

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-229096 -Phase 2 Batch 4 (5 Rules) - Income
Rules and Corresponding NOA Reasons

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1 OVERVIEW

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

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

1. Add all the required Data Collection elements to implement the Financial functionalities for the new solution
2. Create new Admin Summary and Detail pages that can be accessed in Admin tools by the County Admin staff
3. A new set of Admin detail pages, Rules, Batch and NOA triggers will be added for the below Financial.
 1. [Return to Residence](#)
 2. [Shared Housing](#)
 3. [Financial Housing](#)
 4. [Housing Test](#)
 5. [Drug and Alcohol](#)

1.4 Assumptions

1. The existing Los Angeles county rules will remain unchanged.
2. This SCR CA-229096 is based on the WCDS approved documents.
3. The design of the rules is for each CalWIN county based on the Gainwell documents approved by the counties.
4. This SCR CA-229096 is part of phase 2 which consists of 5 CalWIN rulesets for Financial.

5. The functionality of this SCR CA-229096 will be disabled until activated by the system property flag established in SCR CA-215687 which is part of the 20.11 release.
6. Any logic related to San Francisco explicitly called out in relevant WCDS approved use cases will be included in this design. Any, San Francisco sub program logic independent of the rule will be added in SCR CA-215677 DDID 2374 scheduled for 22.01.
7. Alerts will be handled separately outside the Rules design in a separate SCR CA-220119.
8. During testing the EDBC will result in 0 benefit as resource will be set to PASS. Resource and reporting logic will be added in phase 3 release 21.11 (CA-215917).
9. All functionality related to new fields will only affect the rules related to an individual county's General Assistance/General Relief program and will not impact the rules of other programs, unless specified.
10. All Data collection used in EDBC determination is effective for the benefit month.
11. Leveraged rules are main rules from another use cases whose logic are also used in this use case. Leveraged rules in this SCR whose main use case are not designed in phase 1 or 2 cannot be tested using the admin page. Example: Institutional status use case has a leverage rule that is a main rule in Earned income use case. Since Earned income use case is not designed in phase 1 or 2, this leverage rule will not be able to be tested from the admin page.
12. EDBC summary page layout will follow current Los Angeles County GA EDBC summary. The following sections will be in the EDBC summary page, others will be added in later phases: EDBC Header, EDBC Information, Program Configuration, Reporting Configuration, Allotment, Page Mappings (PMCR) and Security (STCR). Note: Allotment will have all 0 for values, and Security will follow current Los Angeles county security framework.
13. All calculation for computed values will detailed in the Visio diagram.
14. 'Participation status' will be an internal flag in CalSAWS, when a participation status is set in the rule it will replace the previous set status for each individual.
15. Logic that checks or creates Sanctions cannot be tested until CA-227328 is implemented.
16. Manual edbc and negative action edbc cannot be run with these changes.
17. Changes to the Financial Data Collection pages will be moved to SCR CA-232396
18. All status reason and calculation for Lumpsum POI cannot be tested until phase 3.
19. Any logic or status reasons related to CalWIN data collection element return reason: 'Emergency Situation' will not be migrated into CalSAWS since 'Emergency situation' is not available in CalWIN.
20. The statement 'Living Arrangement record is applicable for the benefit month' is indicating that the Arrival Date is on or before the benefit month begin date and the Departure Date is either high dated or on or after the benefit month begin date.

2 RECOMMENDATIONS

2.1 Return to Residence Detail

2.1.1 Overview

The Return to Residence Detail page is used to track information about the participant's reason to return to a residence. This page will be updated to track if the participant is restricted from residing within the case carrying county due to parole requirements.

2.1.2 Return to Residence Detail Mockup

Return to Residence Detail

*- Indicates required fields

Save and Return Cancel

Name: * Doe, John 28M	Potentially GA/GR Eligible: No	Signed Return Letter: No
Connection of Place of Residence: Yes	Pre-Approval: No	Return Reason: No
Request Amount: []	Are there conditions of parole that would require residence outside of the case county?: No	
Verified Self-Sufficiency: No		
State: California		
Begin Date: * 09/18/2015	End Date: []	

Save and Return Cancel

Figure 2.1.2.1 – Return to Residence Detail

2.1.3 Description of Changes

1. Add a new Yes/No dropdown field labeled, "Are there conditions of parole that would require residence outside of the case county?". This field will default to blank. This field will only be editable in create and edit modes.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GR -> Return to Residence

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

New page mappings are required for the additional fields.

2.1.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.2 Expense Detail

2.2.1 Overview

The Expense Detail page is used to track the participant's expenses. This page will be updated to store additional information regarding the participant's intent to reduce their overall expenses as well as Landlord information.

2.2.2 Expense Detail Mockup

Expense Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Expense Category: *
Shelter

Description:

Expense Type: *
- Select -

Frequency: *
Monthly

Intent to Reduce Expense Amount:
Yes

Reduction Due Date:

Shared with RDP

Landlord Information

Landlord Type:
Agent of Property Owner

Contributors *

Persons	Begin Date	End Date
No Data Found		

Add

Amounts

Amount	Amount Paid by Others	Begin Date	End Date
No Data Found			

Add

Save and Add Another Save and Return Cancel

Figure 2.2.2.1 – Expense Detail

2.2.3 Description of Changes

1. Add a new Yes/No dropdown field labeled, "Intent to Reduce Expense Amount". This field will be editable in create and edit modes. This field will default to blank.
2. Add a new Date field labeled, "Reduction Due Date". This field will be editable in create and edit modes. This field will default to blank.
3. Add a new section labeled, "Landlord Information". This section will only display for an Expense Category of Shelter. This section will contain the following fields:
 - a. Landlord Type – A dropdown field to indicate what type of landlord is administering the shelter. This field will be editable in create and edit modes. This field will default to blank. This field will have the following options in alphabetical order:
 - i. Agent of Property Owner
 - ii. Legal Tenant
 - iii. Manager of Property Owner
 - iv. Property Owner
 - v. Relative

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Financial -> Expense

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

New page mappings are required for the additional fields.

2.2.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.3 Self-Employment Deduction Type Detail

2.3.1 Overview

The Self-Employment Deduction Type Detail page is used to indicate if there is a deduction related to a program, it's type and the effective

period. This will be expanded to include the General Assistance/General Relief program option.

2.3.2 Self-Employment Deduction Type Detail Mockup

Self-Employment Deduction Type Detail

*- Indicates required fields

Save and Return Cancel

Expense Type:
Rental Income

Program: *

CalWORKs
Medi-Cal
CalFresh
General Assistance/General Relief

Deduction Type: *
Actual

Begin Month: *
08/2021

End Month:

Verified: *
Pending View

Save and Return Cancel

Figure 2.3.2.1 – Self-Employment Deduction Type Detail

2.3.3 Description of Changes

1. Add the General Assistance/ General Relief program option. This will appear for all 58 counties and will not dynamically change program description based on the County of the user's applicable GA/GR program.

2.3.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Financial -> Expense

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

No new page mappings are required for the updated fields.

2.3.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.4 GA/GR

2.4.1 Overview

Relabel the Task Navigation from “GR” to “GA/GR”.

2.4.2 GA/GR Task Navigation Mockup

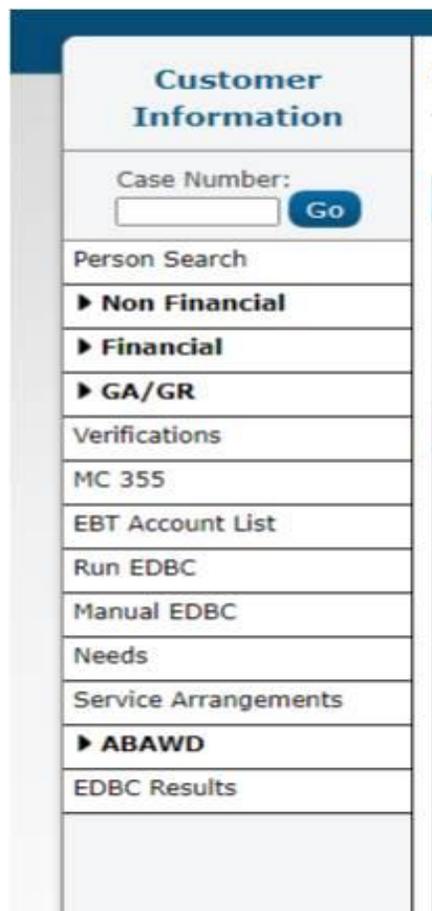


Figure 2.1.1 GA/GR Task Navigation Mockup

2.4.3 Description of Changes

1. Update the Task navigation from GR to GA/GR throughout the system.

2.4.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: GA/GR

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 GA/GR County Options List

2.5.1 Overview

The GA/GR County Options List page is used to view records storing information that is specific to GA/GR and will override or supplement a generic Data Collection field with GA/GR specific information.

2.5.2 GA/GR County Options List Mockup

GA/GR County Options List

Search Results Summary		Results 1 - 2 of 2	
Display			
From:		To:	
<input type="text"/>		<input type="text"/>	
<input type="button" value="View"/>			
<input type="button" value="Add"/>			
Name	Type	Begin Date	End Date
<input type="checkbox"/> Math, Shreela 29M	No SSN Reason	10/06/2021	
<input type="button" value="Edit"/>			
<input type="button" value="View History"/>			
<input type="checkbox"/> math,_perstwo 29M	No SSN Reason	10/01/2021	10/05/2021
<input type="button" value="Edit"/>			
<input type="button" value="View History"/>			
<input type="button" value="Remove"/>			
<input type="button" value="Add"/>			

Figure 2.3.2.1 – GA/GR County Options List

2.5.3 Description of Changes

1. The left-hand task navigation option, "County Options" will appear only if the user has the "GAGRCountyOptionListView" right. It will be the last option under the GR sub-menu.
2. Display From: The earliest date for records appearing in the Search Results may begin.
3. To: The latest date for records appearing in the Search Results may end.
4. View: This button will bring all search results based on the Display From and To dates.
5. Name: The Name of the participants on the case. This will be a link to the "GA/GR County Options Detail" page in view mode, if the user has the "GAGRCountyOptionDetailView" right.
6. Type: The type of option that is being selected.
7. Begin Date: The date the record begins being effective.
8. End Date: The date the record stops being effective.
9. Edit: This button will navigate the user to the GA/GR County Options Detail page in Edit mode for the associated record. This button will only appear if the user has the "GAGRCountyOptionDetailEdit" right.
10. View History: This button will open the Transaction History Detail page for the associated record. This button will only appear if the user has the "GAGRCountyOptionDetailView" right.
11. Remove: This button will remove any records with the checkbox selected. The checkbox and the remove buttons will only display when the user has the "GAGRCountyOptionRemove" right.

12. Add: This button will navigate the user to the GA/GR County Options Detail page in Create mode. This button will only appear if the user has the "GAGRCountyOptionDetailEdit" right.

2.5.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GA/GR -> County Options

2.5.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
GAGRCountyOptionDetailView	The right to view GAGR County Option records	GAGR County Option View, GAGR County Option Edit
GAGRCountyOptionEdit	The right to create and Edit GAGR County Option records	GAGR County Option Edit
GAGRCountyOptionRemove	The right to remove existing GAGR County Option records	GAGR County Option Remove

Security Groups:

Security Group	Group Description	Group to Role Mapping
GAGR County Option View	This group has the capability to view GAGR County Option records	See the Security Matrix for the group to role associations
GAGR County Option Edit	This group has the capability to create and modify GAGR County Option records	See the Security Matrix for the group to role associations
GAGR County Option Remove	This group has the capability to remove	See the Security Matrix for the group to role associations

Security Group	Group Description	Group to Role Mapping
	GAGR County Option records	

2.5.6 Page Mapping

New page mappings are required for the new page.

