overview

The Asset Verification List page allows the user to search for Asset Verification files for the purpose of review. The changes to this page will allow the user to search for a new 'Ad-Hoc' type of file, which can be viewed in addition to the standard monthly 'RE' file. Additionally, the date fields in the search criteria have been updated to account for this new type.

2.1.2 Asset Verification List Mockup

Asset Verification Search

Search

Case Number:

SSN:

Type:
RE

Program:

Retrieve 1000 Rows:
☐

Status:

Month:

Search

Search Results Summary

Results 1 - 2 of 2

Case Number	SSN	Status	Program	Type	File Date
ABCD123	123-45-67890	Reviewed	FS, GA, GW, MC	RE	03/01/2021
DCBA321	111-22-3333	Reviewed	MC	RE	03/01/2021

Figure 2.1.1 – Asset Verification List (Type: RE)

Asset Verification Search

[Search](#)

Case Number:

SSN:

Type:

Program:

Retrieve 1000 Rows:
☐

Status:

Begin Date:

End Date:

[Search](#)

Search Results Summary					Results 1 - 2 of 2
Case Number	SSN	Status	Program	Type	File Date
ABCD123	123-45-67890	Reviewed	FS, GA, GW, MC	Ad-Hoc	03/01/2021
DCBA321	111-22-3333	Reviewed	MC	Ad-Hoc	04/01/2021

Figure 2.1.2 – Asset Verification List (Type: Ad-Hoc)

2.1.3 Description of Changes

1. Type – Add a new dropdown field that describes what type of Asset Verification file will be searched for. This field contains the following values:
 - a. RE – The standard monthly Asset Verification file.
 - b. Ad-Hoc – An Asset Verification file specifically requested by County users.
2. Modify the 'Month' field from a dropdown list containing each month to a date selector for MM/YYYY values. This field will only appear on page load or when the Type field has 'RE' selected.
3. Remove the 'Year' field.
4. Begin Date – This field will only appear dynamically when the 'Type' field has the value of 'Ad-Hoc' selected. This field will allow for date selection in the format of MM/DD/YYYY.
5. End Date - This field will only appear dynamically when the 'Type' field has the value of 'Ad-Hoc' selected. This field will allow for date selection in the format of MM/DD/YYYY.
6. Add a new 'Type' column to the Search Result Summary table. This column will display the Type values of the files, which can be 'RE' or 'Ad-Hoc'.
7. Update the 'Date' column header to 'File Date'.

2.1.4 Page Location

- **Global: Special Units**
- **Local: Asset Verification**

- **Task: Asset Verification List**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update the page mapping for new and removed fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Asset Verification Detail Page

2.2.1 Overview

The Asset Verification Detail page lists out the associated data related to a given case number, including financial, property, aircraft, and watercraft details. This page will be updated with the new 'Type' field as 'File Date', which lists the date that the file was received.

2.2.2 Asset Verification Detail Mockup

Asset Verification Detail

ReviewedClose

Case Number: B000W23	SSN: 110-17-8731	Possible Person Matches: MCKIE, OLIVA 72M
Status: New	Type: RE	File Date: 03/01/2021

Figure 2.2.1 – Asset Verification Detail

2.2.3 Description of Changes

1. Type – Add a new field to the block at the top of the page. This field will contain the type of the Asset Verification file. It will have one of the following two values:
 - a. RE – The standard monthly Asset Verification file.
 - b. Ad-Hoc - An Asset Verification file specifically requested by County users.
2. File Date – Displays the date the file was received in the MM/DD/YYYY format.

2.2.4 Page Location

- **Global: Special Units**
- **Local: Asset Verification**
- **Task: Asset Verification Detail**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update the page mapping with new fields.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Financial Institution Balance Inquiry Page

2.3.1 Overview

The Financial Institution Balance Inquiry page lists out information on banks related to the associated Asset Verification file. This page will be updated with the block from the top of the Asset Verification Detail page that lists the 'Case Number', 'SSN', 'Possible Person Matches', 'Status', 'Type', and 'File Date' fields.

2.3.2 Financial Institution Balance Inquiry Mockup

Financial Institution Balance Inquiry

Close

Case Number: B000W23	SSN: 110-17-8731	Possible Person Matches: MCKIE, OLIVA 72M
Status: New	Type: RE	File Date: 03/01/2021

Figure 2.3.1 – Financial Institution Balance Inquiry

2.3.3 Description of Changes

1. Case Number – This is the case number associated to the Asset Verification record.

2. SSN – This is the SSN associated with the Asset Verification record, formatted as XXX-XX-XXXX.
3. Possible Person Matches – This field lists the possible people that this record could relate to based on the SSN and case number, formatted as [Last Name], [First Name] [Age][Gender]. If there is more than one person that matches, they will be separated by a semi-colon.
Example: Smith, John 38M; Smith Sally 36F.
4. Status – This is a field with the following possible values:
 - a. “New” – This indicates that the record has not been manually reviewed.
 - b. “Reviewed” - This indicates that the record has been manually reviewed.
5. Type – Add a new field to the block at the top of the page. This field will contain the type of the Asset Verification file. It will have one of the following two values:
 - a. RE – The standard monthly Asset Verification file.
 - b. Ad-Hoc - An Asset Verification file specifically requested by County users.
6. File Date – Displays the date the file was received in the MM/DD/YYYY format.

Note: This data and formatting will be the exact same as what is displayed in the top block on the Asset Verification Detail page.

2.3.4 Page Location

- **Global: Special Units**
- **Local: Asset Verification**
- **Task: Financial Institution Balance inquiry**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update page mapping with new fields.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Real Property Inquiry Page

2.4.1 Overview

The Real Property inquiry page lists out information on property related to the associated Asset Verification file. This page will be updated with the block from the top of the Asset Verification Detail page that lists the 'Case Number', 'SSN', 'Possible Person Matches', 'Status', 'Type', and 'File Date' fields.

2.4.2 Real Property Inquiry Mockup

Real Property Inquiry

Close

Case Number: B000W23	SSN: 110-17-8731	Possible Person Matches: MCKIE, OLIVA 72M
Status: New	Type: RE	File Date: 03/01/2021

Figure 2.4.1 – Real Property Inquiry

2.4.3 Description of Changes

1. Case Number – This is the case number associated to the Asset Verification record.
2. SSN – This is the SSN associated with the Asset Verification record, formatted as XXX-XX-XXXX.
3. Possible Person Matches – This field lists the possible people that this record could relate to based on the SSN and case number, formatted as [Last Name], [First Name] [Age][Gender]. If there is more than one person that matches, they will be separated by a semi-colon. Example: Smith, John 38M; Smith Sally 36F.
4. Status – This is a field with the following possible values:
 - a. "New" – This indicates that the record has not been manually reviewed.
 - b. "Reviewed" - This indicates that the record has been manually reviewed.
5. Type – Add a new field to the block at the top of the page. This field will contain the type of the Asset Verification file. It will have one of the following two values:
 - a. RE – The standard monthly Asset Verification file.
 - b. Ad-Hoc - An Asset Verification file specifically requested by County users.
6. File Date – Displays the date the file was received in the MM/DD/YYYY format.

Note: This data and formatting will be the exact same as what is displayed in the top block on the Asset Verification Detail page.

2.4.4 Page Location

- Global: Special Units
- Local: Asset Verification
- Task: Real Property Inquiry

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update page mapping with new fields.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Aircraft Detail Page

2.5.1 Overview

The Aircraft Detail page lists out information on aircraft related to the associated Asset Verification file. This page will be updated with the block from the top of the Asset Verification detail page that lists the 'Case Number', 'SSN', 'Possible Person Matches', 'Status', 'Type', and 'File Date' fields.

2.5.2 Aircraft Detail Mockup

Aircraft Detail

Close

Case Number: B000W23	SSN: 110-17-8731	Possible Person Matches: MCKIE, OLIVA 72M
Status: New	Type: RE	File Date: 03/01/2021

Figure 2.5.1 – Aircraft Detail

2.5.3 Description of Changes

1. Case Number – This is the case number associated to the Asset Verification record.
2. SSN – This is the SSN associated with the Asset Verification record, formatted as XXX-XX-XXXX.
3. Possible Person Matches – This field lists the possible people that this record could relate to based on the SSN and case number, formatted as [Last Name], [First Name] [Age][Gender]. If there is more than one person that matches, they will be separated by a semi-colon.
Example: Smith, John 38M; Smith Sally 36F.
4. Status – This is a field with the following possible values:
 - a. "New" – This indicates that the record has not been manually reviewed.
 - b. "Reviewed" - This indicates that the record has been manually reviewed.
5. Type – Add a new field to the block at the top of the page. This field will contain the type of the Asset Verification file. It will have one of the following two values:
 - a. RE – The standard monthly Asset Verification file.
 - b. Ad-Hoc - An Asset Verification file specifically requested by County users.
6. File Date – Displays the date the file was received in the MM/DD/YYYY format.

Note: This data and formatting will be the exact same as what is displayed in the top block on the Asset Verification Detail page.

2.5.4 Page Location

- **Global: Special Units**
- **Local: Asset Verification**
- **Task: Aircraft Detail**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

Update page mapping with new fields

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Watercraft Detail Page

2.6.1 Overview

The Watercraft Detail page lists out information on watercraft related to the associated Asset Verification file. This page will be updated with the block from the top of the Asset Verification detail page that lists the 'Case Number', 'SSN', 'Possible Person Matches', 'Status', 'Type', and 'File Date' fields.

2.6.2 Watercraft Detail Mockup

Watercraft Detail

Close

Case Number: B000W23	SSN: 110-17-8731	Possible Person Matches: MCKIE, OLIVA 72M
Status: New	Type: RE	File Date: 03/01/2021

Figure 2.6.1 – Watercraft Detail

2.6.3 Description of Changes

1. Case Number – This is the case number associated to the Asset Verification record.
2. SSN – This is the SSN associated with the Asset Verification record, formatted as XXX-XX-XXXX.
3. Possible Person Matches – This field lists the possible people that this record could relate to based on the SSN and case number, formatted as [Last Name], [First Name] [Age][Gender]. If there is more than one person that matches, they will be separated by a semi-colon. Example: Smith, John 38M; Smith Sally 36F.
4. Status – This is a field with the following possible values:
 - a. "New" – This indicates that the record has not been manually reviewed.
 - b. "Reviewed" - This indicates that the record has been manually reviewed.
5. Type – Add a new field to the block at the top of the page. This field will contain the type of the Asset Verification file. It will have one of the following two values:
 - a. RE – The standard monthly Asset Verification file.
 - b. Ad-Hoc - An Asset Verification file specifically requested by County users.
6. File Date – Displays the date the file was received in the MM/DD/YYYY format.

Note: This data and formatting will be the exact same as what is displayed in the top block on the Asset Verification Detail page.

2.6.4 Page Location

- **Global: Special Units**
- **Local: Asset Verification**
- **Task: Watercraft Detail**

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Update page mapping with new fields.

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Asset Verification Weekly Inbound Interface

2.7.1 Overview

DHCS will send specific data to The Systems. This data will be transferred weekly in a fixed length flat file format to then be imported into The Systems.

2.7.2 Description of Change

1. Create a new Inbound FTP Batch job in each system to import the IEV417 flat file into the respective systems.
 - a. File Naming:
 - i. The files names will be as follows:
 1. IEV417_CalSAWS_W<YYMMDD>.txt
 - a. The CalSAWS file with combine C-IV and LA Counties
 - b. The file will be located here DHCS-MCED/CalSAWS
 2. IEV417_CalWIN_CNTY<nn>_W<YYMMDD>.txt
 - a. For CalWIN files <nn> specifies the two-digit County number.
 - b. The file will be located /DHCS-MCED/CalWIN

Note: The naming convention on the DHCS side currently refers to Los Angeles County's data file as LEADER.

- b. The new batch job will check the DHCS server each night to see if the files are available. If the files are available, the job will transfer to a local destination where the batch job will then be able to import the data from the file. CalSAWS will only pull over the proper file based on the file naming described in the above point.
2. Create a new Asset Verification Inbound Reader job to read the IEV417 data file and import the file into The Systems.
 - a. Create a new journal entry for every case identified in the interface using the criteria below:

Journal Entry	Description
New/Update	New
Journal Category	Interfaces
Journal Type	Interfaces
Short Description	Asset Verification received.
Long Description	Asset Verification information is received on the MM/DD/YYYY run.
Trigger Condition	When Asset Verification is received.

3. Add new data element 'Type' to the data model which differentiate the two AVP files:
 - a. RE - Flat files received monthly
 - b. Ad Hoc - Flat files requested by County Users
 - c. Create DCR to add type code of RE for historical records already processed
 4. Add new data element 'File Date' to the data model:
 - a. The date the AVP files are imported from DHCS

2.7.3 Execution Frequency

Daily – The batch will run daily to check if a file is ready to be imported, but the file is delivered weekly.

2.7.4 Key Scheduling Dependencies

Schedule the new FTP job to run as a predecessor to the new inbound reader job.

2.7.5 Counties Impacted

All Counties

2.7.6 Data Volume/Performance

A system-wide estimate of approximately 30,000+ records per week import.

2.7.7 Failure Procedure/Operational Instructions

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227291

BenefitsCal Integration Release 2

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Melissa Mendoza, Gillian Bendicio, Howard Suksanti
	Reviewed By	

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1 OVERVIEW

The BenefitsCal application is being implemented to support customer's applying for aid in CalSAWS. The implementation of the BenefitsCal application requires multiple APIs as well as online page updates to support the application process and viewing of benefit information.

1.1 Current Design

CalSAWS currently uses the YourBenefitsNow (YBN) Application to process applications for customer's in Los Angeles county. CalSAWS does not have a way for the C-IV counties to apply electronically at the time of migration.

1.2 Requests

Update CalSAWS to use the new BenefitsCal application for the C-IV counties at the time of migration while continuing to support YBN for Los Angeles until Los Angeles migrates to BenefitsCal.

1.3 Overview of Recommendations

1. Update the e-Application Summary to display information coming from the BenefitsCal portal through the Application Transfer API.
2. Update data collection pages to support the e-Data mapping of the BenefitsCal e-Applications.
3. Create the Self-Service Portal Customer Privacy pages to allow BenefitsCal users to opt-in/opt-out of BenefitsCal.
4. Add Disaster CalFresh Linking through e-Application.
5. Add a new Task Appointment Schedule, Reschedule of Appointment API.
6. Add a new Task EBT/BIC Card Replacement API.
7. Add a new Task Report A Change API.
8. Add a new Task Create CBO Account API.
9. Update Application Transfer API to create Pending Clearance Task.
10. Add a new MC 210RV Form API.
11. Add a new MC 216 Form API.
12. Add a new MC 217 Form API.
13. Update Form Status batch job to send SAR7 form information.
14. Update Form Status batch job to send CF37 packet information.
15. Update Form Status batch job to send CW Redetermination packet information.
16. Update Form Status batch job to send MC 210RV packet information.
17. Update Form Status batch job to send MC 216 packet information.
18. Update Form Status batch job to send MC 217 packet information.

1.4 Assumptions

1. YBN will continue to be supported until the cutover to BenefitsCal.

2 RECOMMENDATIONS

2.1 E-Application Summary

2.1.1 Overview

The e-Application Summary page displays relevant application information for the worker to process an e-Application. This will be updated to add more information that is coming from the BenefitsCal application.

2.1.2 E-Application Summary

Additional Information						
Have you or any member of your household been found guilty of trading SNAP benefits for drugs after September 22, 1996?						
Have you or any member of your household been found guilty of trading SNAP benefits for guns, ammunitions or explosives after September 22, 1996?						
Have you, or any member of your household, ever been convicted of trafficking (allowing use of or selling EBT cards to others) SNAP benefits of \$500 or more after September 22, 1996?						
Have you, or any member of your household been convicted of fraudulently receiving duplicate SNAP (federal name for food assistance program) benefits in any State after September 22, 1996?						
Have you or anyone in your household had their cash aid stopped for being found guilty of Welfare Fraud?						
Have you or anyone in your household had their cash aid stopped for failure to cooperate with eligibility requirements, work/training sanctions or any other reason?						
Have you or any member of your household been found by a court of law to be in violation of probation or parole?						
Are you or any member of your household hiding or running from the law to avoid prosecution, being taken into custody, or going to jail for a felony crime or attempted felony crime?						
Name	Type	Reason	Begin Date	County	State	Transfer Status
No Data Found						

Figure 2.1.1 – Adding new question field to Non-Compliance section

▶ Race/Ethnic Origin

▶ Additional Information

Other Applicants

	<input checked="" type="checkbox"/>	Name	SSN	Date of Birth	Gender	Transfer Status
	<input checked="" type="checkbox"/>	YAM, SAM		01/10/1991	Male	Pending
	<input checked="" type="checkbox"/>	YAM, SAM		01/10/1991	Male	Pending

Programs

	<input checked="" type="checkbox"/>	Program
	<input checked="" type="checkbox"/>	CalFresh

▶ Authorized Representative

Figure 2.1.2 Removal of the e-Application Post History Section

2.1.3 Description of Changes

1. Update the Additional Information subsection of the Non-Compliance section to display the following field "Have you or anyone in your household had their cash aid stopped for failure to cooperate with eligibility requirements, work/training sanctions or any other reason?".
 - a. This is a Yes, No, or blank field.
2. Remove the e-Application Post History section from the page.
3. Update the page logic that sends the e-Application status to BenefitsCal portal when a status is updated.
 - a. The page will insert a transaction log when the web service call is not successful.
4. Update the page logic that sends the e-Application status to BenefitsCal portal when a status is updated to be an asynchronous web service call.

2.1.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update the page mapping to remove unused elements and add new fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 E-Application Search – Disaster CalFresh

2.2.1 Overview

The e-Application Search page allows the User to search for e-Applications that have been submitted through BenefitsCal. When a Disaster CalFresh application is submitted it is sent as a Disaster CalFresh program.

2.2.2 e-Application Search

e-Application Search

*- Indicates required fields

Search

e-App Status: * <input type="text" value="Pending Clearance"/>	e-App Number: <input type="text"/>	e-App RE: <input type="text"/>
ES/IN: <input type="text"/>	e-App Language: <input type="text"/>	
Search By: * <input type="text" value="Program"/>	Program: * <input type="text" value="Disaster CalFresh"/>	
Application Date Range		
Begin Date: <input type="text" value="06/01/2021"/>	End Date: <input type="text"/>	
▶ Advanced Search		

Results per Page: Search

Search Results Summary							Results 1 - 11 of 11	
e-App Number CalHEERS		Applicant Name	Application Date	e-App Status	Case Number	Programs	RE	
ES/IN	Number							
 IN	LRS8934023	Baxter, Thelma OM	07/19/2021	Pending Clearance		DC	Yes	
 IN	LRS8407207	Leach, Zelma OM	07/19/2021	Pending Clearance		DC	Yes	
 IN	LRS7527410	Bass, Deana OM	07/19/2021	Pending Clearance		DC	Yes	

Figure 2.2.2 e-Application Search - Disaster CalFresh program

2.2.3 Description of Changes

1. Update the e-Application Search page to include the Disaster CalFresh option in the Program dropdown allowing the User to search by on Disaster CalFresh applications.
 - a. The DCF program will display in the Programs column in the Search results.
2. Remove the Disaster CalFresh checkbox from the e-Application Search page.
3. Remove the DCF column under the Search Results Summary.

