CalSAWS

California Statewide Automated Welfare System

Design Document

CA-49395

ACL 16-92: Update and create ARC 1 Packet

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/08/2019	.01	Initial Design	Ramya Raghuraman
06/29/2021	1.0	Updated Design with latest template	Rainier Dela Cruz, Jasmine Chen
07/26/2021	1.1	Updated Design with latest (06/21) ARC 1A in English and removing the recommendation for threshold languages.	Jasmine Chen
09/30/2021	1.2	Content Revision 1 – updating coversheet so ARC 1/1A are on their own pieces of paper.	Jasmine Chen
12/14/2021	1.3	Content Revision 2 – updating ARC 1 Packet to not be posted to SSP	Jasmine Chen

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1 OVERVIEW

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

1.1 Current Design

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

1.2 Requests

Create an ARC 1 Packet that includes the State's latest ARC 1 and ARC 1A.

1.3 Overview of Recommendations

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

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Correspondence – Update ARC 1 Form

2.1.1 Overview

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

Current State Form: ARC 1 (12/2014)

Current Programs: Foster Care (ARC)

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All Counties

Existing Languages: English

2.1.2 Description of Change

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

2.2 Correspondence – Add New ARC 1 Packet

2.2.1 Overview

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

State Form: ARC 1 Packet

Programs: Foster Care (ARC)

Attached Forms: N/A

Forms Category: Form

Template Repository Visibility: All Counties

Languages to Add: English

2.2.2 Create Form XDP

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

Form Header: CalSAWS Standard Header (Header_1)

Form Title: ARC 1 Packet

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

Form Number: ARC 1 Packet

Include NA Back 9: No

Imaging Form Name: ARC 1 Packet

Imaging Document Type: Customer Reporting

Form Mockup/Example: See Supporting Document #1

2.2.3 Add Form Variable Population

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

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

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

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

2.2.4 Add Form Control

Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

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

2.2.5 Add Form to Template Repository

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

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

2.2.6 Add Form Print Options and Mailing Requirements

Add the following print options:

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

Mailing Requirements:

Mail-To (Recipient): When generated through Template Repository, the individual selected from the 'Customer Name' parameter.
Mailed From (Return): Foster Care Worker's Office/District Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: N/A
Enclosures: None
Electronic Signature: No
Post to SSP (Self Service Portal): ~~Yes~~ No

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207127 | DDID 2215

Update Appointment Management Solution to Add Snooze Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Farhat Ulain
	Reviewed By	Matthew Lower, Long Nguyen, Amy Gill, Michael Wu, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/13/2021	1.0	Initial Revision	Farhat Ulain
11/10/2021	2.1	1. Added Snooze Reason section in the Visit Purpose Detail page. 2. Replacing Snooze Reason text field with Snooze Reason dropdown in the Reception Log Detail Page and in the Message Center. 3. Updated Reception Log's and Message Center's mockups. 4. Added a status appendix to specify the status and system behavior.	Farhat Ulain
12/14/2021	1.2	Added section 2.6 – Web service changes	Howard Suksanti

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1 OVERVIEW

The Reception Log is used to track Customer visits to the county offices. When a Reception Log record is created, an electronic message is automatically sent to the Message Center (a worker must be associated to the Reception Log record). The Message Center/E-mail notification informs the worker that the Customer is checked-in and is currently waiting to be seen. Furthermore, a worker can acknowledge the notification by pressing the 'Acknowledge' button.

1.1 Current Design

In the CalSAWS system, when a Reception Log record is created and the worker is notified, there is no other way to remind the worker that the Customer is waiting in the lobby to be seen.

1.2 Requests

Add a Snooze functionality in the Reception Log and in the Message Center that will remind the worker about a customer who is waiting in the lobby to be seen. Additionally, the Snooze functionality will allow the worker to specify the reason for the delay.

1.3 Overview of Recommendations

1. Add Snooze functionality in the Reception Log Detail page and in the Message Center.
2. Add a Snooze column to the Visit Purpose List page.
3. Add a Snooze field to the Visit Purpose Detail page.

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.
2. Snooze will not shift remaining appointments in the day.
3. All Snooze history will be saved with number of snoozes and the Snooze Reasons.

2 RECOMMENDATIONS

2.1 Visit Purpose List

2.1.1 Overview

The Visit Purpose List page provides a list view of all appointment types with the threshold time configured. This change will add a Snooze column in the Visit Purpose List page to display the Snooze minutes configured for the appointment type.

2.1.2 Visit Purpose List Page Mockup

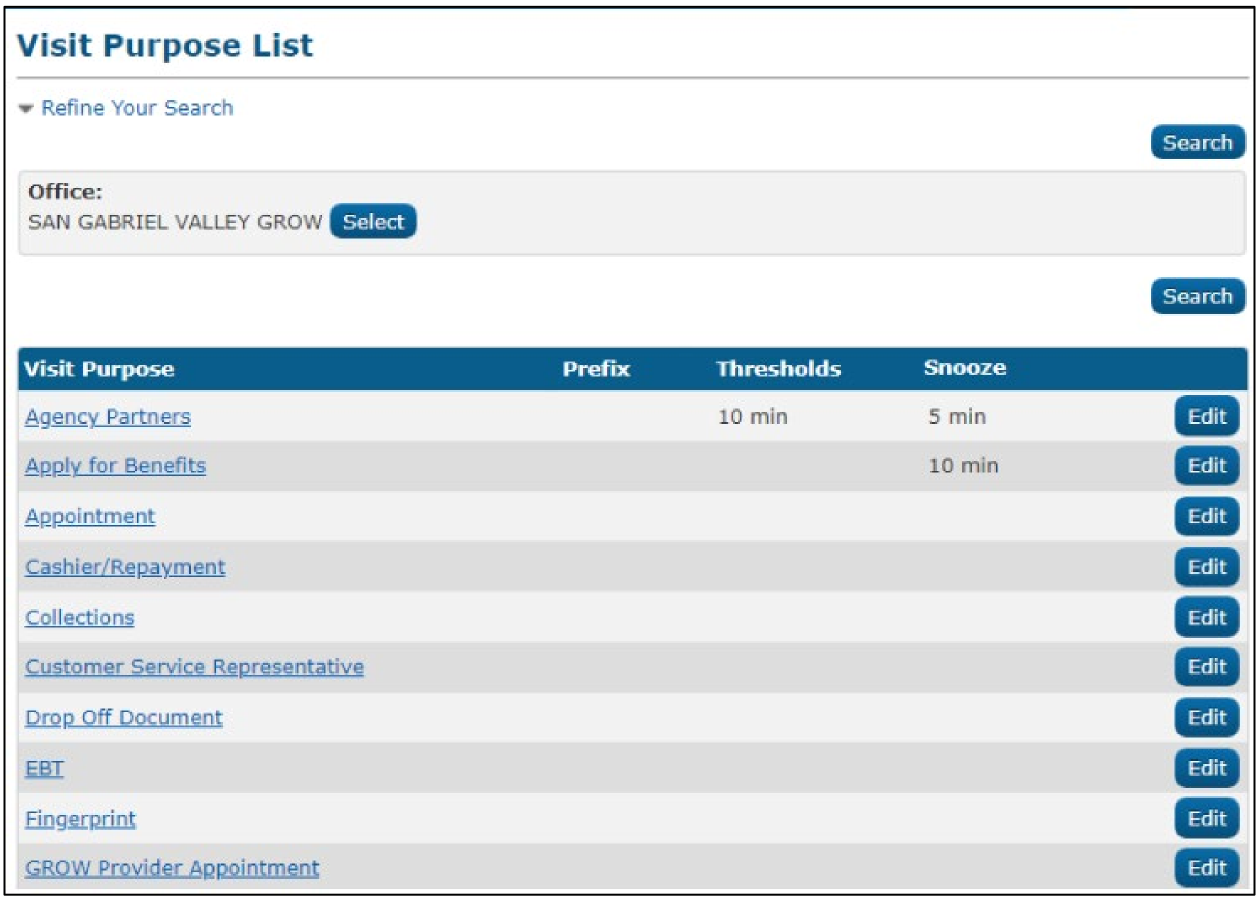


Figure 2.1.2-1 – Visit Purpose List Page

2.1.3 Description of Change

1. Add a Snooze column to the Visit Purpose List page as displayed in Figure 2.1.2-1.
   a. This column will display the Snooze Minutes for the appointment type formatted as "{Snooze Minutes} min".

2.1.4 Page Locations

Global: Admin Tools

Local: Office Admin

Task: Visit Purpose

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add page mapping for the new fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Visit Purpose Detail

2.2.1 Overview

The Visit Purpose Detail page provides detailed information about an appointment type per office. Multiple levels of thresholds and the email recipient can be configured in this page for escalation. This change will add a Snooze field and a Snooze Reason section to this page. User will be able to configure the snooze reason(s) per visit purpose, and that will be used to remind the user about an appointment time, before the escalation begins.

2.2.2 Visit Purpose Detail Page Mockup

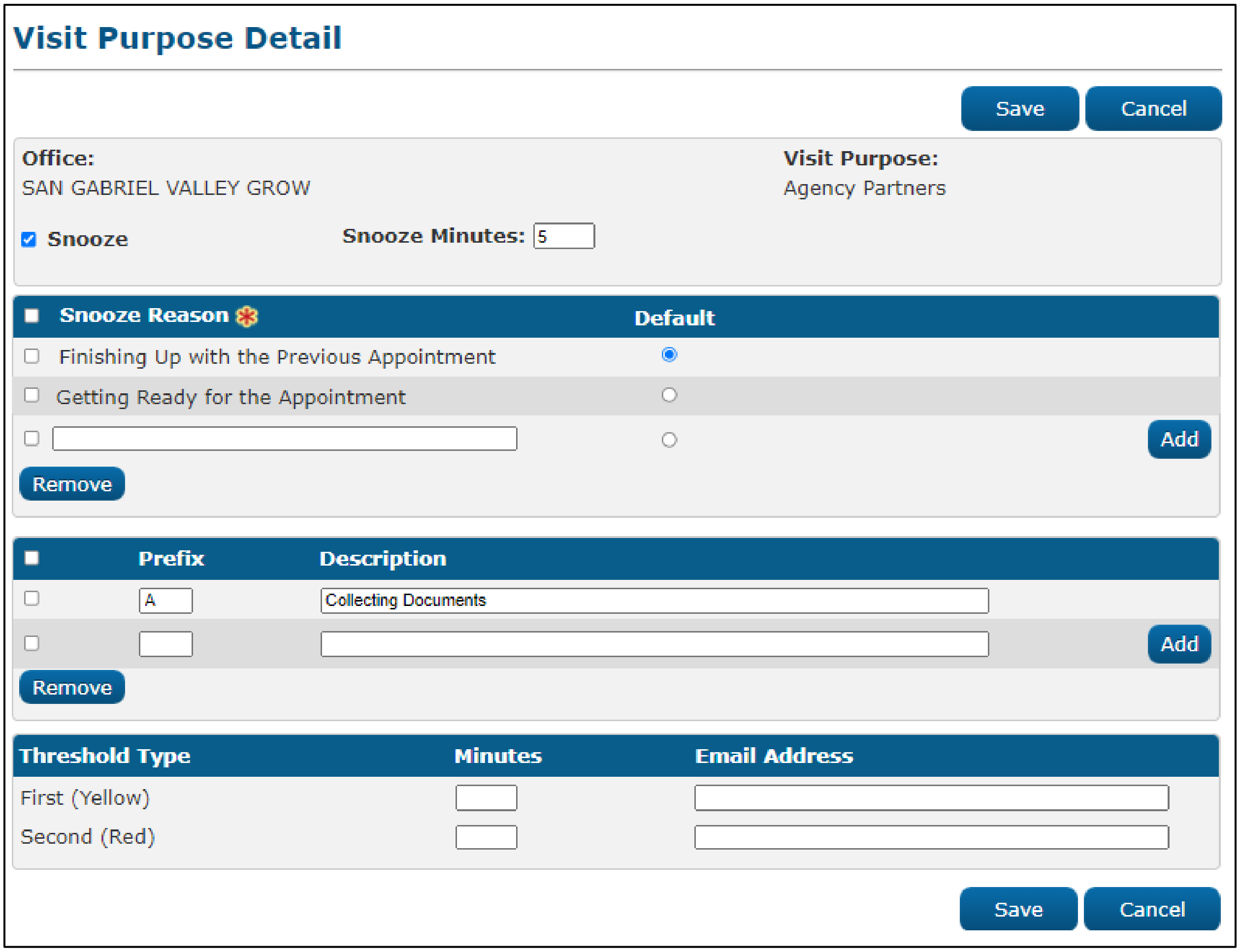


Figure 2.2.2-1 – Visit Purpose Detail Page

2.2.3 Description of Change

1. Add a Snooze field with a checkbox to the Visit Purpose Detail page as displayed in Figure 2.2.2-1.
   a. Clicking on Snooze checkbox, a text box will be displayed in front of the Snooze field to configure the Snooze Minutes per Visit Purpose. This field will only contain whole numbers.
      i. Snooze Minutes will not exceed the number of minutes that is entered for either of the Threshold Type.
      ii. A validation will be displayed:
      Snooze Minutes - Cannot exceed the Threshold Type Minutes.
      iii. If the Threshold Type does not have Minutes assigned, it will not be considered for the validation trigger.
   b. Clicking on Snooze checkbox, a 'Snooze Reason' section will be displayed below as displayed in the 2.2.2-1.
      i. It will be required field. A validation will be displayed:
      Snooze Reason – Field is required. Please enter a value.

   ii. Upon entering the snooze reason and clicking on 'Add' button, user will be able to configure the snooze reason.
   iii. Maximum character limit for the text box will be 100 characters.
   iv. User will be able to configure more than one snooze reason per Visit Purpose.

c. Add a Default column in the Snooze Reason section as displayed in the figure 2.2.2.1.
   i. User will be able to select a snooze reason in the Default column to be defaulted in the Snooze Reason dropdown that appears in the Message Center and in the Reception Log Detail page.
   ii. Default will be a required field. A validation will be displayed:
      Default – Select a reason.
   iii. User will not be able to remove the defaulted reason. A validation will be displayed:
      Default – Defaulted Snooze Reason cannot be removed.
   iv. The Default column will display 'Yes' in view mode for the selected reason. This column will be blank if the reason is not selected to be default.

Note: If the user unchecks the Snooze option, Snooze Minutes field along with the text box and the Snooze Reason section will disappear.

A message notification that appears in the Message Center will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page.

The Snooze Reason dropdown that appears in the Message Center and in the Reception Log Detail page will display the reasons that is configured in the Visit Purpose Detail page in alphabetical order.

CalSAWS does not allow more than 3 digits, negative and non-zero numbers to be entered in the Minutes field. Snooze 'Minutes' field will follow the same logic.

2.2.4 Page Locations

Global: Admin Tools

Local: Office Admin

Task: Visit Purpose

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Add page mappings for the new fields.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Reception Log Detail

2.3.1 Overview

A Reception Log record gets created and notifies the worker when a customer checks in for an appointment. This change will add a Snooze functionality to the Reception Log Detail page for the user to snooze the notification for the set number of minutes that is configured in the Visit Purpose Detail page.

