

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-49395

ACL 16-92: Update and create ARC 1 Packet

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/08/2019	.01	Initial Design	Ramya Raghuraman
06/29/2021	1.0	Updated Design with latest template	Rainier Dela Cruz, Jasmine Chen
07/26/2021	1.1	Updated Design with latest (06/21) ARC 1A in English and removing the recommendation for threshold languages.	Jasmine Chen
09/30/2021	1.2	Content Revision – updating coversheet so ARC 1/1A are on their own pieces of paper.	Jasmine Chen

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1 OVERVIEW

An ARC 1 form is a Statement of Facts supporting the eligibility for an approved relative caregiver (ARC) of the ARC Funding Option Program.

1.1 Current Design

The current version of the ARC 1 form in CalSAWS (12/14) is not aligned with the State's latest version and is generated manually from the Template Repository. Also, CalSAWS does not have the ARC 1A form which details the Rights and Responsibilities of the ARC recipient.

1.2 Requests

Update ARC 1 (12/14) in the Template Repository to match the State's latest version. Create an ARC 1 Packet that includes the State's latest ARC 1 and ARC 1A.

1.3 Overview of Recommendations

1. End-date the ARC 1 form (12/14) in the CalSAWS system.
2. Add a new ARC 1 Packet into the CalSAWS system with its ARC 1, ARC 1A forms matching the latest State's version. Use a CSF 147 Add a coversheet.

1.4 Assumptions

1. The ARC 1 form is always supplemented with an ARC 1A form.
2. CA-219916 will implement the ARC 1 Packet batch process and BRM addresses for all 58 counties.
3. Threshold languages of the ARC 1 Packet will be scoped in a future SCR.

2 RECOMMENDATIONS

2.1 Correspondence – Update ARC 1 Form

2.1.1 Overview

A new ARC 1 Packet will replace the current CalSAWS ARC 1 (12/14) form. The ARC 1 form will be turned off from the Template Repository.

Current State Form: ARC 1 (12/2014)

Current Programs: Foster Care (ARC)

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All Counties

Existing Languages: English

2.1.2 Description of Change

1. End-date the ARC 1 form in the CalSAWS System and make it not available from the Template Repository.

2.2 Correspondence – Add New ARC 1 Packet

2.2.1 Overview

Because ARC 1A supplements the ARC 1 form, the CalSAWS system will add a new ARC 1 packet that will consist of both forms.

State Form: ARC 1 Packet

Programs: Foster Care (ARC)

Attached Forms: N/A

Forms Category: Form

Template Repository Visibility: All Counties

Languages to Add: English

2.2.2 Create Form XDP

Add the new ARC 1 Packet into the CalSAWS system consisting of the following: **CSF 147, CalSAWS Standard Header on the first page, with a blank back page** (as a coversheet), ARC 1 (11/16) and ARC 1A (06/21)

Form Header: N/A – **The packet will have a coversheet. CalSAWS Standard Header (Header_1)**

Form Title: ARC 1 Packet

Form Template Description: The following forms are included in this Packet: **CSF-147**, ARC 1, ARC 1A

Form Number: ARC 1 Packet

Include NA Back 9: No

Imaging Form Name: ARC 1 Packet

Imaging Document Type: Customer Reporting

Form Mockup/Example: See Supporting Document #1

2.2.3 Add Form Variable Population

Populate the form variables of the ARC 1 Packet that were populated in the original ARC 1 form:

VARIABLE NAME	POPULATION	FORMATTING	TEMPLATE REPOSITORY POPULATION
ARC 1			
RELATIVE_CAREGIVER	Approved Relative Caregiver's Name in Section 1. Name of the relative caregiver or placement organization. From the Foster Care Resource Detail page.	Arial Font Size 9	Y
ORG_PHONE	Phone in Section 1. Phone number of the relative caregiver or organization. From the Foster Care Resource Detail page.	Arial Font Size 9	Y
BIRTH_NAME	Child/Youth's Name (First, Middle, Last) in Section 2. Name of child/youth. From the Child Placement Detail page.	Arial Font Size 9	Y
MALE FEMALE	Gender: Male, Female - Checkboxes in Section 2. Gender of the child/youth. From the Individual Demographic Detail page.	Arial Font Size 9	Y
CUSTOMER_ADDRESS_1	Address in Section 2.	Arial Font Size 9	Y

	Mailing address of the child/youth. From the Foster Care Resource Detail page.		
CUSTOMER_DOB	Birthdate (Month/Day/Year) in Section 2. Date of birth of the child/youth. From the Individual Demographic Detail page.	Arial Font Size 9	Y
BIRTH_PLACE	Birthplace (City/State/Country) in Section 2. Birthplace of the child/youth. From the Vital Statistics Detail page.	Arial Font Size 9	Y
CHILD_SSN_MASKED	Social Security Number in Section 2. Masked social security number (XXX-XX-1234) of the child/youth. From the Individual Demographic Detail page.	Arial Font Size 9	Y
CITIZEN_YES CITIZEN_NO	Citizen of U.S.A.? Yes, No - Checkboxes in Section 2. US Citizenship of the child/youth. From the Vital Statistics Detail page.	Arial Font Size 9	Y
CALIFORNIA_YES CALIFORNIA_NO	Reside in State of California? Yes, No - Checkboxes in Section 2. CA Residency of the child/youth. From the Residency detail page.	Arial Font Size 9	Y
NONCITIZEN_STATUS	Noncitizen Status in Section 2. Noncitizen Status of the child/youth. From the Citizenship Detail page.	Arial Font Size 9	Y

COUNTY_NAME	County and Agency in COUNTY USE ONLY right-hand section. County of the relevant case. From the Case Summary page.	Arial Font Size 9	Y
CASE_NAME	Case Name in COUNTY USE ONLY right-hand section. Case name of the relevant case. From the Case Summary page.	Arial Font Size 9	Y
CASE_NUMBER	Case Number in COUNTY USE ONLY right-hand section. Case number of the relevant case. From the Case Summary page.	Arial Font Size 9	Y

2.2.4 Add Form Control

Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Note: Please refer to Assumption #2 regarding BRM barcode and addresses.

2.2.5 Add Form to Template Repository

Add the new ARC 1 Packet to the Template Repository with the following required parameters:

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

2.2.6 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
Y	Y	Y	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): When generated through Template Repository, the individual selected from the 'Customer Name' parameter.

Mailed From (Return): Foster Care 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 SSP (Self Service Portal): Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	Mockup of ARC 1 Packet – English	CA 49395 - ARC 1 Packet_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1226	The LRS shall include the ability to locally print any requested notice, NOA, form, letter, stuffer, and flyer in English, all threshold languages, and in any other language for which the State has provided a translation.	The CalSAWS System will add an ARC 1 Packet into the Template Repository in the available language of English.

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
9/27/2021	1.4	Content Revision to update NOA Document List reference for consistency	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"/></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 EDBCs 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: 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: Other Reasons

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*
-------------	---------------	-------------

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-203485

Update to intake applications source/program history - Portal Applications.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Michael Wu, Shilpa Suddavanda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/14/2021	1.0	Initial	Kusnadi.E
9/27/2021	2.0	Content Revision 1: Updated Section 2.1.3 #1.a.i.1 that when the 'Source' field is left blank it will display as 'Other' instead of 'blank'. This is existing functionality	Kusnadi.E

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1 OVERVIEW

Participants can apply for multiple programs through the Self Service Portal. For applications that are received in CalSAWS through the Self Service Portal, a unique e-Application number is assigned to the application and labeled as an e-Application. For all e-Applications that are received, county workers will review each e-Application to determine the programs that they want to apply for and whether it is a new application or a reapplication. Workers are then able to go to the Program History or the Program History Detail page in CalSAWS to view the application history of a particular program. Currently, programs added through the e-Application flow are not easily identifiable. This SCR will update both the Program History and the Program History Detail page to display the Application Source and the Source Application# for every program that was added through the e-application flow that was received through the Self Service portal.

1.1 Current Design

For applications received through the Self Service Portal, workers will add all the appropriate programs in CalSAWS through the e-Application flow. However, when workers go to the Program History or the Program History Detail page, the Application Source and Source Application# are not displayed. This is different for programs that were added to CalSAWS through the application registration flow where both the Application Source and the Source Application# are displayed.

1.2 Requests

Update both the Program History and Program History Detail page to display the corresponding Application Source and Source Application # for program applications that were received through the Self Service Portal and was added through the e-Application flow.

1.3 Overview of Recommendations

1. Update the Program History page to display the corresponding Application Source and Source Application# for program applications that were received through the Self Service Portal and added through the e-Application flow.
2. Update the Program History Detail page to display the corresponding Application Source and Source Application# for program applications that are received through the Self Service Portal and was added through the e-Application flow.

1.4 Assumptions

1. Existing e-Application flow will remain unchanged for applications that are received through BenefitsCal.
2. E-Application number will display for applications received through YBN (Your Benefits Now) application if it was linked to the case through the e-application flow once this change is in production.

3. All existing functionalities will remain unchanged unless called out as part of the design document.

2 RECOMMENDATIONS

Both the Program History and Program History Detail page will be updated to display the corresponding Application Source and Source Application# for program applications that are received through the Self Service Portal and linked to a case through the e-Application flow.

2.1 Program History

2.1.1 Overview

The Program History page allows the worker to access the history of a single program. However, for programs that are added through the e-Application flow the corresponding Application Source and Source Application# are not displayed on the page. This is different for programs that are added through the application registration flow. This SCR will update the Program History page to display the Application Source and Source Application# for programs that are linked to a case through the e-Application flow.

2.1.2 Program History Mockup

CalFresh History

Close

Program Application History						
App #	App Source	Source App #	App Date	Application Type	Action	Action Date
4	Self-Service Portal	104644	06/11/2021	Reapplication	Pended	06/11/2021
3			06/10/2021	Reapplication	Denied	06/11/2021
2	In Person	03049308	06/10/2021	Reapplication	Denied	06/10/2021
1	Self-Service Portal	104635	06/10/2021	New Application	Denied	06/10/2021

Program Detail History					
App #	Program Type	Status	Status Reason	Begin Month	End Month
4	Regular	Pending		06/2021	

Program Re-Evaluation History				
Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason

Worker History		
Worker ID	Begin Month	End Month
19LS004H00	06/2021	
19LS004H00	06/2021	06/2021

Close

This Type 1 page took 0.36 seconds to load.

Figure 2.1.1 – Program History page (for users with 'EAppView' security right)

CalFresh History

Close

Program Application History

App #	App Source	Source App #	App Date	Application Type	Action	Action Date
4	Self-Service Portal	104644	06/11/2021	Reapplication	Pended	06/11/2021
3			06/10/2021	Reapplication	Denied	06/11/2021
2	In Person	03049308	06/10/2021	Reapplication	Denied	06/10/2021
1	Self-Service Portal	104635	06/10/2021	New Application	Denied	06/10/2021

Program Detail History

App #	Program Type	Status	Status Reason	Begin Month	End Month
4	Regular	Pending		06/2021	

Program Re-Evaluation History

Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason
-------------	-----------	----------------	-----------------	-------------------

Worker History

Worker ID	Begin Month	End Month
19LS004H00	06/2021	
19LS004H00	06/2021	06/2021

Close

This [Type 1](#) page took 0.36 seconds to load.

Figure 2.1.2 – Program History page (for users without 'EAppView' security right)

CalFresh History

Close

Program Application History

App #	App Date	Application Type	Action	Action Date
2	06/10/2021	Reapplication	Pended	06/10/2021
1	06/10/2021	New Application	Denied	06/10/2021

Program Detail History

App #	Status	Status Reason	Begin Month	End Month
2	Pending		06/2021	

Program Re-Evaluation History

Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason
-------------	-----------	----------------	-----------------	-------------------

Worker History

Worker ID	Begin Month	End Month
19LS004H00	06/2021	

Close

This [Type 1](#) page took 4.48 seconds to load.

Figure 2.1.3 – Program History page for program application not added through the e-Application flow or application registration flow (reference only)

2.1.3 Description of Changes

1. The Program History page will be updated to display the corresponding Application Source on the 'App Source' field for program applications that are linked to case through the e-Application flow as shown on Figure 2.1.1 and Figure 2.1.2.
 - a. The 'App Source' field will display the Application Source information specific to that e-Application.
 - i. Value to be display under the 'App Source' field will be based on the value that was selected and saved on the 'Source' field from the New Programs Detail page for that specific e-Application.
 1. When the 'Source' field is left blank on the New Programs Detail page, the 'App Source' field on the Program History page will display as **'blank'** **'Other'**.
 - b. The 'App Source' field will not be an editable field.

- c. The 'App Source' field will display as blank when the program application is not linked to the case through the e-Application flow or the application registration flow.
- d. The 'App Source' field will not display if none of the programs were added to the case through the e-Application flow or the application registration flow as shown on Figure 2.1.3.

Note: The application number will display under the 'App Source App' field for program applications that are linked to case through the application registration flow. The Program History page will not display the 'App Source' field when none of the program applications are link to a case through the application registration flow. Both are an existing functionality in CalSAWS. With this SCR, one of the program application will now need to be linked to case either through the application registration flow or the e-Application flow for the 'App Source' field to display on the page.

- 2. The Program History page will be updated to display the corresponding e-Application # on the 'Source App #' field for program applications that are linked to a case through the e-Application flow.
 - a. The 'Source App #' field will display the e-Application number (e-Application number will be a value that will be sent to CalSAWS through the Self Service Portal) specific to that e-Application.
 - i. E-Application number will display as a hyperlink for workers that have the 'EAppView' security right as shown on Figure 2.1.1.
 - 1. Clicking on the hyperlink will take the worker to the e-Application Summary page in View mode.
 - a. Clicking the 'Close' button on the e-Application Summary page will take the worker back to the Program History Page.
 - i. This flow is specific to just e-Application Summary page that is accessed through the Program History Page.
 - 2. For workers that are not assigned the 'EAppView' security right, the e-Application number will not be a hyperlink as shown on Figure 2.1.2.
 - b. The 'Source App #' field will not be an editable field.
 - c. The 'Source App #' field will display as blank when the program application is not linked to the case through the e-Application flow.

- d. The 'Source App #' field will not display if none of the programs were added to the case through the e-Application flow as shown on Figure 2.1.3.