2.5.7 Page Usage/Data Volume Impacts

No usage impacts as this is a new page.

2.6 GA/GR County Options Detail

2.6.1 Overview

The GA/GR County Options Detail page is used to store information that is specific to GA/GR and will override or supplement a generic Data Collection field with GA/GR specific information.

2.6.2 GA/GR County Options Detail Mockup

GA/GR County Options Detail

*- Indicates required fields

Save and Return Cancel

Name: *

Type: *

Reason: *

Begin Date: *  **End Date:** 

Save and Return Cancel

Figure 2.4.2.1 – GA/GR County Options Detail (Create Mode)

2.6.3 Description of Changes

1. Name: The Name of the participants on the case. This dropdown will be editable in Create mode. This field is required. This field will default to “-Select-”.
2. Type: The type of option that is being selected. This dropdown will be editable in Create and Edit modes. This field is required. This field will default to “-Select-”. This dropdown will have the following values:
 - a. No SSN Reason
3. Reason: The reason for the given county option that is being selected. This dropdown will be editable in Create and Edit modes. This field is required, when visible. If a Type does not have related Reasons, the field will be hidden. This field will default to “-Select-”. This dropdown will have the following values based on the associated Type:
 - a. Type: No SSN Reason
 - i. AAP Case/Person
 - ii. Against Religion
 - iii. Birth Verification Unavailable
 - iv. Capacity
 - v. Child less than one
 - vi. Can't provide info to SSA
 - vii. Comatose/Incompetent
 - viii. Domestic Abuse
 - ix. Failed to Obtain Effective MD
 - x. Evidence Household has Applied
 - xi. Exempt from SSN requirement
 - xii. Expedited Services
 - xiii. Good Cause
 - xiv. Household Made Effort to Get Info
 - xv. Ineligible due to Immigration Status
 - xvi. Illness
 - xvii. Incarcerated
 - xviii. Incomplete Documents
 - xix. Lack of transportation
 - xx. Minor Consent Case
 - xxi. Not Qualified
 - xxii. Not Required
 - xxiii. Not in Satisfactory Immigrant Status
 - xxiv. Other
 - xxv. Refusal to cooperate
 - xxvi. Refused to State
 - xxvii. Temporary absence
 - xxviii. Undocumented
 - xxix. Undocumented Non-Citizen
 - xxx. Unwillingness

4. Begin Date: The date the record begins being effective. This field will be editable in Create and Edit modes. This field is required. This field will default to blank.
5. End Date: The date the record begins being effective. This field will be editable in Create and Edit modes. This field will default to blank.
6. Save and Return: This button will save the information entered on the page and navigate the user to the GA/GR County Options List page. This button will be available in Create and Edit modes.
7. Cancel: This button will discard changes entered on the page and navigate the user to the GA/GR County Options List page. This button will be available in Create and Edit modes.
8. Edit: This button will save the information entered on the page and navigate the user to the GA/GR County Options Detail page in Edit mode. This button will be available in View mode. This button will only appear if the user has the "GAGRCountyOptionDetailEdit" right.
9. Close: This button will navigate the user to the GA/GR County Options List page. This button will be available in View mode.

2.6.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GA/GR -> County Options

2.6.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
GAGRCountyOptionEdit	The right to create and Edit GAGR County Option records	GAGR County Option Edit

Security Groups:

Security Group	Group Description	Group to Role Mapping
GAGR County Option Edit	This group has the capability to create and modify GAGR County Option records	See the Security Matrix for the group to role associations

2.6.6 Page Mapping

New page mappings are required for the new page.

2.6.7 Page Usage/Data Volume Impacts

No usage impacts as this is a new page.

2.7 Money Management Detail

2.7.1 Overview

The Money Management Detail page is used to store information used for splitting payments between vendors and participants. A new type for Drug and Alcohol will be added as an option for the General Assistance/General Relief program.

2.7.2 Money Management Detail Mockup

Money Management Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Name: *

Vendor Name: * **Select** **Program:** General Assistance/General Relief **Priority: ***

Payment Amount used by EDBC

Amount	Begin Date	End Date	Report Date	Pay Code
No Data Found				

Add

Save and Add Another Save and Return Cancel

Figure 2.5.2.1 – Money Management Detail (GA/GR Automated EDBC/CC solution)

2.7.3 Description of Changes

1. The “Vendor Type” dropdown will not be displayed for GA/GR Automated EDBC/CC solution.

2.7.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Financial -> Money Management

2.7.5 Security Updates

No security updates

2.7.6 Page Mapping

No page mappings required

2.7.7 Page Usage/Data Volume Impacts

No usage impacts.

2.8 Money Management Detail

2.8.1 Overview

The Money Management Detail page is used to store information used for splitting payments between vendors and participants. A new type for Drug and Alcohol will be added as an option for the General Assistance/ General Relief program.

2.8.2 Payment Amount Used By EDBC Mockup

Payment Amount Used By EDBC

*- Indicates required fields

Save and Return Cancel

Amount: *

Begin Date: *  End Date:  Report Date: * 

Save and Return Cancel

Figure 2.7.2.1 – Payment Amount Used By EDBC

2.8.3 Description of Changes

1. Display the following existing fields:
 - a. Amount – The amount used for the payment.
 - b. Begin Date – The date the Payment amount is effective.
 - c. End Date – The date the Payment amount is no longer effective.
 - d. Report Date – The date the Payment amount is reported.

2.8.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Financial -> Money Management

2.8.5 Security Updates

No security updates

2.8.6 Page Mapping

No page mappings required

2.8.7 Page Usage/Data Volume Impacts

No usage impacts.

2.9 Living Arrangements Detail

2.9.1 Overview

The Living Arrangement Detail page is used to store information regarding the participant's living situation. A new field will be added to indicate if a participant has a negotiated rate with the facility they reside at that differs from the standard values.

2.9.2 Living Arrangements Detail Mockup

Living Arrangements Detail

*- Indicates required fields

Save and Return Cancel

Change Reason

New Change Reason: *
- Select -

New Reported Date: *
[Date Picker]

Change Reason:
Participant Provided - Verbal

Reported Date:
08/01/2021

View

Name: *
Math. Shreela 29M

Living Arrangement Type: *
Temporary Housing or Shelter

Name of Location (Institution, Center, Shelter, Facility, etc.):
[Text Field]

Arrival Date: *
08/19/2021

Departure Date:
[Date Picker]

Expected Date of Release:
[Date Picker]

General Assistance/General Relief

Eligible for Group Housing: Yes	Shared Housing Situation: Shared housing with three other individuals	Vendor Type: Mental Health Room
CHASS Shelter Required: Yes	CHASS Shelter Refused: No	Unable to Stay in CHASS Shelter: No
Willing to Stay with Responsible Relative: No		Reason: Unemployment
ASP Needs Met: Yes	Food Needs Met: No	Household Needs Met: Yes
County Funded: No	DHSS Licensed: Yes	Meets Presumptive Eligibility: No
Personal Needs Met: No	Facility Rate Letter Provided: No	Facility Sub-Type: Veterans Acute Care Facility
Referred by Mental Health Case Manager: No		Negotiated Facility Rate: [Text Field]
Sleeping Quarters Separate from Family: No		Living with Relative: Yes

Verified: *
Pending

View

Save and Return Cancel

Figure 2.6.2.1 – Living Arrangements Detail

2.9.3 Description of Changes

1. Add the Negotiated Facility Rate field. This field will be constrained to only allow monetary input values. This field will only be editable in Create and Edit modes. This field will default to blank.
2. Update the CHASS Shelter Required field to display for all Living arrangement types.
3. Update the CHASS Shelter Refused field to display for all Living arrangement types.
4. Update the Unable to Stay in CHASS Shelter field to display for all Living arrangement types.
5. Add a new Yes/No dropdown field labeled, "Referred by Mental Health Case Manager". This field will default to blank. This field will only be editable in create and edit modes.
6. Add a new Yes/No dropdown field labeled, "Living with Relative". This field will default to blank. This field will only be editable in create and edit modes.
7. Add a new Yes/No dropdown field labeled, "Sleeping Quarters Separate from Family". This field will default to blank. This field will only be editable in create and edit modes.
8. Add the "Vendor Type" Dropdown field. This field will only be editable in Create and Edit modes. This field will default to blank and have the following options:
 - a. Board and Care
 - b. Drug and Alcohol
 - c. Mental Health Room
 - d. Shelter

2.9.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Non-Financial -> Living Arrngmt

2.9.5 Security Updates

No security updates

2.9.6 Page Mapping

New page mappings are required for the new fields.

2.9.7 Page Usage/Data Volume Impacts

No usage impacts.

2.10 MSUDRP Pre-Screening List

2.10.1 Overview

The MSUDRP Pre-Screening List page is used to track and edit MSUDRP records. Updating this page to not display the Generate Appointment button GR Automated EDBC/CC Counties.

2.10.2 MSUDRP Pre-Screening List Mockup

MSUDRP Pre-Screening List

*- Indicates required fields Continue

Search Results Summary Results 1 - 1 of 1

Display by
Name: Result: From: To: View

Add

Name	Result	Begin Date	End Date
<input type="checkbox"/> Math, Shreela 29M	Positive	10/01/2021	

Edit
View History

Remove Add

Complete

Continue

Figure 2.8.2.1 – MSUDRP Pre-Screening List Mockup

2.10.3 Description of Changes

1. Update the MSUDRP Pre-Screening List page to not to display "Generate Appointment" button for GA/GR Automated EDBC/CC Counties.

2.10.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GA/GR -> MSUDRP Pre-Screening

2.10.5 Security Updates

No security updates

2.10.6 Page Mapping

New page mappings are required for the new fields.

2.10.7 Page Usage/Data Volume Impacts

No usage impacts.

2.11 MSUDRP Pre-Screening Detail

2.11.1 Overview

The MSUDRP Pre-Screening Detail page is used to track if the participant is showing symptoms or has been using substances that would potentially disqualify them for benefits or require additional treatment to receive benefits. This page will be updated to have unique questions for each county based on their input.

