

CalSAWS | Notes from GAGR Committee SCR review mtg - CA-233487, CA-233488, CA-233489, CA-225255, CA-224771, CA-214919

Date:	Dec. 15, 2021	Notes Location:	[Filename or file path]
Time:	2:00 pm – 5:00pm	Meeting Materials:	[Document Name or file path]
Meeting Called by:	Adelaide Mendoza		[Document Name or file path]
Attendees:	Adelaide Mendoza, Caroline Bui, Denise Barajas, Girish Chakkingal, Peterson Etienne, Marqui Simmons, Stephanie Hugo, Richard Weeks, Jennifer Chen, Susette Gee, Deron Schab, Cathy Lawrence, Justin Dobbs, Dymas Pena, Dennis Kohn Region 1- Shari Garrity, Jerry Kulper, Shari Penrod-Mills, Lauren Hartmann Region 2- Stacie McNally, Elizabeth Oakland, Ilda Torrez Region 3- Lynzee Hess Region 4- Michelle Hernandez, Dino Licon, Guadalupe Wilson Region 5- Kristen Timmins, Belinda Sagun, RoAnn Brewer for Rosario Arguelles, Sonia Garcia, Leopoldo Huerta Region 6- Maria Hunt, Vinh Tran		

Topic

Important Points

Guest Topic

- BenefitsCal and GA/GR Applications (3pm) – 10 mins

- Joann and June
- Displaying comment log from BenefitsCal from testing prior to 2.0 release
- 23 counties opted in to receiving GA/GR apps via BenefitsCal
- How does the committee feel about the proposed response?
- No issues or questions from the Committee
- Comment: Jerry: Workers are instructed to go over and clarify e-app currently. These are only foundational questions, not the only mode of determining eligibility. The hierarchy is always reviewed and eligibility for all programs is considered.

SCR Review & Vote

- CA-214919: Task Management – New GA/GR Tasks

Voting: **APPROVED**

- (1) Y x2
- (2) Y
- (3) Y
- (4) Y x2
- (5) Y x3
- (6) Y x3

- **Create a Task when a GA/GR Recipient applies for SSI**
- Each County can turn on/off and customize task and automated action
- Action will initially be set up as inactive
- Q: Elizabeth: Appendix on 7.1 = GR, County uses GA...does that matter? A: Justin will confirm. Girish: Program code on back end is "GR".
- Action triggers when info is entered in SSIAP detail page and saved
- Q: Belinda: Who completed the SSIAP detail page? A: County business process. Follow up: As a managed program will we opt into this? It will be available to all counties. We may not have all required information to complete page but would like to receive the

automated action. Will Worker have access to this? Depends on county authorized security rights.

- Jerry (Monterey): SSI advocates are entering info on this screen currently.
- Q: Shari Garrity: Will assignment default to worker or advocate? A: Worker
- Q: Shar Penrod Milles: Is this a manual page? A: Yes
- **Create a Task when a GA/GR Vendor Payment is ending**
- Based on Money Management Detail Page
- Each County can turn on/off and customize task and automated action
- Action will initially be set up as inactive
- Batch triggered automated action – used to determine if we are approaching an end date.
- Q: Shari Garrity: When does batch trigger action? A: 5 days prior to vendor payment ending.

SCR Review & Vote

- CA-225255: Batch Sweeps for CalWIN GA GR MU triggers – Phase 1

Voting: **Approved**

- (1) Y x2
- (2) Y
- (3) Y
- (4) Y x2
- (5) Y x3
- (6) Y x3

- This SCR will implement new Batch EDBC Sweeps in CalSAWS to replace the MU (Mass Update) Triggers that exist for the GA/GR Automated EDBC/CC Counties.
- Will run EDBC sweep for CF and GR
- 2.1 – will retrieve participants that have a last aid date populated to discontinue the following month.
- 2.2 – will retrieve cases that have return to residence aid code at end of month (9G).
- Q: Sonia: Ventra: Current does approval/discontinuance...Will it be the same? A: Yes, will not issue on reoccurring basis.

SCR Review & Vote

- CA-224771: GA GR Fiscal changes Phase 2

Voting: **Approved**

- (1) Y x2
- (2) Y
- (3) Y
- (4) Y x2
- (5) Y x3
- (6) Y x3

- This SCR will implement the second phase of the General Assistance/General Relief (GA/GR) Automated EDBC/CC Counties program into the CalSAWS solution.
- 2.1 - Add Logic to filter out non-county specific GA/GR programs from Program Lists.
- 2.2 – Change program name to “General Assistance/General Relief (GA/GR)”
- 2.3 – Update service arrangement page to validate it is not deregistered.
- 2.4 – Update payment request detail page
- 2.5 – Update nightly payment request batch sweep
- 2.6 – Update payment request issuance claiming

SCR Review & Vote

- CA-233487: GA GR – Group 4 Forms
Voting: **Approved**

- This SCR will implement the fourth group of Non-EDBC correspondence triggers for GA/GR Automated EDBC/CC Solution.