Note: The application number will display under the 'Source App #' field for program applications that are linked to case through the application registration flow. The Program History page will not display the 'Source App #' field when none of the program applications are link to a case through the application registration flow. Both are an existing functionality in CalSAWS. With this SCR, one of the program application will now need to be linked to case either through the application registration flow or the e-Application flow for the 'Source App #' field to display on the page.

2.1.4 Page Location

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

2.1.5 Security Updates

No new security rights are being added as part of this SCR. The 'EAppView' security right is already existing in CalSAWS.

2.1.6 Page Mapping

Update Page Mapping to reflect the changes being made to the Program History page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Program History Detail

2.2.1 Overview

The Program History Detail page displays the history of a particular program on a case. However, for programs that were added through the e-Application flow the corresponding Application Source and Source Application# are not being displayed on the page. This is different for programs that are linked to a case through the application registration flow. This SCR will update the Program History Detail page to display the Application Source and Source Application# for programs that were added through the e-Application flow.

2.2.2 Program History Detail Mockup

Program History Detail

Close

Program Type:	Application Date:	App #:	Application Source:	Source Application #:
CalFresh	06/11/2021	4	Self-Service Portal	104644

Event Date	Event Type	Reason	Effective Date	Updated By
06/11/2021	Pended		06/01/2021	999400

Worker Id:	Begin Date:	End Date:
19LS004H00	06/11/2021	
19LS004H00	06/10/2021	06/10/2021

Close

This [Type 1](#) page took 0.45 seconds to load.

Program History Detail

Close

Program Type:	Application Date:	App #:	Application Source:	Source Application #:
CalFresh	06/11/2021	4	Self-Service Portal	104644

Event Date	Event Type	Reason	Effective Date	Updated By
06/11/2021	Pended		06/01/2021	999400

Worker Id:	Begin Date:	End Date:
19LS004H00	06/11/2021	
19LS004H00	06/10/2021	06/10/2021

Close

This [Type 1](#) page took 0.45 seconds to load.

Figure 2.2.2 – Program History Detail page (for users without 'EAppView' security right)

Program History Detail

Close

Program Type:

CalFresh

Application Date:

06/10/2021

App #:

3

Event Date	Event Type	Reason	Effective Date	Updated By
06/11/2021	Denied	Application Opened in Error	06/01/2021	999400
06/10/2021	Pended		06/01/2021	999400

Worker Id:

[19LS004H00](#)

Begin Date:

06/11/2021

End Date:

[19LS004H00](#)

06/10/2021

06/10/2021

Close

Figure 2.2.3 – Program History Detail page for a program application not added through the e-Application flow (reference only)

2.2.3 Description of Changes

1. The Program History Detail page will be updated to display the corresponding Application Source on the 'Application Source' field for program application that are linked to case through the e-Application flow as shown on Figure 2.2.1 and Figure 2.2.2.
 - a. The 'Application Source' field will display the Application Source information specific to that e-Application.
 - i. Value to be display under the 'Application Source' field will be based on the value that was selected and saved on the 'Source' field from the New Programs Detail page for that specific e-Application.
 1. When the 'Source' field is left blank on the New Programs Detail page, the 'Application Source' field on the Program History page will display as 'blank'.
 - b. The 'Application Source' field will not be an editable field.
 - c. The 'Application Source' field will not display when the program application is not linked to the case through the e-Application flow as shown on Figure 2.2.3.

Note: Application Source will display under the 'Application Source:' field for program application that is added through the application registration flow. For program application that's not added through the application registration flow, the 'Application Source:' field will not display on the Program History Detail page. Both are an existing functionality in CalSAWS.

2. The Program History Detail page will be updated to display the e-Application number on the 'Source Application #' for program application that is linked to case through the e-Application flow.
 - a. The 'Source Application #' field will display the e-Application number (e-Application number will be a value that will be sent to CalSAWS through the Self Service Portal) specific to that e-Application.
 - i. E-Application number will display as a hyperlink for workers that have the 'EAppView' security right as shown on Figure 2.2.1.
 1. Clicking on the hyperlink will take the worker to the e-Application Summary page in View mode.
 - a. Clicking the 'Close' button on the e-Application Summary page will take the worker back to the Program History Detail Page.
 - i. This flow is specific to just e-Application Summary page that is accessed through the Program History Detail Page.
 2. For workers that are not assigned the 'EAppView' security right, the e-Application number will not be a hyperlink as shown on Figure 2.2.2.
 - b. The 'Source Application #' field will not be an editable field.
 - c. The 'Source Application #' field will not display when the program application is not linked to the case through the e-Application flow as shown on Figure 2.2.3.

Note: The application number (this is different than the e-Application number) will display under the 'Source Application #' field for program application that's linked to case through the application registration flow. For program application that's not linked to case through the application registration flow, the 'Source Application #' field will not display on the Program History Detail page. Both are an existing functionality in CalSAWS.

2.2.4 Page Location

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

2.2.5 Security Updates

No new security rights are being added as part of this SCR. The 'EAppView' security right is already existing in CalSAWS.

2.2.6 Page Mapping

Update Page Mapping to reflect the changes being made to the Program History Detail page.

2.2.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.2.1	The LRS shall maintain the source of the application, the type of assistance requested, the date the application was received, and the date the application was entered in the LRS.	The Program History and Program History Detail page will be updated to display the corresponding Application Source for program application that was added through the e-Application flow and received through the Self Service Portal.
2.4.2.8	The LRS shall record the application for tracking and reporting purposes, once the applicant has signed the application.	The Program History and Program History Detail page will be updated to display the corresponding e-Application number for program application that was added through the e-Application flow and received through the Self Service Portal.



California Statewide Automated Welfare System

Design Document

CA-221329

MAGI Person Detail Page Cosmetic Clean-up

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Renee Gustafson
	Reviewed By	Derek Goering, Prashant Goel, Geetha Ramalingam, Michael Wu, Long Nguyen

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/04/2020	.1	Original Draft	Renee Gustafson
01/20/2021	.2	Updated per requests from Committee: Keep Non-MAGI Referrals section and move referral fields from 'Additional Information' into Non-MAGI Referrals	Renee Gustafson
04/05/2021	.3	Added Former Foster Youth updates	Renee Gustafson
04/09/2021	.4	Added HCBS to LTC label	Renee Gustafson
04/26/2021	.5	Added ICT External Person Detail page impacts and updates	Renee Gustafson
04/27/2021	.6	Reviewed with MC Analysts. Req MC Type FFY should not send FFY Admin Verif. Updated document.	Renee Gustafson
04/29/2021	.7	Updated name format for Relationships and Tax Dependents section.	Renee Gustafson
08/10/2021	1.1	Content Revision: Removed fields not used in eHIT <ul style="list-style-type: none"> • CalHEERS Person Begin Date • Case Person Begin Date • Case Person End Date 	Renee Gustafson
09/03/2021	1.2	Content Revision: 2.3.2.1.c flipped the order of what to use when there is more than one FC record. Changed to FC program, then OPA, then Requested MC Type	Renee Gustafson
09/16/2021	1.3	Content Revision: Removed update to ICT External Person Detail page 'county' column. Address County is not part of eICT Transaction.	Renee Gustafson

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1 OVERVIEW

The MAGI Person Detail page displays the person details for an individual included in an Eligibility Determination Request (EDR) or Determination of Eligibility Response (DER) transaction in eHIT. The information communicated in an EDR and DER in eHIT has changed over time and the MAGI Person Detail page displays outdated information and some fields are duplicated on the page. This SCR cleans up and streamlines the MAGI Person Detail page for the current version of eHIT. The ICT External Person Detail page shares some code with the MAGI Person Detail page so the ICT External Personal Detail page is updated with some of the changes to the MAGI Person Detail page as well.

1.1 Current Design

The MAGI Person Detail page **Individual Demographics** section displays 'Language', 'Birth Country' and 'US Entry Date' but none of these fields were ever used in eHIT so they always display with blank values. The value for the 'Foster Care State' shows the two-letter abbreviation for the State instead of the full State name. The 'Date of Death' field is in the **Individual Demographics** section at the very bottom and is easy to miss.

Individual Demographics

Social Security Number: 108-97-6500	Reason for No SSN:	ATIN:	ITIN:
Date of Birth: 08/08/2000	CIN: 048223522	Gender: Male	Language:
Marital Status: Never Married	Was in Foster Care: Yes	Foster Care State: AZ	
Hispanic: No	Birth Country:	US Entry Date:	
Tribe State:	Tribe Name:		
Received Indian Health Services:	Indian Health Services Eligible:		

Race/Ethnic Origin

American Indian or Alaskan Native
Black or African American
Asian
Other
White
Unknown

Optional Gender Identity and Sexual Orientation Information

Gender Identity:	Birth Certificate Gender:	Sexual Orientation:
Date of Death:		

Figure 1.1.1 – MAGI Person Detail page – Before with 'Individual Demographics' section

The **Additional Information** section has several fields that are duplicates of fields in the **Non-MAGI Referral** section.

Additional Information		
Applying for Health Coverage: Yes	Full MC Determination Requested: No	Other: No
Full Time Student: No	Intended To Return Home: No	Deprivation: No
Blind or Disabled: No	DDSD Disability Indicator:	SSA Disability Indicator:
Long Term Care: No	Long Term Care Request: No	Temporary Disabled: No
Third Party Liability: No	Military/Veteran: No	Spouse or Parent is Military/Veteran: No

Figure 1.1.2 – MAGI Person Detail page – Before with ‘Additional Information’ section

The **Address Information** section does not display the ‘County’ column in the list of addresses.

Contact Information				
Preferred Method of Communication: Regular Mail	Preferred Written Language: English	Preferred Spoken Language: English		
Address Information				
Physical Address same as Primary's: No	Mailing Address same as Primary's: No	Residing Outside Country/US:		
Type	Address	County	Begin Date	End Date
Physical	123 MAIN ST NORWALK, CA 90650		11/02/2021	
Mailing	123 MAIN ST NORWALK, CA 90650		11/02/2021	
Temporary Out of the State: No		No Permanent Home Address: No		

Figure 1.1.3 – MAGI Person Detail page – Before ‘Address Information’ section

The **Relationships** section displays the ‘Person 1’ and ‘Person 2’ names in the incorrect format of ‘First Name Last Name’. The correct format is ‘Last Name, First Name Age Gender’. For Example: ‘Singh, Raj 36M’ for a 36 year old Male with First Name Raj; Last Name Singh.

Relationships		
Person 1	Relationship	Person 2
Raj Singh	Parent (Biological/Adoptive)	Priya Singh

Figure 1.1.4 – MAGI Person Detail page – Before ‘Relationships’ section

The **ACA Information** displays the ‘Primary Contact’, ‘CalHEERS Person Begin Date’, ‘Case Person Begin Date’, and ‘Case Person End Date’. ‘Primary Contact’ is that are better suited for the **Name** and **CalHEERS Admin Information** sections near the top of the page. ‘CalHEERS Person Begin Date’, ‘Case Person Begin Date’ and ‘Case Person End Date’ are only part of a DER transaction and CalHEERS does not use the fields and has never sent data in the fields.

The ‘Person Date of Death’ is a duplicate of ‘Date of Death’ in the **Individual Demographics** section.

The ‘Applying for Health Coverage’ is a duplicate of ‘Applying for Health Coverage’ in **Additional Information** section; ‘Begin Date’ and ‘End Date’ have no functionality in eHIT so they always display blank.

The **Tax Filer Information** section is missing the ‘Tax Dependents’ sub section.

The **Non-MAGI Referrals** section ‘Was In Foster Care’ is outdated and no longer received from CalHEERS as a Non-MAGI Referral. Former Foster Youth (FFY) information is now communicated in both an EDR and a DER and displays in the **Additional Information** section as ‘Was in Foster Care’ and ‘Foster Care State’. ‘Long Term Care’ field actually represents a request for both Long Term Care or Home and Community-Based Services.

Former Foster Youth

Former Foster Youth information is communicated in three fields in an EDR and DER; *Was In Foster Care*, *Foster Care State*, and *Former Foster Youth Admin Verification*.

Note: A MAGI Determination is not required for a Medi-Cal program with only an FFY individual(s); CalSAWS EDBC will grant Medi-Cal aid code 4M for the FFY individual(s). However, if the Medi-Cal program requires a MAGI Determination because it has other non-FFY individuals who require a MAGI Determination or the Medi-Cal application was initiated in CalHEERS, the FFY individual is included in the EDR.

- *Was in Foster Care*
'Was in Foster Care' is displayed in both the **Individual Demographics** and **Non-MAGI Referrals** sections on the MAGI Person Detail page.

Outbound eHIT logic (Population of EDR transaction)

The outbound eHIT logic populates 'Was in Foster Care' = "Yes" in the **Individual Demographics** section based on data in the Other Program Assistance (OPA) page. If the OPA record is for the "Foster Care" program, the record is active on the individual's 18th birthday, the record is end-dated AND the individual is age 18 through and including 26 in the EDR benefit month, then 'Was in Foster Care' = "Yes" in the **Individual Demographics** section. This is mapped to send 'WasInFosterCareInd' = 'Y' in the EDR.

The outbound eHIT logic populates 'Was In Foster Care' = "Yes" in the **Non-MAGI Referrals** section when either of the following are true: The individual's Requested Medi-Cal Type is 'Former Foster Youth' for the benefit month OR the individual was Active in a Foster Care program on their 18th birthday. However, this is not mapped to send in the EDR. This means the user must also enter a Foster Care OPA record to actually send 'WasInFosterCareInd' = 'Y'; otherwise, the individual will not be determined MAGI Eligible to 4M (FFY) when they are actually eligible to FFY.

This is an unnecessary step when the Foster Care data is already in CalSAWS in the other places (Requested MC Type or in FC program).

Inbound eHIT logic (Population from a DER transaction)

The inbound eHIT logic populates 'Was in Foster Care' in the **Individual Demographics** based on the value received in 'WasInFosterCareInd'. 'Was In Foster Care' in the **Non-MAGI Referrals** is never updated from a DER and always displays "No" as a default.