2.3.2 Reception Log Detail Page Mockups

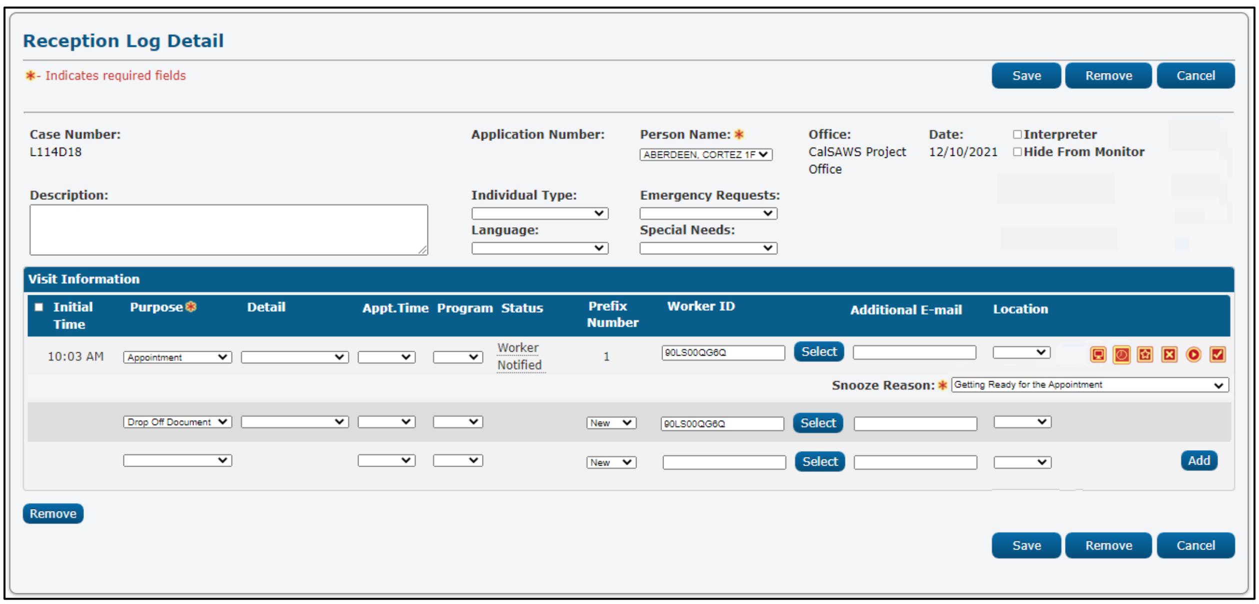
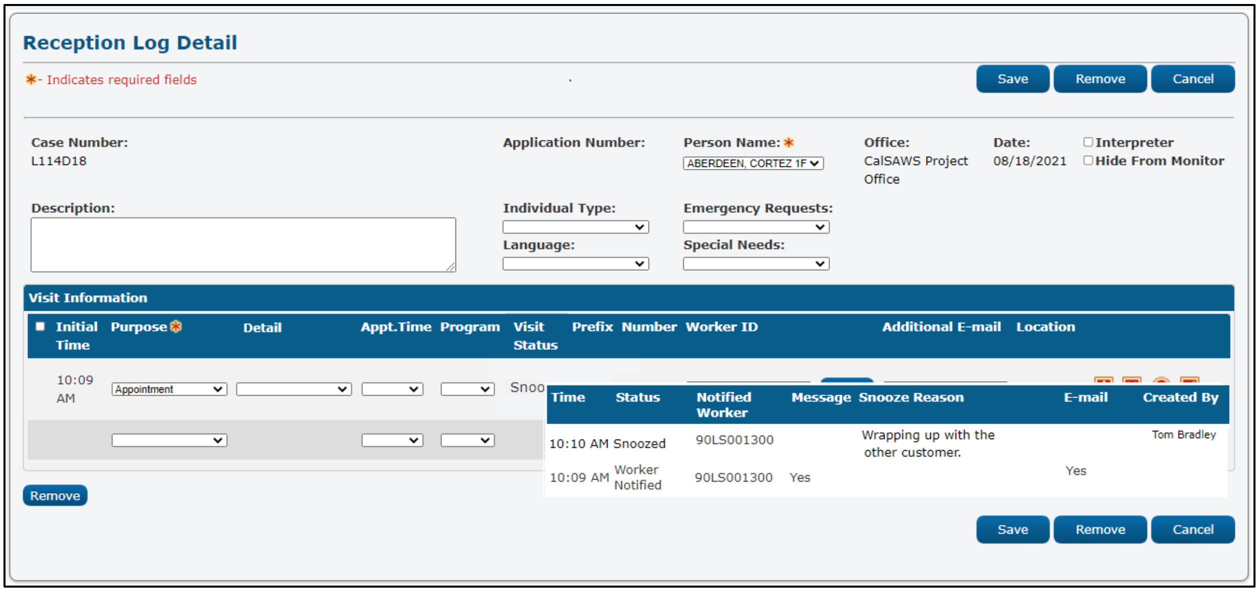


Figure 2.3.2-1 – Reception Log Detail Page



2.3.3 Description of Change

1. Add a Snooze icon to the Reception Log Detail page as displayed in the Figure 2.3.2-1.
    a. Snooze Icon:

    b. The Snooze icon will only be displayed for the appointments that are configured for the Snooze in the Visit Purpose Detail page.
    c. The Snooze icon will only be displayed when the Visit Status is 'Worker Notified', 'Worker Acknowledged', and 'Snoozed'.
    d. Upon clicking on the Snooze icon, a Snooze Reason field with a dropdown will be displayed.
    Note: If user clicks on another icon on the page, Snooze Reason dropdown will disappear.
    e. Upon selecting the Snooze Reason and saving the record, the appointment will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page for a Visit Purpose.
        i. The Snooze Reason dropdown will be a required field.
2. Update Status column label to be Visit Status as displayed in the Figure 2.3.2-1/2.3.2-2.
3. Add a Snooze Reason column in the tooltip of Visit Status column.
    a. The Snooze Reason text will be displayed in the Snooze Reason column in the Visit Status tooltip as displayed in Figure 2.3.2-2.
    b. The Snooze Reason column will be dynamic and will only be displayed when an appointment is snoozed and the snooze reason is selected by the user.

c. When the appointment is snoozed, the 'Snoozed' status will be displayed in the Status column of the tooltip.
    i. The Snoozed status will be mapped with "Customer Status – Waiting To Be Seen".

Note: The Message Center notification for the appointment will re-appear when the number of Snooze minutes is over. If the user snoozes multiple times, prior to the previous Snooze Minutes completing, a new Snooze time will be set on the appointment and the previous Snooze time will be discarded and the most recent snooze reason will be sent out with the escalation email.

Snooze Reason dropdown will display the reasons that is configured in the Visit Purpose Detail page in alphabetical order.

A reason will be defaulted in the Snooze Reason dropdown that is selected in the Default column in the Visit Purpose Detail page.

2.3.4 Page Locations

CalSAWS Home Page

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Add page mapping for the new fields.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Message Center

2.4.1 Overview

The Message Center displays the e-mail notification when a customer checks in for the appointment. Currently, the Message Center displays the message with the Acknowledge, No Response, Lobby Monitor Call, and Complete icons. This change will add a Snooze functionality in the Message Center for the workers to snooze the appointment.

2.4.2 Message Center – Mockup

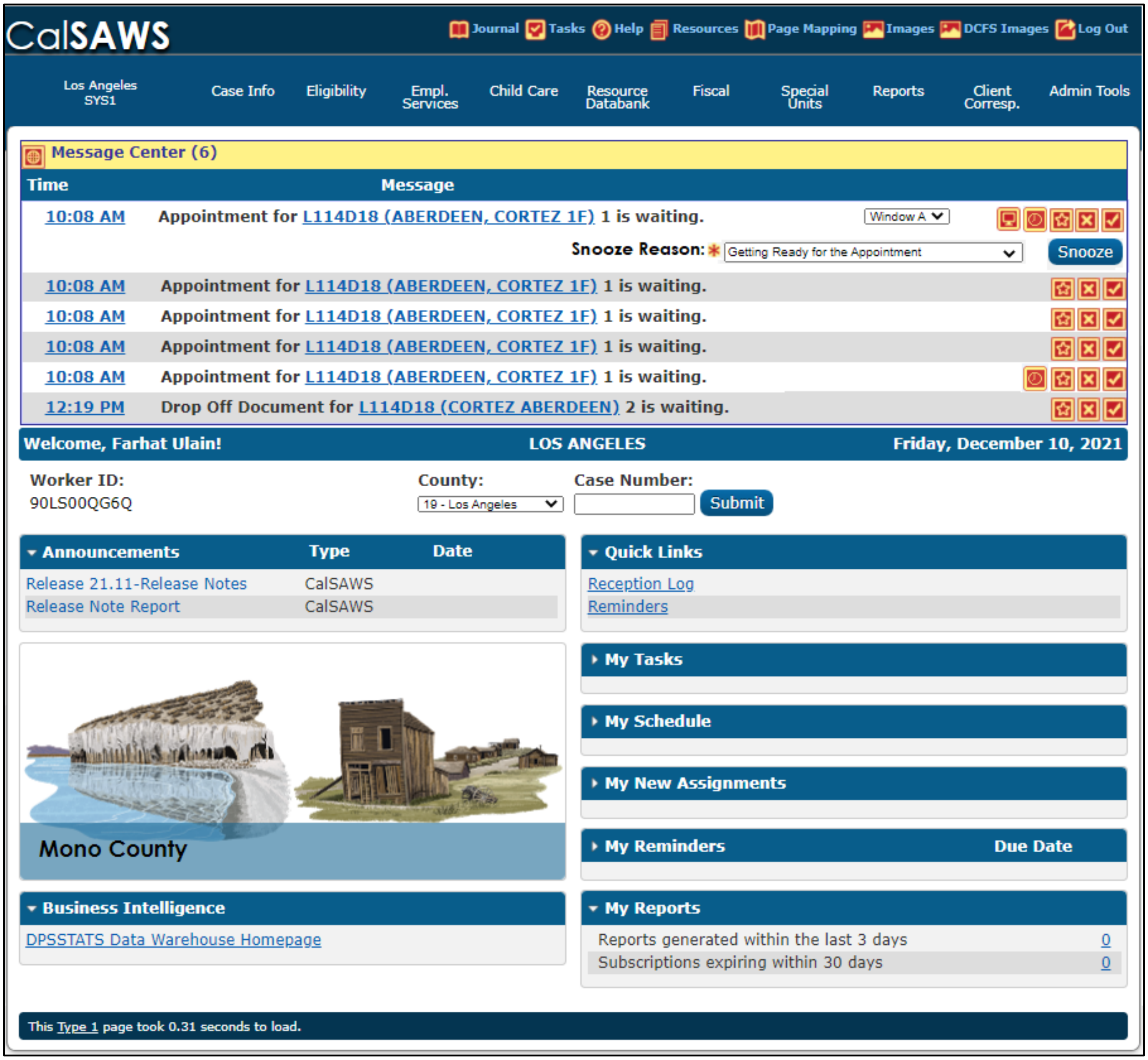


Figure 2.4.2-1 – CalSAWS Home Page-Message Center

2.4.3 Description of Change

1. Add a Snooze icon in the Message Center as displayed in the figure 2.4.2-1
   a. Upon clicking on the Snooze icon, a Snooze Reason field with a dropdown and a Snooze button will be displayed underneath. Note: If clicking on another icon on the page, Snooze Reason dropdown will disappear.
   b. Upon selecting the Snooze Reason and clicking on the Snooze button, the appointment will be snoozed and disappear for the

number of minutes that is configured in the Visit Purpose Detail page for the appointment type.

i. A notification will re-appear when the number of Snooze Minutes is over for the appointment.

ii. The Snooze Reason dropdown will be a required field.

2. The Snooze icon will only be displayed for the appointments that are configured for Snooze in the Visit Purpose Detail page.
3. The Snooze icon will only be displayed when the Visit Status is set to 'Worker Notified', Worker Acknowledged', and 'Snoozed'.
4. The number of snoozes and the most recent Snooze reason will be sent with both levels of thresholds/escalation emails.
    a. Add the 'Number of Snoozes' and the 'Last Snooze Reason' to the body of the existing threshold/escalation email.

    Body of the escalation email:

    Waiting Time is over the {First/Second} threshold limit
    Time Waited: {Minutes the appointment is past due}
    Visit Purpose: {Purpose of the visit}
    Number Assigned: {Assigned Number}
    Case Number: {Case Number}
    Number of Snoozes: {Number of times the user has snoozed the appointment}
    Last Snooze Reason: {Most recent snooze reason entered by the user}

Note: Users will be able to Snooze an appointment more than once.

Snooze Reason dropdown will display the reasons that is configured in the Visit Purpose Detail page in alphabetical order.

A reason will be defaulted in the Snooze Reason dropdown that is selected in the Default column in the Visit Purpose Detail page.

2.4.4 Page Locations

N/A

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 CalSAWS Lobby Applications

2.5.1 Overview

CalSAWS Lobby Applications are used by the customers to get themselves checked-in when they visit to the county office for their appointments. These applications are used on different devices such as Kiosk and tablet. Customers/participants also use these applications to obtain the case information, submitting the documents, and checking the e-notifications. Upon successfully checking-in for the appointment, a Reception Log gets created for the worker to take further action for the scheduled appointment.

2.5.2 Description of Change

1. The Reception Log that is created in response to the CalSAWS Self Service Application will get the same Snooze functionality as described in the section 2.3 for the following lobby applications:

- CalSAWS Lobby Check-in Application
- CalSAWS Self Service Kiosk Application
- CalSAWS Lobby Kiosk
- CalSAWS Lobby Tablet

2.5.3 Page Location

N/A

2.5.4 Security Updates

N/A

2.5.5 Page Mapping

N/A

2.5.6 Page Usage/Data Volume Impacts

N/A

2.6 Update Lobby & Self Service – Check-in web services.

2.6.1 Overview

When customer visit to the county office for their appointments and check-in through the Lobby/Self Service application, the reception log information is sent to Lobby Check-in web service. The Lobby Check-in web service save the information into CalSAWS database and send a web service call to the Message Center. This SCR will update the web service to send the snooze reason over to Message Center to build the snooze reason drop down value.

2.6.2 Description of Changes

Modify Lobby & Self Service Check-in web services to send the applicable snooze reasons to the Message Center. The snooze reason will be determined by the visit type of the customer.

2.6.3 Execution Frequency

N/A.

2.6.4 Key Scheduling Dependencies

N/A.

2.6.5 Counties Impacted

CalSAWS counties.

2.6.6 Data Volume/Performance

N/A.