2.11.2 MSUDRP Pre-Screening Detail Mockup

MSUDRP Pre-Screening Detail

* - Indicates required fields

Save and Add Another Save and Return Cancel

Name: * Begin Date: * End Date: *

Doe, John 27M 11/02/2020

MSUDRP Screening - Eligibility

Have you ever felt you should cut down on your drinking or drug use? * No

Have people annoyed you by criticizing you for drinking or drug use? * Yes

Have you felt bad or guilty about your drinking or drug use? * Yes

Have you ever had a drink or used drugs first thing in the morning to steady your nerves, or get rid of a hangover to get the day started? * Yes

Are you currently in a treatment program (either In or Outpatient)? * Yes

Program Name: *
Sample program

Address:

City: _____ State: _____ ZIP Code: _____

Phone: _____

Other's Observation

Did you receive information from a receptionist / security/supervisor that the client has been using alcohol/drugs? * Yes

Worker Observation - Do you observe any of the following :

<input type="checkbox"/> Burned finger tips or lips	<input type="checkbox"/> Needle marks or Tracks
<input type="checkbox"/> Drug Symbols/ Paraphernalia	<input type="checkbox"/> Blank stare, Stupor
<input type="checkbox"/> Belligerent/Abusive	<input type="checkbox"/> Alcoholic breath
<input type="checkbox"/> Ulcer/Sores around the nose	<input type="checkbox"/> Tremors/Shaking hands
<input type="checkbox"/> Delusions or Hallucinations	<input type="checkbox"/> Non-Responsive
<input type="checkbox"/> Nodding Off	<input type="checkbox"/> Paranoia
<input type="checkbox"/> Unstable Balance	<input type="checkbox"/> Anxious/Rapid breathing
<input type="checkbox"/> Extremely thin	<input type="checkbox"/> Profuse sweating/chills
<input type="checkbox"/> Scratching	<input type="checkbox"/> Hyperactivity/Agitated
<input type="checkbox"/> Lethargic	<input type="checkbox"/> Distracted/Poor Concentration

Eyes

<input type="checkbox"/> Bloodshot	<input type="checkbox"/> Pupils Pinpointed
<input type="checkbox"/> Erratic Movement	<input type="checkbox"/> Sunglasses Indoors
<input type="checkbox"/> Pupils Enlarged	<input type="checkbox"/> Watery Eyes

Speech

<input type="checkbox"/> Abusive	<input type="checkbox"/> Excessive Talking
<input type="checkbox"/> Rapid	<input type="checkbox"/> Mumbles/Rambles/Slurred

Face

<input type="checkbox"/> Strong thirst/Dry	<input type="checkbox"/> Broken Vessels/Nose
<input type="checkbox"/> Acne/Sore	<input type="checkbox"/> Runny Nose/Sniffing

Save and Add Another Save and Return Cancel

Figure 2.8.2.1 – MSUDRP Pre-Screening Detail

2.11.3 Description of Changes

2. Update the MSUDRP Screening – Eligibility section to display a list of questions based on the county. Specific items for each county will be available in Supporting Document “MSUDRP Questions.xlsx” on Sheet “MSUDRP Screening – Eligibility”.
3. Update the “Other Observations” section to display a list of questions based on the county. Specific items for each county will be available in Supporting Document “MSUDRP Questions.xlsx” on Sheet “Other Observations”.

2.11.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GA/GR -> MSUDRP Pre-Screening

2.11.5 Security Updates

No security updates

2.11.6 Page Mapping

New page mappings are required for the new fields.

2.11.7 Page Usage/Data Volume Impacts

No usage impacts.

2.12 Eligibility Logic: Return to Residence

2.12.1 Overview

When the participant applied for 'Return to Residence' benefit, EDBC will pass with 'Zero' benefit for the benefit month RTR applied when the participant is eligible and will always be discontinued for the following month. However, the worker still needs to enter the 'Request Amount' in Return to Residence detail page to compare the requested amount with Cash in Hand amount for applicable counties.

The worker fills the 'Needs' data collection information to pay the 'Return to Residence' benefit amount outside of EDBC to the participant/vendor for the benefit month.

2.12.1 Description of Changes

The worker will follow below steps to create the Needs record in CalSAWS:

1. From Eligibility:

- i. Place the cursor over Eligibility on the Global navigation bar.
- ii. Select Customer Information from the Local navigator.
- iii. Click the Needs link on the Task navigation bar to access the Needs List page.
- iv. Click 'Add Need' button.

2. From Employment Services

- i. Place the cursor over Employment Services on the Global navigation bar.
- ii. Select Supportive Services from the Local navigator.
- iii. Click the Needs link on the Task navigation bar to access the Needs List page.
- iv. Click the Add Need button.

The screenshot displays the 'Needs List' page. At the top, there is a navigation bar with 'Eligibility' highlighted. Below it, a sidebar contains various menu items, with 'Needs' highlighted in yellow. The main content area features a search filter section with fields for 'Display by Name', 'From', 'To', 'Category', and 'Type', along with a 'View' button. Below the filters is a 'Search Results Summary' section showing 'Results 1 - 4 of 4'. A table with columns 'Type', 'Name', 'Category', 'Begin Date', 'End Date', and 'Status' is visible. The 'Add Need' button is highlighted in yellow in the top right corner of the table area. A 'Remove' button is also visible in the bottom left corner of the table area. A status message at the bottom of the table area reads: 'This Type_1 page took 0.31 seconds to load.'

2.9.1.1 Adding a Need on the Needs List page.

3. To Add a New Need:

- i. Go to the Need Detail page.
- ii. Enter the appropriate information in Need Detail page.

- iii. Select 'Service Arrangement' for Save and Add New and then click 'Go' button to add new service arrangement record.

Need Detail

*- Indicates required fields

Save And Return Cancel

Name: *
 First Name, Last Name

Category: * GR Non-Recurring Special Need **Type: *** Return to Residence

Begin Date: * 09/06/2021

Description: Bus Ticket

Status: * Indicated **Status Reason: *** Documented

Save & Add New: Service Arrangement Go

Save And Return Cancel

This Type_1 page took 1.26 seconds to load.

2.9.1.2 Entering the information on the Need Detail page.

Service Arrangement Detail

Save and Return Cancel

Need *

Type	Name	Category	Begin Date
Return to Residence	Last Name, First Name 31M	GR Non-Recurring Special Need	09/06/2021

Activities

Type	Status	Begin Date	End Date

Select

Arrangement Details

Arrangement Period: *
 From: To:

Program Type: * **Aid Code: ***
 General Assistance/General - Select -

Relief Voucher: *
 No

Payee: *
 - Select -

Employed: *
 - Select -

Additional Payee:

Service Type Description **Total**

Status History

Status	Status Reason	Status Date
		09/09/2021

Comments:

Save and Return
Cancel

2.9.1.3 The screen for the Service Arrangement Detail.

2.13 Eligibility Logic: Drug and Alcohol, Room, Board and Shelter

2.13.1 Overview

When the participant has Living Arrangement record applicable for the benefit month with Facility Sub-Type as 'Alternative General Assistance Program Drug & Alcohol' or 'Drug and Alcohol Rehab Public Funding' or 'Drug and Alcohol Treatment Private Funding' and vendor type is 'Drug and Alcohol' in Living Arrangement Detail page and a vendor payment is required for the facility then worker will follow the below process to issue the vendor payment.

Also, when the participant has a Living Arrangement record applicable for the benefit month with Vendor type as 'Board and Care' or 'Mental Health Room' or 'Shelter' and a vendor payment is required for the facility then worker will follow the below process to issue the vendor payment.

A Money Management Detail Record must be created to manage the payment to the facility. Also, the Resource Databank will be used to create records specific to vendors/facilities. When EDBC is run and accepted, the GAGR grant will split with the appropriate amount being paid to the vendor and the applicant/recipient.

2.13.2 Description of Changes

1. Money Management List Screen:
 - i. Place the cursor over Eligibility on the Global navigation bar.
 - ii. Select Customer Information from the Local navigator.
 - iii. Click the Money Management link in the Task navigation bar.
 - iv. Select General Assistance/General Relief from the Program drop list.
 - v. Click the Add button to add a new Money management Detail record.

Customer Information

Case Number: **Go**

Person Search

▼ Non Financial

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Immunizations

School Attend.

Degrees Licenses

Money Management List

Continue

Display From: **To:**

View **Add**

Vendor Name	Vendor Type	Priority	Start Month	End Month
No Data Found				

Program: * **Add**

- CalWORKs
- General Assistance/General Relief
- Homeless - Perm
- Homeless - Temp

Complete **Continue**

This Type_1 page took 1.11 seconds to load.

2.11.2.1 Creating a Money Management General Assistance/General Relief on the Money Management List page.

2. Money Management Detail record:
 - i. Add a new Money Management detail record in Money Management Detail page for the vendor.
 - ii. Select Participant's Name from the Name drop list.
 - iii. Click the Select button under Vendor Name and select the vendor/facility name to which the payment is required
 - iv. Select 1 for Priority.
 - v. Add a record for Payment amount used by EDBC with the appropriate vendor split amount that needs to be paid to the vendor/facility.

The screenshot displays the 'Money Management Detail' form. On the left is a sidebar with 'Customer Information' and various search and filter options. The main form area includes fields for Name, Vendor Name (with a 'Select' button), Program (set to 'General Assistance/General Relief'), and Priority (set to '1'). Below these is a table titled 'Payment Amount used by EDBC' with columns for Amount, Begin Date, End Date, Report Date, and Pay Code. A single row shows an amount of 100.00 from 09/01/2021 to 09/30/2021, with a report date of 09/08/2021 and pay code 'Drug and Alcohol'. Buttons for 'Save and Add Another', 'Save and Return', and 'Cancel' are visible at the top and bottom of the form.

Payment Amount used by EDBC					
	Amount	Begin Date	End Date	Report Date	Pay Code
<input type="checkbox"/>	100.00	09/01/2021	09/30/2021	09/08/2021	Drug and Alcohol

2.11.2.2 Adding a payment in the Money Management Detail.

3. Vendor payment calculation:
 - i. When the worker adds a money management record and runs EDBC, the benefit amount will be split between vendor or vendor(s) in case of multiple vendors and the remaining amount will be paid to the participant as per the current CalSAWS vendor payment calculation process.

- ii. EDBC will calculate, split, and display separately the participant portion of the GAGR Benefit and vendor portion for facility for each benefit month.
- 4. The money management section from GAGR EDBC summary page is as follows to show the vendor/facility payment details. The pay code would be the vendor type selected in the living arrangements detail page:

Money Management			
Vendor	Pay Code	Name	Amount
VENDOR NAME	Drug and Alcohol	First Name, Last Name	\$ 100.00
Previous Potential Benefit			- 0.00
Net Benefit Amount			= 100.00

2.11.2.3 Money Management Section on the EDBC Summary Page.

- 5. EDBC will issue only supplemental payment to the vendor but the recoupment of overpayment to vendor will be done outside of EDBC as per the current CalSAWS process. In this scenario, when the vendor payment is less than the previous potential benefit then the net benefit amount will be shown as zero.
- 6. The vendor amount will be subtracted from Potential Benefit amount to participant the net amount will be shown as Potential benefit to Participant on EDBC summary page as per the current CalSAWS process. The line item will be changed dynamically depending on the vendor type selected in the living arrangements detail page.

Aid Payment	Regular
Combined Aid Payment	\$ 221.00
Excess Net Earned Income	\$ N/A
Final Aid Payment	\$ 221.00
Overridden Aid Payment	\$
Adjustments	- <u>0.00</u>
Potential Benefit	= 221.00
Vendor Name - Drug and Alcohol Amount	- 100.00
Potential Benefit to Participant	= 121.00
Previous Potential Benefit	- <u>0.00</u>
Overpayment Adjustment Amount	- <u>0.00</u>
Authorized Amount	= 121.00

2.11.2.4 The Vendor information on the EDBC Summary Page.

Aid Payment		Regular
Combined Aid Payment	\$	221.00
Excess Net Earned Income	\$	N/A
Final Aid Payment	\$	221.00
Overridden Aid Payment	\$	
Adjustments	-	<u>0.00</u>
Potential Benefit	=	221.00
Vendor name - Drug and Alcohol Amount	-	100.00
Potential Benefit to Participant	=	121.00
Previous Potential Benefit	-	<u>0.00</u>
Overpayment Adjustment Amount	-	<u>0.00</u>
Authorized Amount	=	121.00

Money Management			
Vendor	Pay Code	Name	Amount
Vendor Name	Drug and Alcohol	First Name, Last Name	\$ <u>100.00</u>
Previous Potential Benefit			- 0.00
Net Benefit Amount			= 100.00

2.11.2.5 EDBC Summary page with Aid payment and Vendor Payment information

2.14 Eligibility Logic: Hard Validation

For GAGR program, when a Money management record is added for vendor payment and the Vendor Type is not selected (blank) in Living Arrangements Detail page then the following hard validation will be shown on Run EDBC Page while running EDBC for the benefit month for which money management detail is applicable. This is applicable for GA/GR Automated EDBC/CC Counties Solution program only and will not affect other counties including LA county.