- *Foster Care State*

Outbound eHIT logic (Population of EDR transaction)

The outbound eHIT logic populates the 'Foster Care State' value in the **Individual Demographics** section based on State specified in the Other Program Assistance (OPA) page. If the OPA record is for the "Foster Care" program, the record is active on the individual's 18th birthday, the record is end-dated AND the individual is age 18 through and including 26 in the EDR benefit month, then 'Foster Care State' will be populated in the **Individual Demographics** section based on the OPA selection of the 'State' as follows:

- If the OPA 'State' is one of the 50 US states, populate the State 2-character code.
- If the OPA 'State' is a US Territory or Armed Forces, populate 'US'; this means "US Territories" in eHIT.
- Otherwise, populate with 'DK'; this means "I don't know" in eHIT.

The 'Foster Care State' value in the **Individual Demographics** section is mapped to send as the value for 'FormerFosterPersonLocationCode' in the EDR.

The 'Foster Care State' value in the **Individual Demographics** section does not populate at all when the FFY is based on the Requested Medi-Cal Type 'Former Foster Youth' nor when based on an actual Foster Care record.

Inbound eHIT logic (Population from a DER transaction)

The inbound eHIT logic populates 'Foster Care State' in the **Individual Demographics** based on the value received in 'FormerFosterPersonLocationCode'. 'Foster Care State' displays the two-character code instead of the description of the code.

- *Former Foster Youth Admin Verification.*
Outbound eHIT logic (Population of EDR transaction)
The outbound eHIT logic populates the 'Former Foster Youth' Admin Verification value in the **Verification** section based on the Verification Status specified in the Other Program Assistance (OPA) page. If the OPA record is for the "Foster Care" program, the record is active on the individual's 18th birthday, the record is end-dated AND the individual is age 18 through and including 26 in the EDR benefit month, then 'Former Foster Youth' Admin Verification will populate the value as follows:
 - Verified will populate 'Yes'
 - Refused will populate 'No'
 - Pending or Not Applicable will populate <blank>

The 'Former Foster Youth' value in the **Verification** section is mapped to send as the value for SAWSAAdministrativeVerification. AdministrativeVerificationType = 'WFC' in the EDR.

The 'Former Foster Youth' value in the **Verification** section does not populate at all when the FFY is based on the Requested Medi-Cal Type 'Former Foster Youth' nor when based on an actual Foster Care record.

Inbound eHIT logic (Population from a DER transaction)
The inbound eHIT logic populates 'Former Foster Youth' in the **Verification** section based on the value received in ManualVerification. AdministrativeVerificationType = 'WFC' in the DER'. 'Former Foster Youth' cannot be e-verified so it is always sent and received as an Admin Verification.

The MAGI Person Detail page shares code with ICT External Person Detail page and some of the same fields need updating on the ICT External Person Detail page.

The ICT External Person Detail page **Individual Demographics** section has 'Foster Care State' which displays the two-letter abbreviation for the State instead of the full State name. The 'Date of Death' field is at the very bottom and is easy to miss.

ICT External Person Detail Close

Name

Last Name: Johnson	First Name: Edward	Middle Name:
Maiden Name:	Suffix:	

CalHEERS Admin Information

Individual Demographics

Social Security Number: 111-11-1111	Reason for No SSN:	ATIN:	ITIN:
Date of Birth: 01/01/1983	CIN: XXXXX321G	Gender: Male	Language: English
Marital Status:	Was in Foster Care: Yes	Foster Care State: CA	
Hispanic: No	Birth Country: United States	US Entry Date:	
Tribe State:	Tribe Name:		

Has person gotten a service from the Indian Health Service, a tribal health program through a contract with one of the tribes?

Vital Statistics

Identification Document Type: United States Passport - recorded without limitation	Identification Document Number:
Citizenship Document Type: U.S. Public Birth Record recorded before age 5	Citizenship Document Number:

Date of Death:

Figure 1.1.5 – ICT External Person Detail page – Before with 'Individual Demographics' section

The **Address Information** section does not display the 'County' column in the list of addresses.

The screenshot shows the 'Address Information' section of the ICT External Person Detail page. It contains a table with the following columns: Type, Address, County, Begin Date, and End Date. The table lists two addresses: Physical and Mailing, both at 123 MAIN ST, NORWALK, CA 90650, with a Begin Date of 02/06/2021. A red box highlights the 'County' column, which is empty in the table rows, indicating that the column is not displaying data.

Type	Address	County	Begin Date	End Date
Physical	123 MAIN ST NORWALK, CA 90650		02/06/2021	
Mailing	123 MAIN ST NORWALK, CA 90650		02/06/2021	

Below the table, there are two fields: 'Temporary Out of the State:' with a value of 'No' and 'No Permanent Home Address:' with a value of 'No'.

Figure 1.1.6 – ICT External Person Detail page – Before 'Address Information' section

The **Non-MAGI Referrals** section 'Was In Foster Care' is outdated and no longer received from CalHEERS as a Non-MAGI Referral. Former Foster Youth information is now communicated in both an EDR and a DER and displays in the **Additional Information** section as 'Was in Foster Care' and 'Foster Care State'. 'Long Term Care' field actually represents a request for both Long Term Care or Home and Community-Based Services.

The screenshot shows the 'Non-MAGI Referrals' section of the ICT External Person Detail page. It contains several fields: 'Blind or Disabled:' (No), 'Temporary Disability:' (No), 'Long Term Care:' (No), 'Intended To Return Home:' (No), 'Other Indicator:' (No), 'Long Term Care Request:' (No), and 'Was in Foster Care:' (No). A red box highlights the 'Long Term Care:' field, which is currently set to 'No'.

Blind or Disabled: No	Temporary Disability: No	Long Term Care: No
Intended To Return Home: No	Other Indicator: No	Long Term Care Request: No
Was in Foster Care: No		

Figure 1.1.7 – ICT External Person Detail page – Before Non-MAGI Referrals' section

1.2 Requests

1. Update the MAGI Person Detail page as follows:
 - a. Remove duplicate fields on the page
 - b. Move some fields to other sections in the page that are suitable for the fields to streamline the view.
 - c. Add the Tax Dependents sub section.
 - d. Rename the **Non-MAGI Referral** section 'Long Term Care' label to include 'HCBS' for Home and Community-Based Services.
 - e. Remove fields that are not valid for eHIT.
 - f. Update Page mapping.
2. Update the ICT External Person Detail page as follows:
 - a. Move 'Date of Death' in **Individual Demographics** section up to the same row as 'Date of Birth' and 'Gender'; move 'Language' down one row to accommodate.
 - ~~b. Add 'County' column to the **Address Information** section.~~
 - c. Rename the **Non-MAGI Referral** section 'Long Term Care' label to include 'HCBS' for Home and Community-Based Services.
 - d. Remove 'Was in Foster Care' in **Non-MAGI Referral** section because it is not valid for eHIT.
3. Update the Former Foster Youth logic to also populate and send in an EDR based on the Requested Medi-Cal Type 'Former Foster Youth' and/or the Foster Care program active on the 18th birthday so an OPA record is not required to get CalHEERS to determine an FFY individual MAGI Eligible to 4M on a DER.
 - a. If the individual was Active on FC on their 18th birthday, consider them:
 - Former Foster Youth = Yes
 - Foster Care State = California
 - Former Foster Youth Admin Verification = Yes
 - b. If the individual has a Requested Medi-Cal Type 'Former Foster Youth' for the EDR benefit month, consider them:
 - Former Foster Youth = Yes
 - Foster Care State = I don't know
 - Former Foster Youth Admin Verification not sent
 - c. If more than one record exists for FFY, populate and send the FFY value(s) based on **OPA first**, FC program **first**, **OPA** second and lastly Requested Medi-Cal type.

1.3 Overview of Recommendations

1. The MAGI Person Detail page is now streamlined, and duplicate fields are removed.
2. The ICT External Person Detail page now displays the correct Foster Care information, 'County' displays with the address, 'Date of Death' is moved to an easier place to find, and 'HCBS' is added to 'Long Term Care' for the Non-MAGI Referral.
3. Update the Former Foster Youth logic to populate and send based on the Requested Medi-Cal Type 'Former Foster Youth' and/or the Foster Care program active on the 18th birthday in addition to OPA for Foster Care.

1.4 Assumptions

1. C-IV stores the values for 'Was in Foster Care' and 'Foster Care State' (CH_NON_MAGI) on the MAGI Person Detail page in a table that is not used in CalSAWS. C-IV values will be converted to the table location used in CalSAWS (ICT_PERS_ATTR) per CCC-1967.
2. LA County EDRs that currently display with 'Was In Foster Care' = "Yes" in the **Non-MAGI Referral** section never actually sent the 'WasInFosterCareInd' to CalHEERS and was erroneously displaying on the MAGI Person Detail page. There will be no conversion of this value to display in the **Individual Demographics** section.
3. The Former Foster Youth changes to the display on MAGI Person Detail page, and the FFY outbound eHIT mapping logic does not change the existing Medi-Cal EDBC logic that determines when a MAGI Determination is required for an FFY individual.

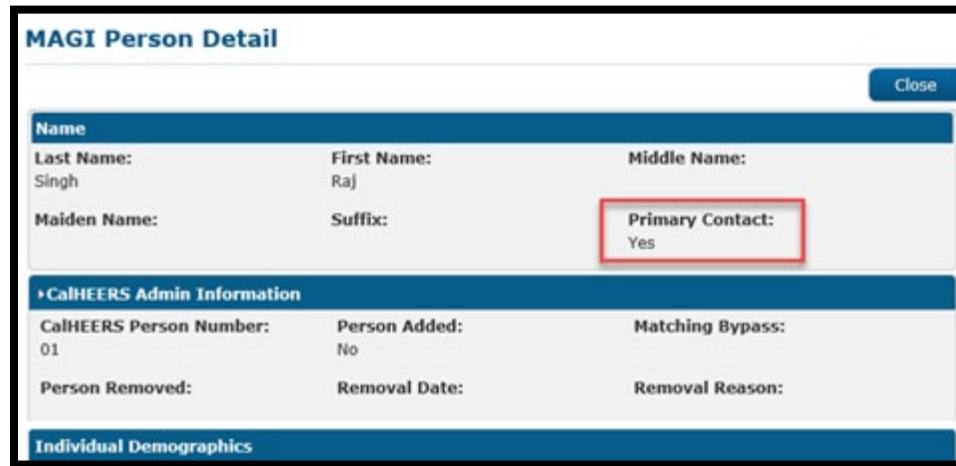
2 RECOMMENDATIONS

2.1 MAGI Person Detail

2.1.1 Overview

The MAGI Person Detail page is now streamlined, and duplicate fields are removed.

2.1.2 MAGI Person Detail Mockup



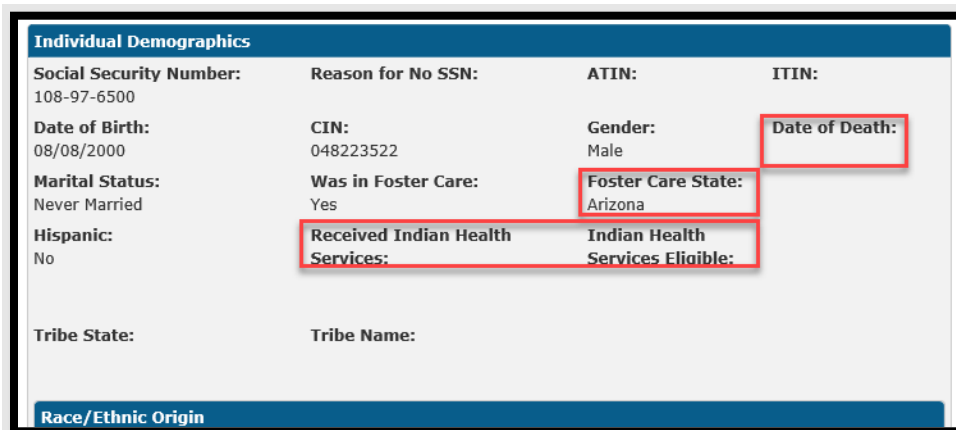
The mockup shows the 'MAGI Person Detail' page with a 'Close' button in the top right. The 'Name' section contains fields for Last Name (Singh), First Name (Raj), Middle Name, Maiden Name, Suffix, and Primary Contact (Yes). The 'CalHEERS Admin Information' section contains fields for CalHEERS Person Number (01), Person Added (No), Matching Bypass, Person Removed, Removal Date, and Removal Reason. The 'Individual Demographics' section is partially visible at the bottom.

Name		
Last Name:	First Name:	Middle Name:
Singh	Raj	
Maiden Name:	Suffix:	Primary Contact:
		Yes

CalHEERS Admin Information		
CalHEERS Person Number:	Person Added:	Matching Bypass:
01	No	
Person Removed:	Removal Date:	Removal Reason:

Individual Demographics			
Social Security Number:	Reason for No SSN:	ATIN:	ITIN:
108-97-6500			
Date of Birth:	CIN:	Gender:	Date of Death:
08/08/2000	048223522	Male	
Marital Status:	Was in Foster Care:	Foster Care State:	
Never Married	Yes	Arizona	
Hispanic:	Received Indian Health Services:	Indian Health Services Eligible:	
No			
Tribe State:	Tribe Name:		

Figure 2.1.2.1 – MAGI Person Detail page – After with updates to 'Name' and 'CalHEERS Admin Information' sections



The mockup shows the 'Individual Demographics' section of the 'MAGI Person Detail' page. It contains fields for Social Security Number, Reason for No SSN, ATIN, ITIN, Date of Birth, CIN, Gender, Date of Death, Marital Status, Was in Foster Care, Foster Care State, Hispanic, Received Indian Health Services, Indian Health Services Eligible, Tribe State, and Tribe Name. The 'Race/Ethnic Origin' section is partially visible at the bottom.