2.6.7 Failure Procedure/Operational Instructions

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

3 APPENDIX

Reception Log Record Status	Behavior
Waiting	'Monitor Call' icon, 'X' icon, 'Check Mark' icon will display in Reception Log. Message Center will not be present for Waiting Status.
Worker Notified	'Snooze' icon, 'Monitor Call' icon, 'Star' icon, 'X' icon, 'Play' icon, and 'Check Mark' icon will display in Reception Log. The 'Monitor Call' icon, 'Star' icon, 'X' icon and 'Check Mark' icon will display in Message Center.
Worker Acknowledged	'Snooze' icon, 'Monitor Call' icon, 'Play' icon, 'X' icon and 'Check Mark' icon will display in both Reception Log and Message Center (this only apply to Message Center if worker updated the status to Worker Acknowledged directly from Message Center). Note: If a worker updates the status to Worker Acknowledge from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Snoozed	'Snooze' icon, 'Star' icon, 'X' icon, and 'Check Mark' icon will display in both Reception Log and Message Center. Note: If a worker updates the status to Worker Acknowledge from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Lobby Monitor Call	'Monitor Call' icon, 'X' icon, 'Play' icon and 'Check Mark icon will display in both Reception Log and Message Center (this only apply to Message Center if worker updated the status to Lobby Monitor Call directly from Message Center). Note: If a worker updates the status to Lobby Monitor Call from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Kiosk Start	No Icons will display in both Reception Log and Message Center.
No Response	No icons will display in both Reception Log and Message Center.
Meeting Started	'Check Mark' icon will display in both Reception Log and Message Center (this only apply to Message Center if worker updated the status to Meeting Started directly from Message Center).

	Note: If a worker updates the status to Meeting Started from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Complete	No icons will display in both Reception Log and Message Center.

4 MIGRATION REQUIREMENTS

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2215	The Contractor shall update the Appointment Management Solution to include "snooze" functionality on appointment notifications, which allow the user to reschedule the appointment for a county-specified number of minutes later by pressing one button and prompts the user for a reason for the delay. The county administrators must be able to control whether this feature is enabled in their county.	Assuming the appointment notification referenced is in CalSAWS. Assuming the user referenced is a county staff member. Assuming snooze doesn't shift remaining appointments in the day.	Snooze functionality will be added in the Reception Log and in the Message Center, enabling the worker to Snooze an appointment before the escalation begins.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214916

DDID 2252

Task Mgt – Task QA Sampling

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/02/2021	1.0	Initial Revision	Rakan Ali
12/08/2021	1.1	Content Revision #1 • Added a note in section 2.1.3.1 that explains the required security groups needed to access Quality Review.	Rakan Ali
12/15/2021	1.2	Content Revision #2 • Updated the Title field explanation in section 2.2.3.7. • Updated the Begin Date field explanation in section 2.2.3.15.b. • Updated the Begin Month field explanation in section 2.2.3.15.3. • Added a "BLANK" option for the Run Result field in section 2.3.3.3.e. • Added a GA/GR Program for C-IV Counties in the Appendix. • Added GA/GR Programs for Calwin Counties in the Appendix. • Updated the validation message for the Completed/Void End Date field in section 2.2.5.10. • Updated verbiage in Figure 2.2.2.2 - QA/QC Task Sample Detail View Mode Page Mockup to show Begin and End Date and Completed/Void fields. • Updated verbiage for Begin Date for the Recurrence field in section 2.2.3.15.b.	Rakan Ali

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to allow authorized users to define and schedule periodic sampling of Tasks for QA/QC purposes.

1.1 Current Design

The CalSAWS System does not include functionality to configure a one time or recurring retrieval of Tasks from defined sources for review.

1.2 Requests

Update the CalSAWS System Task Management functionality to allow authorized users to define and schedule a periodic sampling of Tasks. The periodic Task sample results will be accessible for review.

1.3 Overview of Recommendations

1. Add QA/QC Task Sample Search, Detail, and Results pages to the CalSAWS System to allow configuration and review of periodic QA/QC Task Sample instructions.
2. Add a QA/QC Task Sample Results Export icon to export sample results into a consolidated spreadsheet format.
3. Add batch processing to execute QA/QC Task Sample instructions based on the recurrence configuration.

1.4 Assumptions

1. This enhancement will not include any logic to make updates or changes to Task attributes. The QA/QC processing is a mechanism to configure a retrieval of a sampling of Tasks for review.
2. The new Security Groups being introduced with this enhancement will not be associated automatically to any Staff. Local Security Administrators (LSA) will administer the appropriate security as necessary.

2 RECOMMENDATIONS

This section will outline recommendations to include a set of pages that allow authorized users to add, edit, view, and schedule a configuration to retrieve a sample of Tasks for Quality Assurance/Quality Control (QA/QC) review.

2.1 QA/QC Task Sample Search Page

2.1.1 Overview

The QA/QC Task Sample Search page allows Users to search for and view QA/QC Task Sample instructions that exist for the county. From this page, Users can view, create, edit, and remove QA/QC Task Sample instructions.

2.1.2 QA/QC Task Sample Search Page Mockups

Figure 2.1.2.1 – Task Navigation Panel Mockup

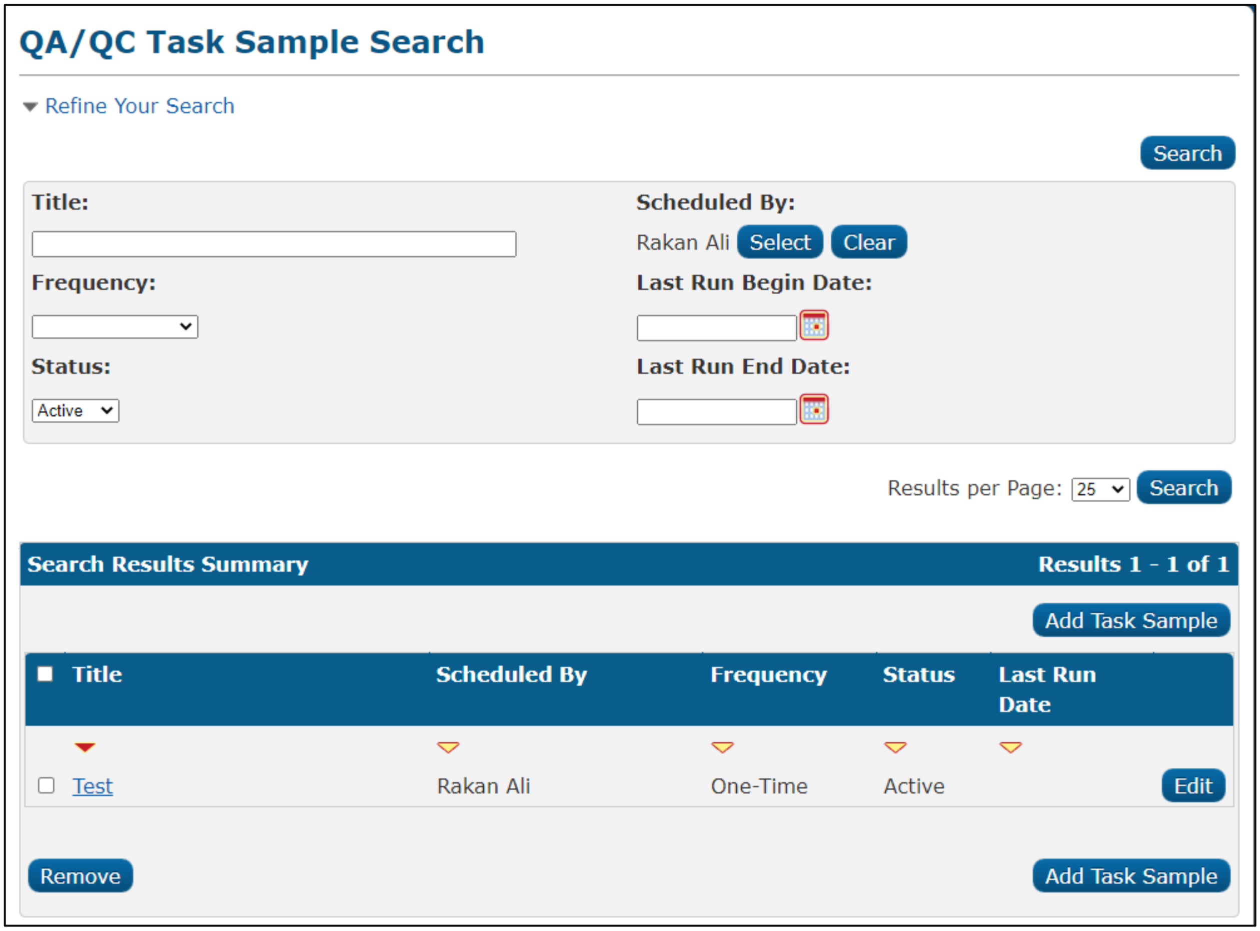

Figure 2.1.2.2 – QA/QC Task Sample Search Page Mockup

2.1.3 Description of Changes

Add a QA/QC Task Sample Search page to the CalSAWS System.

1. Add "QA/QC Tasks" to the Task Navigation menu that will navigate the worker to the QA/QC Task Sample Search page. This option will display if the user's security profile includes the "QAQCTaskView" security right.

   NOTE: A prerequisite to access this Task Navigation menu at all is either the "Quality Review View", "Quality Review Edit", or "Home Call Referral" security groups are required to access "Special Units > Quality Review".

2. **BUTTON:** Search – When clicked, the search results section is refreshed to display existing QA/QC Task Sample instructions based on the Search Parameters. If this button is clicked without filling in any parameters, all QA/QC Task Samples for the county will display. all

records will display. If this button is clicked and no records satisfy the search criteria, a “No Data Found” message displays in the search results section.

3. Search Parameters

   The following parameters display toward the top of the page and allow users to filter the QA/QC Task Sample instructions that exist for the county. This is an expandable section toward the top of the page that displays parameters which can be used to filter the Tasks displayed on the page. The Scheduled By field will default to the logged in worker, all other fields will default as blank.

   a. Title – A text field which will filter QA/QC Task Sample instructions if the Title attribute includes the text within this field (upper/lower case does not matter). This field will only allow a maximum of 50 characters.

   b. Scheduled By – A field that will allow QA/QC Task Sample instructions to be searched based on a Staff person.
      i. **BUTTON:** Select – When clicked, will navigate the User to the “Select Staff” page to search for and select a specific Staff to apply to the search. When a selection has been made, a “Clear” button will be available to clear the selection if needed.
      ii. **BUTTON**: Clear – This button appears when a Staff value exists in this field. Clicking this button will clear Staff person from the field.

   c. Frequency – This field allows searching of QA/QC Task Sample instructions by a specific frequency. Options include blank, One-Time, Daily (M-F), Weekly, or Monthly.

   d. Last Run Begin Date – This field sets a beginning date range filter to search for QA/QC Task Sample instructions by the date the instruction was last executed.

   e. Status – This field allows searching of QA/QC Task Sample instructions by a specific Status. Options include blank, Active, and Inactive. At initial load of the page, the default status option is Active.

   f. Last Run End Date – This field sets an ending date range filter to search for QA/QC Task Sample instructions by the date the instruction was last executed.

      Note: If a QA/QC Task Sample has not been run yet, the Last Run Date attribute is blank. These QA/QC Task Sample instructions will be included in the search results when the "Last Run Begin Date" and "Last Run End Date" search options are left blank.

4. Search Results Summary:

   This table contains the resulting QA/QC Task Sample instructions that satisfy the User specified search criteria. Each column is sortable. The default filter displays Active results where the Scheduled By field is equal to the Staff User that is logged in. The default order of the results will be sorted alphabetically by Title.

   a. **BUTTON**: Add Task Sample – This button will display if the worker's security profile contains the "QAQCTaskEdit" security right. Clicking this button will open the QA/QC Task Sample Detail page in create mode.

   The results table consists of the following columns:

   b. Selectable Checkbox –For each result displayed in this section, a selectable checkbox will display if the worker's security profile contains the "QAQCTaskEdit" security right.

   c. Title – The title of the QA/QC Task Sample instruction. If the worker's security profile contains the "QAQCTaskView" security right, this field will display as a hyperlink that navigates to the QA/QC Task Sample Detail page in view mode for the QA/QC Task Sample instruction.

   d. Scheduled By – The first and last name of the Staff person that created the QA/QC Task Sample instruction.

   e. Frequency – The frequency attribute of the QA/QC Task Sample instruction.

   f. Status – The current Status of the QA/QC Task Sample instruction.

   g. Last Run Date – The Last Run Date attribute of the QA/QC Task Sample instruction.

   h. **BUTTON**: Edit – This button will display if the worker's security profile contains the "QAQCTaskEdit" security right. Clicking this button displays the QA/QC Task Sample Detail page in Edit mode for the corresponding row.

i. **BUTTON**: Remove – This button will remove the Task Sample instruction(s) with a checkmark in the Selectable Checkbox column. This button will display if the worker's security profile contains the "QAQCTaskEdit" security right.

2.1.4 Page Validations

1. "Last Run End Date – The Last Run End Date must be later than the Last Run Begin Date. Please enter a different date."

   A validation message displays when Last Run End Date entered is before Last Run Begin Date in the "Refine Your Search" section.

2.1.5 Page Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
QAQCTaskView	• QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List;	• QA/QC Task View • QA/QC Task Edit
QAQCTaskEdit	• QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List;	• QA/QC Task Edit
SelectWorker	• Enter Report Parameters; • Select Worker; • Select Unit; • Select Office; Select Staff;	• QA/QC Task View • QA/QC Task Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
QA/QC Task View	View QA/QC Task Sample information.	• View Only
QA/QC Task Edit	View and Edit QA/QC Task Sample information.	• N/A

2.1.7 Page Mapping

Implement page mapping for the QA/QC Task Sample Search page.

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.2 QA/QC Task Sample Detail Page

2.2.1 Overview

The QA/QC Task Sample Detail page allows Users to manage the configuration and sample results for QA/QC Task Sample instructions. The QA/QC Task Sample Detail page includes general instruction information including Task Source, Sample Options and Recurrence configurations. Sample results can also be accessed from this page.