Topic

- (1) Y x2
- (2) Y
- (3) Y
- (4) Y x2
- (5) Y x3
- (6) Y x3

Important Points

- 2.1 – Trigger for GA Overpayment Notice – occurs when adjustment occurs.
- 2.2 – Trigger for EBT card and pin statement – occurs when a EBT card is printed
- Jerry: PIN responsibility statement generated by worker? A: Yes, it is for the customer. Follow up: This will generate in the primary language of case (all threshold languages)? Whatever languages are available in CalWIN currently.
- 2.3 – Trigger for EBT request for DAC/AR – add print button
- 2.4 – Trigger for Job Club Activity Appointment letter – occurs when customer is scheduled activity
- 2.5 – Technical Change – Update to issuance detail page – shouldn't affect end user

SCR Review & Vote

- CA-233488: GA GR Phase 2 Batch 5 - Income Rules and corresponding NOA Reasons

Voting: **Approved**

- (1) Y x2
- (2) Y
- (3) Y
- (4) Y x2
- (5) Y x3
- (6) Y x3

- This SCR will implement the financial functionality for the GA/GR Automated EDBC/CC Counties Solution in CalSAWS
- 2.1 – FRE non-applicant
- 2.2 – Logic (detailed how to set up special needs)
- 2.3 – Program Configuration Override
- 2.4 - Program Status Reason ("view all" button on case summary page)
- 2.5.1 – Financial (Special Need eligibility)
- 2.5.2 – Financial (Grant addition functionality) –
- Q: Jerry: Is there parameters in place to prevent granting over max aid. A: EDBC logic will use threshold limit in grant amount admin page.
- 2.5.3 – Financial (Additional Status Reasons added for other functionalities)
- 2.5.4 – Details approval NOAs
- 2.5.5 – Financial overall flow
- 2.5.6 – Now testable features (things that were not testable but will be)

SCR Review & Vote

- CA-233489: GA GR Phase 3 Batch 2 – Resource Rules and corresponding NOA Reasons

Voting: **Approved**

- (1) Y x2
- (2) Y
- (3) Y
- (4) Y x2
- (5) Y x3

- This SCR will implement Resource functionality for the GA/GR Automated EDBC/CC Counties Solution in CalSAWS
- Change: "Utilization Date" for property history detail
- Added property category drop down
- 2.3 Logic Overview (POI) Period of non-eligibility – suspend month. Will use transfer of property screen and results get entered in non-compliance screen. POI automatically calculated.
- 2.4 Financial - Transfer, Lump sum, POI, spend down functionality

Topic

Important Points

- (6) Y x3

- 2.5 Resources - Earned income tax credit functionality
- 2.5.3 Real Property Utilization functionality
- 2.5.4 Liquid Resource functionality
- 2.5.5 Life insurance functionality
- 2.5.6 Secondary Real property test functionality
- 2.5.7 Secondary Real property functionality
- 2.5.8 Burial Assets functionality
- 2.5.9 Transfer of resources functionality

- Noncompliance reason types CRFI

- CRFI just went out to PPOCs
- Will be updating the non-compliance page; it will not be county specific. All reasons will be listed in drop down. Need to get down from 243.
- The ask: CalWIN Counties Only: **Identify what non-compliance reasons are currently being displayed in your County and confirm if you still use that reason. Complete column E on Excel spreadsheet.**
- Q: Sonia Garcia: What is the response due date? A: 12/29/2021
- Q: Sione Tulua: Why can't it be made county admin selectable to select which reason are displayed in each county? A: that is not how framework is designed. Was not a requirement.

- Immediate Need CRFI (coming soon – maybe tomorrow)

- CalWIN Counties only answer the following on the Excel spreadsheet:
 - Do you want this functionality to be turned on in your county?
 - Do you want the amount subtracted from the GR grant amount?
 - Do you want system to only issue immediate need and zero out the GR grant?
 - Do you want the system to issue full GR grant in addition to the Immediate Need?
 - What would you like the immediate need threshold be set at?
- Options are mutually exclusive. Each county should only choose one option.
- Q: Sherri: Can you add notes for NSDI? A: Don't want to add those details as many counties don't use that functionality.

(Optional Items)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
1	Respond to Noncompliance Reason CRFI	CalWIN Counties only	12/15/2021	12/29/2021	
2	Respond to Immediate Need CRFI	CalWIN Counties only	12/15/2021	TBD	

#	Decision Made	Who Made the Decision	Date
1			
2			

DRAFT