Individual Demographics			
Social Security Number:	Reason for No SSN:	ATIN:	ITIN:
108-97-6500			
Date of Birth:	CIN:	Gender:	Date of Death:
08/08/2000	048223522	Male	
Marital Status:	Was in Foster Care:	Foster Care State:	
Never Married	Yes	Arizona	
Hispanic:	Received Indian Health Services:	Indian Health Services Eligible:	
No			
Tribe State:	Tribe Name:		

Race/Ethnic Origin	

Figure 2.1.2.2 – MAGI Person Detail page – After with updates to 'Individual Demographics' section

▼ Additional Information		
Applying for Health Coverage: Yes	Full MC Determination Requested: No	Third Party Liability: No
DDSD Disability Indicator:	SSA Disability Indicator:	Deprivation: No
Military/Veteran: No	Spouse or Parent is Military/Veteran: No	Full Time Student: No

▼ Contact Information		
Preferred Method of Communication: Regular Mail	Preferred Written Language: English	Preferred Spoken Language: English

▼ Address Information				
Physical Address same as Primary's: No	Mailing Address same as Primary's: No	Residing Outside Country/US:		
Type	Address	County	Begin Date	End Date
Physical	123 MAIN ST NORWALK, CA 90650	Los Angeles	11/02/2020	02/04/2021
Mailing	123 MAIN ST NORWALK, CA 90650	Los Angeles	11/02/2020	02/04/2021

Temporary Out of the State: No	No Permanent Home Address: No
-----------------------------------	----------------------------------

▼ Phone Numbers

Figure 2.1.2.3 – MAGI Person Detail page – After with updates to 'Additional Information' and 'Address Information' sections

▼ Relationships		
Person 1	Relationship	Person 2
Singh, Raj 21M	Parent (Biological/Adoptive)	Singh, Priya 3F

Figure 2.1.2.4 – MAGI Person Detail page – with updates to 'Relationships' section

▼ Tax Filer Information		
Primary Tax Filer: Yes	Expected to be Required to File Taxes this year: Yes	Plan to File Taxes this year: Yes
Expected Filing Status: Head of Household	Claimed as a Dependent: No	Expect to be Claimed by NCP: No
Tax Filing Status Association:	Claimed as a Dependent by:	NCP is not on the Application: No
Caretaker:		
<div style="border: 1px solid red; padding: 2px;"> Tax Dependents Singh, Priya 3F </div>		
Non-MAGI Referrals		
Blind or Disabled: No	Temporary Disability: No	Long Term Care/HCBS: No
Intended To Return Home: No	Other: No	Long Term Care Request: No
Other Health Care		
Enrolled: Employer Sponsored Insurance Premium:	Current or Offered Health Program: ESI Premium Frequency:	Offered ESI:
Minimum Standard Value:	Expected Changes To Current Coverage:	Term Date Of Current Or Offered Coverage:
Received Medicare Benefits:	Employer Name:	
Free Medicare Part A:	Affordability Standards:	

Figure 2.1.2.5 – MAGI Person Detail page –After with ‘ACA Information’ and ‘Applying for Health Coverage’ sections removed, and updates to ‘Tax Filer Information’ and ‘Non-MAGI Referrals’ sections

2.1.3 Description of Changes

1. **Name** section

- a. Move ‘Primary Contact’ from **ACA Information** section up to **Name** section. Position to the right of ‘Suffix’ and under ‘Middle Name’

2. **CalHEERS Admin Information** section

- a. Move ‘CalHEERS Person Begin Date’, ‘Case Person Begin Date’, and ‘Case Person End Date’ from **ACA Information** section up to **CalHEERS Admin Information** section. Position as last row.

3. **Individual Demographics** section

- a. Remove 'Language', 'Birth Country', and 'US Date of Entry' fields; none of these fields are used in eHIT.
- b. Move 'Date of Death' from below **Optional SOGI** section up to the **Individual Demographics** section where 'Language' was positioned.
- c. Update 'Foster Care State' to display the description for the State value instead of the two-character code.
 - i. Add a new Code Table (CT_485) for the following Former Foster Care State eHIT values:

eHIT Code	Description
AT	An American Indian or Alaska Native Tribe
DK	I don't know
US	US Territories

- ii. Update the 'Foster Care State' value to display the description from either the State Codes table (CT_241) or the new values from 2.1.3.3.c.i. (CT_485)
 - 1. If the EDR or DER Foster Care State code exists in the State Codes table (CT_241), display the Long Decode Name;
 - 2. Otherwise, display the Description from the code table created in 2.1.3.3.c.i. (CT_485)
- d. Rearrange the remaining fields per the mockup in **Figure 2.1.2.2**

4. **Additional Information** section

- a. Remove the following fields as they are duplicates of fields in the **Non-MAGI Referral** section.
 - i. 'Other'
 - ii. 'Intended to Return Home'
 - iii. 'Blind or Disabled'
 - iv. 'Long Term Care'
 - v. 'Long Term Care Request'
 - vi. 'Temporary Disabled'
- b. Rearrange the remaining fields per the mockup in **Figure 2.1.2.3**

5. **Address Information** section

- a. Add 'County' column positioned between 'Address' and 'Begin Date'. The 'County' field will display the County name (CT_15) for the Physical and/or Mailing address.

6. **Relationships** section

- a. Update the format of the 'Person 1' and 'Person 2' names to be CalSAWS standard name format '<Last Name>, <First Name> <Age><Gender>'

Technical Note: The **Relationships** section will have the same look as the ICT External Person Detail page.

7. **ACA Information** section

- a. Remove **ACA Information** section completely. This includes removing the following fields and subsections:
 - i. 'Primary Contact' - moved to **Name** section with Recommendation 2.1.3.1.a.
 - ii. 'CalHEERS Person Begin Date', 'Case Person Begin Date', and 'Case Person End Date' - moved to **CalHEERS Admin Information** section with Recommendation 2.1.3.2.a. these fields have no logic in eHIT and are always blank. If logic is added to the fields in a future SCR, the fields will be added to the page accordingly.
 - iii. 'Person Date of Death' - this field is duplicated. 'Date of Death' displays in **Individual Demographics** section.
 - iv. 'Applying for Health Coverage' - this field is duplicated. 'Applying for Health Coverage' displays in **Additional Information** section.
 - 1. 'Begin Date' and 'End Date' - these fields have no logic in eHIT and are always blank. If logic is added to the fields in a future SCR, the fields will be added to the page accordingly.

8. **Tax Filer Information** section

- a. Promote **Tax Filer Information** subsection to be its own section (outside of what used to be **ACA Information** section).
 - i. Add **Tax Dependents** subsection under 'Caretaker' field. The **Tax Dependents** subsection lists the name(s) of the tax dependents of the tax filer. Each tax dependent is listed on a separate row. The name format is '<Last Name>, <First Name> <Age><Gender>'

Technical Note: The **Tax Dependents** section will have the same look as the ICT External Person Detail page.

9. **Non-MAGI Referrals** section

- a. Promote the **Non-MAGI Referrals** subsection to its own section (outside of what used to be **ACA Information** section).
 - i. Remove 'Was in Foster Care' – this field is outdated. This is no longer sent in the **Non-MAGI Referrals** section and instead is sent and received as 'Was in Foster Care' in **Individual Demographics** section and is communicated in both an EDR and DER.
 - ii. Update the label for 'Long Term Care' to now read 'Long Term Care/HCBS'

2.1.4 Page Location

EDR

In the context of a case

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility→Request MAGI→MAGI Request Detail→Name hyperlink

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility→Determination hyperlink→Request ID hyperlink→MAGI Request Detail→Name hyperlink

- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** IAT Summary→Initiated Date hyperlink→Request ID hyperlink→MAGI Request Detail→Name hyperlink

Not In the context of a case

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI→MAGI Referral Search→Referral Date hyperlink→MAGI Referral Summary→Request ID hyperlink→MAGI Request Detail→Name hyperlink

DER

In the context of a case

- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** IAT Summary→Initiated Date hyperlink→MAGI Referral Detail→Name hyperlink

Not In the context of a case

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI→MAGI Referral Search→Referral Date hyperlink→MAGI Referral Detail→Name hyperlink

2.1.5 Security Updates

No changes

2.1.6 Page Mapping

Update page mapping to reflect the updated fields and sections.

2.1.7 Page Usage/Data Volume Impacts

No changes

2.2 ICT External Person Detail page

2.2.1 Overview

The ICT External Person Detail page now displays the correct Foster Care information, 'County' displays with the address, 'Date of Death' is moved to an easier place to find, and 'HCBS' is added to 'Long Term Care' for the Non-MAGI Referral.

2.2.2 ICT External Person Detail Mockup

Individual Demographics

Social Security Number: 111-11-1111	Reason for No SSN:	ATIN:	ITIN:
Date of Birth: 01/01/1983	CIN: XXXXX321G	Gender: Male	Date of Death:
Marital Status:	Was in Foster Care: Yes	Foster Care State: California	Language: English
Hispanic: No	Birth Country: United States	US Entry Date:	
Tribe State:	Tribe Name:		

Has a person gotten a service from the Indian Health Service through a tribal health program through a... one of the...

Vital Statistics

Identification Document Type: United States Passport - recorded without limitation	Identification Document Number:
Citizenship Document Type: U.S. Public Birth Record recorded before age 5	Citizenship Document Number:

Contact Information

Preferred Method of Communication:	Preferred Written Language:	Preferred Spoken Language:
---	------------------------------------	-----------------------------------

Address Information

Type	Address	County	Begin Date	End Date
Physical	123 MAIN ST NORWALK, CA 90650	Los Angeles	02/06/2021	
Mailing	123 MAIN ST NORWALK, CA 90650	Los Angeles	02/06/2021	

Temporary Out of the State: No	No Permanent Home Address: No
--	---

Figure 2.2.2.2 – ICT External Person Detail page – After 'Address Information' sections

Non-MAGI Referrals		
Blind or Disabled:	Temporary Disability:	Long Term Care/HCBS:
No	No	No
Intended To Return Home:	Other Indicator:	Long Term Care Request:
No	No	No

Figure 2.2.2.3 – ICT External Person Detail page –After 'Non-MAGI Referrals' section

2.2.3 Description of Changes

1. **Individual Demographics** section
 - a. Move 'Language' down one row.
 - b. Move 'Date of Death' from below **Vital Statistics** section up to the **Individual Demographics** section where 'Language' was positioned.
 - c. Update 'Foster Care State' to display the description for the State value instead of the two-character code.
 - i. Update the 'Foster Care State' value to display the description from either the State Codes table (CT_241) or the new values from 2.1.3.3.c.i. (CT_485)
 1. If the EDR or DER Foster Care State code exists in the State Codes table (CT_241), display the Long Decode Name;
 2. Otherwise, display the Description from the code table created in 2.1.3.3.c.i. (CT_485)

2. Address Information section

- a. Add 'County' column positioned between 'Address' and 'Begin Date'. The 'County' field will display the County name (CT_15) for the Physical and/or Mailing address.

3. Non-MAGI Referrals section

- a. Remove 'Was in Foster Care' – this field is outdated.
- b. Update the label for 'Long Term Care' to now read 'Long Term Care/HCBS'

2.2.4 Page Location

- **Global:** Case Info
- **Local:** eTools
- **Task:** Incoming ICT→ICT Detail→Name hyperlink in **All People Associated with the ICT** section

2.2.5 Security Updates

No changes

2.2.6 Page Mapping

Update page mapping to reflect the updated fields.

2.2.7 Page Usage/Data Volume Impacts

No changes

2.3 eHIT

2.3.1 Overview

Update the outbound eHIT mapping logic to also populate and send FFY information based on the Requested Medi-Cal Type 'Former Foster Youth' and/or the Foster Care program active on the 18th birthday in addition to OPA for Foster Care.

2.3.2 Description of Change

1. Update outbound eHIT mapping logic to also populate and send FFY information based on the Requested Medi-Cal Type 'Former Foster Youth' and/or the Foster Care program active on the 18th birthday in addition to the current logic that populates based on the 'Foster Care' record in OPA.
 - a. If the individual was Active on FC (in any case in CalSAWS) on their 18th birthday, send in an EDR:
 - Was in Foster Care (WasInFosterCareInd) = Yes
 - Foster Care State (FormerFosterPersonLocationCode) = California (CA)
 - Former Foster Youth Admin Verification = Yes (SAWSAdministrativeVerification.AdministrativeVerificationType = WFC) and (SAWSAdministrativeVerification.AdministrativeVerificationInd = Y)
 - b. If the individual has a Requested Medi-Cal Type 'Former Foster Youth' for the EDR benefit month, send in an EDR:
 - Was in Foster Care (WasInFosterCareInd) = Yes
 - Foster Care State (FormerFosterPersonLocationCode) = I Don't Know (DK)
 - Former Foster Youth Admin Verification not sent
 - c. If more than one record exists that indicates FFY, send in the EDR the value(s) based on **OPA first**, FC program **first**, **OPA** second and lastly Requested Medi-Cal Type.
 - d. Save the value sent in the EDR for 'WasInFosterCareInd' to ICT_PERS_ATTR.ICT_ELMNT_CODE = 'B3'; no longer save to CH_NON_MAGI.FOSTER_CARE_IND.
 - e. Save the value sent in the EDR for 'FormerFosterPersonLocationCode' to ICT_PERS_ATTR.ICT_ELMNT_CODE = 'B4'

Note: There is no way to specify 'An American Indian or Alaska Native Tribe' Foster Care State for an EDR, but if received on a DER the description will display on the MAGI Person Detail page.

2.3.3 Interface Partner

CalHEERS

2.3.4 Schema Version

eHIT Schema Version 17

2.4 Automated Regression Test

2.4.1 Overview

Review and update existing MAGI / Medi-Cal regression test scripts to remove references to the removed fields, and to correct the section identifiers for the moved fields.