2.2.2 QA/QC Task Sample Detail Page Mockup

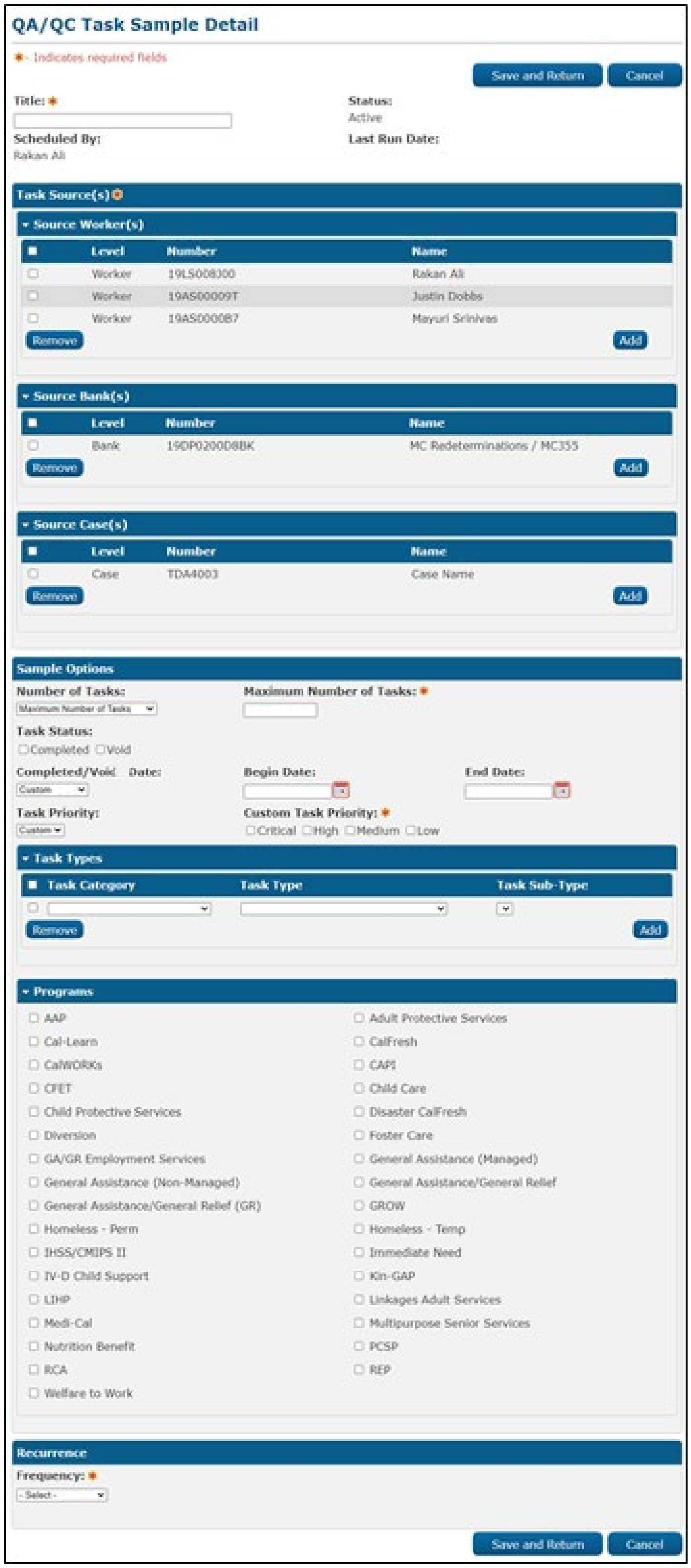

Figure 2.2.2.1 – QA/QC Task Sample Detail Create/Edit Page Mockup

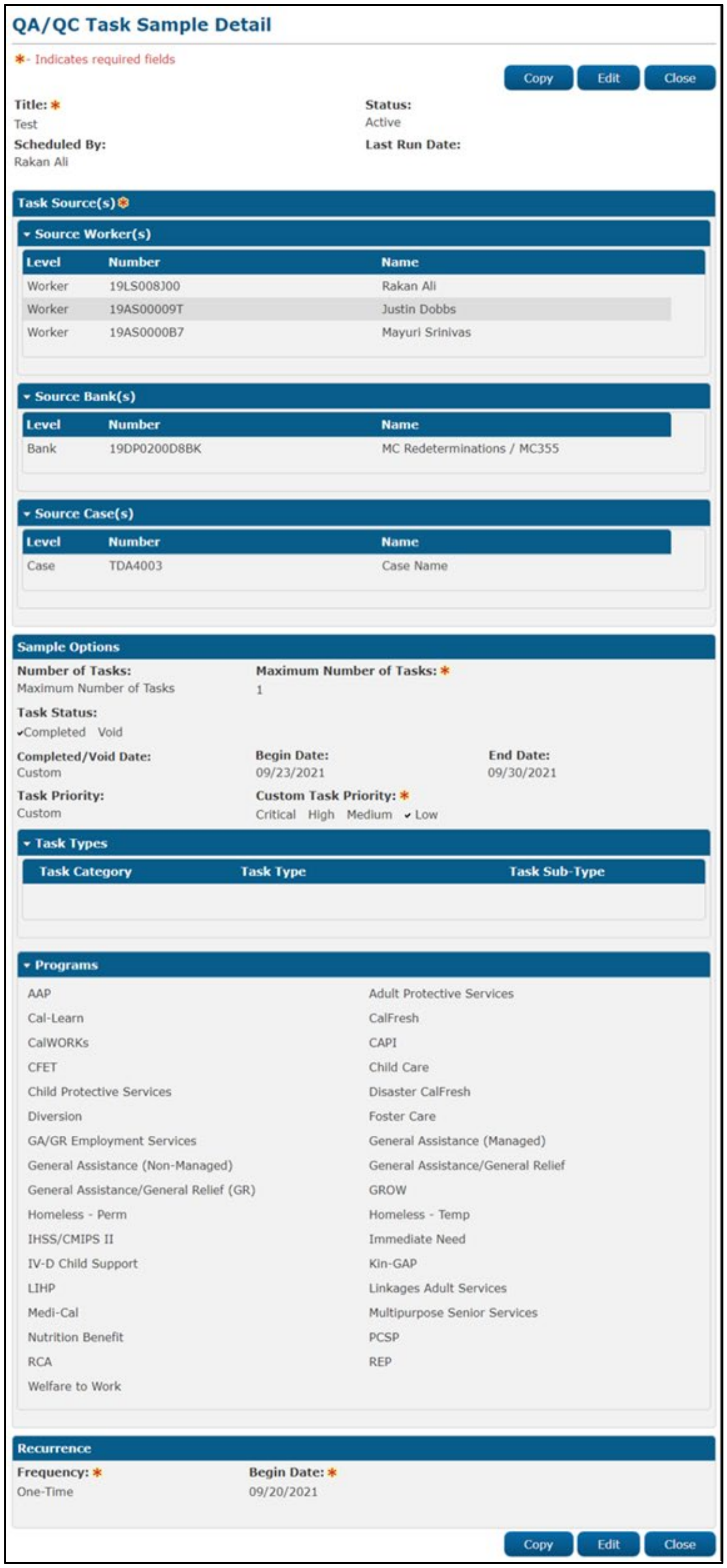

Figure 2.2.2.2 – QA/QC Task Sample Detail View Mode Page Mockup

2.2.3 Description of Changes – Create/View/Edit Mode

Add QA/QC Task Sample Detail page to the CalSAWS System.

1. **BUTTON:** View Results -- This button navigates the User to the QA/QC Task Sample Results List page which includes the resulting details for each QA/QC Task Sample instruction execution (See Section 2.3). This button appears when the page is in View mode and the QA/QC Task Sample instruction has executed at least one time.

2. **BUTTON:** Copy – This button navigates the User to the QA/QC Task Sample Detail page in Create mode, with all details pre-populated to match the originating QA/QC Task Sample Detail page. This button appears when the page is in view mode and the user's security profile contains the "QAQCTaskEdit" security right.

   The following fields will not be copied over to the new QA/QC Task Sample Detail page. Standard defaults will apply for these fields:

   a. Scheduled By
   b. Last Run Date
   c. Recurrence Begin Date
   d. Recurrence End Date

3. **BUTTON:** Edit – This button appears when the page is in View mode and the user's security profile contains the "QAQCTaskEdit" security right. This button will refresh the page into Edit mode.

4. **BUTTON:** Close – This button displays when the page is in View mode and when clicked, will navigate the user back to the QA/QC Task Sample Search page.

5. **BUTTON:** Save and Return – This button appears when the page is in Create or Edit mode. When clicked, the page will be saved and the user will be directed back to the QA/QC Task Sample Search page.

6. **BUTTON:** Cancel – This button appears when the page is in Create or Edit mode. On click, any changes to the page will be discarded and the user will be directed back to the QA/QC Task Sample Search.

7. Title **(Required)** – The Title of the QA/QC Task Sample instruction. If this field contains the "<" or ">" characters, they will be removed once the user clicks off of the field.

8. Status – The Status of the QA/QC Task Sample instruction. Possible values for this field are:
    a. Active: The QA/QC Task Sample instruction is set to execute based on the Recurrence/Frequency set by the authorized User.
    b. Inactive: The QA/QC Task Sample instruction will not be executed.

When the page is in Create mode, the default value is Active and cannot be modified until after the page is initially saved.

9. Scheduled by – This column will display the Staff name of the user who created the QA/QC Task Sample instruction. When the page is in Create mode, this field will pre-populate with the Staff name of the logged in worker.

10. Last Run Date – The most recent run date of the QA/QC Task Sample instruction. This field will be blank if the QA/QC Task Sample instruction has not yet been executed.

11. <u>Task Source(s) **(Required)**:</u>

    a. Source Worker(s):
        i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Workers can be removed by checking the selectable checkbox and clicking the "Remove" button.
        ii. Level – This column displays the Level of the organization selected for a given row. The possible values are "- Select -" (as default), Worker, Unit, or Office. When a value is selected, the Select button is displayed in the same row in the table.
        iii. Number – This column displays the Number or Code associated to the selected organization or Worker.
        iv. Name – This column displays the Name associated to the selected organization or Worker.
        v. **BUTTON**: Select – This button will open Select Worker, Select Unit, or Select Office page depending on the value selected in the Level dropdown. Once a value is selected from the Select Worker, Select Unit or Select Office page, the Add button can be used to add the row to the Source Worker table. This button will display when the page is in Create or Edit mode.

vi. **BUTTON**: Add – This button inserts a new row in the table. A new row will not be inserted if a row was previously added and has not been completed. This button will display when the page is in Create or Edit mode.

vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in Create or Edit mode.

b. Source Bank(s):

i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Banks can be removed by checking the selectable checkbox and clicking the "Remove" button.

ii. Level – This column will display "Bank"

iii. Number – This column displays the Bank ID for each Bank displayed in this section.

iv. Name – This column displays the Bank Name for each Bank displayed in this section.

v. **BUTTON**: Select – This button will display the Select Bank page. This button will display when the page is in create or edit mode.

vi. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the rows allowing the user to select a specific Bank. This button will display when the page is in create or edit mode.

vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

c. Source Case(s):

i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Cases can be removed by checking the selectable checkbox and clicking the "Remove" button.

ii. Level – This column will display "Case"

iii. Number – This column displays the Case Number for each Case displayed in this section.

iv. Name – This column displays the Case Name for each Case displayed in this section.

v. **BUTTON**: Select – This button will display the Person Search page. This button will display when the page is in create or edit mode.

vi. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the row allowing the user to select a specific Case. This button will display when the page is in create or edit mode.

vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

12. Sample Options

a. Number of Tasks – This dropdown allows the User to configure the size of the QA/QC Task Sample.

i. Maximum Number of Tasks – When the page is in Create mode, this value is the default. When selected, a **Required** "Maximum Number of Tasks" field will appear prompting the user to enter a number indicating the maximum number of Tasks to be sampled. This field has a maximum length of four characters. Valid inputs are numbers from 1-2500 only due to the sample size limit of 2500.

ii. Number of Tasks per Worker - When selected, a **Required** "Number of Tasks per Worker" field will appear prompting the user to enter a number indicating the maximum number of Tasks to be sampled per worker configured in the Task Source(s) section. Valid inputs are numbers from 1-2500 only due to the sample size limit of 2500. This attribute will only be applied to the pool of workers within the configured Task Source(s), it will not apply to Source Banks.

iii. Percentage of Tasks – When selected, a **Required** "Percentage of Tasks" field will appear prompting the user to enter a percentage of tasks to be sampled. This field has maximum length of three characters. Valid inputs are numbers from 1-100 only.

b. Task Status – This field will display two values each with a checkbox for selection. The options available for the Task Status are:

i. Completed

ii. Void

c. Completed/Void Date – A dropdown allowing configuration of a specific timeframe based on Task completion or void action. The following options will be included:

i. Previous 7 Days (default) – Only Tasks with a Completed/Void date within the previous 7 calendar days of the QA/QC Task Sample instruction's run date will be sampled.

ii. Previous Month – Only Tasks with a Completed/Void date within the previous month of the QA/QC Task Sample instruction's run date will be sampled.
iii. Custom – Begin Date and End Date fields will display allowing the User to specify a specific date range for Task Completed/Void date restriction.

d. Task Priority – This dropdown allows the User to configure the QA/QC Task Sample instruction for specific Task priority values. Options include:
   i. Any (default)
   ii. Custom – When selected, a **Required** "Custom Task Priority" section will display the four possible Priority values each with a checkbox. Priorities that have been selected to apply to the QA/QC Task Sample instruction have check marks to the left of them when the page is in View mode. The Field is only visible when Custom is chosen in the Task Priority field. When visible, this field is required to have at least one of the Task Priority checkboxes selected. The QA/QC Task Sample will only sample Tasks if the Priority of their associated Task Types matches one of the values checked in this field. The following are the options for Custom Task Priority:
      1. Critical
      2. High
      3. Medium
      4. Low

13. <u>Task Types:</u>

By default, this section loads in collapsed view with no rows specified. An empty section means Tasks of any Type and Sub-Type will be included in the QA/QC Task Sample processing. Note: This section will load in expanded mode if at least one row is available in the table. The User may expand this section and specify Task Types and Task Sub-Types to be included in the QA/QC Task Sample processing. The following columns and buttons are available in this section:

a. Selectable checkbox – For each result displayed, when the page is in Create or Edit mode, a selectable checkbox will display at the beginning of the row. Task Type rows can be removed by checking the selectable checkbox and clicking the "Remove" button.
b. Task Category – This column displays the Task Category for each row, if the worker has selected a Task Category for the row. When adding a new row, Task Category is not a required field; the user may choose a Task Type without selecting a Task

Category. However, if the user selects a Task Category, the Task Type dropdown will only display Task Types available within the selected Task Category. Similarly, if the user does not select a Task Category value, and they do select a Task Type value, the Task Category value will remain blank. The Task Category dropdown will include all available Task Categories.

c. Task Type – This column displays the Task Type for each row. When adding a new row, a dropdown will display with all available Task Types for the county. However, if the user has selected a value in the Task Category dropdown, the Task Type dropdown will only display Task Types available within the selected Task Category for the county. A value is not required in this field as a user may choose to sample Tasks based on a Task Category alone.

d. Task Sub-Type – This column contains Task Sub-Type information. When adding a new row, a dropdown will display with all available Task Sub-Types for the Task Type selected in the Task Type dropdown.

e. **BUTTON**: Add – This button inserts a new row in the table and will display when the page is in Create or Edit mode.

f. **BUTTON**: Remove – This button will display when the page is in Create or Edit mode. On click, processing will remove rows within the table with a checkmark in the Selectable Checkbox.

14. Programs: By default, this section loads in collapsed view with no programs checked. This means Tasks regardless of program association will be included in the QA/QC Task Sample Search process.

The User may expand this section and choose to identify a program, or set of programs, from which to draw Tasks. Programs that are considered intake programs or external programs will be displayed. Refer to Appendix (See Section 7) for a current list of intake/external programs.

15. Recurrence:

a. Frequency **(Required)** – Four options are available with the default displaying as "- Select - ":

i. One-Time – The QA/QC Task Sample instruction will only run one time.

ii. Daily (M-F) – The QA/QC Task Sample instruction will run on a daily basis- Monday through Friday.

iii. Weekly – This instruction will run every week on the weekday(s) selected- Monday through Friday.

iv. Monthly – This instruction will run every month.

b. Begin Date **(Required)** – Displays when the value selected in the Recurrence dropdown is “One-Time”, “Daily (M-F)”, or “Weekly”. This is the start date for the QA/QC Task Sample instruction. The value is defaulted to the current CalSAWS System date.

Note: This field is not editable after the QA/QC Task Sample instruction has been executed for the first time.