2.2.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.3 e-Application Summary – Disaster CalFresh

2.3.1 Overview

Update the e-Application Summary page to display the Disaster CalFresh section when a Disaster CalFresh application is submitted. The Disaster CalFresh section will not display unless it is a Disaster CalFresh application. The new Disaster CalFresh section will display the data that is received through the API.

2.3.2 e-Application Summary

Disaster CalFresh

Household Information

Name	County	State	Monthly Allotment	Replacement Requested/Received	Replacement Amount	Transfer Status
Cyrus Christian				Yes	10.00	Pending

Additional Information

Was anyone in your household living in the disaster area at the time of the disaster?

Yes

Was anyone in your household working in the disaster area at the time of the disaster?

Yes

Are you unable to get to your household's income or cash resources?

Yes

Have your income or cash resources been lowered, delayed, or stopped because of the disaster?

Yes

Will you be buying food and preparing meals during the disaster benefit period?

Yes

Is anyone in your household employed by a County/State CalFresh Agency?

Yes

Name of County/State CalFresh Agency

No

What is the total amount of take home pay or other income all persons listed above have received or will get during the disaster benefit period?

10.00

List all your income sources:

10

Income/Resources/Expenses

Cash On Hand Amount	Amount in Savings Accounts	Amount in Checking Accounts	Other Amount	Transfer Status
10.00	10.00	10.00	10.00	Pending

Disaster Expense Type	Amount	Transfer Status
		Pending

Figure 2.3.2 e-Application Summary Disaster CalFresh section

2.3.3 Description of Changes

1. Add the Disaster CalFresh section when an application is marked as a Disaster CalFresh (DCF) application through the App Transfer API from BenefitsCal. This section will only display for a DCF application.
 - a. Add Household Information block containing the following fields:
 - i. Name
 - ii. County
 - iii. State

- iv. Monthly Allotment
- v. Replacement Requested/Received
- vi. Replacement Amount
- vii. Transfer Status
- b. Add the Additional Information section with the following fields:
 - i. Was anyone in your household living in the disaster area at the time of the disaster?
 - ii. Was anyone in your household working in the disaster area at the time of the disaster?
 - iii. Are you unable to get to your household's income or cash resources?
 - iv. Have your income or cash resources been lowered, delayed, or stopped because of the disaster?
 - v. Will you be buying food and preparing meals during the disaster benefit period?
 - vi. Is anyone in your household employed by a County/State CalFresh Agency?
 - vii. Name of County/State CalFresh Agency
 - viii. What is the total amount of take home pay or other income all persons listed above have received or will get during the disaster benefit period?
 - ix. List all your income sources:
- c. Add the Income/Resources/Expenses section with the following fields:
 - i. Cash On Hand Amount
 - ii. Amount in Savings Accounts
 - iii. Amount in Checking Accounts
 - iv. Other Amount
 - v. Transfer Status
 - vi. Disaster Expense Type
 - vii. Amount
 - viii. Transfer Status

2.3.3 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

2.3.4 Security Updates

N/A

2.3.5 Page Mapping

Add new fields to Page Mapping.

2.4 e-Application Summary – Disaster CalFresh Linking Flow

2.4.1 Overview

Update the e-Application Summary page to link the Disaster CalFresh Program through the linking flow to create a new case with the Disaster CalFresh program.

2.4.2 New/ Reapplication Detail

New / Reapplication Detail

✱ Indicates required fields

Save and Return Cancel

✱ Cancel - The Program Type of 'Disaster CalFresh' cannot be added to a case that has other Program Types on it.

View Date: 06/09/2021 Program Type: Disaster CalFresh

Disaster CalFresh

Declared Disaster: Los Angeles February 2020 DCLL Test Disaster

Application Begin Date: 06/01/2021 Application End Date: 06/30/2021

Disaster Period Begin Date: 06/01/2021 Disaster Period End Date: 06/30/2021

Primary: ✱ Erin Patel 47M Application Date: ✱ 06/01/2021 Requested BDA: ✱ 06/01/2021 Source:

Name	DOB	Role	Role Reason	Status	Status Reason
Erin Patel	07/21/1973				

Save and Return Cancel

Figure 2.5.2 New/ Reapplication Detail – Disaster CF

2.4.3 Description of Changes

1. The Disaster CF (DCF) Application cannot be linked to an existing case with any other programs on it. If the Worker attempts to link to an existing case with any programs other than Disaster CalFresh the following validation message will display:
"Cancel - The Program Type of 'Disaster CalFresh' cannot be added to a case that has other Program Types on it".
2. More than one DCF application can be linked to the same DCF case when multiple types of disasters occur in a county at the same time.
3. The Disaster CalFresh program will appear on the Case Summary once the linking flow is completed.

2.4.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.5 Self-Service Portal Customer Privacy Task Navigation

2.5.1 Overview

The Self-Service Portal Customer Privacy Task Navigation will allow the worker to select a person in CalSAWS to access their Self-Service Portal Customer Privacy information. The purpose of the Self-Service Portal Customer Privacy pages is to prevent a person's case information from being passed from CalSAWS to BenefitsCal. Creating a record for a person's case will prevent all Case data along with Notices/Documents from being viewed on BenefitsCal.

2.5.2 Self-Service Portal Customer Privacy Mockup

CalSAWS

Journal
Tasks
Help
Resources
Page Mapping
Images
DCFS Images
Log Out

Los Angeles AT6

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

e-Tools

▼ E-Application

e-Application Search

e-Application Document Search

Case Link Request

Self-Service Portal Customer Privacy

E-Messages

Application Registration Search

▼ Inter-County Transfer

Incoming ICT

Outgoing ICT

ICT Additional Documents

▼ External Agencies

Subscriber County Review List

Targeted Low-Income

MAGI

VLP

Select Person

Search

Case Number:

Social Security Number:

CIN:

Last Name:

First Name:

Middle Name/Initial:

Date Of Birth:

Gender:

Phone Number:

Address Type:

Address Line 1:

Address Line 2:

City:

State:

ZIP Code:

☒ Include Phonetic Search Results

Results per Page: 25 Search

This Type 1 page took 0.39 seconds to load.

Figure 2.2.1 – Self-Service Portal Customer Privacy Task Navigation

CalSAWS Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles AT6

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

e-Tools

- ▼ **E-Application**
 - e-Application Search
 - e-Application Document Search
 - Case Link Request
 - Self-Service Portal Customer Privacy
 - E-Messages
 - Application Registration Search
- ▼ **Inter-County Transfer**
 - Incoming ICT
 - Outgoing ICT
 - ICT Additional Documents
- ▼ **External Agencies**
 - Subscriber County Review List
 - Targeted Low-Income
 - MAGI
 - VLP

Select Person

► Refine Your Search

Search Results Summary Results 1 - 1 of 1

Select Cancel

Name	SSN	DOB	Alien#	Address
<input checked="" type="radio"/> HOGAN, RHETT 33F	908-72-6002	05/11/1988		107 ERIN RD LOS ANGELES, CA 90064

Select Cancel

This Type_1 page took 0.22 seconds to load.

Figure 2.2.2 – Select a Person page after a person has been selected

2.5.3 Description of Changes

1. Update the Task Navigation for e-Tools to have the Self-Service Portal Customer Privacy navigation item. Clicking this will navigate the worker to the Select Person page flow which allows them to find a person in CalSAWS to create a Self-Service Portal Customer Privacy record.
 - a. The worker will need the 'Self Service Portal Customer Privacy Search' right to view this task navigation item.

2.5.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Self-Service Portal Customer Privacy**

2.5.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
SelfServicePortalCustomerPrivacySearch	Allows user to access the Self-Service Customer Privacy Search pages	Self-Service Portal Customer Privacy View, Self-Service Portal Customer Privacy Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Self-Service Portal Customer Privacy View	Allow access to view the Self-Service Portal Customer Privacy Pages.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff, Regional Call Center Supervisor
Self-Service Portal Customer Privacy Edit	Allow access to create, edit, and view the Self-Service Portal Customer Privacy Pages.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff, Regional Call Center Supervisor

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Self-Service Portal Customer Privacy Search

2.6.1 Overview

The Self-Service Portal Customer Privacy Search will allow the worker to view a person's information, their associated cases, and the customer privacy records associated to their case(s). The customer privacy records will be used by the Case Inquiry API when returning case information associated to a person, to BenefitsCal.

2.6.2 Self-Service Portal Customer Privacy Search Mockup

CalSAWS Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles AT6 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Self-Service Portal Customer Privacy Search

▼ Refine Your Search Search

Name: RHETT HOGAN **SSN:** 908-72-6002 **Date of Birth:** 05/11/1988

CIN Number: 14066681C

Address: 107 ERIN RD
LOS ANGELES, CA 90064 **Gender:** Female

Case Number: [B1FMN15](#) [L013816](#) [B0X0705](#) [B0K0333](#) [B0X1269](#) [HW2N566](#) [L018894](#) **Customer Privacy Date Range**

Begin Date: 05/18/2021 **End Date:** 08/03/2021

Results per Page: 25 Search Add

Opted-Out Privacy History

Case Number	Begin Date	End Date	
B0X1269	05/18/2021	05/18/2021	Edit
B0X1269	05/18/2021	05/18/2021	Edit
B0X1269	05/18/2021	05/18/2021	Edit
B0X1269	05/18/2021	05/18/2021	Edit
B0X1269	05/18/2021	05/18/2021	Edit
B0X1269	05/18/2021	05/18/2021	Edit
B0X1269	05/18/2021	05/18/2021	Edit
<input type="checkbox"/> B1FMN15	05/19/2021		Edit

Remove Add

This Type 1 page took 0.24 seconds to load.

Figure 2.3.1 – Self-Service Portal Customer Privacy Search

2.6.3 Description of Changes

1. Create the Self-Service Portal Customer Privacy Search page which will allow the worker to view and access the customer privacy records associated to the case. The page will have the following components from the individual selected in the Select Person page:
 - a. Person Information subsection:
 - i. Name
 1. The name of the person. This field is view only.
 - ii. SSN
 1. The SSN of the person. This field is view only.
 - iii. Date of Birth
 1. The date of birth of the person. This field is view only.
 - iv. CIN Number
 1. The CIN of the person. This field is view only.
 - v. Gender
 1. The gender of the person. This field is view only.
 - vi. Address
 1. The physical address of the person. This field is view only.
 - vii. Case Number
 1. The case numbers associated to the person. Clicking the case number hyperlink will navigate the worker to the Case Summary page of the case.
 - viii. Customer Privacy Date Range
 1. Begin Date
 - a. This date field is editable.
 2. End Date
 - a. This date field is editable.
 - b. Search button
 - i. Clicking the search button will filter the records displayed on the Opted-Out Privacy History based on the Begin Date and End Date fields. The records displayed per page is determined by the Results per Page dropdown.
 - c. Opted-Out Privacy History
 - i. This section displays the customer privacy record(s) associated to the person. It will have the following components:
 1. Remove Checkbox
 - a. This checkbox displays for records that are NOT end-dated.
 2. Case Number
 - a. This is the Case Number associated to the customer privacy record. Clicking on this hyperlink will navigate the worker to the

Self-Service Customer Privacy Detail page in View Mode.

3. Begin Date
 - a. The begin date of when the customer privacy record starts.
4. End Date
 - a. The end date of when the customer Privacy record ends.
5. Add button
 - a. Clicking this button will navigate the worker to the Self-Service Customer Privacy Detail page in Create Mode.
 - b. The user needs the 'SelfServicePortalCustomerPrivacyDetailEdit' security right to access this button.
6. Edit button
 - a. Clicking this button will navigate the worker to the Self-Service Customer Privacy Detail page in Edit Mode.
 - b. The user needs the 'SelfServicePortalCustomerPrivacyDetailEdit' security right to access this button.
7. Remove button
 - a. Clicking this button will remove the marked customer privacy record.
 - b. The user needs the 'SelfServicePortalCustomerPrivacyRemove' security right to access this button.

2.6.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Self-Service Portal Customer Privacy**

2.6.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
SelfServicePortalCustomerPrivacySearch	Allows user to access the Self-Service	Self-Service Portal Customer

Security Right	Right Description	Right to Group Mapping
	Customer Privacy Search pages	Privacy View, Self-Service Portal Customer Privacy Edit
SelfServicePortalCustomerPrivacyDetailEdit	Allows user to create and edit Self-Service Customer Privacy records.	Self-Service Portal Customer Privacy Edit
SelfServicePortalCustomerPrivacyRemove	Allows user to remove Self-Service Customer Privacy records.	Self-Service Portal Customer Privacy Remove

4. Security Groups

Security Group	Group Description	Group to Role Mapping
Self-Service Portal Customer Privacy View	Allow access to view the Self-Service Portal Customer Privacy Pages.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff, Regional Call Center Supervisor
Self-Service Portal Customer Privacy Edit	Allow access to create, edit, and view the Self-Service Portal Customer Privacy Pages.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff, Regional Call Center Supervisor
Self-Service Portal Customer Privacy Remove	Allow access to remove a Self-Service Portal Customer Privacy record.	

2.6.6 Page Mapping

Page mapping is created for this page.

2.6.7 Page Usage/Data Volume Impacts

Expected low volume of records.

2.7 Self-Service Portal Customer Privacy Detail

2.7.1 Overview

The Self-Service Portal Customer Privacy Search will allow the worker to view/create/edit a customer privacy record for a case(s) associated to a person. The customer privacy records will be used by the Case Inquiry API when attempting to return case information to BenefitsCal for the associated person.

2.7.2 Self-Service Portal Customer Privacy Detail Mockup

The mockup shows the CalSAWS interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a secondary navigation bar with links for Los Angeles AT6, Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled "Self-Service Portal Customer Privacy Detail". On the left is a sidebar menu with categories: E-Application (containing e-Application Search, e-Application Document Search, Case Link Request, Self-Service Portal Customer Privacy, and E-Messages), Inter-County Transfer (containing Incoming ICT, Outgoing ICT, and ICT Additional Documents), and External Agencies (containing Subscriber County Review List, Targeted Low-Income, MAGI, and VLP). The main content area displays a form for a customer privacy record. The form includes fields for Case Number (B1FMN15), Name (RHETT HOGAN), SSN (908-72-6002), Date of Birth (05/11/1988), Gender (Female), Address Line 1 (107 ERIN RD), City (LOS ANGELES), State (CA), Zip Code (90064), Begin Date (05/19/2021), and End Date. There are "Edit" and "Close" buttons at the top right and bottom right of the form. A status bar at the bottom indicates "This Type_1 page took 0.40 seconds to load."

Category	Item
E-Application	e-Application Search
	e-Application Document Search
	Case Link Request
	Self-Service Portal Customer Privacy
	E-Messages
Inter-County Transfer	Incoming ICT
	Outgoing ICT
	ICT Additional Documents
External Agencies	Subscriber County Review List
	Targeted Low-Income
	MAGI
	VLP

Self-Service Portal Customer Privacy Detail

EditClose

Case Number:

B1FMN15

Name:

RHETT HOGAN

SSN:

908-72-6002

Date of Birth:

05/11/1988

Gender:

Female

Address Line 1:

107 ERIN RD

City:

LOS ANGELES

State:

CA

Zip Code:

90064

Begin Date:

05/19/2021

End Date:

EditClose

This Type_1 page took 0.40 seconds to load.

Figure 2.4.1 – Self-Service Portal Customer Privacy Detail View Mode

CalSAWS | Journal | Tasks | Help | Resources | Page Mapping | Images | DCFS Images | Log Out

Los Angeles AT6 | Case Info | Eligibility | Empl. Services | Child Care | Resource Databank | Fiscal | Special Units | Reports | Client Corresp. | Admin Tools

Self-Service Portal Customer Privacy Detail

Save and Return | Cancel

Case Number: *
 Select
 B1FMN15
 L013816
 B0X0705

Name: RHETT HOGAN

SSN: 908-72-6002

Date of Birth: 05/11/1988

Gender: Female

Address Line 1: 107 ERIN RD

City: LOS ANGELES

State: CA

Zip Code: 90064

Begin Date: *

End Date:

Save and Return | Cancel

This Type 1 page took 0.22 seconds to load.

Navigation Menu:

- ▼ E-Application
 - e-Application Search
 - e-Application Document Search
 - Case Link Request
 - Self-Service Portal Customer Privacy**
 - E-Messages
 - Application Registration Search
- ▼ Inter-County Transfer
 - Incoming ICT
 - Outgoing ICT
 - ICT Additional Documents
- ▼ External Agencies
 - Subscriber County Review List
 - Targeted Low-Income
 - MAGI
 - VLP

Figure 2.4.2 – Self-Service Portal Customer Privacy Detail Create Mode

CalSAWS Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles AT6 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Self-Service Portal Customer Privacy Detail

Save and Return Cancel

Case Number:
B1FMN15

Name:
RHETT HOGAN

SSN: 908-72-6002 **Date of Birth:** 05/11/1988 **Gender:** Female

Address Line 1: 107 ERIN RD **City:** LOS ANGELES **State:** CA

Zip Code: 90064

Begin Date: 05/19/2021 **End Date:**

Save and Return Cancel

This Type 1 page took 0.22 seconds to load.

Figure 2.4.3 – Self-Service Portal Customer Privacy Detail Edit Mode

2.7.3 Description of Changes

1. Create the Self-Service Portal Customer Privacy Detail page that will have 3 modes: View, Create, Edit. It will have the following component and details:
 - a. Case Number field
 - i. This field is a multi-select during Create mode. Each highlighted case will have its own customer privacy record when the 'Save and Return' button is clicked.
 - ii. This field is not editable in View and Edit modes.
 - b. Name field
 - i. This field is not editable in all modes.
 - ii. It is the name of the person selected in the 'Select Person' page flow.
 - c. SSN field
 - i. This field is not editable in all modes.
 - ii. It is the social security number of the person selected in the 'Select Person' page flow.

