CalSAWS

California Statewide Automated Welfare System

Design Document

CA-233487 DDID 2319 – FDS GA GR – Group 4
Forms Design

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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1 OVERVIEW

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

1.1 Current Design

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program.

1.2 Requests

A new GA/GR Automated solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will add additional Non-EDBC correspondence triggers through either online or batch.

1.3 Overview of Recommendations

1. Add Online Notice Trigger for the GA Overpayment Notice
2. Add Online and Batch Triggers for the EBT Card and PIN Responsibility Statement
3. Add online trigger for the EBT Request for DAC/AR form
4. Add online trigger for the Job Club Activity Appointment Letter
5. Technical Change: Updates to the Issuance Detail page

1.4 Assumptions

1. All the changes in this SCR will not affect the Los Angeles GA, GA (Managed) and GA (Non-Managed) programs.
2. This SCR will only implement triggers based on the existing CalWIN GA/GR Correspondences. Verbiage and format are not covered in this SCR.
3. All triggers are based on current existing triggers in CalWIN.
4. The triggers will only be available to cases from counties that are mentioned in the recommendation's respective "Correspondence Information" section.
5. The functionality of this SCR will be disabled until activated by the system property flag established in SCR CA-215669.
6. Miscellaneous Parameter implementation and functionality is covered in SCR CA-215920 covering the technical details of the GA/GR Correspondence Functionality on the CalSAWS side.
7. This SCR follows the general Online Non-EDBC Correspondence Generation recommendation (rec. 2.1) from SCR CA-215670.
8. New buttons added through this SCR will only be visible to cases with a GA/GR Automated EDBC/CC Program. Additional visibility conditions will be specified in the recommendations as necessary.

9. The consolidation logic implemented in SCR CA-215920 applies to all correspondences on this SCR.

2 RECOMMENDATIONS

2.1 Add Online Notice Trigger for the GA Overpayment Notice

2.1.1 Overview

This notice is triggered when a GA/GR Overpayment adjustment has occurred.

2.1.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
500019	Yolo	NOA	Over Payment	GA Overpayment Notice	YC GA 501	607395

2.1.3 Description of Change

Trigger the correspondence for Yolo county upon "Save and Continue" of an EDBC and the following conditions are met:
1. There is an EDBC for a GA/GR Automated EDBC/CC Program that is **"Active"**.
2. There is an associated Recovery Account that is "**Active**".
3. There is an Overpayment Adjustment Amount being collected (value is greater than zero).

2.1.4 Miscellaneous Parameters

The below miscellaneous parameters will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
500019	"RC"	Overpayment Adjustment Amount	Ex. RC00000160.00
500019	"DS"	Overpayment ID	Ex. DS0004159546
500019	"RP"	Minimum Recoupment Percentage	Ex. RP022.00

2.2 Add Online and Batch Triggers for the EBT Card and PIN Responsibility Statement

2.2.1 Overview

This form is triggered when an EBT card is printed to be used for a GA/GR program.

2.2.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
C50012	All	Forms	N/A	Electronic Benefit Transfer (EBT) Card and PIN Responsibility Statement	CSF 67 (03/08)	506900

2.2.3 Description of Online Changes

Trigger the correspondence for All opted-in counties through the following pages upon "**Save**" of the EBT Card Detail page and the following conditions are met:
1. The case associated to the EBT Account has a GA/GR Automated EDBC/CC Program that is either "**Pending**" or "**Active**".
2. Access type is either "**Cash**" or "**Cash & CalFresh**".
3. Delivery Method is set for the first time and is of type "**Mail**".

OR

Trigger the correspondence for All opted-in counties when the Delivery Method is set to "**Pick-Up**" and the following conditions are met:
1. The case associated to the EBT Account has a GA/GR Automated EDBC/CC Program that is either "**Pending**" or "**Active**".
2. Access type is either "**Cash**" or "**Cash & CalFresh**".
3. The EBT card is printed at the office through:
    a. Pressing the "**Print**" button on the Select Printer page after selecting the "**Select Printer**" button on the EBT Card Detail after the EBT Card Detail record was created.
    b. Pressing the "**Print**" button on the EBT Print List page to print the EBT Card associated to the EBT Account.

2.2.4 Description of Batch Changes

1. Update the EBT Inbound Demographic File Batch (PIXXF402) send the Electronic Benefit Transfer (EBT) Card and PIN Responsibility Statement form for all opted-in counties when the following conditions are true:

a. The EBT Card is for a person who is an applicant/recipient of a GA/GR Automated EDBC/CC Counties Program that is either "**Active**" or "**Pending**".
b. Upon reading the file, the EBT card was successfully created.
c. The form was not sent for the program during the day.

2. For each record found, a record will be inserted into the batch transaction table to generate a Electronic Benefit Transfer (EBT) Card and PIN Responsibility Statement form during batch forms processing.

   Transaction values:

   a. Case ID: Case associated to GA/GR Automated EDBC/CC Counties Program
   b. Program ID: Program ID
   c. Person ID: Primary Applicant of Active GA/GR Automated EDBC/CC Counties Program
   d. Type Code: FR
   e. Sub Type Code: TBD by build
   f. Eff Date: Batch Date
   g. Created By: Batch
   h. Updated By: Batch

2.2.5 Miscellaneous Parameters

The below miscellaneous parameters will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
C50012	"CC"	Unique EBT Card ID in the EBT_CARD table	Ex. CC3731

2.3 Add online trigger for the EBT Request for DAC/AR form

2.3.1 Overview

This form is triggered upon clicking the "Print DAC/AR Request" button on the EBT Account Detail page.