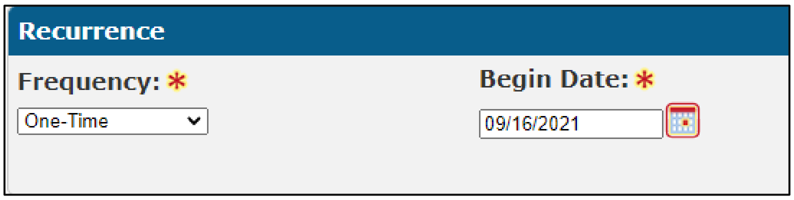

Figure 2.2.3.1 – QA/QC Task Sample Detail One-Time Mockup

c. End Date **(Required)** – Displays when the value selected in the Frequency dropdown is “Daily (M-F)” or “Weekly”. This is the end date for QA/QC Task Sample instruction.

This value is defaulted to one year from the CalSAWS System date when the page is in Create mode. It cannot be edited to be more than one year from the CalSAWS System date.

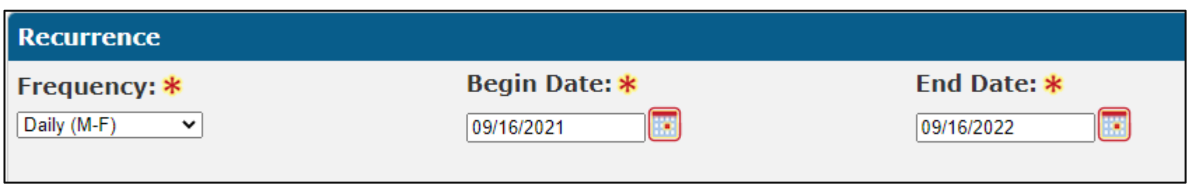

Figure 2.2.3.2 – QA/QC Task Sample Detail Daily (M-F) Mockup

d. Weekday(s) **(Required)** – Displays when the value selected in the Frequency dropdown is “Weekly”. Weekday names (Monday through Friday) will display with a checkbox available for each day allowing the user to select one or more weekdays.

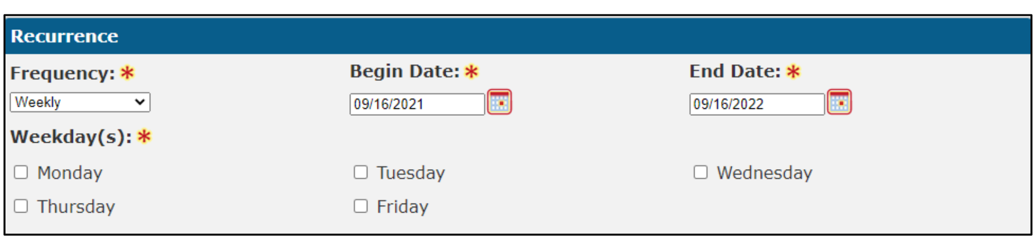

Figure 2.2.3.3 – QA/QC Task Sample Detail Weekly Mockup

e. Begin Month **(Required)** – Displays when the value selected in the Frequency dropdown is “Monthly”. This is the start month for the QA/QC Task Sample instruction. The value is defaulted to the current CalSAWS System month.

Note: This field is not editable after the QA/QC Task Sample instruction has been executed for the first time. This field displays when the value selected in the Frequency dropdown is "Monthly".

f. End Month **(Required)** – Displays when the value selected in the Frequency dropdown is “Monthly”. This is the end month for QA/QC Task Sample instruction.

This value is defaulted to one year from the CalSAWS System date when the page is in Create mode. It cannot be edited to be more than one year from the CalSAWS System date.

Example – Begin Month: 08/2021 and End Month: 09/2021

g. Day of the Month **(Required)** – Displays when the value selected in the Frequency dropdown is “Monthly”. This value determines at what point during the month the QA/QC Task Sample instruction will execute. The field is a dropdown menu with the following options:

   i. First Day of the Month
   ii. Last Day of the Month

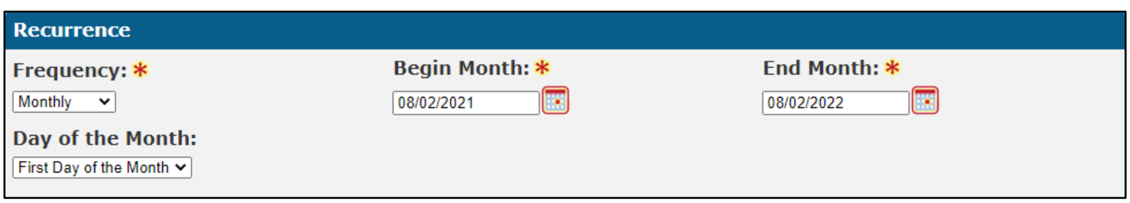

Figure 2.2.3.4 – QA/QC Task Sample Detail Monthly Mockup

2.2.4 Description of Changes – Results Mode

Display the top pane of the QA/QC Task Sample Detail page in Results mode when navigating from the QA/QC Task Sample Results List page (See Section 2.3). When the QA/QC Task Sample Detail page is accessed through the QA/QC Task Sample Results List Page, there are additional fields displayed related to the specific QA/QC Task Sample occurrence that ran. The QA/QC Task Sample Detail page will also display a snapshot of the detail settings for the QA/QC Task Sample instruction as they were at the time the sample was retrieved.

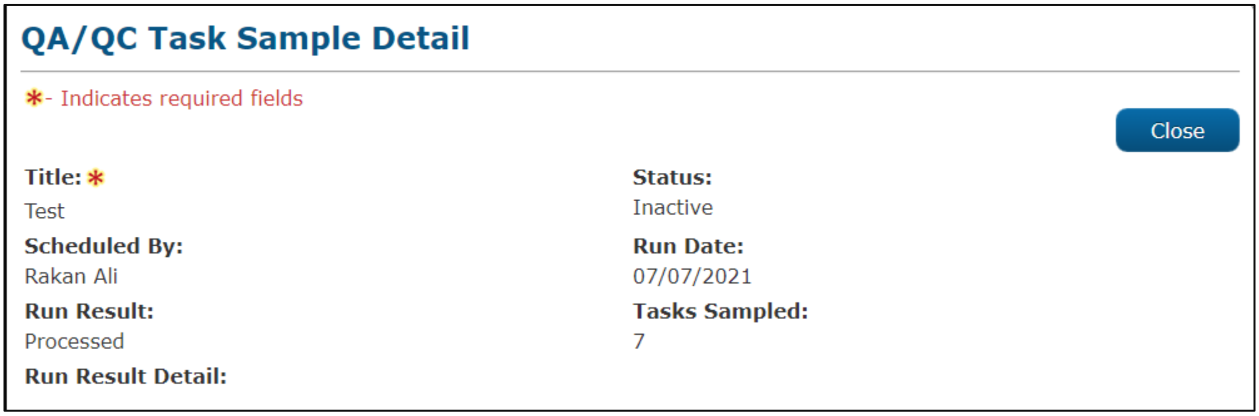

Figure 2.2.4.1 – QA/QC Task Sample Detail Results Mode Page Mockup

1. **BUTTON:** Close – This button closes the page and navigates the User back to the QA/QC Task Sample Results List page.

The following fields display only when the page is in Results mode:

2. Run Date – This field displays the date the QA/QC Task Sample was run.
3. Run Result – This field displays the result status for the QA/QC Task Sample. The value will be one of the following options:
    a. Processed
    b. Not Processed
4. Tasks Sampled – This field displays the number of Tasks that were sampled.
5. Run Result Detail – This field displays additional information if the Run Result is Not Processed. Possible values include:
    a. Task Source(s) Do Not Have Task Assignments
    b. Number of Tasks to Sample Is Over Limit

2.2.5 Page Validations

1. "Title – The title is already in use by the staff member listed in the Scheduled By field."
    a. A validation message is displayed when the User attempts to save a QA/QC Task Sample instruction with a Title that already exists for a QA/QC Task Sample instruction where the Scheduled By value is the logged in worker. Upper and Lower case is not considered for uniqueness.

2. “Task Source(s) – A new row may not be added until the last row has been completed.”
    a. A validation message displays when the User attempts to add a row in the Task Source(s) table before completing the last row on that table.

3. “Task Types – A new row may not be added until the last row has been completed.”
    a. A validation message displays when the User attempts to add a row in the Task Types table before completing the last row on that table.

4. “Maximum Number of Tasks – Input value must be a number from 1 – 2500. Please enter a different value.”
    a. A validation message displays when the User attempts to input an invalid value in the Maximum Number of Tasks secondary prompt.

5. “Percentage of Tasks – Input value must be a number from 1 – 100. Please enter a different value.”
    a. A validation message displays when the User attempts to input an invalid value in the Percentage of Tasks secondary prompt.

6. “Begin Date – The Recurrence Begin Date must not be in the past. Please enter a different date.”
    a. A validation message displays when the Users attempts to save a QA/QC Task Sample instruction with a Begin Date in the past.

7. “End Date – The Recurrence End Date must not be in the past, earlier than the Begin Date, or greater than a year from the current date.”
    a. A validation message displays when the Users attempts to save an active QA/QC Task Sample instruction with an End Date in the past, an End Date prior to the Begin Date, or an End Date greater than a year from the current date.

8. “Begin Month - The Recurrence Begin Month must not be in the past. Please enter a different month.”
    a. A validation message displays when the Users attempts to save a QA/QC Task Sample instruction with a Begin Month in the past.

9. “End Month – The Recurrence End Month must not be in the past, earlier than the Begin Month, or greater than a year from the current month.”

a. A validation message displays when the Users attempts to save an active QA/QC Task Sample instruction with an End Month in the past, an End Month prior to the Begin Month, or an End Month greater than a year from the current month.

10. "End Date – The End Date must be later than the Begin Date. Please enter a different date."
    a. A validation message displays when the End Date entered is before Begin Date in the Task Sample Options Panel for "Custom" Completed/Void Date.

11. "Begin Date – Field is required. Please enter a value."
    a. A validation message displays when there is no date entered and the Completed/Void value is "Custom".

12. "End Date – Field is required. Please enter a value."
    a. A validation message displays when there is no date entered and the Completed/Void value is "Custom".

13. "Task Source(s) – A Worker, Bank or Case must be included as a source."
    a. Add a validation to display when the User attempts to save the QA/QC Task Sample instruction without populating at least one Worker, Bank or Case in the Task Source(s) section.

14. "Source Worker(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Source Worker(s) section before completing the last row added to that table.

15. "Source Bank(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Source Bank(s) section before completing the last row added to that table.

16. "Custom Task Priority – The values selected conflict with the priorities associated to the selected Task Types. Please select additional values for Custom Task Priority."
    a. If the User attempts to save a QA/QC Task Sample instruction having checked at least one Custom Task Priority and chosen at least one Task Type, but none of the checked Priorities match a Priority of the selected Task Types or Sub-Types, a validation message is triggered. This is to

prevent Users from saving QA/QC Task Sample instruction that will not return any Tasks.

This validation also displays if the User has selected at least one Custom Task Priority and not chosen any Task Types, but none of the Task Types or Sub-Types in the County have a Priority that match at least one of the Custom Task Priority selections.

17. "Number of Tasks per Worker – Input value must be a number from 1 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Number of Tasks per Worker field.

2.2.6 Page Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks > Click on a hyperlink of the desired result displayed in the QA/QC Task Sample Search page or the "Add Task Sample" button to navigate to the QA/QC Task Sample Detail page.

2.2.7 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
QAQCTaskView	• QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List;	• QA/QC Task View • QA/QC Task Edit
QAQCTaskEdit	• QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List;	• QA/QC Task Edit

Security Right	Right Description	Right to Group Mapping
SelectWorker	• Enter Report Parameters; • Select Worker; • Select Unit; • Select Office; Select Staff;	• QA/QC Task View • QA/QC Task Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
QA/QC Task View	View QA/QC Task Sample Details.	• View Only
QA/QC Task Edit	View and Edit QA/QC Task Sample details. Access to Select pages for Worker, Unit, Office and Staff.	• N/A

2.2.8 Page Mapping

Implement page mapping for the QA/QC Task Sample Detail page.

2.2.9 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 QA/QC Task Sample Results List Page

2.3.1 Overview

This page lists the QA/QC Task Sample Results for the QA/QC Task Sample that was displayed on the QA/QC Task Sample Detail page. The User can view the results and details of the QA/QC Task Sample instruction for each run.

2.3.2 QA/QC Task Sample Results List Mockup

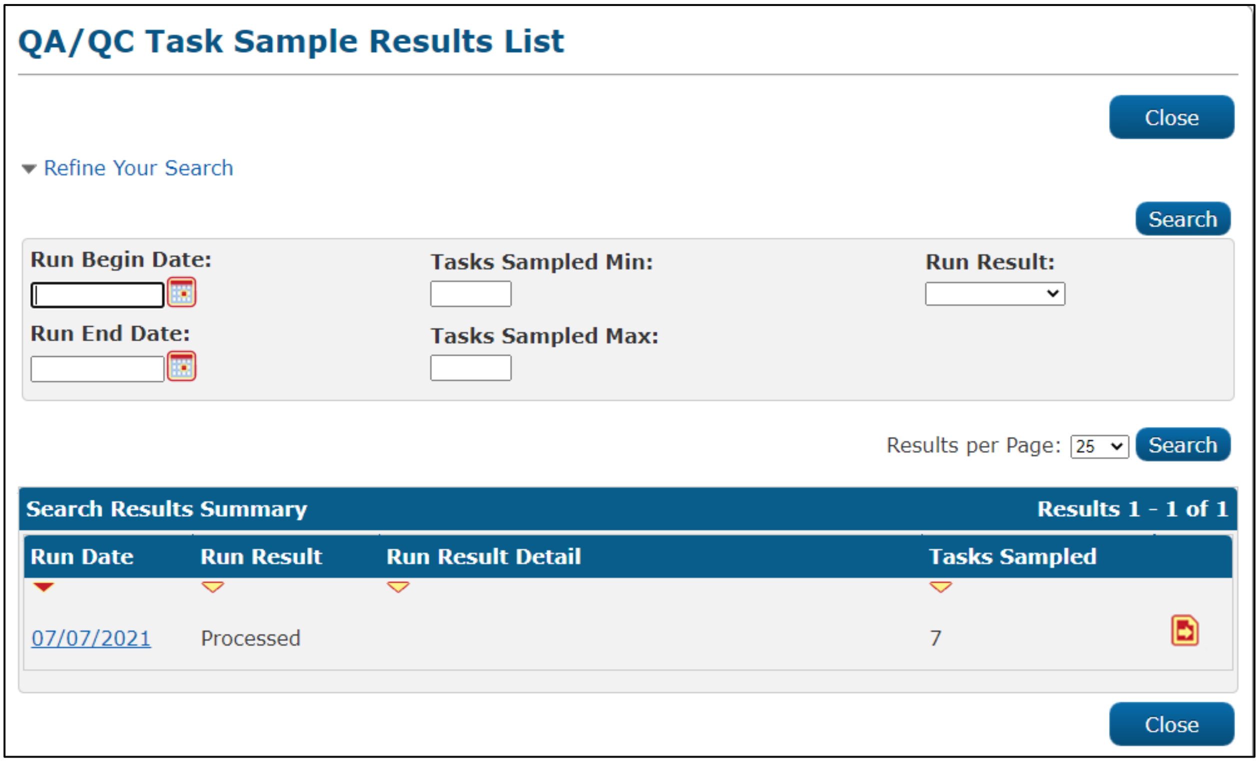

Figure 2.3.2.1 – QA/QC Task Sample Results List Page Mockup

2.3.3 Description of Changes

Add a QA/QC Task Sample Results List page to the CalSAWS System. This page will provide information for each execution of the QA/QC Task Sample instruction. The results included on this page allow access to a maximum of 12 months of historic samples. The page will include an Export Report icon for each row/result with Task Sample results displayed in the Search Results Summary table.