- d. Date of Birth field
 - i. This field is not editable in all modes.
 - ii. It is the date of birth of the person selected in the 'Select Person' page flow.
- e. Gender field
 - i. This field is not editable in all modes.
 - ii. It is the gender of the person selected in the 'Select Person' page flow.
- f. Address Line 1 field
 - i. This field is not editable in all modes.
 - ii. It is the physical address line 1 of the person selected in the 'Select Person' page flow.
- g. City field
 - i. This field is not editable in all modes.
 - ii. It is the physical address city of the person selected in the 'Select Person' page flow.
- h. State field
 - i. This field is not editable in all modes.
 - ii. It is the physical address state of the person selected in the 'Select Person' page flow.
- i. Zip Code field
 - i. This field is not editable in all modes.
 - ii. It is the physical address zip code of the person selected in the 'Select Person' page flow.
- j. Begin Date
 - i. This field is editable in Create and Edit modes.
 - ii. This is the begin date of the customer privacy record.
- k. End Date
 - i. This field is editable in Create and Edit modes.
 - ii. This is the end date of the customer privacy record.
- l. View Mode
 - i. This mode is accessible when the Case Number hyperlink on the Self-Service Portal Customer Privacy Detail page.
 - ii. This mode will have the following buttons:
 - 1. Edit
 - a. This will open the page in edit mode.
 - 2. Close
 - a. This will navigate the worker to the Self-Service Portal Customer Privacy Search
- m. Create Mode
 - i. This mode is accessible when clicking the Add button on the Self-Service Portal Customer Privacy Detail page.
 - ii. This mode will have the following buttons:
 - 1. Save and Return
 - a. This will save the customer privacy record and navigate the worker to the Self-Service Portal Customer Privacy Search.
 - 2. Cancel

- a. This will navigate the worker to the Self-Service Portal Customer Privacy Search without saving the information.
 - n. Edit mode
 - i. This mode is accessible when clicking the Edit button on the Self-Service Portal Customer Privacy Detail page.
 - ii. This mode will have the following buttons:
 1. Save and Return
 - a. This will save the customer privacy record and navigate the worker to the Self-Service Portal Customer Privacy Search.
 2. Cancel
 - a. This will navigate the worker to the Self-Service Portal Customer Privacy Search without saving the information.
2. Creating this record will have an impact to the Case Details API and the Notices/Documents API. When this record exists for a Case, that Case information including all programs and persons on that program will no longer be sent to the BenefitsCal application. The record will also be used for the Notices API and any NOAs or Documents associated to the Case with a Privacy Detail record will not be available to be viewed on BenefitsCal. This will also limit most activity on the BenefitsCal website since Case Details API is used to support the Primary Applicant.

2.7.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Self-Service Portal Customer Privacy**

2.7.5 Security Updates

5. Security Rights

Security Right	Right Description	Right to Group Mapping
SelfServicePortalCustomerPrivacyDetailView	Allows user to view the Self-Service Customer record.	Self-Service Portal Customer Privacy View

Security Right	Right Description	Right to Group Mapping
SelfServicePortalCustomerPrivacyDetailEdit	Allows user to create and edit Self-Service Customer Privacy records.	Self-Service Portal Customer Privacy Edit

6. Security Groups

Security Group	Group Description	Group to Role Mapping
Self-Service Portal Customer Privacy View	Allow access to view the Self-Service Portal Customer Privacy Pages.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff, Regional Call Center Supervisor
Self-Service Portal Customer Privacy Edit	Allow access to create, edit, and view the Self-Service Portal Customer Privacy Pages.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff, Regional Call Center Supervisor

2.7.6 Page Mapping

Page mapping is created for this page.

2.7.7 Page Usage/Data Volume Impacts

Expected low usage for low number of records.

2.8 Case Summary

2.8.1 Overview

The Case Summary page displays case and program information. It will be updated to indicate if the case is linked to a Self-Service Portal account.

2.8.2 Case Summary

Case Summary

Case Name Diana Pacheco	County Los Angeles
---	------------------------------

▼ Companion Cases

Case Number	Case Name	Add
--------------------	------------------	---------------------

▼ Self-Service Portal

e-Applications

e-App Number	Applicant Name	ES/IN	Application Date	e-App Status
LRS66877100	Pacheco, Diana 33	IN	07/19/2021	Data Transfer

Linked Persons

Person Name	CBO
Pacheco, Diana	

Display:

 [View](#)

Figure 2.5.1 – Case Summary page with Self-Service Portal section

2.8.3 Description of Changes

1. Create a new section titled 'Self-Service Portal' on the Case Summary page with the following information:
 - a. Move e-Applications into this new Self-Service Portal section.
 - b. Add Linked Persons
 - i. Displays the names of the persons in the case that are linked to a BenefitsCal account.
 - c. CBO
 - i. Displays if the account linked is for a CBO
 - ii. Yes, No, or blank column
2. The Self-Service Portal section will be collapsed when the Case Summary page is loaded.

2.8.4 Page Location

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

- **Task: Case Summary**

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

Add additional fields.

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 Medical Condition Detail

2.9.1 Overview

The Medical Condition Detail page allows the worker to add, update and view medical condition information for a case member. Whenever medical condition information is available to the case's linked e-Application, e-Data mapping to this page is accessible.

2.9.2 Medical Condition Detail

Medical Condition Detail

* - Indicates required fields

Save and Add Another Save and Return Cancel

e-Data Comparison

<input checked="" type="checkbox"/> Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/> Name		Doe, JohfalsePrim OM	Self Service Portal
<input checked="" type="checkbox"/> Does this person need care so that someone else can work or attend school?		Yes	Self Service Portal
<input checked="" type="checkbox"/> Description		Need Help	Self Service Portal
<input checked="" type="checkbox"/> Does this person work and have medical expenses that are needed to help them keep working?		Yes	Self Service Portal
<input checked="" type="checkbox"/> Description		string	Self Service Portal
<input checked="" type="checkbox"/> Expected Length of Condition		30 days or more	Self Service Portal

Import Selected Data

Change Reason

New Change Reason: * New Reported Date: *

- Select -

Name: * Medical Condition Category: DDSD Re-Exam Date:

- Select - Active

Verified: * Medical Condition Type: *

Pending View - Select -

Does this person need care so that someone else can work or attend school? *

- Select -

Does this person need help with activities of daily living through personal assistance or a medical facility? *

- Select -

Description: *

Does this person work and have medical expenses that are needed to help them keep working? *

- Select -

Description: *

Begin Date: * End Date: Expected Length of Condition:

- Select -

Page Reviewed/Update Status

Save and Add Another Save and Return Cancel

Figure 2.6.1 – Medical Condition Detail

2.9.3 Description of Changes

1. Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when medical condition information is available in the case's linked e-Application:
 - a. Name
 - b. Does this person need help with activities of daily living through personal assistance or a medical facility?
 - c. Description (if answer in b is yes)
 - d. Expected Length of Condition
 - e. Does this person need care so that someone else can work or attend school?
 - f. Does this person work and have medical expenses that are needed to help them keep working?
 - g. Description (if answer in f is yes)

2.9.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Medical Condition**

2.9.5 Security Updates

N/A

2.9.6 Page Mapping

N/A

2.9.7 Page Usage/Data Volume Impacts

N/A

2.10 Tax Household Detail

2.10.1 Overview

The Tax Household Detail page allows the worker to add, update and view tax household information for a case member. Whenever tax household information is available to the case's linked e-Application, e-Data mapping to this page is accessible.

2.10.2 Tax Household Detail

Tax Household Detail

*- Indicates required fields

SaveCancel

▼ e-Data Comparison

✓ Field Name	Existing Value	e-Data Value	Source
✓ Name	KEIGWIN, ART 51F	KEIGWIN, ART 51F	Self Service Portal
✓ Primary Tax Filer	Yes	Yes	Self Service Portal
✓ Is this person expected to be required to file taxes for the current year?	No	Yes	Self Service Portal
✓ Expected Filing Status	Single	Head of Household	Self Service Portal
✓ Is this person expected to be claimed as a Dependent by a non-custodial parent?	No	No	Self Service Portal

Import Selected Data

Name:
KEIGWIN, ART 51F

Primary Tax Filer: *
Yes

Filing Year: *
2020

Is this person expected to be required to file taxes for the current year? *
Yes

Is this person planning to file taxes for the current year? *
Yes

Expected Filing Status: *
Single

Figure 2.8.1 – Tax Household Detail

2.10.3 Description of Changes

1. Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when tax household information is available in the case's linked e-Application:
 - a. Name
 - b. Is this person expected to be required to file taxes for the current year?
 - c. Is this person expected to be claimed as a dependent by a non-custodial-parent?

2.10.4 Page Location

- **Global: Eligibility**

- **Local: Customer Information**
- **Task: Tax Household**

2.10.5 Security Updates

N/A

2.10.6 Page Mapping

N/A

2.10.7 Page Usage/Data Volume Impacts

N/A

2.11 Contact Detail

2.11.1 Overview

The Contact Detail page allows the worker to add, update and view contact information for a case member. Whenever contact information is available to the case's linked e-Application, e-Data mapping to this page is accessible.

2.11.2 Contact Detail

CalSAWS Case Name: Case Name Case Number: B0HKH51 Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles AT6 Case Info **Eligibility** Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Customer Information

Case Number: Go

Person Search

▼ Non Financial

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend

Contact Detail

*- Indicates required fields

Save Save and Return Cancel

▼ e-Data Comparison

Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/> Name	BODLEY, ARON 55M	Bodley, Aron 55M	Self Service Portal
<input checked="" type="checkbox"/> E-mail Address	john.doe@calsaws.org	Donald.Colburn@nytimes.us	Self Service Portal
<input checked="" type="checkbox"/> Number	(123)456-7890	(781)026-5961	Self Service Portal
<input checked="" type="checkbox"/> Type	Home	Main	Self Service Portal

Import Selected Data

Name: * BODLEY, ARON 55M

E-mail Address: john.doe@calsaws.org ☐ Allow E-Mail Reminder

E-mail Status: Verification Not Sent

IVR PIN: Reset PIN

Voice Print: No

E-Notification:

Customer ID: 2094863670

Phone Numbers

Number	Type *	IVR Consent	Text Message	Text Message Status
<input type="checkbox"/> (123)456-7890 ext. <input type="text"/>	Home	Opt-Out	<input type="text"/>	
<input type="checkbox"/> <input type="text"/> ext. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Remove Add

Figure 2.9.1 – Contact Detail

2.11.3 Description of Changes

- Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when contact information is available in the case's linked e-Application:
 - Name
 - E-mail Address
 - Phone
 - Type

2.11.4 Page Location

- Global: Eligibility
- Local: Customer Information
- Task: Contact

2.11.5 Security Updates

N/A

2.11.6 Page Mapping

N/A

2.11.7 Page Usage/Data Volume Impacts

N/A

2.12 Employment Detail

2.12.1 Overview

The Employment Detail page allows the worker to add, update and view employment information for a case member. Whenever employment information is available to the case's linked e-Application, e-Data mapping to this page is accessible.

2.12.2 Employment Detail

CalSAWS Case Name: Johfalse Doe Case Number: N9005C2 Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles AT6 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Customer Information

Case Number: Go

Person Search

▼ Non Financial

- Contact
- Root Questions
- Individual Demographics
- Vital Statistics
- Household Status
- Relationship
- Citizenship
- Pregnancy
- Deemed Eligibility
- Residency
- Other Prog. Assist.
- Non-Compliance
- Customer Options
- Money Mngmt
- Time Limits
- Purch. and Prep.
- Immunizations
- School Attend.

Employment Detail

*- Indicates required fields

Save and View Progress Save and Add Activity Save and Return Cancel

e-Data Comparison

Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/> Name		Doe, Johfalse OM	Self Service Portal
<input checked="" type="checkbox"/> Employer		Foster Farms	Self Service Portal
<input checked="" type="checkbox"/> Address		123 Main St	Self Service Portal
<input checked="" type="checkbox"/> Phone Number		1111111111	Self Service Portal
<input checked="" type="checkbox"/> Job Title		tester	Self Service Portal
<input checked="" type="checkbox"/> Hired Date		01/05/2021	Self Service Portal
<input checked="" type="checkbox"/> Termination Date		01/05/2021	Self Service Portal

Import Selected Data

Change Reason

New Change Reason: * New Reported Date: *

Name: * Category: * Type: *

Figure 2.12.1 – Employment Detail

2.12.3 Description of Changes

1. Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when employment information is available in the case's linked e-Application:
 - a. Name
 - b. Employer
 - c. Address
 - d. Phone Number

2.12.4 Page Location

- Global: Eligibility
- Local: Customer Information
- Task: Employment

2.12.5 Security Updates

N/A

2.12.6 Page Mapping

N/A

2.12.7 Page Usage/Data Volume Impacts

N/A

2.13 Citizenship Status Detail

2.13.1 Overview

The Citizenship Status Detail page allows the worker to add, update and view citizenship information for a case member. Whenever citizenship information is available to the case's linked e-Application, e-Data mapping to this page is accessible.

2.13.2 Citizenship Status Detail

Citizenship Status Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

▼ e-Data Comparison

Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/> Name		Doe, Sameer OM	Self Service Portal
<input checked="" type="checkbox"/> Citizenship Type	US Citizen Born Abroad	US Citizen Born Abroad	Self Service Portal
<input checked="" type="checkbox"/> Document		Visitor/VISA	Self Service Portal
<input checked="" type="checkbox"/> Document Number		string	Self Service Portal
<input checked="" type="checkbox"/> Alien Number		A1234567	Self Service Portal
<input checked="" type="checkbox"/> Date of Entry		01/05/2021	Self Service Portal
<input checked="" type="checkbox"/> Is this an individual who worked 40 quarters or more, or the spouse, dependent child or unremarried surviving spouse of someone who worked 40 quarters or more?		Yes	Self Service Portal
<input checked="" type="checkbox"/> Does this individual have, has applied for, or plans to apply for a T-Visa, U-Visa, or VAWA Petition?		Yes	Self Service Portal
<input checked="" type="checkbox"/> Has this person lived in the U.S. continuously since 1996?		Yes	Self Service Portal

Import Selected Data

Change Reason

New Change Reason: *
- Select -

New Reported Date: *

Name: *
- Select -

Name upon US Entry:

Citizenship Type:
US Citizen Born Abroad

Figure 2.13.1 – Citizenship Status Detail

2.13.3 Description of Changes

1. Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when citizenship information is available in the case's linked e-Application:
 - a. Name

- b. Citizenship Type
- c. Document
- d. A Number
- e. Document Number
- f. Has this person lived in the U.S. continuously since 1996?
- g. Is this an individual who worked 40 quarters or more, or the spouse, dependent child or unremarried surviving spouse of someone who worked 40 quarters or more?
- h. Does this individual have, has applied for, or plans to apply for a T-Visa, U-Visa, or VAWA Petition?

2.13.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Citizenship**

2.13.5 Security Updates

N/A

2.13.6 Page Mapping

N/A

2.13.7 Page Usage/Data Volume Impacts

N/A

2.14 Sponsorship List

2.14.1 Overview

The Sponsorship List page allows workers to view the sponsorship records associated to the case. This page will be updated to support e-Data mapping functionality.

2.14.2 Sponsorship List

Sponsorship List





Continue

Display From:

To:

View

Add

Name	Sponsor	Sponsor Type	Begin Date	End Date
 PLYMPTON, SUZI				<div>Add</div>
 OGDEN, SHELTON				<div>Add</div>
 OGDEN, SHARDA				<div>Add</div>
 OGDEN, KALI				<div>Add</div>

Sponsor Type: *

- Select -

Add

☐ Complete

Continue

Figure 2.14.1 – Sponsorship List

2.14.3 Description of Changes

1. Update the page to support the e-Data mapping functionality. When the case is created through e-Application data transfer and there is Sponsorship information available, the blue arrow icon will show up next to the Name of the household member and an 'Add' button is visible.

2.14.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Sponsorship**

2.14.5 Security Updates

N/A

2.14.6 Page Mapping

N/A

2.14.7 Page Usage/Data Volume Impacts

N/A

2.15 Sponsorship Detail

2.15.1 Overview

The Sponsorship Detail page allows the worker to add, update and view sponsorship information for a case member. Whenever sponsorship information is available to the case's linked e-Application, e-Data mapping to this page is accessible.

2.15.2 Sponsorship Detail

Sponsorship Detail

*- Indicates required fields

Save and Add Another

Save and Return

Cancel

▼ e-Data Comparison

<input checked="" type="checkbox"/> Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/> Sponsor's Name		PLYMPTON, SUZI 33F	Self Service Portal
<input checked="" type="checkbox"/> Sponsor's Phone Number		1111111111	Self Service Portal
<input checked="" type="checkbox"/> Did the sponsor sign an I-864?		No	Self Service Portal
<input checked="" type="checkbox"/> Does the sponsor help with money?		No	Self Service Portal
<input checked="" type="checkbox"/> How much?		0.00	Self Service Portal
<input checked="" type="checkbox"/> Rent		true	Self Service Portal
<input checked="" type="checkbox"/> Clothes		false	Self Service Portal
<input checked="" type="checkbox"/> Food		false	Self Service Portal

Import Selected Data

Sponsor: Individual

Sponsored Non-Citizen's Name: *

- Select -
OGDEN, ABIGAIL 32M
OGDEN, KALI 15F
OGDEN, SHARDA 6M

Sponsor's Name: *

- Select -

Sponsor's Phone Number:

Sponsor's Household Size: *

0

Total Number of Sponsored Non-Citizens: *

0

Did the sponsor sign an I-864? *

- Select -

Date I-864 Signed:

Sponsor Lien Signed?

Figure 2.15.1 – Sponsorship Detail



Sponsor Lien Signed?


Are there any new dependents since the sponsor signed sponsorship documents?

Does the sponsor help with money? *

Does the sponsor help with any of the following?

<input type="checkbox"/> Rent	<input type="checkbox"/> Clothes
<input type="checkbox"/> Food	<input type="checkbox"/> Other

Begin Date: *  **End Date:** 

☐  Page Reviewed/Update Status

Save and Add Another **Save and Return** **Cancel**

Figure 2.15.2 – Sponsorship Detail (continuation)

2.15.3 Description of Changes

- Update the page to display the e-Data Comparison section when e-Data mapping is available for the record display.
- Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when sponsorship information is available in the case's linked e-Application:
 - Sponsored Non-Citizen's Name
 - Sponsor's Name
 - Sponsor's Phone Number
 - Did the sponsor sign an I-864?
 - Does the sponsor help with money?
 - How much?
 - Rent
 - Food
 - Clothes
- Add the Page Reviewed/Update Status checkbox which will update the sponsorship record on the e-Application table as transferred when this is checked. Checking this box and saving will make the e-Data mapping inaccessible for the record.

2.15.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Sponsorship**

2.15.5 Security Updates

N/A

2.15.6 Page Mapping

N/A

2.15.7 Page Usage/Data Volume Impacts

N/A

2.16 Property Detail Pages

2.16.1 Overview

The Property Detail pages allow the worker to add, update and view property information for a case member. Whenever property information is available to the case's linked e-Application, e-Data mapping to this page is accessible. The detail pages depend on the property category: Real, Personal, Motor Vehicle and Liquid.