2.4.2 Description of Change

1. Remove script references to the following fields on the MAGI Person Detail page:
 - a. Language
 - b. Birth Country
 - c. US Entry Date
 - d. Person Begin Date
 - e. Applying for Health Coverage table
 - f. ACA Information section contents
 - g. Was in Foster Care (duplicate)
2. Update the section identifiers for the following fields:
 - a. Primary Contact
 - b. CalHEERS Person Begin Date
 - c. Case Person Begin Date
 - d. Case Person End Date
 - e. Tax Filer Information section contents

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.9	The LRS shall display summary and detailed interface LRS Data that has been received from external systems, as specified by COUNTY.	The MAGI Person Detail page is updated to remove duplicates and display the CalSAWS data both sent to and received by CalHEERS in the eHIT interface.
2.8.1.7	The LRS shall determine when an individual is eligible for special Medi-Cal coverage, including Sneed, Retro Medi-Cal, 1931(b), QMB, SLMB, DDS, Pickle, Medi-Cal bridging, and STP, and shall ensure that all required information is collected, eligibility is determined, and share of cost is computed, as specified by COUNTY.	Former Foster Youth information available in CalSAWS will now be communicated to CalHEERS in an EDR so CalHEERS can evaluate the FFY individual eligible to the FFY Aid Code 4M.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-221791

Updates to MC Auto-Disc EDBC Sweep and
Auto-Rescind

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Feliciano-Nelson
	Reviewed By	Maksim Volf, Derek Goering, William Baretsky, Geetha Ramalingam, Krishna Akula, Naga Chindaluru

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/3/2021	.01	Draft	M. Feliciano
4/21/2021	1.0	Draft Reviewed with MC Analysts	M. Feliciano
7/19/2021	1.1	Design Clarification: 1. Removed references to the new batch numbers for All County Enable/Disable eHIT outbound transaction queue except in Recommendation 2.3.2. The new batch numbers will be in the 900 series instead of 600. 2. Corrected typos	Renee Gustafson
07/29/2021	1.2	Content Revision: 1. Added Recommendation 2.1.2.3 to handle NA for FTC-RE on Mixed MAGI/Non-MAGI cases where all MAGI Individuals are MAGI EL/CE on the RE/RM DER and the Non-MAGI packet is not returned.	Renee Gustafson
08/10/2021	1.3	Content Revision: 1. Added visual for 2.1.2.2	Renee Gustafson
09/01/2021	1.5	Content Revision: 1. Added Recommendation 2.1.2.2 to remove the existing condition that prevents processing programs in batch with at least one non-MAGI person 2. Added Rec 2.1.2.4 to update deemed logic to look at program level instead case level 3. Added Rec 2.1.2.5 to check both NA and RE/RM DER to determine Individual- or program-level disc	Renee Gustafson

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1 OVERVIEW

This SCR updates the CalSAWS batch process for Medi-Cal discontinuances for Negative Action 'Failed to Complete Redetermination' to process cases with multiple Medi-Cal blocks and updates the Medi-Cal Auto-Rescind Sweep job to also identify individuals discontinued for 'Failed to Complete Redetermination' but have a person status other than discontinued and the program RE Due Date was moved forward from some other person remaining on the program who was successfully renewed.

1.1 Current Design

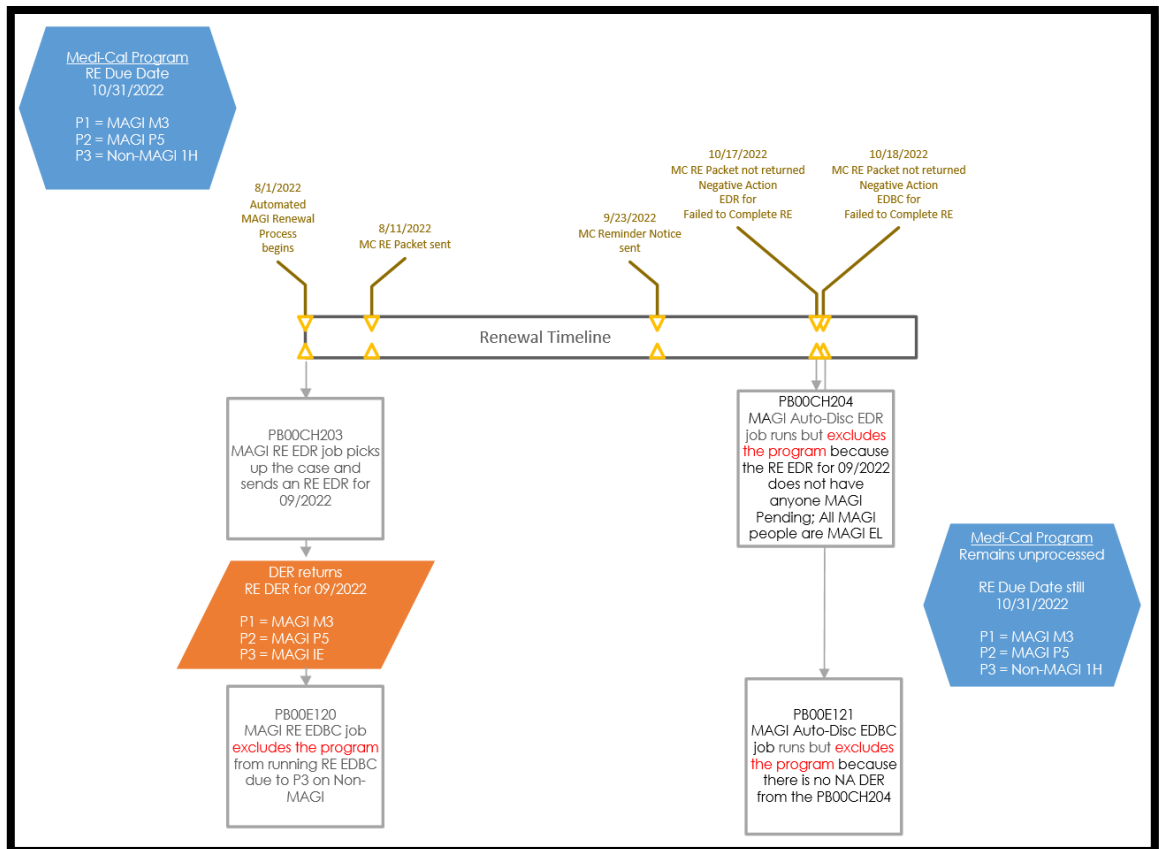
Medi-Cal Auto-Discontinuance

With SCR CA-209422 the Batch MAGI Auto-Discontinuance sweep job was updated to allow processing of cases with multiple Medi-Cal program blocks as long as the RE Due Dates were aligned. The Negative Action (NA) EDR sent from the MAGI Auto-Discontinuance job chooses the MC Program to send on the EDR based on the MC Program assigned to the prior EDR on the case.

If a case has multiple Active Medi-Cal program blocks the Medi-Cal Auto-Discontinuance Batch EDBC Sweep job (PB00E121) targets only the program block associated to the NA EDR for EDBC processing; the other Active Medi-Cal program block(s) is not processed through EDBC. Mixed cases with MAGI/Non-MAGI are excluded from EDBC processing.

This leaves the non-processed Medi-Cal program block(s) in an overdue Renewal situation and there is no notification to the user.

For mixed MAGI/Non-MAGI Medi-Cal cases, when the Renewal (RE/RM) DER has no individuals MAGI Pending, the Batch MAGI Auto-Discontinuance sweep job does not identify the case to send a NA EDR since the MAGI individuals all have final eligibility; this is correct. However, if the Medi-Cal Auto-Discontinuance Batch EDBC sweep job identifies a case for NA EDBC processing, it checks for a corresponding NA DER if the case has at least one MAGI individual. This leaves mixed MAGI/Non-MAGI Medi-Cal cases excluded from the Medi-Cal Auto-Discontinuance Batch EDBC sweep when all MAGI individuals are MAGI Eligible/Conditionally Eligible on the Renewal DER, and the Non-MAGI individual didn't return the RE Packet. The Medi-Cal program(s) remain in an overdue Renewal situation and there is no notification to the user.



Medi-Cal Auto-Rescind

SCR CA-202862 added a new Batch MAGI/EDBC Auto-Rescind Sweep job (PB00E155) that automatically rescinds through batch an individual's eligibility if they were discontinued for 'Failed to Complete Redetermination' effective the first of the month following the RE due date and the RE packet is marked 'Received' or 'Not Applicable' in the system prior to the discontinuance date.

The Batch MAGI/EDBC Auto-Rescind Sweep job process looks specifically for individuals who were discontinued for 'Failed to Complete Redetermination' with a 'Discontinued' status, but it doesn't check for individuals who lost coverage for 'Failed to Complete Redetermination' but left Active FRI on the program due to other Active members. In Release 20.11, SCR CA-209422 enhanced the Batch Medi-Cal Auto-Discontinuance process to allow discontinuances for 'Failed to Complete Redetermination' at an individual level. This individual-level discontinuance allows an individual to be discontinued from the Medi-Cal program for 'Failed to Complete Redetermination' if CalHEERS determined them MAGI Medi-Cal Pending during the renewal process and they failed to return the Medi-Cal RE Packet while allowing other individuals to complete the annual renewal if CalHEERS determined them MAGI Medi-Cal Eligible/Conditionally Eligible.

When the Batch Medi-Cal Auto-Discontinuance processes discontinuances for 'Failed to Complete Redetermination' at an individual level, the RE Due Date on the Medi-Cal program is advanced because of the individuals CalHEERS determined MAGI Medi-Cal Eligible/Conditionally Eligible. If the Medi-Cal Renewal packet is marked 'Received' or 'Not Applicable' in the system prior to the discontinuance date, the Batch MAGI/EDBC Auto-Rescind Sweep job does not target the case because the RE Due Date is beyond the month currently targeted by the batch.

For example: When CalHEERS Determines a child MAGI Medi-Cal Eligible and a parent MAGI Medi-Cal Discontinued for 'Failed to Complete Redetermination', the Batch Medi-Cal Auto-Discontinuance processes discontinuances for 'Failed to Complete Redetermination' at an individual level and only the parent is Discontinued. The child remains Active on Medi-Cal and the parent is switched to Active FRI for budgeting purposes. The RE Due Date is advanced for the program because the child's renewal is complete. If the parent then returns the MC RE Packet prior to the effective date of the discontinuance, the Medi-Cal Auto-Rescind process does not identify this program for rescission because the parent remained with an 'Active' status (even though they are FRI) and because the RE Due Date is advanced.

CalHEERS Outbound eHIT Transaction Queue

The jobs to enable and disable the CalHEERS outbound eHIT transactions queue are designated with a batch number specific to LA county (PB19C600 - enable | PB19C601 - disable) even though the queue is not county specific.

1.2 Requests

Medi-Cal Auto-Discontinuance

Update the criteria for the Medi-Cal Auto-Discontinuance Batch EDBC sweep job (PB00E121) to handle cases with multiple Medi-Cal program blocks and process the Medi-Cal EDBC using the NA DER received from the MAGI Auto-Discontinuance sweep job (PB00CH204), if exists, for all Medi-Cal program blocks. Allow the batch to process EDBC for mixed MAGI/Non-MAGI cases.

For cases with mixed MAGI/Non-MAGI Medi-Cal, identify the Medi-Cal program(s) for NA EDBC processing when the MC RE Packet is not returned even if all MAGI individuals are MAGI Eligible/Conditionally Eligible on the Renewal DER and there is no NA DER from the MAGI Auto-Discontinuance sweep job; the Non-MAGI individuals will be discontinued for Failed to Complete Redetermination and the MAGI individuals will be renewed.

Medi-Cal Auto-Rescind

Update the Auto-Rescind MC MAGI/EDBC sweep job to rescind programs with the RE Due Date advanced from individual-level discontinuance if at least one individual was discontinued for 'Failed to Complete Redetermination' and the packet is returned or marked 'Not Applicable' prior to the date of discontinuance.

Update the Auto-Rescind MC MAGI/EDBC sweep job to handle cases with multiple MC Program Blocks when at least one person is discontinued for 'Failed to Complete Redetermination' to use the program ID from the prior EDR when sending the rescind EDR for cases with multiple MC Program Blocks.

Update Auto-Rescind EDBC logic to include a link to the DER used in the Auto-Rescind EDBC based on the DER in the Reference EDBC.

CalHEERS Outbound eHIT Transaction Queue

Update the job numbers that enable and disable the CalHEERS outbound eHIT transaction queue from LA county specific (PB19C600 - enable | PB19C601 - disable) to be for all counties. There are no functional changes with the jobs themselves since the jobs are already working for all counties.

1.3 Overview of Recommendations

1. The Medi-Cal Auto-Discontinuance Batch EDBC sweep job (PB00E121) identifies cases with a Negative Action for 'Failed to Complete Redetermination' to process through batch EDBC. The sweep job will be updated to identify and process all open Medi-Cal program blocks in a case if the RE Due Dates are aligned, not only the Medi-Cal program assigned to the NA DER, if exists. Cases with mixed MAGI/Non-MAGI Medi-Cal, will be identified for EDBC processing when the MC RE Packet is not returned even when there is no NA DER because all MAGI individuals are MAGI Eligible/Conditionally Eligible on the Renewal DER.
2. The Medi-Cal Batch MAGI/EDBC Auto-Rescind Sweep job (PB00E155) to targets Medi-Cal programs where everyone was discontinued for 'Failed to Complete Redetermination'. The sweep job will be updated to rescind Medi-Cal programs if at least one individual was discontinued for 'Failed to Complete Redetermination' if the packet is returned or marked 'Not Applicable' prior to the effective date of discontinuance. The sweep job will also be updated to handle cases with multiple MC Program Blocks.
3. Update the job numbers to enable and disable the CalHEERS outbound eHIT transactions queue from LA county specific (PB19C600 - enable | PB19C601 - disable) to be for all counties.

1.4 Assumptions

1. There will be no changes to current NOAs.
2. CalHEERS does not yet have functionality to rescind the discontinuance and restore benefits from one request. The 'Rescind' EDR only removes the Negative Action for 'Failed to Complete Redetermination'.
3. The RE Due Date is unchanged from the Auto-Rescind process.

2 RECOMMENDATIONS

2.1 Medi-Cal Auto-Discontinuance Batch EDBC Sweep

2.1.1 Overview

The Medi-Cal Auto-Discontinuance Batch EDBC sweep job (PB00E121) identifies cases with a Negative Action for 'Failed to Complete Redetermination' to process through batch EDBC. The sweep job will be updated to identify and process all open Medi-Cal program blocks in a case if the RE Due Dates are aligned, not only the Medi-Cal program assigned to the NA DER, if exists. Cases with mixed MAGI/Non-MAGI Medi-Cal, will be identified for EDBC processing when the MC RE Packet is not returned, even when there is no NA DER because all MAGI individuals are MAGI Eligible/Conditionally Eligible on the Renewal DER.

2.1.2 Description of Change

Cases with a Negative Action DER

1. Update the Medi-Cal Auto-Discontinuance Batch EDBC sweep job (PB00E121) to insert all Medi-Cal program blocks with aligned RE Due Dates **for Negative Action EDBC processing** when a Negative Action DER is received from the MAGI Auto-Discontinuance sweep job (PB00CH204).