Run EDBC

*- Indicates required fields

Benefit Processing Range:

Begin Month: *
End Month: *

<input type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
	General				
	Assistance/General	Pending			
<input checked="" type="checkbox"/>	Relief				

The Vendor Type in the Living Arrangements Detail is blank and is required for the Vendor payment added in the Money management page.

2.12.1 Run EDBC page with hard validation message

2.15 Financial

2.15.1 Return to Residence Functionality

2.15.1.1 County Admin Detail - Return to Residence

2.15.1.1.1 Overview

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

2.15.1.1.2 Description of Changes

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Return to residence applicable.	N	Y	N	Y	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y
Connection to place of residence.	N	N	N	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y	Y	N	Y	Y
Self-sufficient at place of return.	N	N	N	N	Y	Y	N	N	N	N	Y	N	N	N	N	N	Y	N
Previously received RTR.	N	N	N	Y	Y	N	Y	N	N	N	Y	N	Y	Y	Y	Y	N	N
Signed RTR letter.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
County resident.	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N
County residency dates.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Place of return.	N	N	N	N	Y	Y	N	N	N	N	N	N	N	N	N	Y	Y	N
Parole condition to leave county.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Pre-approved RTR request.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX307C001	Return to residence applicable.	Return to residence applicable.
EDX307C003	Connection to place of residence.	Connection to place of residence.
EDX307C004	Self-sufficient at place of return.	Self-sufficient at place of return.
EDX307C005	Previously received RTR.	Previously received RTR.
EDX307C007	Signed RTR letter.	Signed RTR letter.
EDX307C008	County resident.	County resident.
EDX307C009	County residency dates.	County residency dates.

EDX307C012	Place of return.	Place of return.
EDX307C014	Parole condition to leave county.	Parole condition to leave county.
EDX307C015	Pre-approved RTR request.	Pre-approved RTR request.

The following CalWIN rules has been removed for this functionality.

CalWIN Number	CalWIN Description	Reason
EDX307C002	Grant RTR Request Amount.	This rule is not used in this functionality. This is based on Gainwell notation 'Not in copybook'.
EDX307C006	Previously requests RTR.	This rule is not used in this functionality. This is based on Gainwell notation 'Not in copybook'.
EDX307C011	Individual has resource available.	This rule is not used in this functionality. This is based on Gainwell notation 'Not in copybook'.
EDX307C013	Recipient of other county aid.	This rule is not used in this functionality. This is based on Gainwell notation 'Not in copybook'.

2.15.1.2 EDBC Changes

2.15.1.2.1 Overview

This section will provide the Eligibility Rules flow for Return to Residence Program Person Eligibility that can be filtered for each CalWIN County.

2.15.1.2.2 Description of Change

Return to Residence Rules Flow Diagram:

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

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

Field (CalWIN)	Field (CalSAWS)	Location Details
Potential GA Eligible	Potentially GA/GR Eligible	Return to Residence Detail page
Verified Self-Sufficiency at Place of Return	Verified Self-Sufficiency	Return to Residence Detail page
Other connection to the place of residence	Connection of Place of Residence	Return to Residence Detail page
RTR Request Amount	Request Amount	Return to Residence Detail page
RTR Pre-Approval	Pre-Approval	Return to Residence Detail page
Signed the RTR Letter	Signed Return Letter	Return to Residence Detail page
RTR Reason	Return Reason	Return to Residence Detail page
State of Return	State	Return to Residence Detail page
Are there conditions of parole that the person reside outside of county	Are there conditions of parole that would require residence outside of the case county?	Return to Residence Detail page
Collect Individual prior/current aid detail: Aid Code	Aid Code	Other Program Assistance (OPA) Detail

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram.

Form Reason

1. The status reason CT73 'Approved for RTR Pmt as Greyhound Bus Ticket' will be set to for the form E10026 when all the following conditions are met (Note: this status is only used for triggering the Form, this status will not be displayed on the EDBC):
 - a. The rule 'Return to residence applicable.' is active.
 - b. The rule 'Place of return.' is active.
 - c. The rule 'Self-sufficient at place of return.' is not active, OR The rule 'Connection to place of residence.' is active.

Category	Short Description
73	Approved for RTR Pmt as Greyhound Bus Ticket

New Program/Person Status:

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

1. The new person status reason CT73 'Not Elig. for Pgm' will be set as a failure status reason when all the following conditions are met:
 - a. All the following is true:
 - i. The rule Return to residence applicable. is active.
 - ii. The Individual's current county of residence ('County of Residence' from Residency detail page) is not equal to the case county.
 - iii. The individual has an entry in Return to Residence page.
 - b. The individual 'Potentially GA/GR Eligible' is 'Yes' in Return to Residence Detail page.

Category	Short Description
73	Not Elig. for Pgm

2. The new person status reason CT73 'Connection to the Place of Return not Verified' will be set as a failure status reason when all the following conditions are met in A or B:
 - A. All the following:

- a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
 - b. The rule ' Place of return.' is active.
 - c. The rule ' Previously received RTR.' is active.
 - d. The individual's case was not previously aided with aid code '9G' (check the case, other cases and OPA)
 - e. The rule ' Self-sufficient at place of return.' is active.
 - f. The individual's 'Verified Self Sufficiency' is 'Yes' ('Verified Self Sufficiency' in Return to Residence Detail page)
 - g. The rule ' Connection to place of residence.' is not active.
- B. All the following:
- a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
 - b. The rule ' Place of return.' is active.
 - c. The rule ' Previously received RTR.' is active.
 - d. The individual's case was not previously aided with aid code '9G' (check the case, other cases and OPA)
 - e. The rule ' Self-sufficient at place of return.' is active.
 - f. The individual 'Verified Self Sufficiency' is 'Yes' in Return to Residence Detail page.
 - g. The rule ' Connection to place of residence.' is active.
 - h. The individual's 'Connection of Place of Residence' is 'No' in Return to Residence Detail page

Category	Short Description
73	Connection to the Place of Return not Verified

3. The new person status reason CT73 'Self-sufficiency at Place of Return not Verified' will be set as a failure status reason when all the following conditions are met:
- a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
 - b. The rule ' Place of return.' is active.
 - c. The rule ' Previously received RTR.' is active.
 - d. The individual case was not previously aided with aid code '9G' (check the case, other cases and OPA)
 - e. The rule ' Self-sufficient at place of return.' is active.
 - f. The individual's 'Verified Self Sufficiency' is 'No'. (This is determined in 'Verified Self Sufficiency' in Return to Residence Detail page)

Category	Short Description
73	Self-sufficiency at Place of Return not Verified

4. The new person status reason CT73 'Previously Received RTR' will be set as a failure status reason when all the following conditions are met in A, B or C:
- A. All the following:
 - a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
 - b. The rule ' Place of return.' is active.
 - c. The rule ' Previously received RTR.' is active.
 - d. The individual's case was previously aided with aid code '9G' (check the case, other cases and OPA)
 - B. All the following:
 - a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
 - b. The rule ' Place of return.' is not active.
 - c. The rule ' Previously received RTR.' is active.
 - d. The rule ' Pre-approved RTR request.' is not active.
 - e. The rule ' County residency dates.' is not active.
 - f. The individual's case was previously aided with aid code '9G' (check the case, other cases and OPA)
 - C. All the following:
 - a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
 - b. The rule ' Place of return.' is not active.
 - c. The rule ' Previously received RTR.' is active.
 - d. The rule ' Pre-approved RTR request.' is not active.
 - e. The rule ' County residency dates.' is active.
 - f. The individual's case was previously aided with aid code '9G' (check the case, other cases and OPA)
 - g. The 'Individual Previous RTR Received Date' > Benefit Month Begin date.

Category	Short Description
73	Previously Received RTR

5. The new person status reason CT73 'Did not Sign the RTR Letter' will be set as a failure status reason when all the following conditions are met:

- a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
- b. The rule ' Place of return.' is active.
- c. The rule ' Previously received RTR.' is not active.
- d. The rule ' Signed RTR letter.' is not active.
- e. The rule ' County resident.' is not active.
- f. The rule ' Parole condition to leave county.' is active.
- g. The 'Temp RTR Request Date' is greater than Benefit month begin date.

Category	Short Description
73	Did not Sign the RTR Letter

6. The new person status reason CT73 'Resident of County' will be set as a failure status reason when all the following conditions are met:
- a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
 - b. The rule ' Place of return.' is active.
 - c. The rule ' Previously received RTR.' is not active.
 - d. The rule ' Signed RTR letter.' is not active.
 - e. The rule ' County resident.' is active.
 - f. The individual is a resident of the county with intent to reside (This is determined if the 'Intent to Reside' is checked in Residency Detail page)

Category	Short Description
73	Resident of County

7. The new person status reason CT73 'Not Res. of County for at least 15 but less than 30 days' will be set as a failure status reason when all the following conditions are met:
- a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
 - b. The rule ' Place of return.' is not active.
 - c. The rule ' Previously received RTR.' is active.
 - d. The rule ' Pre-approved RTR request.' is not active.
 - e. The rule ' County residency dates.' is active.
 - f. The individual's case was previously aided with aid code '9G' (check the case, other cases and OPA)

- g. The 'Indv Prev. RTR Received Date' < Benefit Month Begin date. (Determining the individual Previous RTR Received Date will be described in the Vision flow)
- h. The 'County Arrival Date' (County Arrival Date in Residency Detail page) is not between the 'Minimum Arrive Date' and 'Maximum Arrive Date'. (Determining Minimum and Maximum arrival date will be described in the Visio flow)

Category	Short Description
73	Not Res. of County for at least 15 but less than 30 days

8. The new person status reason CT73 'Has Condition must Reside Outside of County' will be set as a failure status reason when all the following conditions are met:
- a. The individual is Potentially GA/GR Eligible (This is determined by 'Potentially GA/GR Eligible' = 'Yes' in Return to Residence Detail page)
 - b. The rule ' Place of return.' is active.
 - c. The rule ' Previously received RTR.' is not active.
 - d. The rule ' Signed RTR letter.' is not active.
 - e. The rule ' County resident.' is not active.
 - f. The rule ' Parole condition to leave county.' is active.
 - g. The 'Temp RTR Request Date' is greater than Benefit month begin date. (Determining Temp RTR Request Date will be determined in Visio Flow)
 - h. The individual does require to have their parole outside the county. (This is determined by having the 'Are there conditions of parole that would require residence outside of the case county?' set to Yes.).

Category	Short Description
73	Has Condition must Reside Outside of County

9. The new program status reason CT73 'Previously Granted RTR Amt' will be set as a failure status reason when all the following conditions are met:
- a. (In multi-month edbc) the GAGR program was not approved for Return to Residence and Return to Residence amount is not granted in the previous month.

Category	Short Description
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73	Previously Granted RTR Amt
----	----------------------------

10. The new program status reason CT73 'Cash on Hand to Meet the Needs' will be set as a failure status reason when all the following conditions are met:

- a. The rule ' Return to residence applicable.' is active.
- b. The rule ' Place of return.' is not active.
- c. The rule ' Previously received RTR.' is not active.
- d. The rule ' Signed RTR letter.' is not active.
- e. The rule ' County resident.' is active.
- f. The individual Cash on Hand Amount' > 'Request Amount'.