2.16.2 Property Detail

Real Property Detail

*- Indicates required fields

Save and Add Another

Save and Return

Cancel

▼ e-Data Comparison

<input checked="" type="checkbox"/> Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/> Real Property Type		Building	Self Service Portal
<input checked="" type="checkbox"/> Owner		Lopez, Delmar 67M	Self Service Portal
<input checked="" type="checkbox"/> Address Line 1		1125 WROXBURY PKWY	Self Service Portal
<input checked="" type="checkbox"/> Address Line 2		1125 WROXBURY PKWY	Self Service Portal
<input checked="" type="checkbox"/> City		LOS ANGELES	Self Service Portal
<input checked="" type="checkbox"/> State		CA	Self Service Portal
<input checked="" type="checkbox"/> ZIP Code		90064	Self Service Portal

Import Selected Data

Real Property Type: *

- Select -

Property has been considered by SSA (1931b only):

▼

Owner(s) *

Percentage

- Select -

Retrieve Address

100

▼

Add

Property Address

Address Line 1: *

Address Line 2:

City: *

State: *

- Select -

ZIP Code: *

Parcel/Deed Number:

Figure 2.16.1 – Real Property Detail

2.16.3 Description of Changes

1. Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when property information is available in the case's linked e-Application:
 - a. Owner(s)
 - b. [Category Name] Type

- c. Property Address section (this is only for Real Property)
 - i. Address Line 1
 - ii. Address Line 2
 - iii. City
 - iv. State
 - v. ZIP Code

2.16.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Property**

2.16.5 Security Updates

N/A

2.16.6 Page Mapping

N/A

2.16.7 Page Usage/Data Volume Impacts

N/A

2.17 Property History Detail

2.17.1 Overview

The Property History Detail page allows the worker to add, update and view property history information for a case member. Whenever property history information is available to the case's linked e-Application, e-Data mapping to this page is accessible. The detail pages depend on the property category: Real, Personal, Motor Vehicle and Liquid.

2.17.2 Property History Detail

Property History Detail

* - Indicates required fields

Save and Return

Cancel

e-Data Comparison

<input checked="" type="checkbox"/> Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/> Fair Market Value		550.00	Self Service Portal
<input checked="" type="checkbox"/> Licensed		Yes	Self Service Portal
<input checked="" type="checkbox"/> Status		Available	Self Service Portal
<input checked="" type="checkbox"/> Usage		Essential to Long Distance Travel	Self Service Portal
<input checked="" type="checkbox"/> Encumbrance		990.00	Self Service Portal

Import Selected Data

Change Reason

New Change Reason: *

- Select -

New Reported Date: *

Property Category:

Motor Vehicle

Property Type:

Fair Market Value Source: *

- Select -

Fair Market Value: *

DMV Class Code:

Year/Asterisk Year:

VLF Value:

Calculate

Licensed: *

- Select -

Registered: *

- Select -

Status: *

- Select -

Status Reason:

Non-Purchase Acquisition:

Usage: *

- Select -

Begin Date: *

End Date:

Figure 2.17.1 – Property History Detail

2.17.3 Description of Changes

1. Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when property history information is available in the case's linked e-Application:
 - a. Status

- b. Fair Market Value (use the estimated amount for Motor Vehicle property when available)

2.17.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Property**

2.17.5 Security Updates

N/A

2.17.6 Page Mapping

N/A

2.17.7 Page Usage/Data Volume Impacts

N/A

2.18 Other Health Care Detail Page

2.18.1 Overview

The Other Health Care Detail page allow the worker to add, update and view other health care information for a case member. Whenever a health care information is available to the case's linked e-Application, e-Data mapping to this page is accessible.

2.18.2 Other Health Care Detail

Other Health Care Detail

* - Indicates required fields

Save and Add Another

Save and Return

Cancel

▼ e-Data Comparison

<input checked="" type="checkbox"/> Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/> Beneficiary		Lowery, Tom 38M	Self Service Portal
<input checked="" type="checkbox"/> Policy Start Date		05/13/2021	Self Service Portal
<input checked="" type="checkbox"/> Policy Stop Date		06/13/2021	Self Service Portal
<input checked="" type="checkbox"/> Do you have medical coverage which is available through employer, but has not been applied for?		Yes	Self Service Portal
<input checked="" type="checkbox"/> Name (Employer, Union, Group, Organization or School)		CalSAWS	Self Service Portal
<input checked="" type="checkbox"/> Expense Amount		100.00	Self Service Portal
<input checked="" type="checkbox"/> Does the plan meet Minimum Standard Value?		Yes	Self Service Portal
<input checked="" type="checkbox"/> Is this COBRA Coverage?		No	Self Service Portal
<input checked="" type="checkbox"/> Is this a retiree health policy?		Yes	Self Service Portal
<input checked="" type="checkbox"/> Is this a state employee benefit policy?		No	Self Service Portal
<input checked="" type="checkbox"/> Is this policy a limited-benefit plan like a school accident policy?		Yes	Self Service Portal
<input checked="" type="checkbox"/> Telephone		200504757	Self Service Portal
<input checked="" type="checkbox"/> Expected Expiration Date		06/13/2021	Self Service Portal
<input checked="" type="checkbox"/> Expiration Reason		yes	Self Service Portal
<input checked="" type="checkbox"/> Local or Group Number		123	Self Service Portal

Import Selected Data

Figure 2.19.1 – Other Health Care Detail

Beneficiary: * <div> <div>- Select -</div> <div>Lowery, Tom 38M</div> </div>		Health Coverage Type: * All Other Health Coverage	
Health Insurance Information			
Health Insurance Company Name: <div>Select</div>		Policy Number: <input type="text"/>	
Policy Start Date: <input type="text"/>		Policy Stop Date: <input type="text"/>	
Address Line 1:		Address Line 2:	
City:		State: Zip:	
MEDS OHC Code: * <div>- Select -</div>		Minimal Essential Coverage: <div>▼</div>	
Expected Expiration Date: <input type="text"/>		Expiration Reason: <input type="text"/>	
Health Insurance Legacy Information			
Health Insurance Details			
Do you obtain medical services from a specific facility or a group of providers? (PHP/HMO/PPO): <div>▼</div>			
Is this Employer Sponsored Insurance Outside Exchange? * <div>- Select -</div>			
Do you have medical coverage which is available through employer, but has not been applied for? <div>▼</div>		Does the plan meet Minimum Standard Value? <div>▼</div>	
Is this policy provided by an Absent Parent? * <div>- Select -</div>		Policy Holder: <div>- Select -</div>	
Is the Policy a Medicare Supplement? <div>▼</div>		Does your health insurance provide or pay for (Select all that apply.): <div> <div>Dental</div> <div>Inpatient</div> <div>Long Term Care</div> </div>	
Do you have an acute, chronic, or pre-existing illness that requires you to see a physician? If so, please list illness:			

Figure 2.19.2 – Other Health Care Detail (continued)

2.18.3 Description of Changes

1. Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when other health care information is available in the case's linked e-Application:
 - a. Beneficiary

- b. Health Insurance Company Name
- c. Health Coverage Type
- d. Name (Employer, Union, Group, Organization or School)
- e. Expense Amount
- f. Does the plan meet Minimum Standard Value?
- g. Is this COBRA Coverage?
- h. Is this a retiree health policy?
- i. Is this a state employee benefit policy?
- j. Is this policy a limited-benefit plan like a school accident policy?
- k. Telephone
- l. Expected Expiration Date
- m. Expiration Reason
- n. Address fields
 - i. Address Line 1
 - ii. Address Line 2
 - iii. City
 - iv. State
 - v. Zip Code
- o. Local or Group Number

2.18.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Other Health Care**

2.18.5 Security Updates

N/A

2.18.6 Page Mapping

N/A

2.18.7 Page Usage/Data Volume Impacts

N/A

2.19 Striker Detail Page

2.19.1 Overview

The Striker Detail page allow the worker to add, update and view striker information for a case member. Whenever striker information is available to the case's linked e-Application, e-Data mapping to this page is accessible.

2.19.2 Striker Detail

Striker Detail

* - Indicates required fields

Save and Add Another

Save and Return

Cancel

▼ e-Data Comparison

<input checked="" type="checkbox"/>	Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/>	Name		PADDOCK, LUZ 40F	Self Service Portal
<input checked="" type="checkbox"/>	Union Name		No	Self Service Portal
<input checked="" type="checkbox"/>	Employer		Burlington Coat Factory	Self Service Portal
<input checked="" type="checkbox"/>	Begin Date		07/27/2016	Self Service Portal
<input checked="" type="checkbox"/>	Date of Last Pay		09/12/2021	Self Service Portal
<input checked="" type="checkbox"/>	Reason		for fun	Self Service Portal

Import Selected Data

Name: *

- Select -

Retrieve Information

Union Name: *

Employer: *

Before Strike Income: *

Date of Last Pay: *

Reason:

Good Cause:

Begin Date: *

End Date:

☐ Page Reviewed/Update Status

Figure 2.20.1 – Striker Detail

2.19.3 Description of Changes

1. Update the page to enable the e-Data mapping (as shown with the blue arrow) to the following fields when striker information is available in the case's linked e-Application:
 - a. Name
 - b. Begin Date
 - c. Date of Last Pay
 - d. Reason

2.19.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Striker**

2.19.5 Security Updates

N/A

2.19.6 Page Mapping

N/A

2.19.7 Page Usage/Data Volume Impacts

N/A

2.20 E-Message Search

2.20.1 Overview

The e-Messages Search page allows the worker to view the messages that were sent to an individual. It also allows the worker to add messages for the individual.

2.20.2 E-Messages Search

e-Messages Search

► Refine Your Search

Search Results Summary			Results 1 - 7 of 7
			<a>Add <a>Cancel
Subject	Status	Date	
Re: test	Sent	Wednesday, June 16, 2021 11:17:12:00 AM	<a>View
Re: i have been charged	Sent	Thursday, June 17, 2021 10:16:21:00 AM	<a>View
Re: test2	Sent	Monday, June 21, 2021 2:22:56:00 PM	<a>View
Re: test3	Sent	Monday, June 21, 2021 3:21:15:00 PM	<a>View
Re: test4	Sent	Friday, June 25, 2021 9:38:15:00 AM	<a>View
Re: test5	Sent	Wednesday, June 30, 2021 11:44:09:00 AM	<a>View
Re: test6	Sent	Tuesday, July 13, 2021 11:50:31:00 AM	<a>View
			<a>Add <a>Cancel

Figure 2.21.1 – e-Messages Search

2.20.3 Description of Changes

1. Update the e-Messages Search page to pull back messages associated with an individual and allow the worker to interact with these messages:
 - a. View button will navigate the worker to the e-Messages page in View mode.
 - b. Add button will navigate the worker to the e-Messages page in Create mode.

2.20.4 Page Location

- Global: Case Info
- Local: e-Tools
- Task: E-Messages

2.20.5 Security Updates

N/A

2.20.6 Page Mapping

N/A

2.20.7 Page Usage/Data Volume Impacts

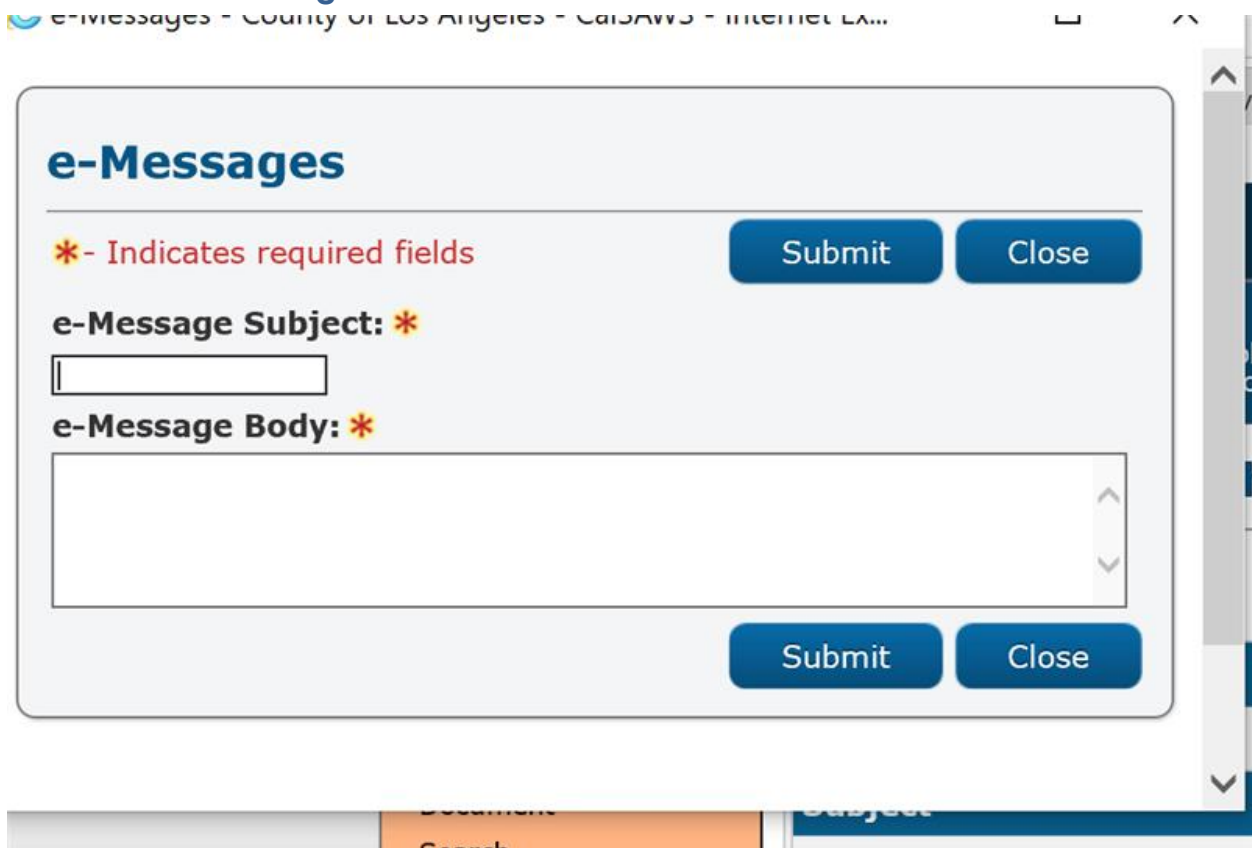
N/A

2.21 E-Messages

2.21.1 Overview

The e-Messages page allows the worker to view the messages that were sent to an individual. It also allows the worker to send messages for the individual.

2.21.2 E-Messages Search



The screenshot shows a web browser window with the address bar displaying "e-messages - County of Los Angeles - CalSWS - Internet Ex...". The main content area features a light blue box titled "e-Messages". Inside this box, there is a legend: "*- Indicates required fields". Below the legend, there are two input fields: "e-Message Subject: *" with a text input box, and "e-Message Body: *" with a larger text area. To the right of the legend and input fields, there are two blue buttons: "Submit" and "Close". At the bottom right of the light blue box, there are another two blue buttons: "Submit" and "Close". The browser's address bar and a portion of the page header are visible at the top.

Figure 2.21.1 – e-Messages Search

e-Messages

e-Message Subject: *
Re: message

e-Message Body: *
you have a new message

2.21.3 Description of Changes

1. Update the e-Messages page to allow a worker to add and submit messages to a BenefitsCal user. Clicking the 'Submit' button will call the Messaging API of the BenefitsCal Portal and send the message to the BenefitsCal user.
2. The User will enter the Subject and Body of Message that is sent to the BenefitsCal User.
 - a. e-Message Subject (required field)
 - b. e-Message Body (required field)

2.21.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: E-Messages**

2.21.5 Security Updates

N/A

2.21.6 Page Mapping

N/A

2.21.7 Page Usage/Data Volume Impacts

N/A

2.22 Select Person (for Case Link Request)

2.22.1 Overview

The Select Person pages will allow the worker to select the individual to initiate BenefitsCal account linking. This page will be updated to display a message to let a worker know if there are no persons in CalSAWS that match the information sent by BenefitsCal.

2.22.2 Select Person



The screenshot shows a web interface titled "Select Person". Below the title is a link "Refine Your Search". A table with five columns (Name, SSN, DOB, Alien#, Address) displays the message "No results found that meet the case linking criteria." At the bottom, a dark blue banner states "This Type 1 page took 0.22 seconds to load."

Name	SSN	DOB	Alien#	Address
No results found that meet the case linking criteria.				

This Type 1 page took 0.22 seconds to load.

Figure 2.23.1 – Select Person message

2.22.3 Description of Changes

1. Update the Select Person page for the Case Link Request process page search results section to display the following message: "No results found that meet the case linking criteria." when the search criteria results are all marked as 'Permanently Out of Home' in their household status.

2.22.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Case Link Request**

2.22.5 Security Updates

N/A

2.22.6 Page Mapping

N/A

2.22.7 Page Usage/Data Volume Impacts

N/A

2.23 Case Linking API

2.23.1 Overview

Case Linking web service links a BenefitsCal account to a CalSAWS individual using the GUID.

2.23.2 Description of Change

1. Update the Case Linking API to prevent linking when the person found is marked Permanently Out of Home.
 - i. The API will return a 404 response when the person found is marked Permanently Out of Home.
 - ii. This logic does not apply when there are 2 or more individual matches found by the link by SSN operation.
 - iii. For link by Case and link by EBT, if the case/associated case provided has the participant as Permanently Out of Home, the API will return a 404 response.
- b. Update the Case Linking API to unlink the GUID when it is linked with a person ID and link it to the new person in the request when the same GUID is passed in the request.

2.23.3 Execution Frequency

N/A.

2.23.4 Key Scheduling Dependencies

N/A.

2.23.5 Counties Impacted

CalSAWS Counties

2.23.6 Data Volume/Performance

N/A.

2.23.7 Interface Partner

BenefitsCal portal

2.23.8 Failure Procedure/Operational Instructions

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

2.24 Case Inquiry API

2.24.1 Overview

Case Inquiry web service retrieves case information in CalSAWS and sends the information to the BenefitsCal portal.

2.24.2 Description of Change

1. Update the Case Inquiry API to return the program person details associated to the individual's case when they exist. It will have the following information:
 - i. First Name
 - ii. Last Name
 - iii. Middle Initial
 - iv. Suffix Name
 - v. Last 4 digits of the Social Security Number
 - vi. CIN
 - vii. Date of Birth
 - viii. Gender
 - ix. Program Person Status
2. Update the Case Inquiry API to return the Person ID of the case members under the CasePersonDetails object.
3. Update the Case Inquiry API to return the current mailing address for each case member instead of all mailing addresses associated to the member.
4. Update the Case Inquiry API to check if there is an active (high-dated) customer privacy record associated to the case. If there is an active customer privacy record, the case information will not be transmitted to the BenefitsCal portal.
5. Update the Case Inquiry API to return the period reports per program and only return the following reports: SAR 7 and MC 176 S.
6. Update the Case Inquiry API to return cases that have programs that are supported by BenefitsCal:
 1. CalWORKs

2. CalFresh
 3. Medi-Cal
 4. General Relief/General Assistance
 5. Disaster CalFresh
 6. CMSP
 7. Homeless – Temporary
 8. Homeless – Permanent
 9. Welfare to Work
 10. GROW
7. If there is no case associated to the person that have any BenefitsCal supported program, the API will return a 204 response to BenefitsCal.