Technical Note: Process each program block per current functionality implemented in CA-209422 which identifies discontinuances by program and/or individuals **using the Negative Action DER just received from the Batch MAGI Auto-Discontinuance sweep job (PB00CH204).**

2. Remove the condition that prevents processing EDBC for the program if there is at least one Non-MAGI individual on the case.

Cases without a Negative Action DER

3. Add new criteria to identify additional mixed MAGI/Non-MAGI Medi-Cal cases where the MC RE Packet(s) was sent and not returned and the MC Program(s) was not identified by the Batch MAGI Auto-Discontinuance sweep job (PB00CH204) because there are no MAGI Pending individuals on the Renewal (RE/RM) DER:
 - a. The Medi-Cal Program(s) RE Due Date is the come-up month; the same date targeted by the Medi-Cal Auto-Discontinuance Batch EDBC sweep job.
 - b. At least one of the following MC RE Packet(s) were sent and none were returned. This means no MC RE Packet(s) has a received date and/or not marked 'Not Applicable'. The MC RE Packet(s) have submit month equal to the month of the targeted RE Due Date.

Customer Reporting Report Type (CT_329)

Non-MAGI RE Packet (MR)

Mixed Household RE Packet (MI)

MAGI RE Packet (MG)

Note: Packets with latest status as 'Generated' and 'Error' are not considered packets that were sent and should not be considered when determining if a "Sent" packet was not returned.

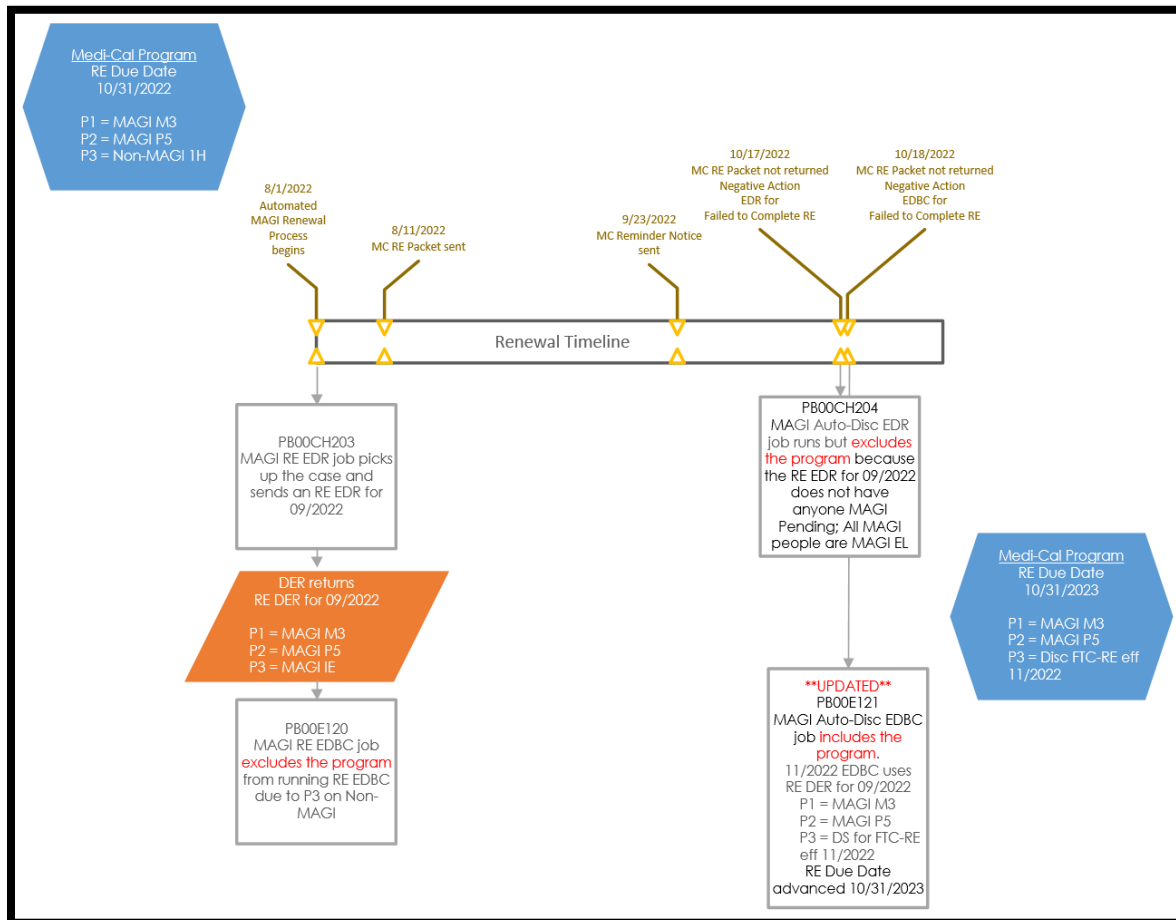
- c. The MC Reminder Notice (CSF 164) was sent after the identified MC RE Packet(s) was sent.
- d. There is at least one MAGI Medi-Cal beneficiary on a MC Program with the targeted RE Due Date.
- e. The valid DER for the case is a Renewal (RM/RE) DER.
 - i. The Renewal DER is for benefit month equal to or greater than two months prior to the EDBC benefit month targeted by the Medi-Cal Auto-Discontinuance Batch EDBC sweep job.

For Example: If the Medi-Cal Auto-Discontinuance Batch EDBC sweep job is targeting Medi-Cal programs with RE Due Date 09/30/2022, the batch will run 10/2022 EDBC benefit month. The Renewal DER can be for 08/2022, 09/2022 or 10/2022.
 - ii. The Renewal DER latest status is 'Reviewed' or 'Complete'.
 - iii. The Renewal DER has no MAGI Medi-Cal Pending Eligible.

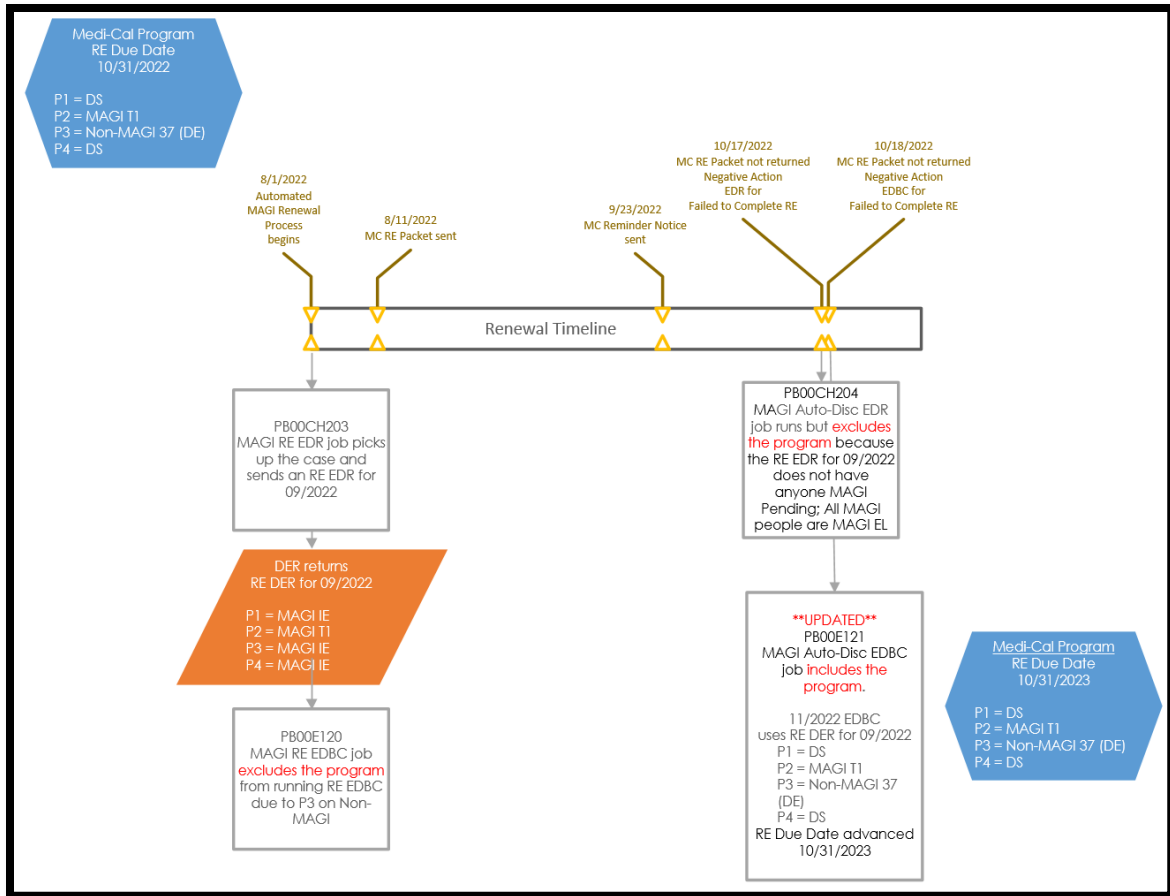
Technical Note: Process each program block per current functionality implemented in CA-209422 which identifies discontinuances by program and/or individuals.

Update Batch

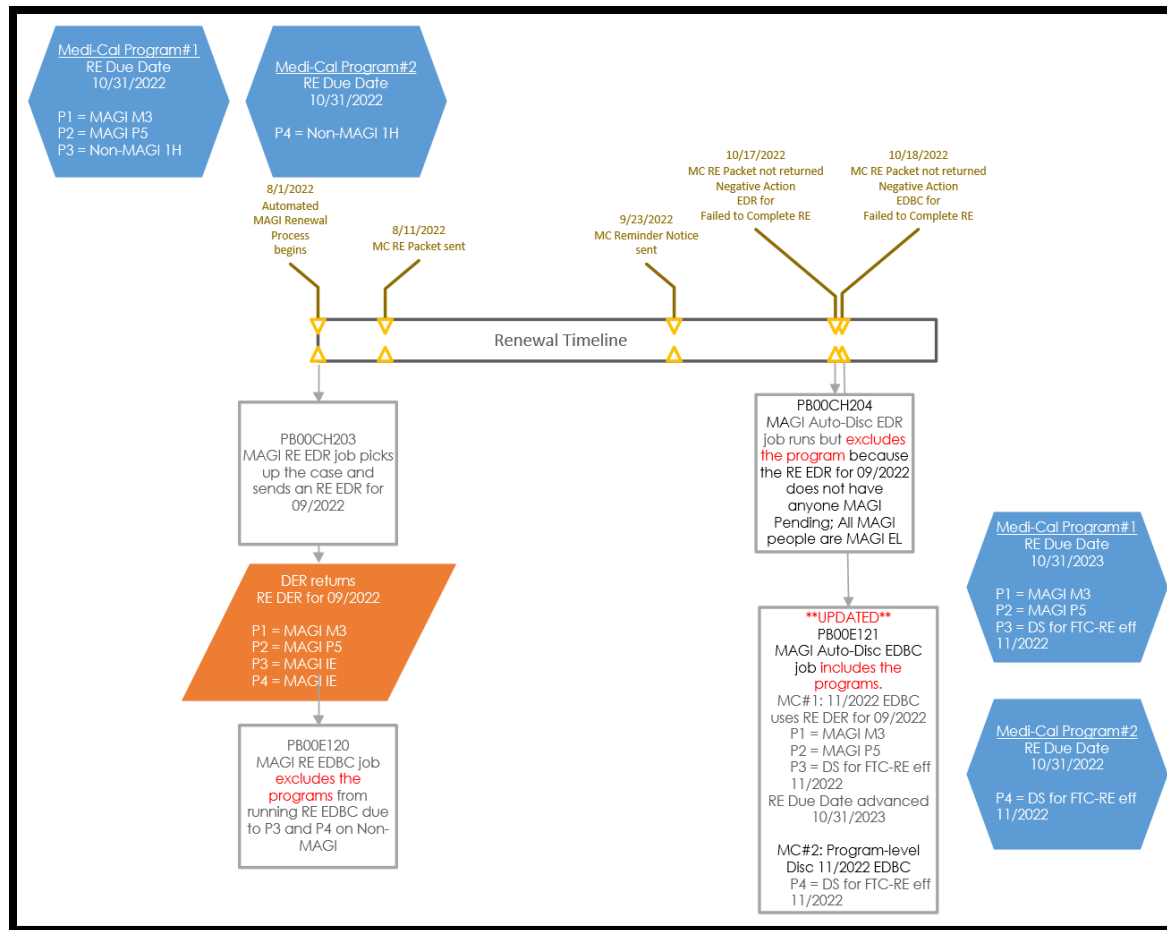
4. Update the deemed infant condition to check if there is a deemed infant at the program level instead of the case level.
 - a. For individual-level discontinuance, set the EDBC Run Reason to RE even if there is a deemed infant on the program.
5. Update the logic that determines if a MC program will be processed at an Individual-level discontinuance versus program-level discontinuance to check the MAGI eligibility on the valid DER (either the NA or RE/RM DER).
 - b. If one or more of below conditions are true, process the program with individual-level discontinuance
 - i. One or more individuals on the program are MAGI EL/CE on the valid DER
 - ii. One or more individuals on the program are deemed
 - c. Otherwise process the program with program-level discontinuance



Example 2.1.2.1 Individual-Level Discontinuance with RE DER



Example 2.1.2.2 Individual-Level Discontinuance – with RE DER and Deemed infant



Example 2.1.2.3 Multiple Program Blocks; MC#1 – Individual-Level Discontinuance and MC#2 - Program-Level Discontinuance

2.1.3 Execution Frequency

No change

2.1.4 Key Scheduling Dependencies

No change

2.1.5 Counties Impacted

All counties

2.1.6 Data Volume/Performance

No significant increase.

2.1.7 Failure Procedure/Operational Instructions

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

2.2 Medi-Cal Auto-Rescind Batch MAGI/EDBC Sweep

2.2.1 Overview

The Medi-Cal Batch MAGI/EDBC Auto-Rescind Sweep job (PB00E155) targets Medi-Cal programs where everyone was discontinued for 'Failed to Complete Redetermination'. The sweep job will be updated to rescind Medi-Cal programs if at least one individual was discontinued for 'Failed to Complete Redetermination' if the packet is returned or marked 'Not Applicable' prior to the effective date of discontinuance. The sweep job will also be updated to handle cases with multiple MC Program Blocks.