1. **BUTTON:** Close – This button closes the page and navigates the User back to the QA/QC Task Sample Detail page.

2. **BUTTON:** Search – When clicked, the Search Results Summary is refreshed to display QA/QC Task Sample results for the specific QA/QC Task Sample instruction used to access the page. If this button is clicked without filling in any parameters, all results for the QA/QC Task Sample instruction will display. If this button is clicked and no records satisfy the search criteria, a “No Data Found” message displays in the Search Results Summary Section.

3. <u>Refine Your Search:</u> Allows User to choose the number of search results displayed per page. This is an expandable section toward the top of

the page that displays parameters which can be used to filter the QA/QC Task Sample instruction results displayed on the page. This section will be collapsed on initial load. The default order for the search results is by Run Date chronologically. The 'Run Date', 'Run Result', 'Run Result Detail', and 'Tasks Sampled' fields will be sortable. The following search parameters are available defaulting to blank:

a. Run Begin Date – This field allows the User to input the beginning date for the search range to be compared to the QA/QC Task Sample run date.
b. Run End Date – This field allows the User to input the end date for the search range to be compared to the QA/QC Task Sample run date.
c. Tasks Sampled Min – This text field allows the User to input a value for the minimum number of Tasks that were sampled for each run. Valid inputs are numbers from 0 – 2500 only.
d. Tasks Sampled Max – This text field allows the User to a value for the maximum number of Tasks that were sampled for each run. Valid inputs are numbers from 0 – 2500 only.
e. Run Result – This dropdown field allows the User to search by specific Run Result values for the QA/QC Task Samples. Options include:
    i. BLANK
    ii. Processed
    iii. Not Processed

4. <u>Search Results Summary:</u> Contains the following information for the result set that matches the User specified search criteria. Each column is sortable. Default sort is Run Date descending.

    Note: Results are kept up to one year from their run date. After one year, the results are purged from the CalSAWS System.

    a. Run Date – This column indicates the date the sample was retrieved. This field will display as a hyperlink that leads to the QA/QC Task Sample Detail page in Results mode (See Section 2.2.4) for the selected run date. All options displayed on this page, will be the settings that were used at the time the sample was pulled.
    b. Run Result – This column indicates the run result for the QA/QC Task Sample execution. Options include:
        i. Processed
        ii. Not Processed
    c. Run Result Detail – This column indicates additional information if the Run Result is Not Processed. Possible values are:
        i. Task Source(s) Do Not Have Task Assignments.
        ii. Number of Tasks to Sample Is Over Limit.

   d. Tasks Sampled – This column indicates the number of Tasks that were retrieved by the QA/QC Task Sample execution.
   e. **ICON:** Export Icon – An icon for each row in the Search Results Summary table, with a Tasks Sampled value greater than 0. On click, the specifics for the Tasks sampled will be exported into a spreadsheet format. (See Section 2.4)

2.3.4 Page Validations

1. "Run End Date – Run End Date must be later than the Run Begin Date. Please enter a different date."
   a. A validation message displays when Run End Date entered is before the Run Begin Date in the "Refine Your Search" section.
2. "Run Begin Date – QA/QC Task Sample results are limited to one year. Please enter a different date."
   a. A validation message displays when the User enters Run Begin Date more than a year in the past.
3. "Tasks Sampled Max – Input value must be a number from 0 – 2500. Please enter a different value."
   a. A validation message displays when the User attempts to input an invalid value in the Tasks Sampled Max field.
4. "Tasks Sampled Min – Input value must be a number from 0 – 2500. Please enter a different value."
   a. A validation message displays when the User attempts to input an invalid value in the Tasks Sampled Min field.
5. "Tasks Sampled Max – Task Sampled Max must be greater than or equal to the Task Sampled Min value. Please enter a different value."
   a. A validation message displays when the User attempts to input a value in Tasks Sampled Min field that is greater than the value in Tasks Sampled Max.

2.3.5 Page Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks > QA/QC Task Sample Search > Click on a hyperlink of the desired result to navigate to the QA/QC Task Sample Detail page > Click the View Results button which will display if the QA/QC Task Sample instruction has run at least once.

2.3.6 Security Updates

This page does not have specific security assigned because it is accessed through the QA/QC Task Sample Detail page. The user can only access the QA/QC Task Sample Detail page with the security defined (See

Section 2.2.7), which by default also allows access to the QA/QC Task Sample Results List page.

2.3.7 Page Mapping

Implement page mapping for the QA/QC Task Sample Results List page.

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 QA/QC Task Sample Results Export Report

2.4.1 Overview

The QA/QC Task Sample Results Export Report contains information for QA/QC Task Sample results.

2.4.2 QA/QC Task Sample Results Export Mockup

General Information
Report: QA/QC Task Sample Results Export
County: Los Angeles
Export Date: 07/07/2021 08:30 AM
QA/QC Task Sample Title: ES
Run Date: 07/16/2021

Figure 2.4.2.1 – QA/QC Task Sample Results Export - General Information Sheet Mockup

Case Number	Case Name	Worker ID	Bank ID	Program	Completed/Void Date	Category	Type	Sub-Type	Status	Priority	Date Created	Long Description
B16N522	Case Name		19DP1700EWBK	Program Name	06/15/2021	SAR7	SAR 7 Received		Void	High	07/7/2021	SAR 7 Received 08/01/2021 SAR 7 submit month August Customer note regarding delay in return of form Award letter from SSA for Robin dated 01/01/2021 Imaged in Barcode mode/indexed Set Task
B1YSV20	Case Name	19DP62U12E		Program Name	06/15/2021	IEVS	IEVS IFDS Verification Received		Completed	High	07/7/2021	

Figure 2.4.2.2 – QA/QC Task Sample Results Export – Exported Data Sheet Mockup

2.4.3 Description of Changes

1. Add a QA/QC Task Sample Results Export Report that will allow exporting of data from the QA/QC Task Sample Results List page for a particular QA/QC Task Sample execution. Reference the Supporting

Documents section for an example report template which includes the report layout and column placement.

a. General Information Sheet
   This sheet will contain general information informing the User of the parameters that were used to generate the Report. This sheet will include a single table with a single column titled "General Information" that will include the following rows:
   i. Report Name formatted as "Report: <Report Name>". For example, "Report: QA/QC Task Sample Results Export".
   ii. The county name formatted as "County: <County Name>". For example, "County: Los Angeles".
   iii. The date and time the export was generated formatted as "Export Date: <mm/dd/yyyy hh:mm AM/PM>". For example, "Run Date: 07/07/2021 08:30 AM".
   iv. The QA/QC Task Sample Title formatted as "QA/QC Task Sample Title: <QA/QC Task Sample Title>". For example, "QA/QC Task Sample Title: ES".
   v. The QA/QC Task Sample Run Date formatted as "Run Date: <mm/dd/yyyy>". For example, "Run Date: 07/16/2021".

b. Exported Data Sheet

Column Name	Description
Case Number	The Case Number associated to the Task.
Case Name	The Case Name of the Case associated to the Task.
Worker ID	The Worker ID that is associated to the Task
Bank ID	The Bank ID that is associated to the Task.
Program	The Program associated to the Task.
Completed/Void Date	The Completed Date of the Task formatted as MM/DD/YYYY.
Category	The Category of the Task Type of the Task.
Type	The Task Type associated with the Task.
Sub-Type	The Task Sub-Type associated to the Task. This column will be blank if no Sub-Type exists.

Column Name	Description
Status	The Status of the Task.
Priority	The Priority of the Task.
Date Created	The date the Task was created formatted as MM/DD/YYYY.
Long Description	The Long Description attribute of the Task.

2.4.4 Report Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks > QA/QC Task Sample Search > Click on a hyperlink of the desired result displayed in the QA/QC Task Sample Search page to navigate to the QA/QC Task Sample Detail page > Click the View Results button which will display if the QA/QC Task Sample instruction has run at least once > Click on Export Icon.

2.4.5 Counties Impacted

All CalSAWS counties are impacted.

2.4.6 Security Updates

N/A – The report does not have specific security.

2.4.7 Report Usage/Performance

There are no expected page report usage/performance impacts

2.5 QA/QC Task Sample Sweep Job

2.5.1 Overview

The QA/QC Tasks Sweep job is responsible for updating QA/QC Task Sample statuses, deleting QA/QC Task Sample results that are older than one year, and creating new transactions to be processed for QA/QC Task Sample instructions. This section will outline the required modifications to implement the QA/QC Task batch sweep job.

2.5.2 Description of Change

1. Create a new daily batch job to sweep active QA/QC Task Samples that are scheduled for execution on the same batch run date. This sweep will be responsible for the following:
    a. Updating the QA/QC Task Sample Status from 'Active' to 'Inactive' for one-time QA/QC Task Samples or recurring sampling that have reached or passed the End Date of the recurrence.
    b. Deleting QA/QC Task Sample results that are older than one year.
    c. Creating the transactions to be processed for active QA/QC Task Samples that are scheduled for execution on the current day (same batch run date).
2. The batch process will evaluate QA/QC Task Sample instructions to determine which instructions are configured to be executed during the current night. The batch process will use the following logic for each Recurrence Frequency to determine if a QA/QC Task Sample should be executed.
    a. One-time: Run if the QA/QC Task Sample Recurrence Begin Date is today or in the past and the instruction has not been executed.
    b. Daily (M-F): Run if the QA/QC Task Sample Recurrence Begin Date is today or in the past, and the End Date is today or in the future.
    c. Weekly: Run if the QA/QC Task Sample Recurrence Begin Date is today or in the past, the End Date is today or in the future, and today has been selected as one of the Weekday(s) in the Recurrence section of the QA/QC Task Sample Detail page.
    d. Monthly: Run if the first of the QA/QC Task Sample Recurrence Begin Month is today or in the past and the first of the End Month is today or in the future, the Day of the Month field is set to "First Day of the Month" and the current day is the first of a month.
    OR
    Run if the last day of the QA/QC Task Sample Recurrence Begin Month is today or in the past and the last of the End Month is today or in the future, the Day of the Month field is set to "Last Day of the Month" and the current day is the last day of a month.

2.5.3 Execution Frequency

This sweep job will be scheduled to run daily for all CalSAWS System business days, excluding Sundays and Holidays.

2.5.4 Key Scheduling Dependencies

Schedule this batch job as a predecessor to the QA/QC Task Sample Execution job.

2.5.5 Counties Impacted

All CalSAWS counties.

2.5.6 Data Volume/Performance

There are no anticipated volume/performance concerns.

2.5.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.6 QA/QC Task Sample Execution Job

2.6.1 Overview

The QA/QC Task Sample Execution job will be responsible for processing the QA/QC Task Sample instructions determined by the QA/QC Task Sample Sweep job. This section outlines the required modifications to implement the QA/QC Task Execution batch job.

2.6.2 Description of Change

1. Create a new daily batch job per county to process active QA/QC Task Sample instructions as determined by the sweep job.

   This process will determine if any QA/QC Task Samples will result in more than the maximum limit of 2500 Tasks. These QA/QC Task Samples will not be processed, and the Run Result Detail will be marked as "Number of Tasks to Sample Is Over Limit". The Run Result is available on the QA/QC Task Sample Detail page in Results mode. This batch job is also responsible for setting the status to 'Inactive' for QA/QC Task Samples with a recurrence of 'One-Time' after processing is completed.

2. <u>QA/QC Task Sample Processing:</u>

   The execution of a QA/QC Task Sample instruction will result in a sample of Tasks being associated to the QA/QC Task Sample instruction which will be accessible on the QA/QC Task Sample Results List page.

3. <u>QA/QC Task Detail:</u>

The following section provides additional details into the logic required associated to each option displayed on the QA/QC Task Sample Detail Page.

a. Task Source(s) – This section defines the sources within the organization to draw Tasks from. Batch will use Task Sources to determine the Source Worker(s), Source Bank(s) and/or Source Case(s) information associated with the Tasks to be sampled.
b. Sample Options – This section contains the Task Sample options the user can use to filter tasks.
    i. Number of Tasks – Defines a limit over the number of Tasks to be sampled from Workers, Banks and Cases. The User can select one of the following options for the number of Tasks:
        - Maximum Number of Tasks: Sample at most, a specific number of Tasks from the Source(s).
        - Percentage of Tasks: Sample a specific percentage (rounded to the nearest number) of all Tasks from the Source(s).
        - Number of Tasks Per Worker: Sample a maximum number of Tasks from each worker determined from the Source(s).
    ii. Task Status – Defines which specific Task Status filters to apply to the Task Samples. Sampled Tasks may be Completed, Void or both.
    iii. Completed/Void Date – The Completed/Void Date filter determines which date range to apply to Tasks based on the Completed/Voided date. The Completed/Voided Date can be set to one of the following options:
        - Previous 7 Days: Only Tasks with a Completed or Void Date within the past 7 calendar days of the QA/QC Task Sample run date will be retrieved.
        - Previous Month: Only Tasks with a Completed or Void Date within the month prior to the current month will be retrieved.
        - Custom: Only Tasks with a Completed or Void Date between the specific date range will be retrieved.
    iv. Task Priority – The Task Priority filter determines the priority of the Tasks to be sampled. The Task Priority can be set to one of the following options:
        - Any: Priority is not evaluated as part of the sample processing. All Tasks are candidates regardless of Priority.
        - Custom: Only Tasks with a Priority value that matches one of the selected Task Priorities will be retrieved.
    v. Task Types – The Task Type filter defines the Task Categories, Task Types and Task Sub-Types to be

sampled. Only Task Categories, Task Types and Task Sub-Types identified by the User will be sampled. If no filters are defined, all Task Types will be included for the QA/QC Task Samples. If a Task Type is identified, and no corresponding Task Sub-Types are identified, all Task Sub-Types are identified, then all Task Sub-Types for that Task Type will be included in the Task Samples. If a Task Category is identified, and no corresponding Task Types are identified, all Task Types for the selected Task Category will be included in the Task Samples.

vi. Programs – This filter defines the Programs that are associated to the Tasks to be sampled. Only the Tasks that are linked to the specified Program types will be sampled. If no filters are defined, all Program Tasks will be included in the QA/QC Task Sample processing.