2.24.3 Execution Frequency

N/A.

2.24.4 Key Scheduling Dependencies

N/A.

2.24.5 Counties Impacted

CalSAWS Counties

2.24.6 Data Volume/Performance

N/A.

2.24.7 Interface Partner

BenefitsCal portal

2.24.8 Failure Procedure/Operational Instructions

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

2.25 Messaging API

2.25.1 Overview

Messaging API is an API that will be used for sending e-message to customer. As part of this SCR, web service client modules will be built for sending message to BC portal application.

2.25.2 Description of Changes

Create a web service client module that will be used for sending e-message to BC portal. The following fields are the parameters for calling Messaging API.

1. caseNumber – CalSAWS case number.
2. GUID.
3. msgID.
4. msgTitle.
5. msgStatus.
6. msgDate.
7. msgType.
8. msg – content of the message.
9. workerDetails
 - a. workerName.
 - b. workerId.
 - c. workerCounty.
 - d. workerPhoneNum.

2.25.1 Execution Frequency

N/A

2.25.2 Key Scheduling Dependencies

N/A

2.25.3 Counties Impacted

CalSAWS Counties.

2.25.4 Data Volume/Performance

N/A

2.25.5 Interface Partner

BenefitsCal Portal

2.25.6 Failure Procedure/Operational Instructions

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

2.26 Task – Schedule, Reschedule of Appointments API

2.26.1 Overview

The Schedule, Reschedule of Appointment web service will be created for the portal to be able to create an appointment task.

2.26.2 Description of Change

1. Add a new Restful service that will take the following parameters. The web service will create task for each request.
 - type – task type (EBT/BIC).
 - guid - guid.
 - countyCode – County code.
 - caseNumber – case number.
 - vitalInd – VITA indicator.
 - apptType – appointment type.

General Appointment detail:

Appointment Task Details	
Trigger Condition	When receives a web service call from BC portal
Automated Action Name	N/A
Automated Action Scenario	N/A
Automated Action Program	N/A

Automated Action Source	N/A
Automated Action Run Date	N/A
Task Initial Assignment	N/A
Task Due Date	5 days
Task Long Description	Customer has requested an appointment with the following information {param from BC}
Task Type	Customer Appointment Requested Through Self Service Portal
Task Sub-Type	N/A.
Task Category	Self Service Portal Communications
Task Priority	Medium
Task Expiration	45 days
Task Available Online	No.
Task Newly Assigned Indicator	Default - 5 days
Task Available for Automation	No.
Navigation	N/A.

General Appointment task assignment logic: The API will use the existing program hierarchy logic to find a worker to receive the task.

VITA Appointment task detail:

VITA Appointment Task Details	
Trigger Condition	When receives a web service call from BC portal
Automated Action Name	N/A
Automated Action Scenario	N/A
Automated Action Program	N/A
Automated Action Source	N/A
Automated Action Run Date	N/A
Task Initial Assignment	N/A
Task Due Date	5 days
Task Long Description	Customer has requested a VITA appointment with the following information {param from BC}
Task Type	Customer VITA Appointment Requested Through Self Service Portal
Task Sub-Type	N/A.

Task Category	Self Service Portal Communications
Task Priority	High
Task Expiration	30 days
Task Available Online	No.
Task Newly Assigned Indicator	Default - 5 days
Task Available for Automation	No.
Navigation	N/A.

VITA Appointment task assignment logic: The API will first search for a worker that is setup to be able to take VITA appointment task. If there is no worker, the API will then search for a bank that is associated to VITA task category. If there is no bank available, the API will return exception.

2.26.3 Execution Frequency

N/A

2.26.4 Key Scheduling Dependencies

N/A

2.26.5 Counties Impacted

CalSAWS Counties.

2.26.6 Data Volume/Performance

N/A

2.26.7 Interface Partner

BenefitsCal Portal

2.26.8 Failure Procedure/Operational Instructions

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

2.27 Task – EBT/BIC API

2.27.1 Overview

The EBT/BIC web service will be created for the portal to be able to create an EBT or BIC task.

2.27.2 Description of Change

1. Add a new Restful service that will take the following parameters. The web service will create task for each request.
 - type – task type.
 - GUID.
 - countyCode – County code.
 - caseNumber – case number.
 - longDescr – task long description.

EBT Task details:

EBT Task Details	
Trigger Condition	When receives a web service call from BC portal
Automated Action Name	N/A
Automated Action Scenario	N/A
Automated Action Program	N/A
Automated Action Source	N/A
Automated Action Run Date	N/A
Task Initial Assignment	N/A
Task Due Date	1 day
Task Long Description	Customer has requested a card replacement with the following information {param from BC}
Task Type	Customer request EBT card replacement
Task Sub-Type	N/A.
Task Category	Self Service Portal Communications
Task Priority	Priority
Task Expiration	30 days
Task Available Online	No.
Task Newly Assigned Indicator	Default - 5 days
Task Available for Automation	No.

Navigation	N/A.
------------	------

EBT task assignment logic: The API will use the existing program hierarchy logic to find a worker to receive the task.

BIC Task details:

BIC Task Details	
Trigger Condition	When receives a web service call from BC portal
Automated Action Name	N/A
Automated Action Scenario	N/A
Automated Action Program	N/A
Automated Action Source	N/A
Automated Action Run Date	N/A
Task Initial Assignment	N/A
Task Due Date	5 days
Task Long Description	Customer has requested a card replacement with the following information {param from BC}
Task Type	Customer request BIC card replacement
Task Sub-Type	N/A.
Task Category	Self Service Portal Communications
Task Priority	Medium
Task Expiration	30 days
Task Available Online	No.
Task Newly Assigned Indicator	Default - 5 days

BIC task assignment logic: The API will use the existing program hierarchy logic to find a worker to receive the task. BIC task is applicable for only CW and MC program worker.

2.27.3 Execution Frequency

N/A

2.27.4 Key Scheduling Dependencies

N/A

2.27.5 Counties Impacted

CalSAWS Counties.

2.27.6 Data Volume/Performance

N/A

2.27.7 Interface Partner

BenefitsCal Portal

2.27.8 Failure Procedure/Operational Instructions

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

2.28 Task – Report a Change API

2.28.1 Overview

The Report a Change web service will be created for the BC portal to be able to create a Report a Change task.

2.28.2 Description of Change

1. Add a new Restful service that will take the following parameters. The web service will create task for each request.
 - countyCode – County code.
 - caseNumber – case number.
 - changeReportSummary – report summary.

Report a Change Task Details	
Trigger Condition	When receives a web service call from BC portal
Automated Action Name	N/A
Automated Action Scenario	N/A
Automated Action Program	N/A
Automated Action Source	N/A
Automated Action Run Date	N/A
Task Initial Assignment	N/A

Task Due Date	9 days
Task Long Description	Customer has reported a change information {param from BC}
Task Type	Customer reported a change
Task Sub-Type	N/A.
Task Category	Self Service Portal Communications
Task Priority	Critical
Task Expiration	60 days
Task Available Online	No.
Task Newly Assigned Indicator	Default - 5 days
Task Available for Automation	No.
Navigation	N/A.

Report a Change task assignment logic: The API will use the existing program hierarchy logic to find a worker to receive the task.

2. The API will create a journal entry with the following detail.

Journal Entry	Description
Journal Category	Interfaces
Journal Type	Self Service
Short Description	A change was reported through BenefitsCal
Long Description	The customer has reported the following through BenefitsCal: {param from BC}.
Trigger Condition	When receives a web service call from BC portal

- Journal category: Interfaces
- Journal type: Self Service

2.28.3 Execution Frequency

N/A

2.28.4 Key Scheduling Dependencies

N/A

2.28.5 Counties Impacted

CalSAWS Counties.

2.28.6 Data Volume/Performance

N/A

2.28.7 Interface Partner

BenefitsCal Portal

2.28.8 Failure Procedure/Operational Instructions

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

2.29 Task – CBO Account API

2.29.1 Overview

The CBO Account web service will be created for the BC portal to be able to create a CBO Account task.

2.29.2 Description of Change

1. Add a new Restful service that will take the following parameters. The web service will create task for each request.
 - firstName – first name.
 - lastName – last name.
 - email – email address.
 - address1 – address line 1.
 - Address2 – address line 2.
 - phone
 - number – phone number.
 - extension – phone extension.
 - Type – phone type.
 - zip – zipcode.
 - countyCode – County code.
 - organization – organization detail.

CBO Task Details	
Trigger Condition	When receives a web service call from BC portal
Automated Action Name	N/A
Automated Action Scenario	N/A
Automated Action Program	N/A
Automated Action Source	N/A
Automated Action Run Date	N/A
Task Initial Assignment	N/A
Task Due Date	2 days
Task Long Description	Request to create a CBO account has been received through BenefitsCal {param from BC}.
Task Type	Request to create a CBO account
Task Sub-Type	N/A.
Task Category	External Agency Admin
Task Priority	High
Task Expiration	45 days
Task Available Online	No.
Task Newly Assigned Indicator	Default - 5 days
Task Available for Automation	No.

Navigation	N/A.
------------	------

CBO task assignment logic: The API will first search for a worker that is setup to be able to take CBO task (worker that is associated to External Agency Admin task category). If there is no worker, the API will then search for a bank that is associated to External Agency Admin task category. If there is no bank available, the API will return exception.

2.29.3 Execution Frequency

N/A

2.29.4 Key Scheduling Dependencies

N/A

2.29.5 Counties Impacted

CalSAWS Counties.

2.29.6 Data Volume/Performance

N/A

2.29.7 Interface Partner

BenefitsCal Portal

2.29.8 Failure Procedure/Operational Instructions

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

2.30 Task – Modify Application Transfer API to create clearance task

2.30.1 Overview

Modify Application Transfer API to create clearance task.

2.30.2 Description of Change

1. Add a logic in Application Transfer API to generate a task and assign to a Bank that has e-Application task category. The API will skip the task generation process when a Bank is not setup to receive clearance task.

Clearance Task Details	
Trigger Condition	When receives a web service call from BC portal
Automated Action Name	N/A
Automated Action Scenario	N/A
Automated Action Program	N/A
Automated Action Source	N/A
Automated Action Run Date	N/A
Task Initial Assignment	N/A
Task Due Date	1 day
Task Long Description	Clearance BenefitsCal
Task Type	Clearance BenefitsCal
Task Sub-Type	N/A.
Task Category	Self Service Portal Communications
Task Priority	Critical
Task Expiration	30 days
Task Available Online	No.
Task Newly Assigned Indicator	Default - 5 days
Task Available for Automation	No.
Navigation	N/A.

2.30.3 Execution Frequency

N/A

2.30.4 Key Scheduling Dependencies

N/A

2.30.5 Counties Impacted

CalSAWS Counties.

2.30.6 Data Volume/Performance

N/A

2.30.7 Interface Partner

BenefitsCal Portal

2.30.8 Failure Procedure/Operational Instructions

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

2.31 Forms API – CF 37

2.31.1 Overview

The Recertification for CalFresh (CF 37) operation on the Forms API will generate a CF 37 form with the information that is included in the requested mapped to the form.

It will then upload to Hyland under the given case drawer.

2.31.2 Description of Change

1. Create a Forms Restful API with a CF 37 operation that accepts a request body with a case number, county code and answers mapping to the CF 37 questions.
 - a. This API will generate a CF 37 with the case information populated.
 - b. The API will return a successful response when the PDF has been successfully generated given the request parameters it received.
 - c. In case of errors, the API will return customized error responses.
 - d. Upon successful generation of the form, it will upload the form to Hyland.

2.31.3 Execution Frequency

N/A

2.31.4 Key Scheduling Dependencies

N/A

2.31.5 Counties Impacted

CalSAWS Counties.

2.31.6 Data Volume/Performance

N/A

2.31.7 Interface Partner

BenefitsCal Portal

2.31.8 Failure Procedure/Operational Instructions

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

2.32 Forms API – SAR 7

2.32.1 Overview

The Eligibility Status Report (SAR 7) operation on the Forms API will generate a SAR 7 form with the information that is included in the requested mapped to the form.

It will then upload to Hyland under the given case drawer.

2.32.2 Description of Change

1. Create a Forms Restful API with a SAR 7 operation that accepts a request body with a case number, county code and answers mapping to the SAR 7 questions.
 - a. This API will generate a SAR 7 with the case information populated.
 - i. If the county code provided is Los Angeles (19), the SAR 7-LA version will be generated. Otherwise, it will generate the 57 County version.
 - b. The API will return a successful response when the PDF has been successfully generated given the request parameters it received.
 - c. In case of errors, the API will return customized error responses.

- d. Upon successful generation of the form, it will upload the form to Hyland.

2.32.3 Execution Frequency

N/A

2.32.4 Key Scheduling Dependencies

N/A

2.32.5 Counties Impacted

CalSAWS Counties.

2.32.6 Data Volume/Performance

N/A

2.32.7 Interface Partner

BenefitsCal Portal

2.32.8 Failure Procedure/Operational Instructions

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

2.33 Forms API – MC 210RV

2.33.1 Overview

MC 210RV Forms API will generate a MC 210RV packet with the information that are included in the requested mapped to the form.

It will then upload to Hyland under the given case drawer.

2.33.2 Description of Change

1. Create a Forms Restful API with a MC 210RV operation that accepts a request body with a case number, county code and answers mapping to the MC 210RV questions.

- The API will return a successful response when the payload is sent into the web service messaging queue.
- 2. There will be a web service listener class that will pick up the data, generate PDF file, and save the file into Hyland system.

2.33.3 Execution Frequency

N/A

2.33.4 Key Scheduling Dependencies

N/A

2.33.5 Counties Impacted

CalSAWS Counties.

2.33.6 Data Volume/Performance

N/A

2.33.7 Interface Partner

BenefitsCal Portal

2.33.8 Failure Procedure/Operational Instructions

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

2.34 Forms API – MC 216

2.34.1 Overview

MC 216 Forms API will generate a MC 216 packet with the information that are included in the requested mapped to the form.

It will then upload to Hyland under the given case drawer.

2.34.2 Description of Change

3. Create a Forms Restful API with a MC 216 operation that accepts a request body with a case number, county code and answers mapping to the MC 216 questions.

- The API will return a successful response when the payload is sent into the web service messaging queue.
- 4. There will be a web service listener class that will pick up the data, generate PDF file, and save the file into Hyland system.

2.34.3 Execution Frequency

N/A

2.34.4 Key Scheduling Dependencies

N/A

2.34.5 Counties Impacted

CalSAWS Counties.

2.34.6 Data Volume/Performance

N/A

2.34.7 Interface Partner

BenefitsCal Portal

2.34.8 Failure Procedure/Operational Instructions

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

2.35 Forms API – MC 217

2.35.1 Overview

MC 217 Forms API will generate a MC 217 packet with the information that are included in the requested mapped to the form.

It will then upload to Hyland under the given case drawer.

2.35.2 Description of Change

1. Create a Forms Restful API with a MC 217 operation that accepts a request body with a case number, county code and answers mapping to the MC 217 questions.
 - o The API will return a successful response when the payload is sent into the web service messaging queue.
2. There will be a web service listener class that will pick up the data, generate PDF file, and save the file into Hyland system.

2.35.3 Execution Frequency

N/A

2.35.4 Key Scheduling Dependencies

N/A

2.35.5 Counties Impacted

CalSAWS Counties.

2.35.6 Data Volume/Performance

N/A

2.35.7 Interface Partner

BenefitsCal Portal

2.35.8 Failure Procedure/Operational Instructions

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

2.36 Notices API

2.36.1 Overview

The Notices API service retrieves a list of documents associated to a BenefitsCal user and an imaged version of a document in which the ID is passed in the request.

2.36.2 Description of Change

1. Create a Notice Restful service that have 2 operations:
 - a. /Notices operation
 - i. This operation returns a list of documents for a given participant using their GUID. If the participant is a Primary Applicant and in the Home, a list of notices will be returned.
 1. The noticeType field is populated with the document ID or the NOA ID.
 2. The documents returned are from the last 6 months based on the current date.
 3. The documents returned are either one of the following statuses:
 - a. Printed Locally
 - b. Printed Centrally
 - c. Hold for Pickup
 - d. Reprint Centrally
 - e. Reprint Locally
 - f. E-Notified
 - g. Converted
 - ii. The documents must be marked as can be viewed on the portal in the database.
 - iii. If the GUID passed has an active (high-dated) customer privacy record associated to a case, the documents relating to that case will not be returned to the BenefitsCal portal.
 - b. /Notices/[noticeIdentifier] operation
 - i. This operation retrieves the imaged document given the identifier and the case number. The county code passed to the File Service API will be derived from the identifier.

2.36.3 Execution Frequency

N/A

2.36.4 Key Scheduling Dependencies

N/A

2.36.5 Counties Impacted

CalSAWS Counties.

2.36.6 Data Volume/Performance

N/A

2.36.7 Interface Partner

BenefitsCal Portal

2.36.8 Failure Procedure/Operational Instructions

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

2.37 Update Form Status batch job to send SAR7

2.37.1 Overview

Form Status batch job sends information relates to a redetermination packet when the packet is generated in CalSAWS. The batch job will be modified to be able to send SAR7 information to BenefitsCal API.

2.37.2 Description of Change

1. Modify the batch job to send SAR7 information to BenefitsCal when SAR7 is generated and mailed out to participant. Please refer to the list of transfer data in the supporting document.

2.37.3 Execution Frequency

No Change. Daily (mon-sat).

2.37.4 Key Scheduling Dependencies

No Change.

2.37.5 Counties Impacted

CalSAWS Counties.

2.37.6 Data Volume/Performance

N/A

2.37.7 Interface Partner

BenefitsCal Portal

2.37.8 Failure Procedure/Operational Instructions

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

2.38 Update Form Status batch job to send CF37

2.38.1 Overview

Form Status batch job sends information relates to a redetermination packet when the packet is generated in CalSAWS. The batch job will be modified to be able to send CF37 information to BenefitsCal API.

2.38.2 Description of Change

1. Modify the batch job to send CF37 information to BenefitsCal when CF37 packet is generated and mailed out to participant. Please refer to the list of transfer data in the supporting document.

2.38.3 Execution Frequency

No Change. Daily (mon-sat).

2.38.4 Key Scheduling Dependencies

No Change.

2.38.5 Counties Impacted

CalSAWS Counties.

2.38.6 Data Volume/Performance

N/A

2.38.7 Interface Partner

BenefitsCal Portal

2.38.8 Failure Procedure/Operational Instructions

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

2.39 Update Form Status batch job to send CW Redetermination packet

2.39.1 Overview

Form Status batch job sends information relates to a redetermination packet when the packet is generated in CalSAWS. The batch job will be modified to be able to send CW RE information to BenefitsCal API.