Category	Short Description
73	Cash on Hand to Meet the Needs

2.15.1.3 Correspondence

2.15.1.3.1 Overview

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

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

2.15.1.3.2 Description of Change

1. **Reason Code: E10021 - Approved for RTR pmt as Greyhound bus ticket**

a. Trigger Condition

Form will be triggered if the current EDBC has the 'Approved for RTR pmt as Greyhound bus ticket' display reason and the previous EDBC did not.

b. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	N/A	Greyhound Travel Estimate	SC 397G	500834

2. Reason Code: XAF387 – Connection to the Place of Return not Verified

- a. Trigger Condition
 - i. This notice generates for the applicable counties when the program was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Connection to the Place of Return not Verified'.
- b. Person Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Discontinuance	DISCONTINUANCE-Various Reasons	CDS 013-1	12450

3. Reason Code: XAF614 – Previously Granted RTR Amt

- a. Trigger Condition
 - i. This notice generates for the applicable counties when the program was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Previously Granted RTR Amt'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Discontinuance	DISCONTINUANCE/RELOCATION OF RESIDENT	CDS 037-1	12441

2.15.1.3.3 Project Requirements

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Return to Residence Applicable} CalSAWS must determine whether an individual is potential eligible to GA/GR Return to Residence.]	The rule 'Return to residence applicable.' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	Business Rule: {Returned to Residence Connection to Residence} CalSAWS must fail an individual for RTR who does not have a connection to the place of residence.]	The rule 'Connection to place of residence. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Returned to Residence Self Sufficient } CalSAWS must fail an individual for RTR who has not verified their self-sufficiency at the place of return.]	The rule 'Self-sufficient at place of return. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Return to Residence Previously Received Fail} CalSAWS must fail an individual who has previously received Returned to Residence GA/GR.]	The rule 'Previously received RTR. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Returned to Residence Signed RTR Letter} CalSAWS must fail an individual for RTR who has not signed the RTR letter.]	The rule 'Signed RTR letter. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Returned to Residence County Resident} CalSAWS must fail an individual for RTR who is a resident of the county with intent to reside.]	The rule 'County resident. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Returned to Residence Dates} CalSAWS must fail an individual for RTR who has not resided in the county within the specified date range.]	The rule 'County residency dates. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Return to Residence Previously Received} CalSAWS must determine whether an individual has previously received Returned to Residence GA/GR.]	The rule 'Place of return. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Returned to Residence Parole Condition} CalSAWS must fail an individual for RTR who has a parole condition that requires the person reside outside the county.]	The rule 'Parole condition to leave county. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Return to Residence Pre-approved} CalSAWS must determine whether an individual is pre-approved for RTR.]	The rule 'Pre-approved RTR request. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix

2.15.2 Shared Housing Functionality

2.15.2.1 County Admin Detail - Shared Housing

2.15.2.1.1 Overview

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

2.15.2.1.2 Description of Changes

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Shared Housing applicable.	N	Y	N	Y	Y	Y	Y	N	N	N	Y	Y	Y	N	N	Y	Y	Y
Shared Housing 340 on file.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Shared Housing with Ineligible Spouse.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX300C001	Shared Housing applicable	Shared Housing applicable.
EDX300C019	Shared Housing 340 on file	Shared Housing 340 on file.
EDX300C026	Shared Housing with Ineligible Spouse – Alameda	Shared Housing with Ineligible Spouse.

The following CalWIN rules has been removed for this functionality.

CalWIN Number	CalWIN Description	Reason
EDX300C007	Divide Expense Between All Individuals.	This rule is not used in this functionality. This is based on Gainwell notation 'Not in copybook'.
EDX300C011	Reduce allowance on HH size.	This rule is not used in this functionality. This is based on Gainwell notation 'Not in copybook'.

Leverage Rule

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Fail the case if no 'ID/Driver License' is provided. (Discontinue/Denied).	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N
Earned income – Santa Barbara Only.	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N
Earned income – Tulare Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Budget on accumulated needs.	N	N	Y	Y	Y	N	N	N	Y	N	Y	Y	Y	N	Y	Y	Y	Y

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

CalWIN Rule	CalSAWS Rule
EDX003C006	Fail the case if no 'ID/Driver License' is provided. (Discontinue/Denied).
EDX309C011	Earned income – Santa Barbara Only.
EDX309C016	Earned income – Tulare Only.
EDX321C002	Budget on accumulated needs.

2.15.2.2 EDBC Changes

2.15.2.2.1 Overview

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

2.15.2.2.2 Description of Change

Shared Housing Rules Flow Diagram:

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

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

Field (CalWIN)	Field (CalSAWS)	Location Details
Housing Needs Met: Living Arrangement Tab in Collect Individual Attributes detail page	Household Needs Met	Living Arrangements Detail
Need CHASS shelter: Living Arrangement Tab in Collect Individual Attributes detail page	CHASS Shelter Required	Living Arrangements Detail
Refusing to be in CHASS shelter: Living Arrangement Tab in Collect Individual Attributes detail page	CHASS Shelter Refused	Living Arrangements Detail
Inability to stay in shelter is verified: Living Arrangement Tab in Collect Individual Attributes detail page	Unable to Stay in CHASS Shelter	Living Arrangements Detail
Form Name: Provide Additional information to client	Type	GA/GR Document Signature List
340 Form on file	Type (Form 340)	GA/GR Document Signature Detail

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram.

2.15.2.2.3 Project Requirements

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Shared Housing applicable} CalSAWS must determine whether shared housing is applicable to a GA/GR case.]	The rule 'Shared Housing applicable. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Shared Housing 340 on file} CalSAWS must determine whether the Shared Housing 340 form is on file when evaluating GA/GR housing need.]	The rule 'Shared Housing 340 on file. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix
	[Business Rule: {Shared Housing with Ineligible Spouse – Alameda} CalSAWS must determine GA/GR shared housing grant for two when there is an ineligible spouse.]	The rule 'Shared Housing with Ineligible Spouse. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix

2.15.3 Financial Housing Functionality

2.15.3.1 County Admin Detail – Housing

2.15.3.1.1 Overview

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

2.15.3.1.2 Description of Changes

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Housing applicable	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y
Allow housing and utilities up to the max	N	N	N	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Allow housing always	N	N	Y	Y	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Allow housing conditionally	Y	Y	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	Y
Allow housing when in house	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Landlord requirements for housing	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N
Proof of rental agreement	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Proof of housing cost	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N
Legal tenant	N	Y	N	N	N	N	Y	Y	Y	N	Y	Y	Y	N	Y	N	N	Y

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX319C001	Housing applicable	Housing applicable.
EDX319C002	Allow housing and utilities up to the max	Allow housing and utilities up to the max.
EDX319C004	Allow housing always	Allow housing always.
EDX319C005	Allow housing conditionally	Allow housing conditionally.
EDX319C006	Allow housing when in house	Allow housing when in house.
EDX319C007	Landlord requirements for housing	Landlord requirements for housing.
EDX319C008	Proof of rental agreement	Proof of rental agreement.

EDX319C009	Proof of housing cost	Proof of housing cost.
EDX319C011	Legal tenant	Legal tenant.

The following CalWIN rules has been removed for this functionality.

CalWIN Number	CalWIN Description	Reason
EDX319C010	No housing allowance without proof	This rule is not used in this functionality. This is based on Gainwell notation 'Not in copybook'.
EDX319C003	Allow housing and utilities	Computation calculated when this rule is active is no longer used in CalWIN

Leverage Rule

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Housing and Basic Needs Test - Alameda	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

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

CalWIN Rule	CalSAWS Rule
EDX323C016	Housing and Basic Needs Test – Alameda.

2.15.3.2 EDBC Changes

2.15.3.2.1 Overview

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

2.15.3.2.2 Description of Change

Financial Housing Flow Diagram:

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

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

Field (CalWIN)	Field (CalSAWS)	Location Details
Rent, Mortgage and Utility Paid Amount	Amount	Expense Amount Detail
Homeless	Living Arrangement † Type = "Homeless"	Living Arrangement Detail
Landlord type: Legal Owner, Manager of Legal Owner, Agent of Property Owner	Owner Type	Shelter Owner Detail

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram.

New Program/Person Status:

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

1. The new status reason CT73 'Shelter Cost not Allowed for Property Manager or Agent' will be set as a display status reason when all the following conditions are met:
 - a. All of the following is True:
 - i. The rule is 'Housing applicable.' active.
 - ii. The 'Shelter Expenses Exists' is true
 - b. The rule 'Allow housing conditionally.' is active.
 - c. All of the following is not true:

- i. The individual's Living Arrangement type is 'Homeless'.
 - ii. The Facility Sub-Type in Living Arrangement Detail page is 'Drug and Alcohol Treatment Private Funding'.
- d. The rule 'Housing and Basic Needs Test – Alameda.' is active.
- e. All of the following is not true:
 - i. 'GR Budget Homeless' is true.
 - ii. 'GR Budget No House Cost' is true.
 - iii. 'GR Budget CHASS' is true.
 - iv. 'GR Budget Free Rent' is true.
 - v. 'GR Budget AGAP' is true.
 - vi. 'GR Budget CHASS House' is true.
 - vii. 'GR Budget BN CHASS' is true.
- f. The rule 'Landlord requirements for housing.' is active.
- g. The following is not true:
 - i. Shelter Expense type is 'Rent' and the Landlord type is any of the following:
 - 1. 'Legal Owner'.
 - 2. 'Manager of Legal Owner'.
 - 3. 'Agent of Property Owner'.

Category	Short Description
73	Shelter Cost not Allowed for Property Manager or Agent

2.15.3.3 Correspondence

2.15.3.3.1 Overview

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

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

2.15.3.3.2 Description of Change

1. Reason Code: XAF352 - Shelter Cost not Allowed for Property Manager or Agent

- a. Trigger Condition

- i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Shelter Cost not Allowed for Property Manager or Agent'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Santa Clara	Denial	GA Denial - Failed to Provide Housing Assistance Verification	GA 114	12042

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Housing Applicable} CalSAWS must determine whether housing costs are applicable in a GA/GR case.]	The rule 'Housing applicable ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Up to Max} CalSAWS must allow total housing costs including utilities up to the maximum for the AU size in the GA/GR budget.]	The rule 'Allow housing and utilities up to the max ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
		The rule 'Allow housing always ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Institution and Homeless} CalSAWS must not allow GA/GR housing costs to an individual who resides in an institution or is homeless.]	The rule 'Allow housing conditionally ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
		The rule 'Allow housing when in house ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Landlord Requirement} CalSAWS must not allow GA/GR housing costs when the landlord is not the property manager or agent of the legal owner.]	The rule 'Landlord requirements for housing ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Proof of Rental Agreement} CalSAWS must not allow GA/GR housing costs when the individual has no proof of rental agreement.]	The rule 'Proof of rental agreement ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Proof of Cost} CalSAWS must allow GA/GR housing costs when the individual provides verification of housing cost.]	The rule 'Proof of housing cost ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Legal Tenant} CalSAWS must allow GA/GR housing costs when the individual is the legal owner or tenant.]	The rule 'Legal tenant ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.