2.3.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template

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C50010	ALL	Forms	N/A	EBT Request for DAC/AR	CSF 64 (02/14)	506897

2.3.3 Description of Change

1. Add a "**Print DAC/AR Request**" button on **view** mode of the EBT Account Detail page. Clicking this will trigger the "EBT Request for DAC/AR" form for any of the opted-in counties.
2. This button should only be visible when all of the following are true:
   a. The EBT Account is associated to a case with a GA/GR Automated EDBC/CC Program that is either "**Pending**" or "**Active**".
   b. The Card Access Type is either "**Cash**" or "**Cash & CalFresh**".
   c. The user has the Security Right "**PrintDACRequest**"

2.3.4 EBT Account Detail Page Mockup

EBT Account Detail

Mockup of the EBT Account Detail page with the "Print DAC/AR Request" button.

2.3.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
PrintDACRequest	EBT Account Detail	Print DAC AR Request

Security Groups:

Security Group	Group Description	Group to Role Mapping
Print DAC AR Request	This group has the capability to access the button that will trigger the EBT Request for DAC/AR form	See the Security Matrix for the group to role associations

2.3.6 Miscellaneous Parameters

The below miscellaneous parameters will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
C50010	"CC"	Unique EBT Card ID in the EBT_CARD table	Ex. CC3731

2.4 Add online trigger for the Job Club Activity Appointment Letter

2.4.1 Overview

This form is triggered when an Employment Services participant has been scheduled for a job club activity.

2.4.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
T91950	Sacramento	Forms	N/A	GA/CFET Job Club Activity Appointment Letter	SAC 1020_34F	

2.4.3 Description of Change

Trigger this form for Sacramento county upon saving a new Customer Activity Detail and the following conditions are met:

1. The activity is for a recipient of a GA/GR Automated EDBC/CC Counties Program that is either "**Active**" or "**Pending**".
2. The person is an Employment Services participant.
3. Category is "**GA/GR Employment Services**" and type is "**Job Club**".
4. One of the following is true:
   a. A new Customer Activity record is created.
      Or
   b. An existing Customer Activity record is updated where the record did not meet the above conditions prior and now meets the conditions upon save.

2.4.4 Miscellaneous Parameters

The below Miscellaneous Parameters will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
T91950	"03"	ID of the Customer Activity	Ex. "8987345"
T91950	"07"	ID of the Customer Activity Attendance	Ex. "0892384"
T91950	"38"	Program Type Code	Ex. "GR"
T91950	"17"	Person ID	Ex. "8987345"
T91950	"PD"	Provider ID	Ex. "8987345"

2.5 Technical Change: Updates to the Issuance Detail page

Please refer to Appendix A – Updates to the Issuance Detail Page for the technical details of the recommendation. This change does not affect the end user.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
		N/A	

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2319	The CONTRACTOR shall update the CalSAWS Software with current available automated CalWIN county specific NOA's and Forms associated to their GA/GR program. The CONTRACTOR shall update the CalSAWS software to trigger an interface to a "Correspondence Service" to generate the automated CalWIN County specific Forms/NOAs generate county specific NOAs and Forms based upon each county's eligibility rules.	Correspondence: 1.There are a total of 180 non EDBC triggered forms of which •53 forms will be manually generated from template repository. •93 forms will be triggered from CalSAWS and generated through DXC service. •34 forms will use current CalSAWS triggers and the corresponding version available. 2. All GA/GR specific and combo program State forms will be triggered/generated through CalSAWS except if any form is customized by county already in CalWIN. In that case, DXC service will be called just for that county alone to generate the form PDF. 3. All GA/GR specific and combo program Non-State forms will be generated through DXC service. Whenever required CalSAWS will call the GA/GR Correspondence service	This requirement is met based on the "NOAs listed in Appendix A" supplemented by the functionality described in this design document.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		with all the data related to the case. 4. New functionality will be added to CalSAWS to determine form generation based on county. 5. All CalSAWS generated state forms will not have capability to add/modify data elements by user. The existing CalSAWS capability to append text to the NOA pdf will be available to the user. 6.If any manual variables are needed, print queue will be accessed through iFrame by calling DXC service where user will be able to add manual variables. Entire case data including office related information will be sent to DXC service for each form/NOA trigger.	

*Note: DXC is now referred to as Gainwell

5 APPENDIX

5.1 APPENDIX A - Updates to the Issuance Detail Page

5.1.1 Overview

With the current button layout on the Issuance Detail page, there is a potential future issue where the buttons will start overlapping with each other due to the current page formatting. This recommendation intends to update this page's formatting to enable a more dynamic button layout.

5.1.2 Description of Change

1. Update the Issuance Detail page's top and bottom button containers to display a second row of buttons if the number of buttons (or display fields, when applicable) exceed five on the first row.
2. This second row of buttons will only be visible if there is more than five buttons on the first row.
3. If the Cancel Warrant/DD button and Cancel Reason dropdowns are visible, these should be anchored to the leftmost position on the first row.
4. The Save and Cancel buttons should be anchored as the rightmost buttons of the first row as displayed in the mockup.

5.1.2.1 Mockup of the Issuance Detail page with two rows of buttons