2.39.2 Description of Change

1. Modify the batch job to send CW Redetermination information to BenefitsCal when CW Redetermination is generated and mailed out to participant. Please refer to the list of transfer data in the supporting document.

2.39.3 Execution Frequency

No Change. Daily (mon-sat).

2.39.4 Key Scheduling Dependencies

No Change.

2.39.5 Counties Impacted

CalSAWS Counties.

2.39.6 Data Volume/Performance

N/A

2.39.7 Interface Partner

BenefitsCal Portal

2.39.8 Failure Procedure/Operational Instructions

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

2.40 Update Form Status batch job to send MC 210RV

2.40.1 Overview

Form Status batch job sends information relates to a redetermination packet when the packet is generated in CalSAWS. The batch job will be modified to be able to send MC 210RV information to BenefitsCal API.

2.40.2 Description of Change

1. Modify the batch job to send MC 210RV information to BenefitsCal when MC 210RV packet is generated and mailed out to participant. Please refer to the list of transfer data in the supporting document.

2.40.3 Execution Frequency

No Change. Daily (mon-sat).

2.40.4 Key Scheduling Dependencies

No Change.

2.40.5 Counties Impacted

CalSAWS Counties.

2.40.6 Data Volume/Performance

N/A

2.40.7 Interface Partner

BenefitsCal Portal

2.40.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from

the directory and contacting the external partner if there is an account or password issue, etc.)

2.41 Update Form Status batch job to send MC 216

2.41.1 Overview

Form Status batch job sends information relates to a redetermination packet when the packet is generated in CalSAWS. The batch job will be modified to be able to send MC 216 information to BenefitsCal API.

2.41.2 Description of Change

1. Modify the batch job to send MC 216 information to BenefitsCal when MC 216 packet is generated and mailed out to participant. Please refer to the list of transfer data in the supporting document.

2.41.3 Execution Frequency

No Change. Daily (mon-sat).

2.41.4 Key Scheduling Dependencies

No Change.

2.41.5 Counties Impacted

CalSAWS Counties.

2.41.6 Data Volume/Performance

N/A

2.41.7 Interface Partner

BenefitsCal Portal

2.41.8 Failure Procedure/Operational Instructions

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

2.42 Update Form Status batch job to send MC 217

2.42.1 Overview

Form Status batch job sends information relates to a redetermination packet when the packet is generated in CalSAWS. The batch job will be modified to be able to send MC 217 information to BenefitsCal API.

2.42.2 Description of Change

1. Modify the batch job to send MC 217 information to BenefitsCal when MC 217 packet is generated and mailed out to participant. Please refer to the list of transfer data in the supporting document.

2.42.3 Execution Frequency

No Change. Daily (mon-sat).

2.42.4 Key Scheduling Dependencies

No Change.

2.42.5 Counties Impacted

CalSAWS Counties.

2.42.6 Data Volume/Performance

N/A

2.42.7 Interface Partner

BenefitsCal Portal

2.42.8 Failure Procedure/Operational Instructions

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

2.43 Application Transfer API

2.43.1 Overview

Application Transfer API is the API that is used for saving the applicant information into CalSAWS application. Application Transfer API will be modified on the following fields

1. primaryApplicant/otherApplicant.program
2. Address.
3. livingarrangement.typeCode
4. primaryApplicant/otherApplicant.birthCountyCode
5. vitalStatistics.birthCityName
6. vitalStatistics.birthStateCode

2.43.2 Description of Change

Modify Application Transfer API on the following.

1. Modify primaryApplicant/otherApplicant.program field on the API to be a mandatory field. The program field must be on the payload for at least a person.
2. Create a DBCR to update the following fields on the address to be an optional field
 - a. stateCode
 - b. zipCode
 - c. countyCode
3. Add a logic to validate the applicant address only. Applicant address will be required to have stateCode, zipCode, and countyCode.
4. Modify the API to be able to accept the following fields.
 - a. primaryApplicant/otherApplicant.birthCountyCode
 - b. vitalStatistics.birthCityName
 - c. vitalStatistics.birthStateCode
5. Create a DBCR to update livingArrangement.type_code field to be a nullable field.

2.43.3 Execution Frequency

N/A

2.43.4 Key Scheduling Dependencies

N/A

2.43.5 Counties Impacted

CalSAWS Counties.

2.43.6 Data Volume/Performance

N/A

2.43.7 Interface Partner

BenefitsCal Portal

2.43.8 Failure Procedure/Operational Instructions

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

2.44 Modify Office Mapping API

2.44.1 Overview

Office Mapping API is an API that is used to return a list of office near customer location. Office Mapping API will be modified to be able to return office for Disaster CalFresh program.

2.44.2 Description of Change

Modify Office Mapping API on the following.

1. On a scenario of a Disaster CalFresh program, the API will return office that support CalFresh program when there is no office that can support Disaster CalFresh program.
2. Remove Hour of Operation Description field from the return parameter.

2.44.3 Execution Frequency

N/A

2.44.4 Key Scheduling Dependencies

N/A

2.44.5 Counties Impacted

CalSAWS Counties.

2.44.6 Data Volume/Performance

N/A

2.44.7 Interface Partner

BenefitsCal Portal

2.44.8 Failure Procedure/Operational Instructions

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

2.45 SAR 7 – All County XDP

2.45.1 Overview

The SAR 7 (All County version) XDP is updated to allow the BenefitsCal user's answers to display on the generated PDF when calling the SAR 7 operation of the Forms API service.

2.45.2 Description of Change

Update the 'SAR 7' XDP file to allow population for the SAR 7 portion of the form. This is only for the English version of the form.

2.46 MC 210 RV XDP

2.46.1 Overview

The MC 210 RV XDP is updated to allow the BenefitsCal user's answers to display on the generated PDF when calling the MC 210 RV operation of the Forms API service.

2.46.2 Description of Change

Update the 'MC 210 RV' XDP file to allow population for the MC 210 RV portion of the form. This is only for the English version of the form.

2.47 MC 216 XDP

2.47.1 Overview

The MC 216 XDP is updated to allow the BenefitsCal user's answers to display on the generated PDF when calling the MC 216 operation of the Forms API service.

2.47.2 Description of Change

Update the 'MC 216' XDP file to allow population for the MC 216 portion of the form. This is only for the English version of the form.

2.48 MC 217 XDP


2.48.1 Overview

The MC 217 XDP is updated to allow the BenefitsCal user's answers to display on the generated PDF when calling the MC 217 operation of the Forms API service.

2.48.2 Description of Change

Update the 'MC 217' XDP file to allow population for the MC 217 portion of the form. This is only for the English version of the form.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
01	Security	Security Matrix Self-Service Portal Customer Privacy Page	 BC-272 Security Matrix.xls

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-228332

ACL 21-52 Opt-in All Counties to Sending Pre-
Populated CF 285

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1 OVERVIEW

There is a batch process that generates the CF 285 for counties that have opted-in for potentially eligible individuals for CalFresh benefits. For LA County, a solicitation letter (PA 6174) is sent for potentially eligible CalFresh households.

1.1 Current Design

At the time of a Medi-Cal intake and Medi-Cal renewal, the system runs the CalFresh non-financial and financial eligibility rules, using the income and expense details available at the time of approving the Medi-Cal program. If the household is potentially eligible for CalFresh benefits, the CalFresh Solicitation Letter, which is a Los Angeles County form, is generated to inform the participants of their potential CalFresh eligibility.

For C-IV Counties that have opted in, a pre-populated CF 285 is generated in batch when a Medi-Cal household is potentially eligible for CalFresh benefits.

1.2 Requests

1. Update the System to opt in all 58 counties (including LA) to the functionality to have the pre-populated CF 285 generate when a Medi-Cal household is potentially eligible for CalFresh benefits during the Medi-Cal Intake or Renewal.
2. The System must mail the CF Solicitation letter for LA separately if the Medi-Cal household is potentially eligible for CalFresh during the Medi-Cal Intake or Renewal.

1.3 Overview of Recommendations

1. Update the CalFresh Potential Eligibility Application batch job to generate the CF 258 for all counties.
2. Update the mailing priority and print options of the CF 285.

1.4 Assumptions

1. The verbiage of the CF 285 will not be changed. SCR CA-225996 will update the CF 285 to the most current version.
2. The verbiage of the PA 6174 will not be updated with this SCR. SCR CA-225996 will make the change to stop sending the PA 6174 for LA when the cover-letter provided by CDSS will be implemented.
3. Both the CF 285 and PA 6174 are generated from the same batch job.
4. For LA County, both the CF 285 and PA 6174 can be generated at the same time.
5. For LA County, The CalFresh Solicitation Letter (PA 6174) will continue to be sent in a separate envelope from the CF 285.

2 RECOMMENDATIONS

2.1 Update the PB00R1948 Batch Job Recommendation

2.1.1 Overview

The PB00R1948 batch job currently generates either the CF 285 for migration counties or the PA 6174 for LA County when a household is potentially eligible for CalFresh during Medi-Cal intake and renewal.

2.1.2 Description of Change

1. Update the batch job to generate the CF 285 for all counties.

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

Approximately 75,000 records monthly.

2.1.7 Failure Procedure/Operational Instructions

No Change

2.2 Update the CF 285 – Application for CalFresh Benefits Recommendation

2.2.1 Overview

The CF 285 currently generates via batch and is available in the template repository. It is the application used for applying for CalFresh benefits.

State Form: CF 285 (06/2019)

Current Programs: CalFresh

Current Attached Form(s): None

Current Forms Category: Application

Current Template Repository Visibility: All

Existing Languages: English and Spanish

2.2.2 Form Verbiage

This effort will add a BRM for the form. The XDP will be updated with this effort to include a BRM header.

Update Form XDP

Form Header: BRM Header (Header_BRM_EN.xdp & Header_BRM_SP.xdp)
– Added to second page of XDP

Form Mockups/Examples: See supporting document #1

2.2.3 Form Generation Conditions

2. Update Form Control

Add a BRM barcode.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	Y	Y

3. Update Form Print/Mailing Options

The Mailing Priority for CF 285 will be updated from priority 5 to priority 4. The print and mailing options will be updated as shown below.

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

Mailing Options:

Mail-To (Recipient): Applicant

Mailed From (Return): Sending Office

Mail-back-to Address: BRM

Outgoing Envelope Type: Full Size Flat Mail

Return Envelope Type: BRM

Additional Options:

Special Paper Stock: None

Enclosures: None

Electronic Signature: Yes

Electronic Signature (IVR/Text): Yes

Check to Sign: Yes
Post to Self Service Portal (SSP): No

3 SUPPORTING DOCUMENTS

Form Number	Functional Area	Description	Attachment
1	Forms	CF 285 Mockups	CF285_EN.pdf CF285_SP.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.1 CAR-1237	<p>The LRS shall automatically generate the following correspondence online or in the batch process, as a result of individual and/or case action initiated by the LRS or by COUNTY-specified Users, except when exempt due to program requirements:</p> <ul style="list-style-type: none">a. Adverse notices (includes: decrease, collection, denial, or termination of benefits);b. Non-adverse notices (includes: approval, increase in benefits, no change, and rescission); andc. Non-approval notices (includes: cancellation, withdrawal, informational, and benefit issuance).	Update the CalFresh Potential Eligibility batch job (PB00R1948) to generate the CF 285 for all counties.



California Statewide Automated Welfare System

Design Document

CA 228715 Safe Water Pilot Approval Notice

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ishrath Khan, Jimmy Tu
	Reviewed By	Sidhant Garg, Duke Vang

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/29/2021	V1.0	Original Draft	Ishrath Khan

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1 OVERVIEW

According to ACL 20-97, CDSS has developed a state-funded pilot program to provide time-limited supplemental nutrition benefits to CalFresh households that meets the following criteria:

- Reside within a disadvantaged community.
- Receive drinking water from a public water system that does not meet primary drinking water standards under the California safe drinking water Act.

The CDSS collaborated with the California Food Policy Advocates (CFPA), the county Welfare Director's Association (CWDA) of California, State Water Resources Control Board (SWRCB), impacted Counties and other impacted partners. Based on the recommendation of the workgroup, Kern County was selected to implement the Safe Water Pilot program. Due to the limited funds available for the Pilot, it is not feasible to serve an entire county and have a meaningful, measurable impact. To keep the pilot population to a feasible size, two key Pilot design elements were used to narrow the eligible population: residential ZIP Codes and an out-of-compliance community water system.

Per ACL 20-97, Active CalFresh households with a residential address in one of the pilot ZIP Codes (93241 (Lamont), 93220 (Edison), 93243 (Gorman-Lebec), 93311 (Bakersfield), 93387 (Bakersfield), 93386 (Bakersfield)) will be eligible to receive pilot benefits in the amount of \$50 per month in food benefits during the Pilot Eligibility period of 12 months or until funding is depleted (whichever is earlier) starting **March 1, 2022**.

1.1 Current Design

In CalSAWS, benefit issuances are created via EDBC authorization records (Online, Batch, Manual), Supportive Service Payment issuances are created via Payment Request authorization records and Auxiliary Issuances via Auxiliary Authorization records which does not require any eligibility determination.

The Auxiliary Issuance framework was introduced in CalSAWS with release 21.05 with an aim of introducing a flexible benefit issuance mechanism to CalSAWS that can be utilized to issue Water Pilot Benefits and can be used in future for purposes beyond the initial Water Pilot implementation.

1.2 Requests

1. This SCR will implement policy changes associated with ACL 20-97 under which CDSS has developed a state-funded pilot program to provide time-limited supplemental nutrition benefits to CalFresh households that meets the following criteria:
 - a. Reside within a disadvantaged community.
 - b. Receive drinking water from a public water system that does not meet primary drinking water standards under the California safe drinking water Act.

This SCR will identify the Safe Water Pilot eligible CalFresh households and mass mail the Approval Notice (CF 304B - Notice of Approval for the CalFresh Water Pilot to eligible participants.

1.3 Overview of Recommendations

1. Create a one-time data change to sweep all eligible CalFresh cases to issue Pilot benefits via the Auxiliary Authorization framework.
2. Create new Water Pilot Reissuance batch to create new auxiliary authorizations for eligible households.
3. Mass mail the CF 304B form to the population who are eligible for 'Safe Water Pilot'.

1.4 Assumptions

1. The SCR CA-227819 will mass mail the CF 304A form which is the informing notice (22.01 release).
2. SCR CA-211719 (21.11) will implement policy changes associated with ACL 20-97 under which CDSS has developed a state-funded pilot program to provide time-limited supplemental nutrition benefits to CalFresh households that meets the criteria for Water Pilot benefits.
3. SCR CA-211719 (21.11) added the following forms to the template repository:
 - CF 304A - Important Information About Your CalFresh Benefits - CalFresh Water Pilot
 - CF 304B - Notice of Approval for the CalFresh Water Pilot
 - CF 304C - Notice of Discontinuance for the CalFresh Water Pilot forms to CalSAWS.
4. The one time data change and water pilot restoration batch will only take action for the eligible zip codes mentioned in the ACL 20-97.

Commented [SG1]: @Jimmy Tu - Mention Release

2 RECOMMENDATIONS

2.1 One time Data Change to sweep Eligible Pilot households

2.1.1 Overview

This one-time data change will sweep all households eligible for receiving Pilot benefits.

2.1.2 Description of Change

1. Identify the eligible household for Water Pilot Benefits based on the following criteria:
 - a. Active CalFresh households with a physical address in one of the pilot ZIP codes:
 - i. 93241 (Lamont)
 - ii. 93220 (Edison)
 - iii. 93243 (Gorman-Lebec)
 - iv. 93311 (Bakersfield)
 - v. 93387 (Bakersfield)
 - vi. 93386 (Bakersfield)
 - b. Household NOT receiving Transitional CalFresh benefits
 - c. Household NOT receiving Transitional Nutrition benefits
 - d. Household NOT already receiving water Pilot benefits
 - e. Household NOT living in an institution or group living arrangement

NOTE:

1. The CalFresh Payee should NOT be eligible to Water Pilot benefits if they have any of the following values on the Living Arrangement page as of the beginning of the benefit month (1st day of the month):

- Board and Care
- Campus Housing
- Commercial Boarding Facility
- Drug and Alcohol Rehabilitation Center
- Homeless Shelter
- Hospital-Acute Hospital Care
- Incarcerated
- Institution-Mental Disease
- Licensed Group Home for Blind and Disabled (SSA)
- Non-Medical out of the home care w/out R&B in XIX Medical Facility (CAPI)
- Nursing Home/Long Term Care
- Shelter in Battered Persons
- Federally Subsidized Housing for the Elderly

2. The data change will have the following values on the Auxiliary Authorization Detail page:
 - a. Begin Month: 03/2022 (Begin Date of Payment -03/01/2022)
 - b. End Month: 02/2023 (End Date of Payment -02/28/2023)
 - c. Program: CalFresh
 - d. Aid Code: 09-CalFresh
 - e. Pay Code: CalFresh Safe Water Pilot Benefits
 - f. Amount: 50
 - g. Issuance Method: EBT
 - h. Immediacy: Routine
 - i. Issuance Business Day: 10
 - j. Only Issue after regular benefit is created: Yes
 - k. Claimed As: Non-Fed
 - l. Non_Fed_Person: 0
 - m. Federal Person: 0
 - n. Comments: CalFresh Safe Water Pilot Benefits
 - o. Status: Approved

3. Create a Journal entry when a household or case is Approved for Water Pilot benefits as follows:
 - a. Filter Type : All
 - b. Journal Type: Narrative
 - c. Short Description: Approval of CF Water Pilot
 - d. Long Description: The CalFresh household has been approved for the Water Pilot program

2.1.3 Estimated Number of Records Impacted/Performance

6100 records approximately.

2.2 Water Pilot Restoration Batch

2.2.1 Overview

If a household eligible for Water Pilot benefit is discontinued after the date of implementation and benefits are later restored without break in aid, the household's pilot benefits will be automatically restored at the same time.

This batch will be sweeping to look for households that meet these criteria.

2.2.2 Description of Change

1. Create new Water Pilot Restoration batch to create new auxiliary authorizations for cases that meet the following criteria:

Commented [KS2]: Can we give a different name to this batch. Reissuance seems like the benefits are getting reissued.
Suggestions:
Water Pilot Restoration Batch
Water Pilot Approval Batch

- a. Identify all the Auxiliary Authorization records with a Pay Code of CalFresh Safe Water Pilot Benefits which are end dated for the immediate previous month with a discontinuance reason populated.
 - b. Does not exist an auxiliary authorization for the current month in disapproved or void status with the pay code of CalFresh Safe Water Pilot Benefits.
2. For each record identified in Section 2.4.2.2, create an Auxiliary Authorization record. The records identified will be verified against the Water Pilot Eligibility Criteria, listed below:
- a. Active CalFresh households with a physical address in one of the pilot ZIP codes:
 - i. 93241 (Lamont)
 - ii. 93220 (Edison)
 - iii. 93243 (Gorman-Lebec)
 - iv. 93311 (Bakersfield)
 - v. 93387 (Bakersfield)
 - vi. 93386 (Bakersfield)
- Note: After coming back on aid, individuals must be in the same zip code they were in originally (when they were on aid) and receiving water pilot benefits.
- b. Household NOT receiving Transitional CalFresh benefits.
 - c. Household NOT receiving Transitional Nutrition benefits.
 - d. Household NOT living in an institution or group living arrangement.