2.15.4 Housing Test Functionality

2.15.4.1 County Admin Detail – Housing Test

2.15.4.1.1 Overview

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

2.15.4.1.2 Description of Changes

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Housing allowance test applicable	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y
Partial payment to vendor	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Rent reduction on time	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Rent reduction plan	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
County contracted facility	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Max Housing allowance if there is any shelter expense	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	Y	N	N
Maximum Housing allowance if homeless	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Housing and Basic Needs Test - Alameda	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

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

CalWIN Number	CalWIN Name	CalSAWS Rule
EDX323C001	Housing allowance test applicable	Housing allowance test applicable

EDX323C003	Partial payment to vendor	Partial payment to vendor
EDX323C006	Rent reduction on time	Rent reduction on time
EDX323C007	Rent reduction plan	Rent reduction plan
EDX323C010	County contracted facility	County contracted facility
EDX323C014	Max Housing allowance if there is any shelter expense	Max Housing allowance if there is any shelter expense
EDX323C015	Maximum Housing allowance if homeless	Maximum Housing allowance if homeless
EDX323C016	Housing and Basic Needs Test - Alameda	Housing and Basic Needs Test - Alameda

The following CalWIN rules has been removed for this functionality.

CalWIN Number	CalWIN Description	Reason
EDX323C005	Actual expense lesser than maximum	The functionality for this rule is only triggering display reason that has no NOA attached and does not fail person/program
EDX323C009	Fraud referral on excess expense	The functionality for this rule is only triggering display reason that has no NOA attached and does not fail person/program
EDX323C011	No allowance when need not verified	Not used anywhere and not active in any County per Gainwell

Leverage Rule

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Earned income - Alameda Only.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income - Sacramento Only.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income - San Diego Only.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Earned income - San Francisco Only.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Earned income - Solano Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N
Earned income - Tulare Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
Earned income - Ventura Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N
Budget on accumulated needs	N	N	Y	Y	Y	N	N	N	Y	N	Y	Y	Y	N	Y	Y	Y	Y

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

CalWIN Rule	CalSAWS Rule
EDX309C001	Earned income - Alameda Only.
EDX309C006	Earned income - Sacramento Only.
EDX309C007	Earned income - San Diego Only.
EDX309C008	Earned income - San Francisco Only.
EDX309C014	Earned income - Solano Only.

EDX309C016	Earned income - Tulare Only.
EDX309C017	Earned income - Ventura Only.
EDX321C002	Budget on accumulated needs

2.15.4.2 EDBC Changes

2.15.4.2.1 Overview

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

2.15.4.2.2 Description of Change

Housing Test Rules Flow Diagram:

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

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

Field (CalWIN)	Field (CalSAWS)	Location Details
Planning to reduce expenses verified: Shelter Food Expense Detail	Intent to Reduce Expense	Expense Detail
Due Date: Shelter Food Expense Detail (This is related to Planning to reduce expenses verified)	Reduction Due Date	Expense Detail

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram.

Form Reason

1. The status reason CT73 'Has Rent that Exceeds Monthly Grant Amt' will be set to for the form E10047 when all the following conditions are met (Note: this status is only used for triggering the Form, this status will not be displayed on the EDBC):

- a. The rule 'Housing and Basic Needs Test - Alameda.' is not active OR all the following (set in other rules) are false:
 - i. 'GR Budget Homeless'
 - ii. 'GR Budget No House Cost'
 - iii. 'GR Budget CHASS'
 - iv. 'GR Budget Free Rent'
 - v. 'GR Budget AGAP'
 - vi. 'GR Budget CHASS House'
- b. The rule 'Housing allowance test applicable.' is active.
- c. The rule 'County contracted facility.' is not active.
- d. The rule 'Earned income- San Diego Only.' is not active.
- e. The rule 'Budget on accumulated needs' is not active.
- f. The rule 'Partial payment to vendor' is not active.
- g. The rule 'Rent reduction plan.' is not active.
- h. The rule 'Rent reduction on time.' is active.
- i. 'Indv Total Shelter Amount' > GAGR Grant Amount.
- j. 'Planning to reduce expenses verified' = 'Received' (from Display Shelter/Food Expense Detail Window).
- k. The benefit month begin date <= due date (Due Date from Shelter Food Expense Detail page).
- l. The expense category = 'Shelter' and shelter expense type = 'Rent'.
- m. The sub program type is 'General Assistance/General Relief.

Category	Short Description
73	Has Rent that Exceeds Monthly Grant Amt

New Program/Person Status:

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

- 1. The new program status reason CT73 'Net Monthly Housing Exp Exceeded Monthly Inc for More Than 30 Days' will be set as a failure status reason when all the following conditions are met:
 - a. The rule 'Housing and Basic Needs Test - Alameda.' is not active OR all the following (set in other rules) are false:
 - i. 'GR Budget Homeless'
 - ii. 'GR Budget No House Cost'
 - iii. 'GR Budget CHASS'
 - iv. 'GR Budget Free Rent'
 - v. 'GR Budget AGAP'
 - vi. 'GR Budget CHASS House'

- b. The rule 'Housing allowance test applicable.' is active.
- c. The rule 'County contracted facility.' is not active.
- d. The rule 'Earned income - San Diego Only.' is not active.
- e. The rule 'Budget on accumulated needs' is not active.
- f. The rule 'Partial payment to vendor' is not active.
- g. The rule 'Rent reduction plan.' is not active.
- h. The rule 'Rent reduction on time.' is active.
- i. 'Indv Total Shelter Amount' > GAGR Grant Amount.
- j. 'Planning to reduce expenses verified' = 'Received' (from Display Shelter/Food Expense Detail Window).
- k. The benefit month begin date > due date (Due Date from Shelter Food Expense Detail page).
- l. The expense category = 'Shelter' and shelter expense type = 'Rent'.

Category	Short Description
73	Net Monthly Housing Exp Exceeded Monthly Inc for More Than 30 Days

2. The new program status reason CT73 'Monthly Housing Exp Exceeded Maximum Grant Amt' will set as a failure reason when the following conditions are met:
- a. The rule 'Housing and Basic Needs Test - Alameda.' is not active OR all the following (set in other rules) are false:
 - i. 'GR Budget Homeless'
 - ii. 'GR Budget No House Cost'
 - iii. 'GR Budget CHASS'
 - iv. 'GR Budget Free Rent'
 - v. 'GR Budget AGAP'
 - vi. 'GR Budget CHASS House'
 - b. The rule 'Housing allowance test applicable.' is active.
 - c. The rule 'County contracted facility.' is not active.
 - d. The rule 'Earned income - San Diego Only.' is not active.
 - e. The rule 'Budget on accumulated needs' is not active.
 - f. The rule 'Partial payment to vendor' is not active.
 - g. The rule 'Rent reduction plan.' is not active.
 - h. The rule 'Rent reduction on time.' is active.
 - i. 'Indv Total Shelter Amount' > GAGR Grant Amount.
 - j. 'Planning to reduce expenses verified' = 'Received' (from Display Shelter/Food Expense Detail Window).
 - k. The benefit month begin date > due date (Due Date from Shelter Food Expense Detail page).

- I. The expense category is not 'Shelter' OR shelter expense type is not 'Rent'.

Category	Short Description
73	Monthly Housing Exp Exceeded Maximum Grant Amt

2.15.4.3 Correspondence

2.15.4.3.1 Overview

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

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

2.15.4.3.2 Description of Change

1. **Reason Code: XAR231 - Net Monthly Housing Exp Exceeded Monthly Inc for More Than 30 Days**

- a. Trigger Condition
 - i. This notice generates for the applicable counties when the program was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Net Monthly Housing Exp Exceeded Monthly Inc for More Than 30 Days'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
San Francisco	Discontinuance	CAAP Discontinuance: Excess Shelter Costs	009 1	12599

2. **Reason Code: XAF302 - Monthly housing exp exceeded maximum grant amt**

- a. Trigger Condition
 - i. This notice generates for the applicable counties when the program was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Monthly housing exp exceeded maximum grant amt'.

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

County	Action	Document Description	Number	Template
San Francisco	Discontinuance	CAAP Discontinuance: Excess Real Property	025 0	12599

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Housing Allowance Applicable} CalSAWS must determine whether housing allowance is applicable to a GA/GR case.]	The rule 'Housing allowance test applicable ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Allowance Vendor Pay} CalSAWS must pay actual housing expense up to max GA/GR grant amount to vendors when the expense is greater than 53% of max grant amount.]	The rule 'Partial payment to vendor ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Allowance Rent Reduction Time Period} CalSAWS must grant up to the maximum of GA/GR until the time period for rent reduction has passed when the actual housing expense is greater than the GA/GR housing allowance grant amount.]	The rule 'Rent reduction on time ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Housing Allowance Rent Reduction Plan} CalSAWS must determine whether the client is planning to reduce expenses when the housing expense is greater than the GA/GR housing allowance grant amount.]	The rule 'Rent reduction plan' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Allowance County Contracted Facility} CalSAWS must sanction the GA/GR individual residing in a county contracted facility and verification of housing expense has expired.]	The rule 'County contracted facility ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Allowance Max Housing Allowance} CalSAWS must grant housing allowance up to the maximum for GA/GR when there is a shelter expense.]	The rule 'Max Housing allowance if there is any shelter expense ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Housing Allowance Homeless} CalSAWS must grant the Maximum GA/GR Housing allowance if the individual is homeless.]	The rule 'Maximum Housing allowance if homeless ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Housing Allowance Needs Met} CalSAWS must determine if the individual is not paying housing expenses for GA/GR.]	The rule 'Housing and Basic Needs Test - Alameda ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.

2.15.5 Drug and Alcohol Functionality

2.15.5.1 County Admin Detail – Drug and Alcohol

2.15.5.1.1 Overview

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

2.15.5.1.2 Description of Changes

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Drug and Alcohol applicable.	Y	N	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y
Fail case when in drug and alcohol.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

Vendor pay to the facility.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Treat as single in shared housing.	N	N	N	Y	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Alternative General Assistance Program Facility.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Grant amt based on facility rate.	N	N	N	N	N	N	N	N	Y	Y	Y	N	N	N	N	N	N	Y

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

CalWIN Number	CalWIN Name	CalSAWS Rule
EDX306C001	Drug and Alcohol applicable.	Drug and Alcohol applicable.
EDX306C002	Fail case when in drug and alcohol.	Fail case when in drug and alcohol.
EDX306C007	Vendor pay to the facility.	Vendor pay to the facility.
EDX306C008	Treat as single in shared housing.	Treat as single in shared housing.
EDX306C009	AGAP Facility.	Alternative General Assistance Program Facility.
EDX306C011	Grant amount based on facility rate.	Grant amt based on facility rate.

Leverage Rule

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Allow ZBG for Indv in Drug & Alcohol Trtmnt Fclty	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N

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

CalWIN Rule	CalSAWS Rule
EDX321C034	Allow ZBG for Indv in Drug & Alcohol Trtmnt Fclty

The following CalWIN rules has been removed for this functionality.

CalWIN Number	CalWIN Description	Reason
EDX306C003	Grant for approved facility method 1	Not using this rule as the values calculated when this rule is active is not used.
EDX306C004	Grant on AU size.	Not using this rule as the values calculated when this rule is active is not used.
EDX306C005	Set provider specific switches.	Not using this rule as the value calculated when this rule is active is already calculated.
EDX306C006	Grant on AU when not funded.	Not using this rule as the values calculated when this rule is active is not used.
EDX306C010	Limit aid for only two months	Not using this rule as the value calculated when this rule is active is not used.
EDX306C012	Grant for approved facility method 2	Not using this rule as the value calculated when

		this rule is active is already calculated.
EDX306C013	Government funded facility.	Not using this rule as the values calculated when this rule is active is not used.

2.15.5.2 EDBC Changes

2.15.5.2.1 Overview

This section will provide the Eligibility Rules flow for Drug and Alcohol Program Person Eligibility that can be filtered for each CalWIN County.