4. QA/QC Task Sample Results:
    a. After running each QA/QC Task Sample, the processing will log the following information for future reference.
        i. Run Result – The results status for the QA/QC Task Sample. This value will be one of the following options:
            - Processed – At least 1 Task has been sampled per instructions.
            - Not Processed – No Tasks have been sampled per instructions.
        ii. Run Result Detail – If the Run Result is Not Processed, additional details are captured in this field. The additional detail can be one of the following scenarios:
            - Task Source(s) do not have Task Assignments – This means no Tasks were assigned to the Workers, Units, Offices, Banks or Cases identified in the Task Source(s) section.
            - Number of Tasks to Sample is Over Limit – This means the task sample instructions specified return more than 2500 Tasks.
        iii. Run Date – The date the QA/QC Task Sample executed.
5. Task Samples – The total number of Tasks that were sampled, along with the individual Task IDs, and point in time QA/QC Task Sample configuration.

2.6.3 Execution Frequency

The batch job will be scheduled to run daily, excluding Sundays and Holidays.

2.6.4 Key Scheduling Dependencies

Schedule the Task Sample Execution Batch job to run after the Task Sample Sweep job.

2.6.5 Counties Impacted

All CalSAWS counties.

2.6.6 Data Volume/Performance

There are no expected data volume or performance concerns as daily volume is anticipated to be low.

2.6.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	QA/QC Task Sample Search Report	QAQC%20Task%20Sample%20Search%2(
2	Security	Security Matrix	CA-214916 DDID 2252 Security Matrix.›

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2252	The CONTRACTOR shall update the Task Management solution to allow authorized users to define and schedule a periodic sampling of tasks. The periodic task sampling results must be viewable to the user that requested it.	None	This design incorporates pages to configure the CalSAWS System to retrieve a sample of Tasks for QA/QC purposes and access the results.

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

1. List of Programs
    a. AAP
    b. Adult Protective Services
    c. CAPI
    d. CFET
    e. Cal-Learn
    f. CalFresh
    g. CalWORKs
    h. Child Care
    i. Child Protective Services
    j. Disaster CalFresh
    k. Diversion
    l. Foster Care
    m. Homeless - Perm
    n. Homeless – Temp
    o. IHSS/CMIPS II
    p. Immediate Need
    q. IV-D Child Support
    r. Kin-GAP
    s. LIHP
    t. Linkages Adult Services
    u. Medi-Cal
    v. Multipurpose Senior Service
    w. Nutrition Benefit
    x. PCSP
    y. RCA
    z. REP
    aa. Welfare to Work

In addition to the above, the following GA/GR programs will be included based on the viewing county:

County	Programs
Los Angeles	a. GROW b. General Assistance/General Relief
1. Alpine 2. Amador 3. Butte 4. Calaveras 5. Colusa 6. Del Norte 7. Glenn 8. Humboldt 9. Imperial	a. General Assistance (Managed) b. General Assistance (Non-Managed) c. GA/GR Employment Services

County	Programs
10. Inyo 11. Kern 12. Kings 13. Lake 14. Lassen 15. Madera 16. Marin 17. Mariposa 18. Mendocino 19. Merced 20. Modoc 21. Mono 22. Monterey 23. Napa 24. Nevada 25. Plumas 26. Riverside 27. San Benito 28. San Joaquin 29. Shasta 30. Sierra 31. Siskiyou 32. Stanislaus 33. Sutter 34. Tehama 35. Trinity 36. Tuolumne 37. Yuba	
1. San Bernardino 2. El Dorado	a. General Assistance (Non-Managed) b. GA/GR Employment Services
1. Alameda 2. Contra Costa 3. Fresno 4. Orange 5. Placer 6. Sacramento 7. San Diego 8. San Francisco 9. San Luis Obispo 10. San Mateo 11. Santa Barbara 12. Santa Clara 13. Santa Cruz 14. Solano	a. GA/GR Automated Solution b. GA/GR Employment Services

County	Programs
15. Sonoma 16. Tulare 17. Ventura 18. Yolo	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-225639

Update on Delivery of Asset Verification Reports

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/14/2021	1.0	Initial Revision	Vallari Bathala Connor O'Donnell
09/16/2021	1.1	Updated Section 2.7.2 Description of Change to: 1. Specify that there will be two new Inbound FTP jobs 2. Specify that there will be two new Inbound Reader jobs 3. Add new requirement that batch job PI00C505 must be updated to assign type code of 'RE' to all flat files received monthly 4. Move requirement: 'Create DCR to add type code of 'RE' for historical records already processed' from #3 to #4	Vallari Bathala
11/12/2021	1.2	Updated Sections 2.12, 2.2.2, 2.3.2, 2.4.2, 2.5.2 and 2.6.2 to include the full page titles in mock ups and descriptions.	Vallari Bathala
11/17/2021	1.3	Updated Section 1.4 with a new assumption: Data requested via Ad-Hoc by County users, and available weekly, may also be available in the standard monthly Asset Verification file. The duplicate data will be processed and displayed as is.	Vallari Bathala
12/8/2021	1.4	Updated Section 2.7.3 Description of Changes to: 1. Remove requirements 1.a.i.1.a and 1.a.1.2: a. The CalSAWS file with combine C-IV and LA Counties 2. IEV417_CalWIN_CNTY<nn>_W<YYMMDD>.txt a. For CalWIN files <nn> specifies the two-digit County number. b. The file will be located /DHCS-MCED/CalWIN 2. Update requirements 1 and 2 to clarify that there will only be one Inbound FTP Batch job and one Reader job for the CalSAWS file.	

		Updated Section 1.4 Assumptions to add assumption #3: CalWIN counties will be added to the inbound CalSAWS IEV417 file with each CalWIN county migration wave.	

Table of Contents

1 OVERVIEW

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

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

1. The layout of the weekly files will be identical to the monthly files implemented by CA-208130.
2. Data requested via Ad-Hoc by County users, and available weekly, may also be available in the standard monthly Asset Verification file. The duplicate data will be processed and displayed as is.
3. CalWIN counties will be added to the inbound CalSAWS IEV417 file with each CalWIN county migration wave.

2 RECOMMENDATIONS

2.1 Asset Verification Search Page

2.1.1 Overview

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

2.1.2 Asset Verification Search Mockup

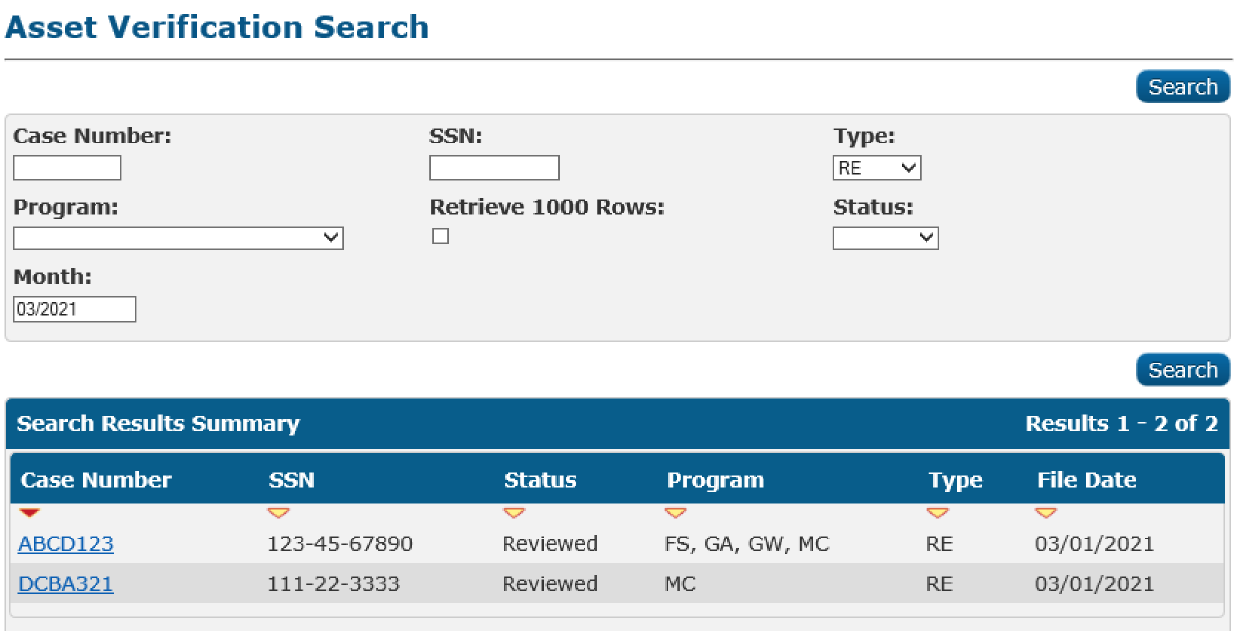

Figure 2.1.1 – Asset Verification Search (Type: RE)

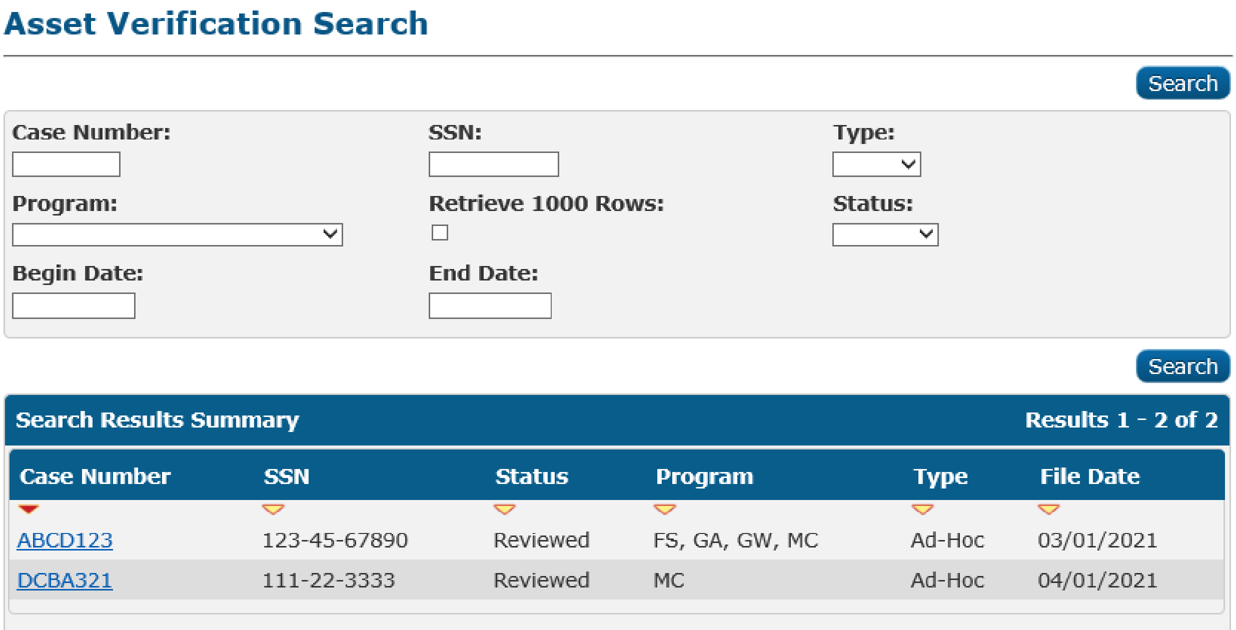

Figure 2.1.2 – Asset Verification Search (Type: Ad-Hoc)

2.1.3 Description of Changes

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

2.1.4 Page Location

- **Global: Special Units**

- **Local: Asset Verification**
- **Task: Asset Verification Search**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update the page mapping for new and removed fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Asset Verification Detail Page

2.2.1 Overview

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

2.2.2 Asset Verification Detail Mockup

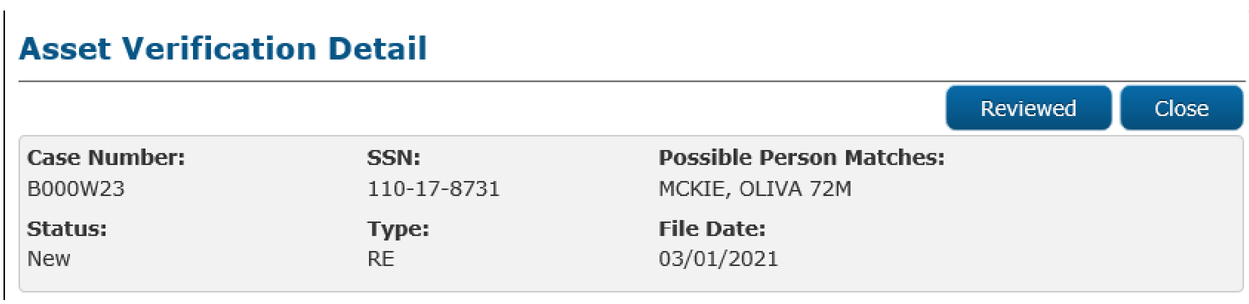

Figure 2.2.1 – Asset Verification Detail

2.2.3 Description of Changes

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

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update the page mapping with new fields.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Asset Verification - Financial Institution Balance Detail Page

2.3.1 Overview

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

2.3.2 Asset Verification - Financial Institution Balance Detail Mockup

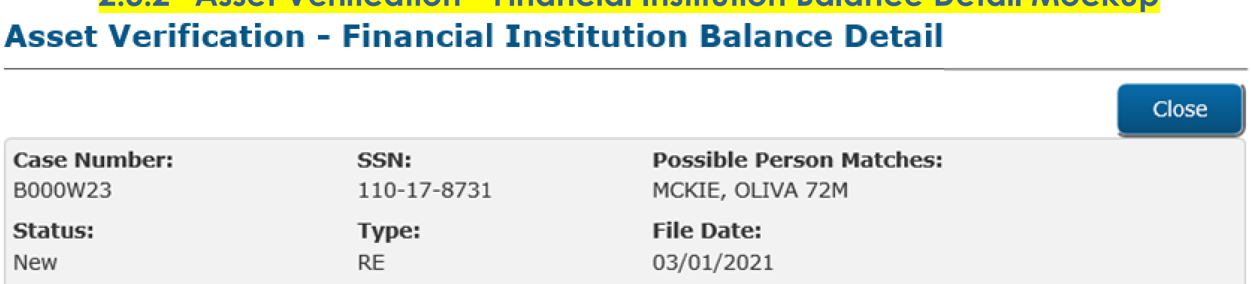

Figure 2.3.1 – Asset Verification - Financial Institution Balance Detail

2.3.3 Description of Changes

1. Case Number – This is the case number associated to the Asset Verification record.
2. SSN – This is the SSN associated with the Asset Verification record, formatted as XXX-XX-XXXX.