Commented [KS3]: How about worker created water pilot auxiliary authorization records and if they are outside of these zip codes

1. NOTE:

1. The CalFresh Payee should NOT be eligible to Water Pilot benefits if they have any of the following values on the Living Arrangement page as of the beginning of the benefit month (1st day of the month):
 - i. Board and Care
 - ii. Campus Housing
 - iii. Commercial Boarding Facility
 - iv. Drug and Alcohol Rehabilitation Center
 - v. Homeless Shelter
 - vi. Hospital-Acute Hospital Care
 - vii. Incarcerated
 - viii. Institution-Mental Disease
 - ix. Licensed Group Home for Blind and Disabled (SSA)
 - x. Non-Medical out of the home care w/out R&B in XIX Medical Facility (CAPI)
 - xi. Nursing Home/Long Term Care

- xii. Shelter in Battered Persons
- xiii. Federally Subsidized Housing for the Elderly

3. The batch will set the following values on the Auxiliary Authorization Detail page for the records identified above:
 - a. Begin Month: xx/2022 (Begin Date set to first day of current month. If batch runs on 8/4/2022, begin date should be set to 8/2022.)
 - b. End Month: 02/2023 (End Date of Payment -02/28/2023)
 - c. Program: CalFresh
 - d. Aid Code: 09-CalFresh
 - e. Pay Code: CalFresh Safe Water Pilot Benefits
 - f. Amount: 50
 - g. Issuance Method: EBT
 - h. Immediacy: Routine
 - i. Issuance Business Day: 10
 - j. Only Issue after regular benefit is created: Yes
 - k. Claimed As: Non-Fed
 - l. Non_Fed_Person: 0
 - m. Federal Person: 0
 - n. Comments: CalFresh Safe Water Pilot Benefits
 - o. Status: Approved

4. Create a Journal entry when a household or case is Approved for Water Pilot benefits as follows:
 - a. Filter Type : All
 - b. Journal Type: Narrative
 - c. Short Description: Restoration of CF Water Pilot
 - d. Long Description: The Water Pilot Benefit has been restored for the CalFresh household.

Commented [KS4]: Should the journal entry have a date for Date of Approval. Restored Water pilot benefits would have multiple journal entries

2.2.3 Execution Frequency

Daily.

2.2.4 Key Scheduling Dependencies

Predecessor: Batch EDBC

Successor: Nightly Issuance Sweeps

2.2.5 Counties Impacted

Only for Kern County.

2.2.6 Data Volume/Performance

We anticipate this to have fewer than 1000 records per month.

2.2.7 Failure Procedure/Operational Instructions

Resubmit the Water Pilot Reissuance batch job with `restart.mode = false`.

2.3 Mass Mail the CF 304B form

2.3.1 Overview

The CF 304B form was added to the CalSAWS as part of the SCR CA-211719. This form needs to be mass mailed to the CalFresh Safe Water Pilot eligible population.

2.3.2 Description of Change

Perform a one-time mass mailing for CF 304B – Notice of Approval for the CalFresh Water Pilot form when the following conditions are true.

1. A CalFresh case is approved for 'CalFresh Safe Water Pilot Benefits' (AUX_PMT table).

For the cases identified, insert the following records into SYS_TRANSACT.

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

- The mass mailing will occur following the 'One time Data Change to sweep Eligible Pilot households' (Section 2.1)
- English forms will be sent to households who have indicated their primary language as English or any language other than Spanish.
- Spanish forms will be sent to households who have indicated their primary language as Spanish.

Commented [KS5]: Would this be created for the eligible population identified in the DCR for water pilot eligibility?

Commented [KS6]: Is this recommendation for inserting sys_transact records. Why do we have SCR [CA-227819](#)?

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

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

6 OUTREACH

None.

7 APPENDIX

None.



California Statewide Automated Welfare System

Design Document

CA-229423

Update Stanislaus County 1099 File

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eric Wu
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/21/2021	1.0	Initial Version	Eric Wu

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1 OVERVIEW

1.1 Current Design

The 1099 Interfaces capture payments made to 1099 eligible vendors via the Supportive Services, Payment Requests and EDBC. The interface will send a file one time per year (first working day of the new calendar year) of all 1099 eligible payments in the CalSAWS system from the prior year.

The current 1099 interface of Stanislaus County will use 'MISC 1' type code for 'Homeless Assistance' service type and 'MISC 7' for other service types.

1.2 Requests

1. Update Stanislaus County 1099 interface to use 'MISC 1' for the 'Relocation/Housing' service type.

1.3 Overview of Recommendations

1. Update Stanislaus County 1099 interface to use 'MISC 1' for the 'Relocation/Housing' service type.
2. Resend Stanislaus County 1099 file for year 2020.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Stanislaus County 1099 Interface (PO50F602)

2.1.1 Overview

The Stanislaus County 1099 Interface will be updated to use 'MISC1' for the 'Relocation/Housing' service type.

2.1.2 Description of Change

1. Update Stanislaus County 1099 interface to use 'MISC 1' for the 'Relocation/Housing' service type.
2. Resend the Stanislaus County 1099 file for 2020.

2.1.3 Execution Frequency

No changes.

2.1.4 Key Scheduling Dependencies

No changes.

2.1.5 Counties Impacted

Stanislaus County

2.1.6 Data Volume/Performance

No changes.

2.1.7 Interface Partner

Stanislaus County IT Department

2.1.8 Failure Procedure/Operational Instructions

No changes.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.5.2	The LRS shall record and track reportable payments and Vendors for which an IRS Form 1099 is required in order to support the 1099 Reporting File interface with COUNTY s Auditor-Controller.	Update the system to report proper type codes based on the service type.

5 MIGRATION IMPACTS

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

6 OUTREACH

None.

7 APPENDIX

None.



California Statewide Automated Welfare System

Design Document

CA-229854

Update Text Message wording for phone
appointments

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Michael Barillas;
	Reviewed By	Dana Peterson; Samy Lawrence;

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/23/2021	1.0	Initial Draft	Michael Barillas

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1 OVERVIEW

Currently the 'Appointment Reminder' and 'Redetermination With Appointment Sent' text messages include verbiage that tell the person their appointment is either 'in person' or 'by phone'. There are text message batch jobs that currently fail when no counties are opted in and have been turned off. This SCR will modify the verbiage to be more generic, no longer fail when no county has opted in, and reactivate those batch jobs.

1.1 Current Design

Text messages 'Appointment Reminder' and 'Redetermination With Appointment Sent' populates the parameter <by phone or in person> as follows:

Use "by phone" if the Appointment Category is 'Telephone Interview' or 'Telephone CW/CF RE Interview'. Use "in person" for all other Appointment Categories.

The following text message batch jobs fail when no counties are opted in: 'Appointment Reminder', 'Redetermination With Appointment Sent', 'MC Packet Sent', 'Missed Appointment', 'Redetermination No Appointment Sent'.

Due to the issues described above the batch jobs have been deactivated.

1.2 Requests

CalSAWS will update the text message verbiage to remove the <by phone or in person> language. Modify the batch job to no longer fail when no county is opted into the batch jobs and enhance logging. Reactivate the text message batch jobs.

1.3 Overview of Recommendations

1. Update 'Appointment Reminder' and 'Redetermination with Appointment Sent' text message wording to remove <by phone OR in person> language, regardless of Appointment Category and Type.
2. Modify the text message batch jobs to no longer fail when no county is opted into the batch jobs and include additional logging.
3. Reactivate the text message batch jobs.

1.4 Assumptions

1. N/A

2 RECOMMENDATIONS

2.1 Update 'Appointment Reminder' and 'Redetermination with Appointment Sent' Verbiage

2.1.1 Overview

Currently Text messages 'Appointment Reminder' and 'Redetermination With Appointment Sent' populates the parameter <by phone or in person> as follows:

Use "by phone" if the Appointment Category is 'Telephone Interview' or 'Telephone CW/CF RE Interview'. Use "in person" for all other Appointment Categories.

Create a CTCR to update verbiage.

2.1.2 Description of Change

1. Create a CTCR to update the following:
 - a. PO00V101 - Appointment Reminder
 - i. Updated English Verbiage: "CalSAWS: You have an appointment on <Date> at <Time>. Questions? <Phone Number>"
 - ii. Updated Spanish Verbiage: "CalSAWS: Usted tiene una cita el <Date> a las <Time>. Preguntas? <Phone Number>"
 - b. PO00V105 - Redetermination With Appointment Sent
 - i. Updated English Verbiage: "CalSAWS: Your redetermination packet has been mailed and your appointment is <mm/dd> at <hh:mi AM/PM> Questions? <Phone Number>"
 - ii. Updated Spanish Verbiage: "CalSAWS: Su paquete de redeterminacion ha sido enviado por correo y su cita es el <mm/dd> a las <hh:mi AM/PM> Preguntas? <Phone Number>"

2.1.3 Estimated Number of Records Impacted/Performance

N/A

2.2 Modify Text Message Batch Jobs

2.2.1 Overview

The following text message batch jobs are inactive and fail when no county opted in: 'PO00V101 – Appointment Reminder', 'PO00V105 – Redetermination With Appointment Sent', 'PO00V133 – MC Packet Sent', 'PO00V103 – Missed Appointment', 'PO00V107 – Redetermination No Appointment Sent'.

Modify the text message batch jobs to no longer fail when no county is opted into the batch jobs and include additional logging.

2.2.2 Description of Change

1. Modify the following batch jobs will no longer fail when there are no counties opted in.
 - a. 'PO00V101 – Appointment Reminder'
 - b. 'PO00V105 – Redetermination With Appointment Sent'
 - c. 'PO00V133 – MC Packet Sent'
 - d. 'PO00V103 – Missed Appointment'
 - e. 'PO00V107 – Redetermination No Appointment Sent'
2. Modify the batch jobs' log file to include a list of:
 - a. Country Names and IDs for those that are opted in
 - b. Country Names and IDs for those that are opted out
3. Create a BSCR to Reactivate the batch jobs as of SCR release.

2.2.3 Execution Frequency

No Change

2.2.4 Key Scheduling Dependencies

No Change

2.2.5 Counties Impacted

All Counties

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file

from the directory and contacting the external partner if there is an account or password issue, etc.)

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.12	The LRS shall alert COUNTY-specified Users of all automated actions taken by the LRS as a result of LRS Data received through an interface.	CalSAWS is updating verbiage sent to the participant to be more generic.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-231902

Document Routing Rule Initial Load

C-IV Migration Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Justin Dobbs
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/12/2021	1.0	Initial Revision	Justin Dobbs

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1 OVERVIEW

1.1 Current Design

The C-IV System includes a population of Automated Actions that are invoked when specific documents are imaged into the imaging solution. These Automated Actions were not introduced to the CalSAWS System with DDID 1628 because Document Routing Rule functionality introduces the configurable capability of configuring Task creation based on document image actions. This functionality was introduced with CA-214917 (DDIDs 2254, 2504 and 2245).

The C-IV migration counties cannot create Document Routing Rules during the county preparation phase due to county Task Types and Banks not being available until conversion.

1.2 Requests

Create Document Routing Rules for the C-IV migration counties based on configurations for the pertinent Automated Actions in the C-IV System.

1.3 Overview of Recommendations

1. Create a data change to create Document Routing Rules for the C-IV migration counties based on existing configurations of the imaged document Automated Actions in the C-IV System.

1.4 Assumptions

1. The C-IV counties do not create Document Routing Rules during the county preparation phase.

2 RECOMMENDATIONS

2.1 Document Routing Rule C-IV County Initial Load

2.1.1 Overview

This section describes the specifics of the data change that will create Document Routing Rules for the C-IV migration counties.

This data change will be compiled from C-IV System data as of close of business on September 1, 2021.

2.1.2 Description of Change

1. For each of the following C-IV Automated Actions that a county has indicated as Active, a Document Routing Rule will be created in the CalSAWS System:
 - a. Customer Report Received: ABD MC RE Packet
 - b. Customer Report Received: CCRR
 - c. Customer Report Received: CF RE Packet
 - d. Customer Report Received: CW RE Packet
 - e. Customer Report Received: CW/CF RE Packet
 - f. Customer Report Received: LTC MC RE Packet
 - g. Customer Report Received: MAGI RE Packet
 - h. Customer Report Received: MC RE Packet
 - i. Customer Report Received: Mixed MC RE Packet
 - j. Customer Report Received: Non-MAGI LTC Mixed HH RE Packet
 - k. Customer Report Received: Non-MAGI Packet
 - l. Customer Report Received: Non-MAGI Screening Aged 65 Packet
 - m. Customer Report Received: Review
 - n. Customer Report Received: SAR 7
 - o. Customer Report Received: TMC 176 S
 - p. Customer Report Received: WTW 733.4
 - q. Customer Report Received: WTW 735.2
 - r. Customer Report Received: WTW 753A
 - s. Image Documents Uploaded: Review
 - t. TNB 4 Recertification Packet Received

The resulting Document Routing Rule attributes will be as follows:

- a. Name: <See attached inventory>
- b. Status: Active
- c. Created By: C-IV Conversion
- d. Notes: This field will be blank

See the attached inventory for the specific Documents, Document Types and Program(s) that will be associated to each Document Routing Rule. A Document Routing Rule will include both the appropriate converted "Legacy" document and, when applicable, the ongoing CalSAWS version of the document.

The Task Type/Task Sub-Type, Due Date and Assignment configurations for the Automated Actions in the C-IV System will be preserved into the resulting Document Routing Rule.


For example, if the "Customer Report Received: CF RE Packet" Automated Action for Alpine county is configured to have a Task Type of "Images Received", a Due Date of "After 5 Calendar Days" and an assignment to the "Current Program Worker"; the resulting "Customer Report Received: CF RE Packet" Document Routing Rule, will also be configured with a Task Type of "Images Received", a Due Date of "After 5 Calendar Days" and an assignment to the "Current Program Worker".

The Additional Options panel override attributes will not be checked by default as this is net new functionality with Document Routing Rules.

2.1.3 Estimated Number of Records Impacted/Performance

This data change will insert approximately 3,000 records into the Document Routing Rule database tables. The performance is estimated to run in 5 minutes or less.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Tasks	Document Routing Rule Data Change Criteria	 SCR CA-231902 DRR Load Mapping.xlsx

4 REQUIREMENTS

N/A

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A



California Statewide Automated Welfare System

Design Document

CA-232394

Add office phone number for CF 377.7C, CF 377.7E1 for C-IV migration counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Jensen
	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/23/2021	0.1	Initial Draft	Maria Jensen
08/25/2021	0.2	BA Review	Maria Jensen

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1 OVERVIEW

This SCR will add the pre-population of the office phone number to both the CF 377.7C and CF 377.7E1 forms in the CalSAWS system for the migrating counties.

1.1 Current Design

Currently the CF 377.7C and CF 377.7E1 forms pre-populate the office phone number only for LA County, using the phone number of the CalFresh Benefit Recovery Ctr.

1.2 Requests

Add variable population of the office phone number for the migration counties for forms CF 377.7C and CF 377.7E1. This is current functionality in the C-IV system for these forms.

1.3 Overview of Recommendations

1. Update CF 377.7C to populate the office phone number for the migration counties.
2. Update CF 377.7E1 to populate the office phone number for the migration counties.

1.4 Assumptions

1. When generated in the context of a case, the body fields will be editable for all counties, as per CalSAWS standards.
2. This effort will only update the Phone Number variable.
3. There will be no updates to the Form Control, nor to the Form Print Options and Mailing Requirements for the updated Forms in this effort.
4. This effort will not be introducing any additional threshold languages for the CF 377.7C and CF 377.7E1 forms.
5. SCR CA-217834 will update form CF 377.7C to the latest State version.

2 RECOMMENDATIONS

2.1 Update Form CF 377.7C - CalFresh Repayment Agreement For Inadvertent Household Errors Only

2.1.1 Overview

This SCR will add Phone Number population for form CF 377.7C - CalFresh Repayment Agreement For Inadvertent Household Errors Only (revision 05/02) in the CalSAWS system, to match the previously existing population in C-IV.

State Form: CF 377.7C (05/02)

Current Programs: CalFresh

Current Attached Forms: None

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

2.1.2 Form/NOA Verbiage

N/A, there will be no updates to the verbiage of the form.

2.1.3 Form/NOA Variable Population

For the migrating counties, for all means of generation for form CF 377.7C, add the variable population described below.

Form Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
<PHONE_NUMBER>	Office Phone Number (Retrieved based on Office Position Id, and formatted) Note: LA County variable population will remain unchanged.	Arial Font Size 10 Format: (XXX) XXX-XXXX	Y, Phone Number	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.

2.1.4 Form/NOA Generation Conditions

This effort will not update the form generation conditions.

Technical Note:

The form can currently be generated in the following ways:

- via the Template Repository as a standalone form;
- Online as part of the CalFresh IHE Packet from the Fiscal - Collections - Recovery Account Search – Recovery Account Detail page, when NonExempt Gross Income on NA1263 is over \$1000;
- via the Recovery Account Activation batch job (PBXXF107) as part of the CalFresh IHE Packet, when NonExempt Gross Income on NA 1263 is over \$1000.

2.2 Update Form CF 377.7E1 - CalFRESH Repayment Agreement for Administrative Errors Only

2.2.1 Overview

This SCR will add Phone Number population for form CF 377.7E1 - CalFRESH Repayment Agreement for Administrative Errors Only (revision 01/14) in the CalSAWS system, to match the previously existing population in C-IV.

State Form: CF 377.7C (01/14)

Current Programs: CalFresh

Current Attached Forms: None

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

2.2.2 Form/NOA Verbiage

N/A, there will be no updates to the verbiage of the form.

2.2.3 Form/NOA Variable Population

For the migrating counties, for all means of generation for form CF 377.7E1, add the variable population described below.

Form Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
<PHONE_NUMBER>	Office Phone Number (Retrieved based on Office Position Id, and formatted) Note: LA County variable population will remain unchanged.	Arial Font Size 10 Format: (XXX) XXX-XXXX	Y, Phone Number	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.

2.2.4 Form/NOA Generation Conditions

This effort will not update the form generation conditions.