2.2.2 Description of Change

Targeted Rescind Month Definition: When the system date is prior to the discontinuance for 'Failed to Complete Redetermination', the *Targeted Rescind Month* is the next month. If the system date is on date of the discontinuance for 'Failed to Complete Redetermination' through the 5th of the discontinuance month, the *Targeted Rescind Month* is the current month.

1. Update the Medi-Cal Batch MAGI/EDBC Auto-Rescind Sweep job (PB00E155) to:
 - a. identify MC Programs that have at least one Medi-Cal Person Discontinued or Active FRI for 'Failed to Complete Redetermination' in the *Targeted Rescind Month*.

Technical Note: For Active FRI look for the Closure of 'Failed to Complete Redetermination' as seen on the Individual Detail page or Application History page.

Note: No changes to the logic that identifies the applicable MC RE Packet.

- b. insert the identified MC Program(s) into SYS_TRANSACT with 'Rescind' Run Reason Code for Batch EDBC processing. Each MC Program will run in Single Program Mode. If a case has multiple MC programs identified, insert a record for each MC Program into SYS_TRANSACT with 'Rescind' Run Reason; each MC Program will run in 'Single Program' mode.

- c. reuse existing rescind methodology to properly rescind the person and (if applicable) program-level statuses of the identified Medi-Cal programs.
 - i. Insert 'Discontinue Rescind' events with Rescind Reason 'System Rescind' effective the Discontinued benefit month for all persons with a 'Discontinued' Event and the Event Reason of 'Failed to Complete Redetermination' for the *Targeted Rescind Month*
 - a. If the MC Program status is 'Discontinued', update the MC Program status to 'Pending' and each of the Person's status to 'Pending' for any person with a Discontinue status of 'Failed to Complete Redetermination' in the *Targeted Rescind Month*
 - b. If the MC Program status is Active, update the Person's status to 'Pending' for any person with a Discontinue status for 'Failed to Complete Redetermination' or Active FRI for 'Failed to Complete Redetermination' for the *Targeted Rescind Month*
- 2. Update the Medi-Cal Batch MAGI/EDBC Auto-Rescind Sweep job (PB00E155) to send a 'Rescind' EDR only for the program associated to the Negative Action EDR, if one exists for the *Targeted Rescind Month*.
 - a. If there is a Negative Action MAGI DER with at least one person with MAGI Discontinue for 'Failed to Complete Redetermination' for the targeted rescind month, insert only the MC Program associated to the NA EDR into CH_TRANSACTION with 'Rescind' Run Reason Code for Batch MAGI processing.

2.2.3 Execution Frequency

No change

2.2.4 Key Scheduling Dependencies

No change

2.2.5 Counties Impacted

All Counties

2.2.6 Data Volume/Performance

No change

2.2.7 Failure Procedure/Operational Instructions

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

2.3 Update CalHEERS Outbound eHIT Transactions Queue

2.3.1 Overview

Update the job numbers to enable and disable the CalHEERS outbound eHIT transactions queue from LA county specific (PB19C600 - enable | PB19C601 - disable) to be for all counties.

2.3.2 Description of Change

1. Update the job numbers for the CalHEERS outbound eHIT transactions queue from LA County-specific to All Counties as follows:
 - a. Rename PB19C600 (Enable CalHEERS outbound eHIT transaction queue) to PB00C900
 - b. Rename PB19C601 (Disable CalHEERS outbound eHIT transaction queue) to PB00C901

2.3.3 Execution Frequency

No change

2.3.4 Key Scheduling Dependencies

No change

2.3.5 Counties Impacted

All Counties

2.3.6 Data Volume/Performance

No change

2.3.7 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.14	The LRS shall determine which individuals must be included in the eligibility determination and take appropriate action(s), based on program rules.	<p>Update CalSAWS to auto-discontinue from the Medi-Cal program for Failed to Complete Redetermination the individuals who are MAGI Medi-Cal pending on the Renewal MAGI Determination when the renewal packet is not returned by the renewal date and advance the renewal for the individuals found MAGI Medi-Cal eligible/conditionally eligible.</p> <p>Update CalSAWS to handle mixed MAGI/Non-MAGI cases in the auto-discontinuance job when there is no NA DER due to all MAGI individuals MAGI EL/CE on the Renewal DER.</p>
2.9.1.7	The LRS shall allow a termination or denial to be rescinded or aid to be restored within a COUNTY-specified period of time, based on program rules.	Update CalSAWS to automatically process Medi-Cal Rescind through batch when the MC RE Packet is received prior to the Discontinuance date.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-223932

DDID 34

Task Mgt Task Export Reports

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/10/2021	1.0	Initial Revision	Rakan Ali
9/22/2021	1.1	Added section 2.4 to describe the behavior of the export icon.	Justin Dobbs

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1 OVERVIEW

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

1.1 Current Design

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

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

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

2 RECOMMENDATIONS

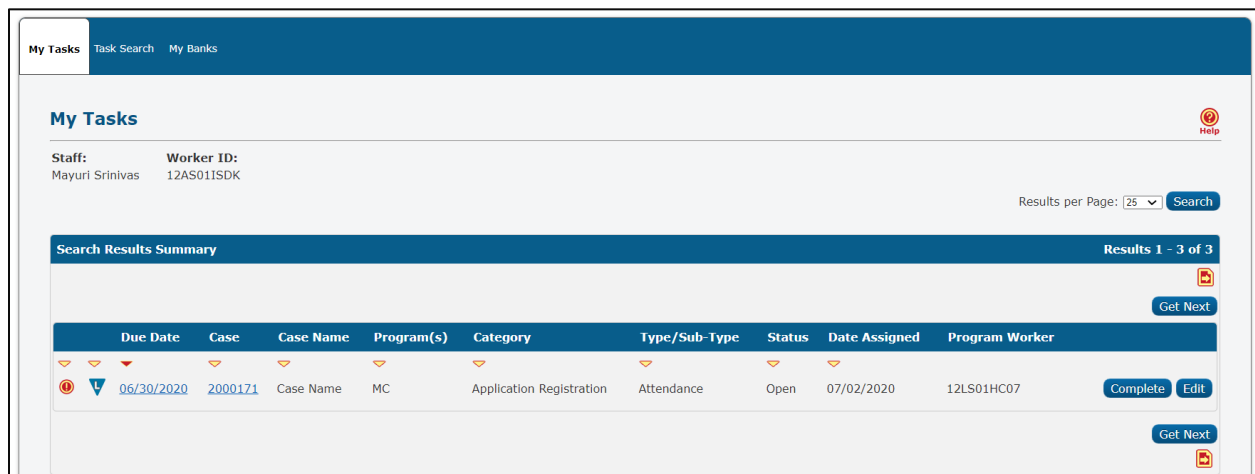
This section will outline recommendations to introduce export functionality to a set of Task Management components in the CalSAWS System.

2.1 My Tasks Page

2.1.1 Overview

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

2.1.2 My Tasks Page Mockup



2.1.3 Description of Changes

1. Add an Export icon to the My Tasks page (See Figure 2.1.2.1 for icon placement).
 - a. Export Icon – The Export icon generates a Task Search Export Report with the Tasks listed in the My Tasks page. The following graphical icon indicates the Export Icon:



2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A – No updates to security.

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

There are no expected page usage/data volume impacts.

2.2 Task Search Page

2.2.1 Overview

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

2.2.2 Task Search Page Mockup

Task Search

* - Indicates required fields

▼ Refine Your Search

Search

Case Number: 2000171 Select

Program: Select

Worker ID: 12AS01ISDK Select

Bank ID: Select

Office Name: Select

Unit ID: 00

Status: Assigned

Category: Select

Type: Select

Sub-Type: Select

Priority: Select

Newly Assigned: Select

Due Date From: To:

Assign Date From: To:

Completed/Voiced/Expired Date From: To:

Results per Page: 100 Search

Search Results Summary Results 1 - 3 of 3

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

Action: * Assign to Me

Remove Bank Assignment: No

Submit

Add Task

Figure 2.2.2.1 – Task Search Page with Export Icon Mockup

2.2.3 Description of Changes

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



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

2.2.4 Page Location

N/A

2.2.5 Security Updates

N/A – No updates to security.

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

There are no expected page usage/data volume impacts.

2.3 Task Reassignment Results List Page

2.3.1 Overview

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

2.3.2 Task Reassignment Results List Page Mockup

Task Reassignment Results List

Close

▼ Refine Your Search

Search

Run Begin Date:

Tasks Reassigned Min:

Run Result:

Run End Date:

Tasks Reassigned Max:

Results per Page: 25 Search

Search Results Summary


Results 1 - 25 of 52

1 2 3 Next

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

Figure 2.3.2.1 – Task Reassignment Results List Page Export Icon Mockup

2.3.3 Description of Changes

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

2.3.4 Page Location

N/A

2.3.5 Security Updates

N/A – No updates to security.

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

There are no expected page usage/data volume impacts.

2.4 Export Icon Behavior



Figure 2.4.1 – Export Processing Window - Processing

Once the processing is completed, the Processing message will update to "Complete" and display an additional message to indicate the total processing time formatted as "Time since document started: <minutes:seconds>". The resulting file will then be accessible at the bottom of the pop up window.

Note: The below figure is using an existing report as an example, which is why the resulting file name does not indicate an export.



Figure 2.4.2 – Export Processing Window - Complete

If the export icon is clicked multiple times, only a single popup window will be open and available at any one time. For example, if a user clicks the export icon and the pop up window opens, clicking the export again will refresh the currently open window with the new export request.

The Processing popup window is not new functionality. This function currently exists for a number of existing On-Request reports. The export function will use this functionality.

2.5 Task Search Export Report

2.5.1 Overview

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

2.5.2 Task Search Export Mockup

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

Figure 2.5.2.1 – Task Search Export - General Information Sheet Mockup

Case Number	Case Name	Program	Due Date	Category	Type	Sub-Type	Status	Priority	Expedited	Worker Assigned	Bank Assigned	Date Created	Worker Assigned Date	Completing/Voiding Worker	Date Voided	Date Completed	Long Description
2000171	Case Name	MC	08/01/2021	Application Registration	First Pend		Completed	Medium	Y	12LS001300		07/01/2021	08/01/2021			08/01/2021	
2000172	Case Name	MC	08/02/2021	Application Registration	Report		Completed	Medium	N	12LS001300		07/02/2021	08/02/2021			08/02/2021	
2000173	Case Name	MC	08/03/2021	Application Registration	Second Pend		Completed	Medium	N	12LS001300		07/03/2021	08/03/2021			08/03/2021	
2000174	Case Name	MC	08/04/2021	Application Registration	Vital Stats		Completed	Medium	N	12LS001300		07/04/2021	08/04/2021			08/04/2021	
2000175	Case Name	MC	08/05/2021	Application Registration	Application		Completed	Medium	Y	12LS001300	12LS01AE0TBK	07/05/2021	08/05/2021	12LS001300		08/05/2021	
2000176	Case Name	MC	08/06/2021	Application Registration	Report	IEVS Report	Completed	Medium	Y	12LS001300		07/06/2021	08/06/2021			08/06/2021	
2000177	Case Name	MC	08/07/2021	Application Registration	First Pend		Completed	Medium	N	12LS001300	12LS01AE0TBK	07/07/2021	08/07/2021	12LS001300		08/07/2021	
2000178	Case Name	MC	08/08/2021	Application Registration	Verification Received		Completed	Medium	Y	12LS001300	12LS01AE0TBK	07/08/2021	08/08/2021	12LS001300		08/08/2021	
2000179	Case Name	MC	08/09/2021	Application Registration	Application		Completed	Medium	N	12LS001300		07/09/2021	08/09/2021			08/09/2021	
2000180	Case Name	MC	08/10/2021	Application Registration	Vital Stats		Completed	Medium	Y	12LS001300		07/10/2021	08/10/2021			08/10/2021	
2000181	Case Name	MC	08/11/2021	Application Registration	Second Pend		Completed	Medium	Y	12LS001300		07/11/2021	08/11/2021			08/11/2021	
2000182	Case Name	MC	08/12/2021	Application Registration	Report		Completed	Medium	N	12LS001300		07/12/2021	08/12/2021			08/12/2021	
2000193	Case Name	MC	08/13/2021	Application Registration	Verification Received		Completed	Medium	N	12LS001300		07/13/2021	08/13/2021			08/13/2021	

Figure 2.5.2.2 – Task Search Export – Exported Data Sheet Mockup

2.5.3 Description of Change

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

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

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

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

b. Exported Data Sheet

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

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

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

2.5.4 Report Location

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

2.5.5 Counties Impacted

All CalSAWS counties are impacted.

2.5.6 Security Updates

N/A – No updates to security.

2.5.7 Report Usage/Performance

There are no expected page report usage/performance impacts.

2.6 Task Reassignment Results Export Report

2.6.1 Overview

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

2.6.2 Task Reassignment Results Export Mockup

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

Figure 2.6.2.1 – Task Reassignment Results - General Information Sheet Mockup

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

Figure 2.6.2.2 – Task Reassignment Results – Task Reassignment Sheet Mockup

2.6.3 Description of Change

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

a. General Information Sheet

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

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

b. Exported Data Sheet

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

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

2.6.4 Report Location

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

2.6.5 Counties Impacted

All CalSAWS counties are impacted.



2.6.6 Security Updates

N/A – No updates to security.

2.6.7 Report Usage/Performance

There are no expected page report usage/performance impacts

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Migration Requirements

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

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

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A



California Statewide Automated Welfare System

Design Document

CA-226492

Update San Bernardino County Warrant Control
Numbers from 7 to 10 digits

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ishrath Khan, Rainier de la Cruz
	Reviewed By	Sheryl Eppler , Duke Vang, Sidhant Garg

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/24/2021	1.0	Initial Revision	Ishrath Khan
9/16/2021	1.1	Content revision to add the State Date Warrant Print Reader	Duke Vang

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1 OVERVIEW

1.1 Current Design

Currently San Bernardino County Has Warrant Control Numbers that are 7 digits in length.

1.2 Requests

San Bernardino would like to increase their Warrant Control Numbers to 10 digits.