2.15.5.2.2 Description of Change

Drug and Alcohol Rules Flow Diagram:

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

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

Field (CalWIN)	Field (CalSAWS)	Location Details
Type from Collect Institutional Care detail page	Facility Sub-Type	Living Arrangements Detail page
Approved by DHSS in Maintain Provider Details	DHSS Licensed	Living Arrangements Detail page
Received County Funds in Maintain Provider Details	County Funded	Living Arrangements Detail page
Negotiated Rate field of Collect Institutional Care Detail Screen	Negotiated Facility Rate	Living Arrangements Detail page
Vendor Category	Vendor Type: Drug and Alcohol	Living Arrangement Detail

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram.

New Program/Person Status:

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

1. The new person status reason CT73 'In Drug and Alcohol Trtmnt Facility Funded by County' will be set as a failure status reason when all the following conditions are met:
 - a. The rule 'Drug and Alcohol applicable' is active.
 - b. The person has an entry in Living Arrangements Detail page applicable for the benefit month.
 - c. Any of the following is true:
 - i. The Facility Sub-Type in Living Arrangement Detail page = 'Alternative General Assistance Program Drug & Alcohol'. and the rule ' Alternative General Assistance Program Facility.' is active
 - ii. The Facility Sub-Type (in Living Arrangement Detail page) is 'Drug and Alcohol Rehab Public Funding'.
 - iii. The Facility Sub-Type is 'Drug and Alcohol Treatment Private Funding'.
 - d. The rule 'Fail case when in drug and alcohol' is not active.
 - e. Any of the following rules is active:
 - i. 'Grant on AU when not funded.'
 - ii. 'Vendor pay to the facility.'
 - iii. 'Treat as single in shared housing.'
 - f. The Drug and Rehabilitation center is County Funded (County Funded is 'Yes' in Living Arrangements Detail page).

Category	Short Description
73	In Drug and Alcohol Trtmnt Facility Funded by County

2. The new person status reason CT73 'In a Drug and Alcohol Treatment Facility' will be set as a failure status reason when all the following conditions are met:
 - a. The rule 'Drug and Alcohol applicable.' is active.

- b. The person has an entry in Living Arrangements Detail page applicable for the benefit month.
- c. Any of the following conditions are met:
 - a. The Facility Sub-Type in Living Arrangement Detail page is 'Alternative General Assistance Program Drug & Alcohol' and the rule 'Alternative General Assistance Program Facility.' is active.
 - b. the Facility Sub-Type (in Living Arrangement Detail page) is 'Drug and Alcohol Rehab Public Funding' or 'Drug and Alcohol Treatment Private Funding'.
- d. The rule 'Fail case when in drug and alcohol' is active.

Category	Short Description
73	In a Drug and Alcohol Treatment Facility

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Drug and Alcohol Facility Applicable} CalSAWS must perform Drug and Alcohol facility evaluation on a GA/GR case.]	The rule 'Drug and Alcohol applicable. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Drug and Alcohol Facility Fail Case} CalSAWS must fail the GA/GR case when individual is in drug and alcohol facility.]	The rule 'Fail case when in drug and alcohol. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Drug and Alcohol Licensed Facility} CalSAWS must determine the GA/GR grant for an individual in a licensed Drug and Alcohol facility based on the number of individuals sharing the house.]	The rule 'Grant for approved facility method. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Drug and Alcohol Facility AU Members} CalSAWS must calculate the GA/GR grant for an individual in a Drug and Alcohol facility based on the number of individuals in the AU.]	The rule 'Grant on AU size. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Drug and Alcohol Facility Provider} CalSAWS must determine whether a drug and alcohol facility provider are licensed, and county funded.]	The rule 'Set provider specific switches. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Drug and Alcohol Facility Funded by County} CalSAWS must fail the GA/GR case when an individual is a resident of a drug and alcohol facility funded by the county.]	The rule 'Grant on AU when not funded. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Drug and Alcohol Facility Vendor Pay} CalSAWS must pay the GA/GR grant to a licensed drug and alcohol facility.]	The rule 'Vendor pay to the facility. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Drug and Alcohol Facility Single in Shared Housing} CalSAWS must consider an individual in a drug and alcohol facility as single in shared housing when determining the grant for GA/GR.]	The rule 'Treat as single in shared housing. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Drug and Alcohol Facility AGAP} CalSAWS must calculate grant when AGAP Facility type applies for GA/GR.]	The rule 'Alternative General Assistance Program Facility. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Drug and Alcohol Facility Rate} CalSAWS must calculate grant amount based on drug and alcohol facility rate for GA/GR.]	The rule 'Grant amt based on facility rate. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Drug and Alcohol Facility} CalSAWS must budget a zero grant for GA/GR when an individual is a resident of a drug and alcohol facility funded by the county.]	The rule 'Government funded facility. 'will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.

2.15.6 Room Board Shelter Functionality

2.15.6.1 County Admin Detail – Room Board Shelter

2.15.6.1.1 Overview

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

2.15.6.1.2 Description of Changes

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Room Board & Shelter applicable.	Y	Y	N	N	N	N	N	N	N	Y	Y	Y	Y	N	N	N	N	Y
Meeting shelter conditions.	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N
Room Board situation.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Rate for homeless in shelter.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y
Allow rates on type of facility.	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N
Allowance only for homeless.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
CHASS Shelter options.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Mental health facility.	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX314C001	Room Board & Shelter applicable	Room Board & Shelter applicable.
EDX314C002	Meeting shelter conditions	Meeting shelter conditions.
EDX314C003	Room Board situation	Room Board situation.
EDX314C004	Rate for homeless in shelter	Rate for homeless in shelter.
EDX314C005	Allow rates on type of facility	Allow rates on type of facility.
EDX314C006	Allowance only for homeless	Allowance only for homeless.
EDX314C007	CHASS Shelter options	CHASS Shelter options.
EDX314C010	Mental health facility	Mental health facility.

Leverage Rule

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

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

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

CalWIN Rule	CalSAWS Rule
EDX309C010	Earned income – San Mateo Only.
EDX309C006	Earned income – Sacramento Only.
EDX323C016	Housing and Basic Needs Test - Alameda

The following CalWIN rules has been removed for this functionality.

CalWIN Number	CalWIN Description	Reason
EDX314C008	Vendor Pay Shelter cost	Not using this rule as the values calculated when this rule is active is not used.
EDX314C009	Shelter cost need amount	Not using this rule as the values calculated when

		this rule is active is not used.
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2.14.6.2 EDBC Changes

2.15.6.1.3 Overview

This section will provide the Eligibility Rules flow for Room Board Shelter Program Person Eligibility that can be filtered for each CalWIN County.

2.15.6.1.4 Description of Change

Room Board Shelter Rules Flow Diagram:

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

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

Field (CalWIN)	Field (CalSAWS)	Location Details
Shelter Bed: Collect Individual Attributes Detail	Living Arrangement Type: Homeless Sub- Type: Shelter Facility	Living Arrangement Detail
Referred by Mental Health Case Manager: Collect Institutional Care Detail	Referred by Mental Health Case Manager	Living Arrangement Detail
Living with Relative: Collect Individual Attributes Detail	Living with Relative	Living Arrangement Detail
Sleeping Quarters Separate from Family: Collect Individual Attributes Detail	Sleeping Quarters Separate from Family	Living Arrangement Detail
Vendor Category	Vendor Types: 1. Board and Care' 2. 'Mental Health Room' 3. 'Shelter'	Living Arrangement Detail

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram.

Form Reason

1. The status reason CT73 'Resident in a Board and Care or Room and Board facility' will be set to for the form E10061 when all the following conditions are met (Note: this status is only used for triggering the Form, this status will not be displayed on the EDBC):
 - a. Any of the following rules are active:
 - i. Room Board & Shelter applicable.
 - ii. Room Board situation.
 - iii. Earned income – Sacramento Only.
 - b. The rule 'CHASS Shelter options.' is active OR all the following:
 - i. The Living Arrangement record is applicable for the benefit month.
 - ii. Facility Sub-Type = 'Board and Care' (Facility Sub-Type in Living Arrangements Detail page).
 - iii. Departure Date (Departure Date in Living Arrangements Detail page) is on or after benefit month begin date.
 - c. The rule 'Meeting shelter conditions.' is active.

Category	Short Description
73	Resident in a Board and Care or Room and Board facility

New Program/Person Status:

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

1. The new status reason CT73 'Residing in an Alternative GA Program Facility', which does not fail the person or program, will be set when all the following conditions are met:
 - a. At least one of the rules is active:
 - i. 'Room Board & Shelter applicable.'
 - ii. 'Room Board situation.'
 - iii. 'Earned income – Sacramento Only.'
 - b. Any of the following is true:
 - i. The rule 'CHASS Shelter options.' is active.
OR
 - ii. All the following:
 - The Living Arrangement record is applicable for the benefit month.
 - Facility Sub-Type = 'Board and Care' (Facility Sub-Type in Living Arrangements Detail page).

- Departure Date (Departure Date in Living Arrangements Detail page) is on or after benefit month begin date.
- c. The rule 'CHASS Shelter options.' is active.
- d. The Facility Sub-Type in Living Arrangement Detail page = 'Alternative General Assistance Program Drug & Alcohol'.

Category	Short Description
73	Residing in an Alternative GA Program Facility

2. The new status reason CT73 'Eligible for the CHASS Program', which does not fail the person or program, will be set when all the following conditions are met:
- a. At least one of the rules is active:
 - i. 'Room Board & Shelter applicable.'
 - ii. 'Room Board situation.'
 - iii. 'Earned income – Sacramento Only.'
 - b. The rule 'CHASS Shelter options.' is active OR all the following:
 - i. The Living Arrangement record is applicable for the benefit month.
 - ii. Facility Sub-Type = 'Board and Care' (Facility Sub-Type in Living Arrangements Detail page).
 - iii. Departure Date (Departure Date in Living Arrangements Detail page) is on or after benefit month begin date.
 - c. The rule 'CHASS Shelter options.' is active.
 - d. All the following in either A or B are true:
 - A. All the following:
 - a. The rule 'Housing and Basic Needs Test - Alameda.' is active.
 - b. The Facility Sub-Type in Living Arrangement Detail page is NOT 'Alternative General Assistance Program Drug & Alcohol'.
 - c. CHASS Shelter Required is true (CHASS Shelter Required = 'Y' in Living Arrangements Detail page)
 - d. CHASS Shelter Refused is NOT true (CHASS Shelter Refused <> 'Y' in Living Arrangements Detail page)
 - e. Unable to Stay in CHASS Shelter is NOT true (Unable to Stay in CHASS Shelter <> 'Y' in Living Arrangements Detail page)
 - B. All the following:
 - a. The rule 'Housing and Basic Needs Test - Alameda.' is not active.

- b. The Facility Sub-Type in Living Arrangement Detail page is NOT 'Alternative General Assistance Program Drug & Alcohol'.
- c. Sub Type = 'Shelter Facility' (Sub Type in Living Arrangements Detail page).

Category	Short Description
73	Eligible for the CHASS Program

2.15.6.2 Correspondence

2.15.6.2.1 Overview

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

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

2.15.6.2.2 Description of Change

1. **Reason Code: XAN383 - Residing in an Alternative GA Program Facility**

- a. Trigger Condition
 - i. This notice generates for the applicable counties when there is a change in benefit amount and the program was 'Active' in the previous saved EDBC and is still 'Active' on the current EDBC with the reason 'Residing in an Alternative GA Program Facility'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Alameda	Change	GA Change - Residing in Alternative Resident Facility	046 3 B (10/10)	12662

2. **Reason Code: XAN331 - Eligible for the CHASS Program**

- a. Trigger Condition
 - i. This notice generates for the applicable counties when the person was 'Pending' and is now 'Active' on the current EDBC with the reason 'Eligible for the CHASS Program'.