Technical Note:

The form can currently be generated in the following ways:

- via the Template Repository as a standalone form;
- Online as part of the CalFresh AE Packet from the Fiscal - Collections - Recovery Account Search – Recovery Account Detail page, when NonExempt Gross Income on NA1263 is over \$1000;
- via the Recovery Account Activation batch job (PBXXF107) as part of the CalFresh AE Packet, when NonExempt Gross Income on NA 1263 is over \$1000.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.15 CAR-1219	The LRS shall pre-populate fields of notices, NOAs, forms, and letters with designated applicant, participant, caregiver, sponsor, authorized representative, and/or any other entity's information.	With SCR CA-232394, forms CF 377.7C - CalFresh Repayment Agreement For Inadvertent Household Errors Only and CF 377.7E1 - CalFRESH Repayment Agreement for Administrative Errors Only will have Phone Number pre-population added to the CalSAWS system to match the previously existing pre-population in C-IV.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-229418 DDID 2319 – FDS GA GR – Group 2
Forms Design

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Stephanie Hugo
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/16/2021	1.0	Initial revision	Stephanie Hugo
8/19/2021	1.1	Updated trigger for the GA/GR Affidavit Form	Stephanie Hugo

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1 OVERVIEW

This SCR will implement the second group of Non-EDBC triggers for CalWIN GA GR Correspondences.

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 GROW program.

1.2 Requests

A new GA/GR Automated 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 add additional Non-EDBC correspondence triggers through either online or batch.

1.3 Overview of Recommendations

1. Batch Job for General Assistance Program – Vocation Services Form.
2. Add Online Form Trigger for Authorization for Release of Information Authorized Representative Form.
3. Add online trigger for Affidavit to Replace Lost or Destroyed Warrant.
4. Add online trigger for the Certification of ID form.
5. Add online trigger for the Early Fraud Detection/Prevention Referral form.
6. Add online trigger for the Hearing Reschedule Notification Form.
7. Add online trigger for the GRWP Job Search Report.
8. Add online trigger for the Daily Tip Statement Form.
9. Add online trigger for the Value of Income In-Kind Form.
10. Batch Job for UIB Application Required Form.
11. Add online trigger for Request for Client to Apply for Available Resource/Benefits Form.
12. Add online trigger for the General Relief Promissory Note.

1.4 Assumptions

1. This SCR will only implement triggers based on the existing CalWIN GA/GR Correspondences. Verbiage and format will be covered in SCR CA-215920.
2. All triggers are based on current existing triggers in CalWIN.
3. The triggers will only be available to cases from counties that are mentioned in the recommendation's respective "Correspondence Information" section.
4. All the changes in this SCR will not affect the Los Angeles GA, GA (Managed) and GA (Non-Managed) programs.
5. The functionality of this SCR will be disabled until activated by the system property flag established in SCR CA-215669.

6. Miscellaneous Parameter implementation and functionality is covered in SCR CA-215920 covering the technical details of the GA/GR Correspondence Functionality on the CalSAWS side.
7. This SCR follows the general Online Non-EDBC Correspondence Generation recommendation (rec. 2.1) from SCR 215670.
8. Trigger for reason code T00001 will be replaced by the existing Reception Log functionality.
9. New buttons added through this SCR will only be visible to cases with a GA/GR Automated EDBC/CC Counties Program. Additional visibility conditions will be specified in the recommendations as necessary.

2 RECOMMENDATIONS

2.1 Batch Job for General Assistance Program – Vocation Services Form

2.1.1 Overview

This form will be triggered by batch 30 days before the work exemption is expiring.

2.1.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
1C105D	Santa Clara	Forms	N/A	General Assistance Program - Vocational Services	SCD 1400 (02/14)	502980

2.1.3 Description of Change

1. Create a new batch job to send the General Assistance Program - Vocational Services for Santa Clara county when the following conditions are true:
 - a. There is a GA/GR Automated EDBC/CC Counties Program on the case that is either **“Active”** or **“Pending”**.
 - b. There is a Work Registration record of type **“GA/GR ES”** and status of **“Unemployable”** and the batch date is 30 calendar days from the End Date
 Note: Form will be triggered even if the end date is less than 30 days from the date entered.
 - c. The form was not generated in batch within the 30-day period prior the End Date.
2. For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a General Assistance

Program - Vocational Services during batch forms processing.

Transaction values:

- a. Case ID: Case associated to GA/GR Automated EDBC/CC Counties Program
- b. Program ID: Program ID
- c. Person ID: Primary Applicant of Active GA/GR Automated EDBC/CC Counties Program
- d. Type Code: FR
- e. Sub Type Code: TBD by build
- f. Eff Date: Batch Date
- g. Created By: Batch
- h. Updated By: Batch

2.1.4 Execution Frequency

Daily, CalSAWS business days

2.1.5 Key Scheduling Dependencies

This job will run before forms balancers.

2.1.6 Counties Impacted

This job will run for Santa Clara county

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

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

2.2 Add Online Form Trigger for Authorization for Release of Information Authorized Representative Form

2.2.1 Overview

This form is triggered when an authorized representative is identified for a case.

2.2.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
1B114F	All	Forms	N/A	Authorization for Release of Information Authorized Representative	CSF 14	506481

2.2.3 Description of Change

Upon saving the Authorized Representative Detail record, trigger this form when an authorized representative is added for the case's GA/GR Automated EDBC/CC Counties Program.

2.3 Add online trigger for Affidavit to Replace Lost or Destroyed Warrant

2.3.1 Overview

These forms trigger when the client reports a lost, stolen, or destroyed warrant or check.

2.3.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
300001	Placer	Forms	N/A	Affidavit to Obtain Duplicate Warrant	All 662	609763
300001	Santa Barbara	Forms	N/A	Affidavit to Obtain Duplicate of Lost or Destroyed Warrant	W 141	609707
300001	Sonoma	Forms	N/A	Affidavit to Replace Lost or Destroyed Warrant	HSD 423	609738
300001	All	Forms	N/A	Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant	CSF 1	506468

2.3.3 Description of Change

1. Add **"GA/GR Affidavit"** to the **"Affidavit Types"** dropdown (CT10341) on the Affidavit Detail page.

2. Add logic to the "Affidavit Types" dropdown to only display the "GA/GR Affidavit" option when the issuance linked to the Affidavit is a GA/GR Automated EDBC/CC Counties Program that is either "Active" or "Pending".
1. Trigger this form for all opted-in counties upon saving the Affidavit Detail page and one of the following is true:
 - a. A new Affidavit Detail record is created and the Affidavit Type is "GA/GR Affidavit".
 - Or
 - a. An existing Affidavit Detail record is updated and the Affidavit Type has changed to "GA/GR Affidavit".

2.4 Add online trigger for the Certification of ID form

2.4.1 Overview

This form is triggered upon clicking the "Print ID" button on the Issuance Detail page.

2.4.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
300006	All	Forms	N/A	Certification of ID	CSF 54 (04/08)	506739

2.4.3 Description of Change

1. Add an "Print ID" button on view of the Issuance Detail page after selecting an issuance from the Issuance search results. Clicking this will trigger the "Certification of ID" form for any of the opted-in counties.
2. This button should only be visible when all of the following are true:
 - a. The issuance is for a GA/GR Automated EDBC/CC Counties Program.
 - b. There is a GA/GR Automated EDBC/CC Counties Program on the case associated to the record.
 - c. The status of the Issuance is "Issued".
 - d. Issuance Method is "Warrant"
 - e. The user has the Security Right "PrintIDCertification"

2.4.4 Page Mockup

CalSAWS Case Name: Case Name Case Number: L599619 Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles AT1 Global TS Case Info Eligibility Empl. Services Child Care Resource Databank **Fiscal** Special Units Reports Client Corresp. Admin Tools

Issuances

Issuance Search Pending Distribution List Placement Verification Search

Issuance Detail

*- Indicates required fields

Print ID Affidavit External Reissue Reissue Edit Close

Control Number: 0013760030 Category: Monthly Benefit Benefit/Service Month: 01/2021
Case Number: [L599619](#) Case Name: Case Name Program: AAP

Mockup of the Issuance Detail page with the "Print ID" button.

2.4.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
PrintIDCertification	Issuance Detail	Print ID Certification

Security Groups:

Security Group	Group Description	Group to Role Mapping
Print ID Certification	This group has the capability to access the button that will trigger the Certification of ID Form	See the Security Matrix for the group to role associations

2.5 Add online trigger for the Early Fraud Detection/Prevention Referral form

2.5.1 Overview

This form is triggered when the user clicks the "Print Referral Form" button from the Special Investigation Referral and Special Investigation Detail pages.

2.5.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
500020	All	Forms	N/A	Early Fraud Detection/Prevention Referral	CSF 45 (12/07)	506509

2.5.3 Description of Change

1. Add a **"Print Referral Form"** button on View mode of a Special Investigation Referral **or** Special Investigation Detail record. Clicking this button will then trigger the "Early Fraud Detection/Prevention Referral" form for any of the opted in counties.
2. This button should only be visible when all of the following are true:
 - a. One of the programs selected on the Special Investigation Detail Record is the GA/GR Automated EDBC/CC Counties Program.
 - b. There is a GA/GR Automated EDBC/CC Counties Program on the case associated to the record.

2.5.4 Page Mockup

The mockup shows the CalSAWS interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The main header displays 'Los Angeles AT1' and 'Special Investig F900013418'. The left sidebar lists various investigation options, with 'Detail' selected. The main content area is titled 'Special Investigation Detail' and contains a form with the following fields:

- Investigation ID:** F900013418
- Legacy Fraud Number:**
- Investigation Status:** * Referral
- DPA 266 Type:** * Drug Felon
- Source Category:**
- Allegation:**
- Project Code:**
- Origin:** * Internal
- Investigation Priority:**
- Restricted Access - Internal Investigation?** * No
- Case Type:** * Internal
- Case Number:** * B11D645
- Case Name:** Case Name
- Language:** * English
- Disposition Type:**
- Disposition Date:**
- Fraud Type:** * Historical
- Historical Fraud Type:** * ADH
- Child Care Agency**
- CIN:** 05373016E
- ID/Driver License:**

A red box highlights the 'Print Referral Form' button located at the top right of the form area.

Mockup of the Print Referral Form button on the Special Investigation Detail page

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2.5.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
PrintReferralForm	Special Investigation Detail and Special Investigation Referral	Print Referral Form

Security Groups:

Security Group	Group Description	Group to Role Mapping
Print Referral Form	This group has the capability to access the button that will trigger the Early Fraud Detection/Prevention Referral Form	See the Security Matrix for the group to role associations

2.5.6 Miscellaneous Parameters

The below Miscellaneous Parameter/s will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
500020	"C2"	Other Participant in the Household's PERS_ID	Ex. C21237898
500020	"AB"	Case's Absent Parent PERS_ID	Ex. AB1237899

2.6 Add online trigger for the Hearing Reschedule Notification Form

2.6.1 Overview

This form is triggered when the hearing is Rescheduled.

2.6.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
GC0860	All	Forms	N/A	Hearing Reschedule Notification	CSF 42	506488

2.6.3 Description of Change

Trigger this correspondence upon **updating** the Hearing Detail page and the following conditions are met:

1. There is a GA/GR Automated EDBC/CC Counties Program on the case associated to the record.
2. The GA/GR Automated EDBC/CC Counties Program is selected in the Program Section.
3. The current '**Hearing Date**' is now different from the previous date.

2.6.4 Miscellaneous Parameters

The below Miscellaneous Parameter/s will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
GC0860	"HR"	The Hearing ID as displayed on the Hearing Detail Page	Ex. HR1234567

2.7 Add online trigger for the GRWP Job Search Report

2.7.1 Overview

This form is triggered when an Employment Services participant has been scheduled for a job search activity.

2.7.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
T91895	Orange	Forms	N/A	GRWP Job Search Report	F063-08-71A (R04/15)	609761

2.7.3 Description of Change

Trigger this form for Orange county upon saving a new Customer Activity Detail and the following conditions are met:

1. The activity is for a recipient of a GA/GR Automated EDBC/CC Counties Program that is either **"Active"** or **"Pending"**.
2. The person is an Employment Services participant.
3. Category is **"GA/GR Employment Services"** and type is **"Job Search"**.

2.7.4 Miscellaneous Parameters

The below Miscellaneous Parameter/s will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
T91895	"03"	ID of the Generic Employment Services Activity	Ex. "8987345"
T91895	"07"	ID of the ES activity assignment	Ex. "0892384"
T91895	"38"	Program Type Code	Ex. "GR"
T91895	"17"	Person ID	Ex. "8987345"
T91895	"PL"	Plan ID	Ex. "8987345"
T91895	"PD"	Provider ID	Ex. "8987345"

2.8 Add online trigger for the Daily Tip Statement Form

2.8.1 Overview

This form is triggered when a client reports earnings from tips.

2.8.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
1B300D	All	Forms	N/A	Daily Tip Statement	CSF 34	506504

2.8.3 Description of Change

Trigger this form upon saving an Income and the following conditions are met:

1. The income is for a recipient of a GA/GR Automated EDBC/CC Counties Program that is either **"Active"** or **"Pending"**.
2. Income Category is **"Earnings"** and Type is **"Tips"**
3. There is an income amount for **"Cash / CalFresh"** under **"Program"**

2.9 Add online trigger for the Value of Income In-Kind Form

2.9.1 Overview

This form is triggered when a client reports in-kind income.

2.9.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
1C302C	Santa Cruz	Forms	N/A	Value of Income In-Kind Form	WEL 5080	505866

2.9.3 Description of Change

Trigger this form for Santa Cruz county upon saving a new Income and the following conditions are met:

1. The income is for a recipient of a GA/GR Automated EDBC/CC Counties Program that is either **"Active"** or **"Pending"**.
2. Income Category is one of the following:
 - a. Income In-Kind – Earned
 - b. Income In-Kind – Unearned
3. There is an income amount for **"Cash / CalFresh"** under **"Program"**

2.10 Batch Job for UIB Application Required Form

2.10.1 Overview

This form will be triggered by batch when a GA/GR applicant/recipient's employment has been end dated and is not claiming a disability, but has worked in the past 19 months.

2.10.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
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1C103E	Contra Costa	Forms (OCC)	N/A	UIB Application Required	734 0 (01/03)	301793
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2.10.3 Description of Change

1. Create a new batch job to send the UIB Application Required form for Contra Costa county when the following conditions are true:
 - a. There is a GA/GR Automated EDBC/CC Counties Program on the case that is either **"Active"** or **"Pending"**.
 - b. The GA/GR applicant/recipient's latest Employment record Termination Date is **prior** to the the batch date
 - c. The GA/GR applicant/recipient's latest Employment record was active within 19 months **prior** to the batch date
 - d. The GA/GR applicant/recipient does not have an active GR Health Assessment record of type **"Medical"**.
2. For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a UIB Application Required form during batch forms processing.

Transaction values:

- a. Case ID: Case associated to GA/GR Automated EDBC/CC Counties Program
- b. Program ID: Program ID
- c. Person ID: Primary Applicant of Active GA/GR Automated EDBC/CC Counties Program
- d. Type Code: FR
- e. Sub Type Code: TBD by build
- f. Eff Date: Batch Date
- g. Created By: Batch
- h. Updated By: Batch

2.10.4 Execution Frequency

Daily, CalSAWS business days

2.10.5 Key Scheduling Dependencies

This job will run before forms balancers.

2.10.6 Counties Impacted

This job will run for Contra Costa county

2.10.7 Data Volume/Performance

N/A

2.10.8 Failure Procedure/Operational Instructions

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

2.11 Add online trigger for Request for Client to Apply for Available Resource/Benefits Form

2.11.1 Overview

This form is triggered when a GA participant is required to apply for available resource/benefits as a condition of eligibility.

2.11.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
1P006E	Tulare	Forms (OCC*)	N/A	Request for Client to Apply for Available Resource/Benefits	915	328239

** note: Other Client Correspondences (OCCs) will be considered under the "Forms" correspondence category in CalSAWS.*

2.11.3 Description of Change

Trigger this form for Tulare county upon saving a Potentially Available Income Detail record and the following conditions are met:

1. The selected person is an applicant/recipient of a GA/GR Automated EDBC/CC Counties Program and the status is "**Pending**" or "**Active**".
2. The **Type** is one of the following:
 - a. Disability
 - b. Medicare
 - c. Military Benefits
 - d. Native American Benefits
 - e. Retirement
 - f. SSI
 - g. State Disability Insurance
 - h. Survivor Benefits
 - i. Unemployment Insurance Benefits
 - j. Veterans

- k. Worker's Compensation
- 3. The Program is "**Cash**"
- 4. The Status is "**Referred**"
- 5. One of the following is true:
 - a. A new Potentially Available Income record is created
 - Or
 - b. An existing Potentially Available Income record is updated and now matches conditions 1-4.

2.12 Add online trigger for the General Relief Promissory Note

2.12.1 Overview

This form is triggered when a client reports a change in their real property ownership.

2.12.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
1E202C	Orange	Forms	N/A	General Relief Promissory Note	F0912-26-74 (R08/15)	610085

2.12.3 Description of Change

Trigger this form for Orange county upon saving a Real Property Detail record and the following conditions are met:

1. The owner is an applicant/recipient of a GA/GR Automated EDBC/CC Counties Program that is either "**Active**" or "**Pending**".
2. One of the following is true:
 - a. A new Real Property Detail record is created
 - Or
 - b. An existing Real Property Detail record is updated and the owner(s) was not an applicant/recipient of a GA/GR Automated EDBC/CC Counties Program that is either "**Active**" or "**Pending**"

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
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1.	Correspondence	Technical Flow Diagram for Non-EDBC Correspondences	Non-EDBC Correspondence Technical Flow.pptx
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4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2319	<p>The CONTRACTOR shall update the CalSAWS Software with current available automated CalWIN county specific NOA's and Forms associated to their GA/GR program.</p> <p>The CONTRACTOR shall update the CalSAWS software to trigger an interface to a "Correspondence Service" to generate the automated CalWIN County specific Forms/NOAs generate county specific NOAs and Forms based upon each county's eligibility rules.</p>	<p>Correspondence:</p> <p>1. There are a total of 180 non EDBC triggered forms of which</p> <ul style="list-style-type: none"> • 53 forms will be manually generated from template repository. • 93 forms will be triggered from CalSAWS and generated through DXC service. • 34 forms will use current CalSAWS triggers and the corresponding version available. <p>2. All GA/GR specific and combo program State forms will be triggered/generated through CalSAWS except if any form is customized by county already in CalWIN. In that case, DXC service will be called just for that county alone to generate the form PDF.</p>	<p>This requirement is met based on the "NOAs listed in Appendix A" supplemented by the functionality described in this design document.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		<p>3. All GA/GR specific and combo program Non-State forms will be generated through DXC service. Whenever required CalSAWS will call the GA/GR Correspondence service with all the data related to the case.</p> <p>4. New functionality will be added to CalSAWS to determine form generation based on county.</p> <p>5. All CalSAWS generated state forms will not have capability to add/modify data elements by user. The existing CalSAWS capability to append text to the NOA pdf will be available to the user.</p> <p>6.If any manual variables are needed, print queue will be accessed through iFrame by calling DXC service where user will be able to add manual variables.</p> <p>Entire case data including office related information will be sent to DXC service for each form/NOA trigger.</p>	