1.3 Overview of Recommendations

1. Update the length of Warrant Control Number field in the San Bernardino interfaces/batch jobs to 10 digits.
2. Update San Bernardino's Rush Warrant template to expand the Control Number field to fit 10 digits.

1.4 Assumptions

1. San Bernardino County will be responsible for updating the Rush warrant valuable inventory.

2 RECOMMENDATIONS

2.1 SB Warrant Print – Daily and Monthly & Paid Warrant

2.1.1 Overview

The San Bernardino Warrant Print Writer Interface is used to send new issuances to be printed to the San Bernardino auditing system.

SB Daily Warrant Print: The daily interface writer processes all benefits that are not monthly benefits such as– supplemental benefits, rush benefits, manual issuances, and service payments. Cancellations and pre-notes are included in the outbound file for all programs.

SB Monthly Non-FC Warrant Print: The monthly interface writer processes all benefits that are monthly Non-FC benefits.

SB Monthly FC Warrant Print: The monthly interface writer processes all benefits that are monthly FC benefits.

SB Paid Warrant Reader: This daily interface processes a file from San Bernardino County containing warrants that were paid on the previous day. The interface job updates the status of each warrant in the file to Paid in the CalSAWS database.

Stale Date Warrant Reader: This daily interface processes warrants that have been stale dated.

2.1.2 Description of Change

1. Update the following batch jobs to increase the warrant control number field from 7 digits to 10 digits:
 - a. SB Daily Warrant Print (PO36F100)
 - b. SB Monthly Non-FC Warrant Print (PO36F105)
 - c. SB Monthly FC Warrant Print (PO36F106)
 - d. SB Paid Warrant file (PI36F500)
 - e. **SB Stale Date Warrant Reader (PI36F501)**
2. Update the Record length Batch Property for production and test environments for the following batch jobs:
 - a. SB Daily Warrant Print FTP (PO36F140)
 - b. SB Monthly Non-FC Warrant Print FTP (PO36F145)
 - c. SB Monthly FC Warrant Print FTP (PO36F146)
 - d. SB Paid Warrant file FTP (PIF36F560)
 - e. **SB Stale Date Warrant Print FTP (PI36F561)**
3. Conduct County Interface file testing for the following Interface files:
 - a. SB Daily Warrant Print (PO36F100)
 - b. SB Monthly Non-FC Warrant Print (PO36F105)
 - c. SB Monthly FC Warrant Print (PO36F106)
 - d. SB Paid Warrant file (PI36F500)
 - e. **SB Stale Date Warrant Print (PI36F501)**

2.1.3 Counties Impacted

San Bernardino.

2.1.4 Interface Partner

San Bernardino County.

2.1.5 Failure Procedure/Operational Instructions

N/A.

2.2 Update San Bernardino County Rush Warrant Template

2.2.1 Overview

Update San Bernardino's Rush Warrant template to expand the Control Number field to fit 10 digits.

State Form: N/A

Current Programs: N/A

Form Title: SB Rush Warrant

Form Number: SB Rush Warrant

Current Attached Forms: None

Current Forms Category: Forms

Current Template Repository Visibility: N/A – not visible from Template Repository

Existing Language: English

2.2.2 Description of Change

1. Update Field #9 on the San Bernardino Rush Warrant template to fit a 10 digit control number.

Form Mockups/Examples: See Supporting Documents #1

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	San Bernardino County Rush Warrant Template Mockups	SB_WARRANT.pdf SB_WARRANT.xpd

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.2	The LRS shall include the ability to issue benefits via EBT, direct deposit, or warrants and/or checks distributed to the payee and shall issue appropriate notices.	This requirement is met by Updating the length of Warrant field in San Bernardino County specific jobs to 10 digits as requested by the county.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A.

6 OUTREACH

N/A.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-229939

One-time Batches to Transition Older Adults (50 or older) from Restricted to Full Scope Medi-Cal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tisha Mutreja
	Reviewed By	Renee Gustafson, Derek Goering, Prashant Goel, Chad Quan, Suneetha Minnekanti, Sireesha Kommajosyula, Noel Acosta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/12/2021	0.1	Original Draft	Tisha Mutreja
07/28/2021	0.2	Updated design per published policy ACWDL 21-13	Tisha Mutreja
08/19/2021	0.4	Updated document to state "Older Adult Expansion" instead of "Health4All – Older Californians" post updated policy from DHCS	Tisha Mutreja
9/24/2021	0.5	Content Revision: Updated Section 2.1.4 Key Scheduling Dependencies	Tisha Mutreja

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1 OVERVIEW

This SCR will automate the transition of individuals aged 50 years or older, currently in restricted scope Medi-Cal to full scope MAGI Medi-Cal with a one-time batch process.

1.1 Current Design

In Release 22.02, CalHEERS and CalSAWS were updated to grant full scope Medi-Cal for individuals 50 years of age or older, regardless of satisfactory citizenship or immigration status if they meet all other eligibility criteria for the benefit month starting May 2022 with CA-228957 and CalHEERS Change Request CH-159158. This population is referred to as "Older Adult Expansion".

CalSAWS has individuals age 50 or older, still receiving restricted scope Medi-Cal who should be transitioned to full scope Medi-Cal.

CalSAWS Batch EDBC functionality allows Batch EDBC to automatically add a standard Journal entry to cases processed by Batch EDBC with:

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for [MONTH/YEAR].

Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the Medi-Cal program for the following reasons: <Batch EDBC Sweep Code Short Description>

There is no Batch EDBC Sweep Code for Older Adult Expansion one-time transition batch processing, so CalSAWS will automatically create the journal entry with a missing reason in the Long Description.

1.2 Requests

1. Automate the transition of individuals aged 50 years or older, currently receiving restricted scope Medi-Cal to full scope Medi-Cal based on the transition Aid Code Crosswalk provided by DHCS.
2. Add a Batch EDBC Sweep Code so the auto-journal Long Description will display the reason: "Older Adult Expansion".
3. Provide one-time County lists for County Eligibility Workers to follow-up on any individuals who remain in restricted scope Medi-Cal or are discontinued from Medi-Cal after the one-time transition batch processing is complete.

1.3 Overview of Recommendations

1. Initiate a one-time process to send Eligibility Determination Requests (EDRs) to CalHEERS and run Batch EDBC for identified individuals 50 years of age or older who are receiving restricted scope Medi-Cal to transition to full scope Medi-Cal.

2. Add a Batch EDBC Sweep Code to display the Journal Long Description reason: "Older Adult Expansion one-time transition batch".
3. Generate one-time County lists to aid the counties to complete the transition of Older Adult Expansion to full scope Medi-Cal after Batch EDBC completes.

1.4 Assumptions

1. This one-time batch process may include Medi-Cal programs with an overdue RE or an in-process RE.

2 RECOMMENDATIONS

2.1 One-Time Batch

2.1.1 Overview

Initiate a one-time process to send EDRs to CalHEERS and run Batch EDBC for identified individuals 50 years of age or older, who are receiving restricted scope Medi-Cal to be transitioned to full scope Medi-Cal. Create a Journal entry for the cases processed successfully in the one-time process.

2.1.2 Description of Changes

1. Batch MAGI

- a. Identify Medi-Cal programs that meet all the following conditions for one-time Batch MAGI processing:
 - i. The Medi-Cal program contains an individual that meets all the following conditions:
 - I. The individual's 50th birthday is on or before 05/31/2022.
 - II. The individual is currently receiving any of the following aid codes during the May 2022 benefit month:
 - a. A restricted scope adult MAGI Medi-Cal aid code
 - i. Parent/Caretaker Relative: M4
 - ii. Pregnant Individual: M0, M8
 - iii. Adults 19-64 Years Old: M2, L7
 - or
 - b. A restricted scope Non-MAGI Medi-Cal aid code
 - Exclude CMSP aid codes
 - ii. The program contains at least one MAGI Medi-Cal beneficiary.

- iii. The CEW has not already processed MAGI and a corresponding Medi-Cal EDBC for May 2022 benefit month since the start date of the Older Adult Expansion rules update in CA-228957.
 - iv. The Medi-Cal EDBC effective May 2022 is not an overridden, read-only, or manual EDBC.
- b. Send an EDR for the benefit month of May 2022 based on the Medi-Cal program assigned to the most recent EDR. If there is no prior EDR, then assign the Medi-Cal program for the EDR based on the Medi-Cal program assigned to the most recent DER.

2. **Batch EDBC**

A. MAGI Medi-Cal and mixed MAGI/Non-MAGI

- a. Identify MAGI Medi-Cal and mixed MAGI/Non-MAGI Medi-Cal programs that meet all the following conditions for one-time Batch EDBC processing:
 - i. The DER is received from Recommendation 1 and all the following conditions are true:
 - 1. There are no 'Pending Eligible' MAGI Medi-Cal individuals on the DER.
 - 2. No individual was discontinued or ineligible for MAGI Medi-Cal who was previously a recipient of MAGI Medi-Cal.
 - 3. There are no individuals on Soft Pause on the DER.
 - ii. Medi-Cal EDBC has not been processed against the DER from Recommendation 1 or any subsequent DER for the May 2022 benefit month.
 - iii. The Medi-Cal EDBC effective May 2022 is not an overridden, read-only, or manual EDBC.
- b. Run Batch EDBC for May 2022 benefit month for the Medi-Cal program in Targeted Program mode with Type Code "Batch Eligibility" (BE). Include the new Batch EDBC Sweep Code added in Recommendation 2.1.2.3.

B. Non-MAGI Medi-Cal

- a. Identify Non-MAGI Medi-Cal cases that meet all the following conditions for one-time Batch EDBC processing:
 - i. The program does not contain a MAGI Medi-Cal beneficiary.
 - ii. The program contains an individual where all the following are true:
 - 1. The individual's 50th birthday is on or before 05/31/2022.

2. The individual is currently receiving a restricted scope Non-MAGI Medi-Cal aid code during the May 2022 benefit month.
 - Exclude CMSP aid codes
- iii. Medi-Cal EDBC has not been processed for May 2022 benefit month since the start date of the Older Adult Expansion rules update in CA-228957.
- iv. The Medi-Cal EDBC effective May 2022 is not an overridden, read-only, or Manual EDBC.
- b. Run Batch EDBC for May 2022 benefit month only for the Medi-Cal program in Targeted Program mode with Type Code 'BE' (Batch Eligibility). Include the new Batch EDBC Sweep Code added in Recommendation 2.1.2.3.

3. Journal Entry

- a. Add Batch EDBC Sweep Code (CT_942) for "Older Adult Expansion one-time transition batch" to the code table.

Code Table	Description
New/Update	New
Category Id	942
Short Description	Older Adult Expansion
Long Description	Older Adult Expansion one-time transition batch

This will allow CalSAWS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.1.2.2.

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for 05/2022.

Long Description: Batch EDBC ran for 05/2022. Batch EDBC processed for the Medi-Cal program for the following reason: Older Adult Expansion one-time transition batch.

2.1.3 Execution Frequency

This is a one-time batch.

2.1.4 Key Scheduling Dependencies

~~One-time batch will run on April 9th, 2021, before regularly scheduled batch.~~

- Friday 04/08/2022
Batch operations team will run the Data Change Request (DCR) for Batch MAGI before regularly scheduled batch. Then Friday's regularly scheduled batch will send the EDRs during Batch MAGI.
- Saturday 04/09/2022
Batch operations will run the DCR for Batch EDBC before regularly scheduled batch processing. Then Saturday's regularly scheduled batch will process the cases through Batch EDBC before the nightly batch is run.


2.1.5 Counties Impacted

All counties

2.1.6 Data Volume/Performance

Approximately 190K individuals will be processed with this change.
At least one Notice of Action is expected for each of the cases processed in Batch EDBC.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	ACWDL 21-13	 21-13.pdf

4 OUTREACH

Generate one-time County lists to aid the counties to complete the transition of Older Adult Expansion to full scope Medi-Cal after Batch EDBC completes.

The lists will display the below columns:

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

List will be posted at following locations:

CalACES Web Portal>System Changes>SCR and SIR Lists>2022>CA-229939

1. **List Name:** Medi-Cal Program Discontinued

Generate a list of cases where the Medi-Cal program was discontinued due to the one-time Batch EDBC processing for Older Adult Expansion transition to full scope.

County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate.

2. **List Name:** Medi-Cal Individual Discontinued

Generate a list of cases where an individual was discontinued from the Medi-Cal program due to the one-time Batch EDBC processing for Older Adult Expansion transition to full scope.

Additional Columns:

- CIN
- Prior Aid Code – *Display the aid code the individual was on prior to the discontinuance*
- DOB

County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close individuals, review these cases to verify the closure was accurate.

3. **List Name:** Older Adult Expansion remains in restricted scope

Generate a list of cases where an individual age 50 or older remains in restricted Medi-Cal after the one-time Batch EDBC processing for Older Adult Expansion completes. Include a column for the reason they did not transition.

Additional Columns:

- CIN
- Aid Code
- DOB
- Reason*

***Known reasons:**

- **Became MAGI Elig on DER:** As a result of Batch MAGI, an individual became eligible for MAGI Medi-Cal who was previously not in receipt of MAGI Medi-Cal.
- **MAGI Disc or Inelig on DER:** As a result of Batch MAGI, an individual became discontinued or ineligible for MAGI Medi-Cal who was previously a recipient of MAGI Medi-Cal.
- **MAGI Pending on DER:** EDBC did not process because an individual is Pending Eligible on MAGI Determination.
- **Soft Pause:** EDBC did not process because there is an individual on the DER in Soft Pause.
- **Read-Only EDBC:** EDBC processed, but it was Read-Only.
- **Overridden, Read-only or Manual EDBC:** The Medi-Cal program was not processed by Batch MAGI nor Batch EDBC because the EDBC effective for May 2022 is an overridden, read-only, or manual EDBC.
- **DER returned after Batch EDBC:** EDBC did not process because the DER from Batch MAGI did not return prior to running Batch EDBC; however, the DER did return prior to generating this list.

County Action: These individuals should be transitioned to full scope Medi-Cal but remain in restricted scope.

5 REQUIREMENTS

5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.2	The LRS shall determine an applicant's/participant's eligibility for a program or programs.	CalSAWS will automate the transition of individuals aged 50 years or older, currently in restricted scope MAGI Medi-Cal to full scope MAGI Medi-Cal with a one-time batch process.