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

County	Action	Document Description	Number	Template
Alameda	Approval	GA Approval - CHASS Single Person	102 1 (06/24/13)	608831

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Room Board Shelter} CalSAWS must determine whether Room and Board Shelter is applicable for GA/GR.]	The rule 'Room Board & Shelter applicable. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Shelter Board and Care} CalSAWS must grant Board and Care rate when Room and Board Shelter is applicable for GA/GR.]	The rule 'Meeting shelter conditions. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Room Board Living Situation} CalSAWS must evaluate an individual's living situation for GA/GR Board and Care.]	The rule 'Room Board situation. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Homeless Shelter} CalSAWS must determine whether a homeless GA/GR individual resides in a homeless shelter.]	The rule 'Rate for homeless in shelter. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Shelter Rate Facility Type} CalSAWS must determine shelter rates for GA/GR based on type of facility.]	The rule 'Allow rates on type of facility. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Room Board Homeless Allowance} CalSAWS must determine GA/GR room and board allowance for homeless.]	The rule 'Allowance only for homeless. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Shelter CHASS Options} CalSAWS must determine GA/GR room and board allowance for CHASS Shelter eligible individuals.]	The rule 'CHASS Shelter options. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Shelter Cost Vendor Pay} CalSAWS must determine whether a vendor pays shelter cost for GA/GR.]	The rule 'Vendor Pay Shelter cost. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Shelter Cost Need Amount} CalSAWS must determine shelter cost need amount for a GA/GR individual residing in a Board and Care facility.]	The rule 'Shelter cost need amount. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.
	[Business Rule: {Room Board Shelter Mental Health Facility} CalSAWS must determine Board and Care shelter rates for a GA/GR individual in a licensed mental health facility.]	The rule 'Mental health facility. ' will meet this requirement	The following rule is stated in the business flow diagram and admin matrix.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.			

2.			
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4 MIGRATION IMPACTS

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

5 OUTREACH

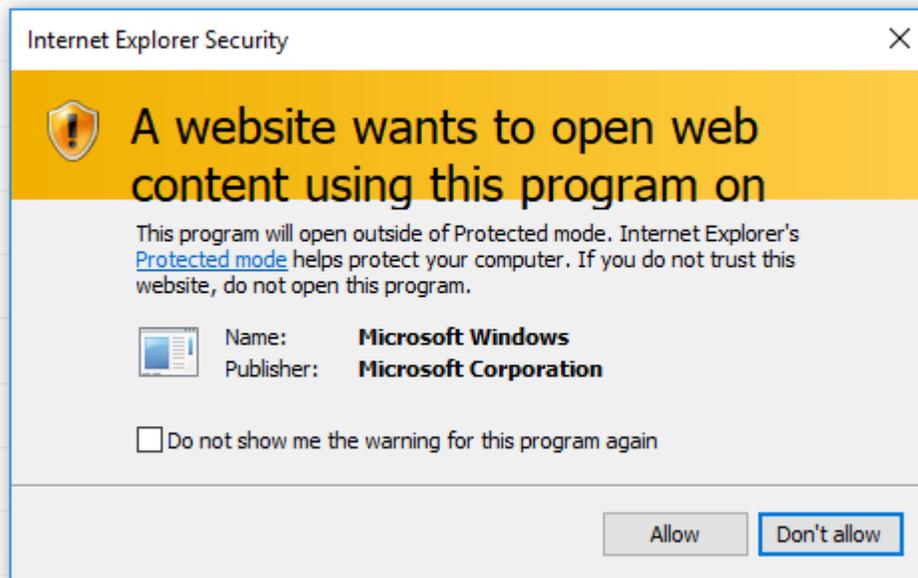
NONE

6 APPENDIX

6.1 Rules Flow Diagram

Viewing Visio Document in Internet Explorer

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



Gurint Inia

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



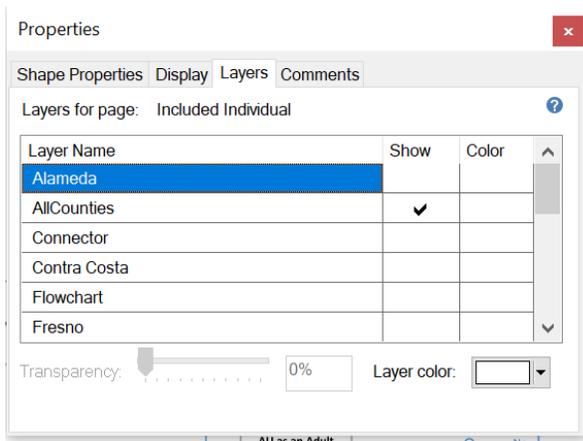
7. Click Allow Blocked Content.
8. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



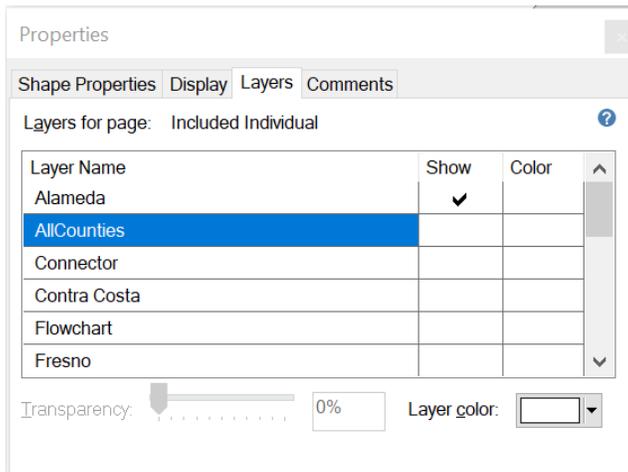
9. Click the layer icon circled in red color below



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



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



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

Viewing Visio Document in Microsoft Visio

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

2. Once you double click the attachment or right click and open with Visio then it will open in Microsoft Visio
3. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



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



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

Alameda

- Alameda
- Contra Costa
- Fresno
- Orange
- Placer
- Sacramento
- San Diego
- San Francisco
- San Luis Obispo
- SanMateo
- Santa Barbara
- Santa Clara
- Santa Cruz
- Solano
- Sonoma
- Tulare
- Ventura

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

6.2 Reference Table

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

- a. Key:
- i. GR Priority
 - 01. The lower the number the higher the priority
 - ii. GR Program Role
 - 01. FE – This indicator means the status reason will change the person role to FRE - 'Financially Responsible – Excluded'
 - 02. FI – This indicator means this status reason will change the person role to FRI 'Financially Responsible – Included'
 - 03. MM – This indicator means this status reason will change the person role to MMO 'Medi-Cal Member Only'
 - 04. UP – This indicator means this status reason will change the person role to UP 'Unaided Person'
 - iii. GR Close Person

- 01. CanCloseBoth – Indicator means this status reason can close both person and program level.
- 02. Y – indicator means this status reason can close the person.
- iv. GR Close Program
 - 01. CanCloseBoth – Indicator means this status reason can close both person and program level.
 - 02. Y – Indicator means this status reason can close the program.
- v. General Relief
 - 01. Y -Indicator means this status reason will be applicable for CalWINs General Relief Program

6.3 CalWIN RT table search reference (used by developers)

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

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

<p>Shared Housing Housing Test</p>	<p>GA Deduction Type</p>	<p>The table 'GAGR Deduction' (CT10663) will provide the disregard allowed amount and deduction disregard Allowed percentage for specific values based on the CalWIN GAGR County.</p> <p>The code number identifier is used to retrieve the deduction and percentage amount.</p> <p>Each county will have two reference column one will be for disregard allowed amount titled '[County Name] disregard allowed amount' and the other will be for disregard allowed percentage amount titles '[County Name] disregard allowed amount percentage'.</p> <p>Note - [County Name] is a placeholder for whatever county being searched for.</p>	<p>Example: Get Alameda (01) defined 'deduction disregard amount' and deduction disregard percentage for 'Applicant earned income' for Alameda.</p> <p>Search: Code number identifier = 'AE'</p> <p>From: Code Detail Table</p> <p>Where: Code number identif = 'AE' Category Id = 10663</p> <p>Result: Alameda disregard allowed amount = 0 Alameda disregard allowed percentage = 75</p> <p>Meaning: Alameda disregard allowed amount for 'Applicant earned income' is 0 and Alameda disregard allowed percentage for 'Applicant earned income' is 75.</p>	<p>10663</p>
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Special Need Eligibility	Special Need expense	<p>The table 'GAGR Special Need expense' is used to retrieve the grant amount for a CalWIN County.</p> <p>The county code (CT 18) and the Need type (CT 200) will be used to retrieve the GA Amount.</p>	<p>Example: Get Contra Costa (07) defined 'maximum cremation cost amount' / 'GR budget net grant amount' for the need type: 'Indigent cremation' (IC).</p> <p>Search: Grant Amount</p> <p>From: Code Detail Table</p> <p>Where: Need Type: IC County: 07</p> <p>Result: Grant Amount = 825</p> <p>Contra Costa (07) 'maximum cremation cost amount' / 'GR budget net grant amount' for the need type: 'Indigent cremation' (IC) is 825.</p>	10662
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<p>Room and Board Shelter</p>	<p>GAGR Living Arrangement County Reference Table</p>	<p>This table 'GAGR Living Arrangement County Reason' (CT 10657) is to determine what category a CalWIN GAGR county set for their living arrangement type.</p> <p>Using the reference column 'County code' (which reference CT15 County Code) and 'Facility sub Type' (which reference CT10657 Facility Subt Type Code') to search in the Reference table 'GAGR Living Arrangement County Reference Table' (CT 10657) to get the value in the reference column 'Category' .</p> <p>The reference column 'Category' hold numeric values categorizing what each specific GAGR CalWIN county determines a living arrangement type should be based on their business logic.</p> <p>The reference column 'Category' was brought in 'As is' from the CalWIN Database.</p>	<p>Example to determine what Alameda categorized the facility sub type ' Group Home':</p> <p>Search: Reference Column: Category</p> <p>From: Code Detail Table</p> <p>Where: Reference Column: County Code = 01 Reference Column: Group Home = 'GH' Category Id = 10657</p> <p>Result Category = 1</p> <p>Meaning: The county Alameda (01) categorize the facility sub type 'Group Home' (GH) as category '1' .</p>	<p>10657</p>
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Return to Residence	County Defined Time Limit	<p>The table 'County Defined Time Limit' (CT 10634) will provide the time limit duration for the CalWIN GAGR CalWIN County.</p> <p>Search based on the Code number identif 'EL' .</p> <p>Retrieve the following reference columns:</p> <p>Reference column '[County Name] TIME LIMIT' which will give a numeric value (1,2,3.....). Reference column "[County Name] UNIT OF MEASUREMENT" will give a String Value (D,H,M or Y) with (D = Days, H=Hours, M = Months, Y = Years).</p> <p>These two values will give the duration of 'County Defined Specific Period'.</p> <p>Note - [County Name] is a placeholder for whatever county being searched for.</p>	<p>Example for Searching the time limit table for Max age limit for the county of Alameda :</p> <p>Search: Reference Column: Alameda Time Limit Reference Column: Alameda Unit of measurement</p> <p>From: Code Detail table</p> <p>Where: Code number identif = EL Category Id = 10634</p> <p>Result: "Alameda Time Limit" = 65 "Alameda Unit of measurement" = Y</p> <p>*Alameda time limit duration for 'Max age limit' is 65 Years</p>	10634
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