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

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

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update page mapping with new fields.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Asset Verification - Real Property Detail Page

2.4.1 Overview

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

2.4.2 Asset Verification - Real Property Detail Mockup

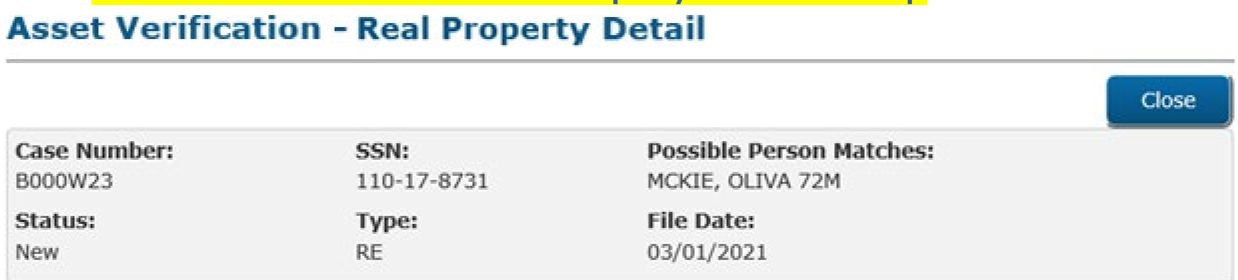

Figure 2.4.1 – Asset Verification - Real Property Detail

2.4.3 Description of Changes

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

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

2.4.4 Page Location

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

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update page mapping with new fields.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Asset Verification - Aircraft Detail Page

2.5.1 Overview

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

2.5.2 Asset Verification - Aircraft Detail Mockup

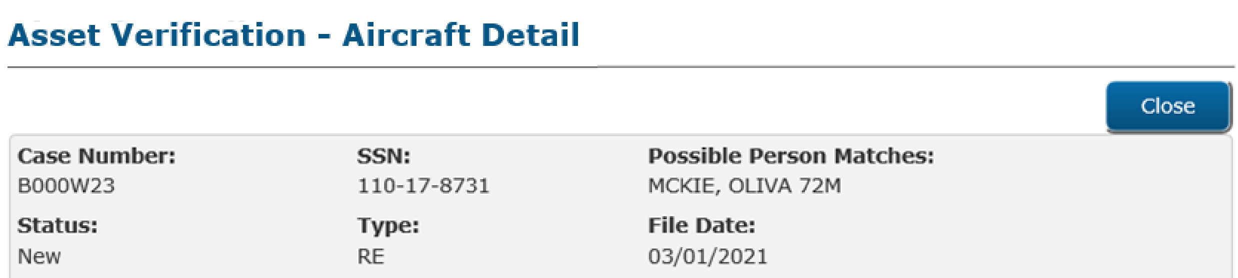

Figure 2.5.1 – Asset Verification - Aircraft Detail

2.5.3 Description of Changes

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

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

2.5.4 Page Location

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

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

Update page mapping with new fields

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Asset Verification - Watercraft Detail Page

2.6.1 Overview

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

2.6.2 Asset Verification - Watercraft Detail Mockup

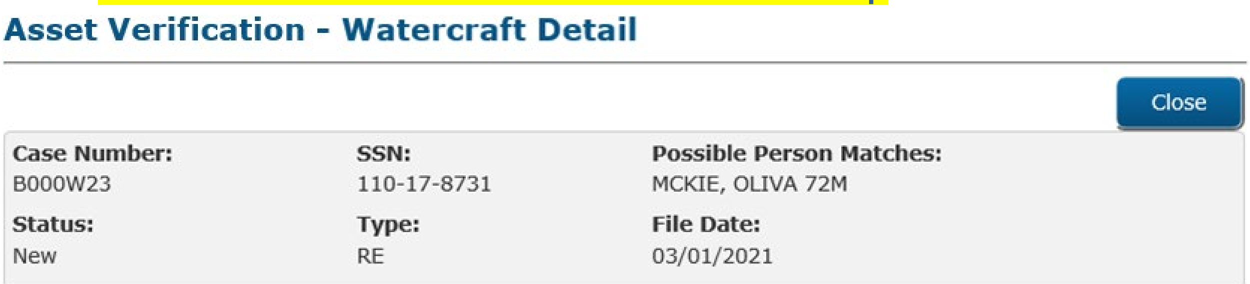

Figure 2.6.1 – Asset Verification - Watercraft Detail

2.6.3 Description of Changes

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

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

2.6.4 Page Location

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

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Update page mapping with new fields.

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Asset Verification Weekly Inbound Interface

2.7.1 Overview

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

2.7.2 Description of Change

1. Create a new Inbound FTP Batch job to read from the folder in the system and import the IEV417 flat file into The System.
    a. File Naming:
        i. The files names will be as follows:
            1. IEV417_CalSAWS_W<YYMMDD>.txt
                a. The file will be located here DHCS-MCED/CalSAWS

       Note: The naming convention on the DHCS side currently refers to Los Angeles County's data file as LEADER.
    b. The new batch job will check the DHCS server each night to see if the files are available. If the files are available, the job will transfer to a local destination where the batch job will then be able to import the data from the file. CalSAWS will only pull over the proper file based on the file naming described in the above point.

2. Create a new Asset Verification Inbound Reader job to read the IEV417 data file and import the file into The System.
    a. Create a new journal entry for every case identified in the interface using the criteria below:

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

3. Add new data element 'Type' to the data model which differentiate the two AVP files:
    a. RE - Flat files received monthly
    b. Ad Hoc - Flat files requested by County Users
4. Update Asset Verification Inbound Reader job (PI00C505) to assign type code of 'RE' to flat files received monthly.
    a. Create DCR to add type code of 'RE' for historical records already processed.
5. Add new data element 'File Date' to the data model:
    a. The date the AVP files are imported from DHCS.

2.7.3 Execution Frequency

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

2.7.4 Key Scheduling Dependencies

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

2.7.5 Counties Impacted

All Counties

2.7.6 Data Volume/Performance

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

2.7.7 Failure Procedure/Operational Instructions

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

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-229096 DDID 2314 FDS: GA GR Rules Phase 2 Batch 4 (6 Rules) - Income Rules and Corresponding NOA Reasons

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Peterson Etienne, Stephanie Hugo, Taylor Fitzhugh
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/02/2021	1.0	Initial Draft	Peterson Etienne, Stephanie Hugo, Taylor Fitzhugh
10/12/2021	1.1	Updated the document based on the QA comment log	Peterson Etienne, Shreesha Venugopal Math
11/04/2021	1.2	Added 'Catastrophic' as a drop down value for No SSN Reason. Requested by SFO.	Peterson Etienne
11/05/2021	2.0	After 11/04/2021 Review it was decided to remove the following SSN Reason drop types: • Child less than one • Failed to Obtain Effective MD • Expedited Services • Good Cause • Household Made Effort to Get Info • Incarcerated • Minor Consent Case • Not in Satisfactory Immigrant Status • Refusal to cooperate • Refused to State • Undocumented • Unwillingness Note added that counties that has Undocumented as an applicable No SSN reason will be switched to	Peterson Etienne

		Undocumented citizen.	
11/11/2021	2.1	Included information in Section 2.13 Eligibility Logic: Drug and Alcohol, Room, Board and Shelter' and screenshot instructing to choose a vendor type.	Rama Krishna Kuchibhotla
11/12/2021	2.2	Add assumption 'Indigent burial related logic cannot be tested until 22.03 release. It will be defaulted to false in 22.01.'	Jennifer Chen
11/12/2021	2.3	Replaced the existing validation and Added new edbc validation messages in Section 2.14	Rama Krishna Kuchibhotla
11/17/2021	2.4	Corrections in the trigger conditions for Return to Residence section 2.15.1.2	Justis Ketcham
11/29/2021	2.5	Updated the Landlord types	Shreesha V Math
12/05/2021	2.6	Modified the validation message and conditions for the new edbc hard validation messages added in section 2.14.	Rama Krishna Kuchibhotla
12/30/2021	2.7	Added assumption #23	Justis Ketcham
1/5/2021	2.8	Removed Reason Code XAF352	Stephanie Hugo

Table of Contents

1 OVERVIEW

This SCR will implement the household composition and Non-financial functionality for the GA/GR Automated EDBC/CC Counties 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 GA/GR Automated EDBC/CC Counties 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 rules.

    1. Return to Residence
    2. Shared Housing
    3. Financial Housing
    4. Housing Test
    5. Drug and Alcohol
    6. Room Board Shelter

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 3 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 (SCR 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 be 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 SCR 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.

21. Indigent burial related logic cannot be tested until 22.03 release. It will be defaulted to false in 22.01.
22. The information in the Living Arrangements Detail page is
23. System will validate only the current application for RTR benefit to verify if the benefit is issued previously. However, worker needs to verify if RTR benefit is being issued previously prior to the current application to avoid duplicate payments.

~~22.~~

~~23. The Expense page changes will be viewed by LA and all other programs.~~

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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

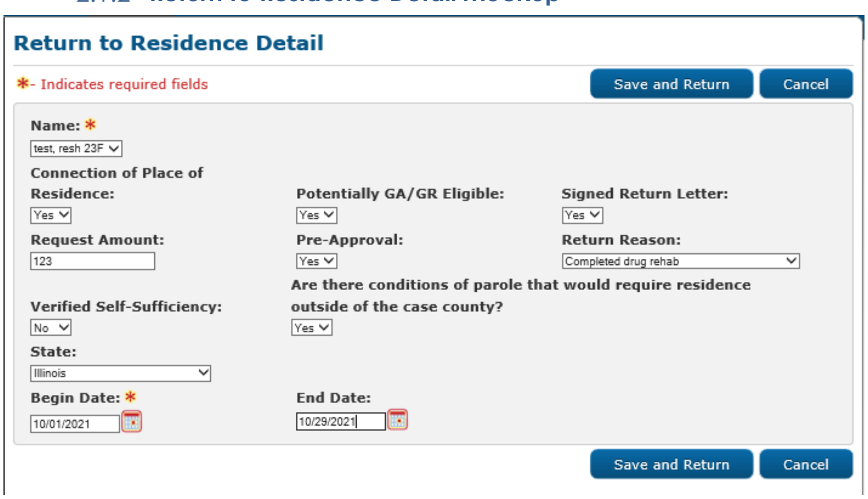


Figure 2.1.2.1 – Return to Residence Detail

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

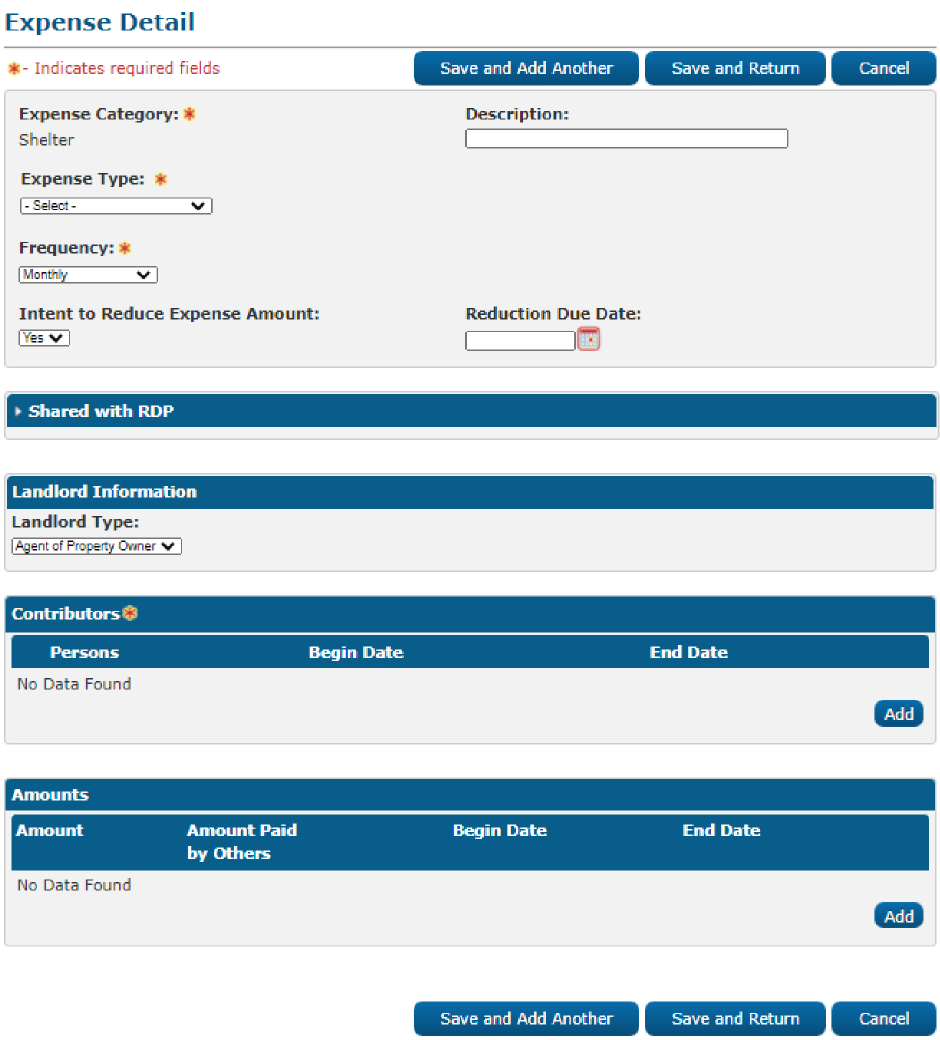


Figure 2.2.2.1 – Expense Detail

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~~ Owner
        iii. Manager of ~~Property~~ Legal Owner
        ~~iv. Property Owner~~
        ~~v. Relative~~

~~Please Note: The Expense page changes can also be viewed by LA and all other programs.~~

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

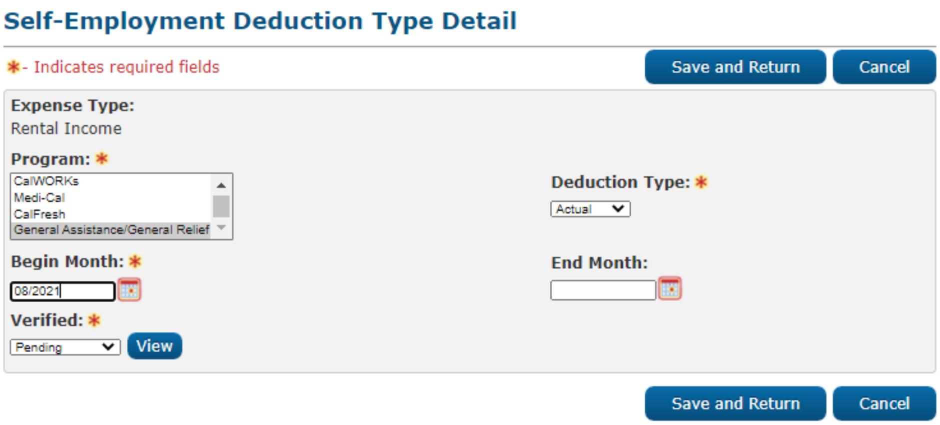


Figure 2.3.2.1 – Self-Employment Deduction Type Detail

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

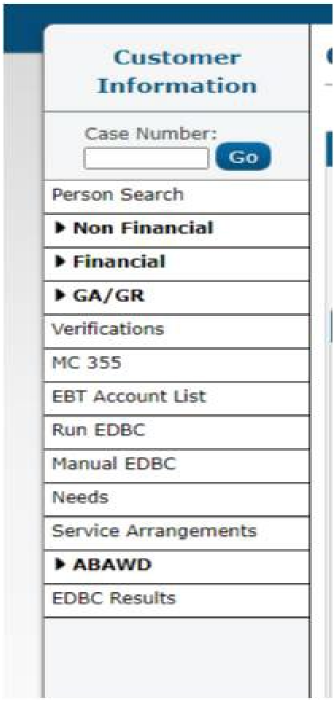


Figure 2.1.1 GA/GR Task Navigation Mockup

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

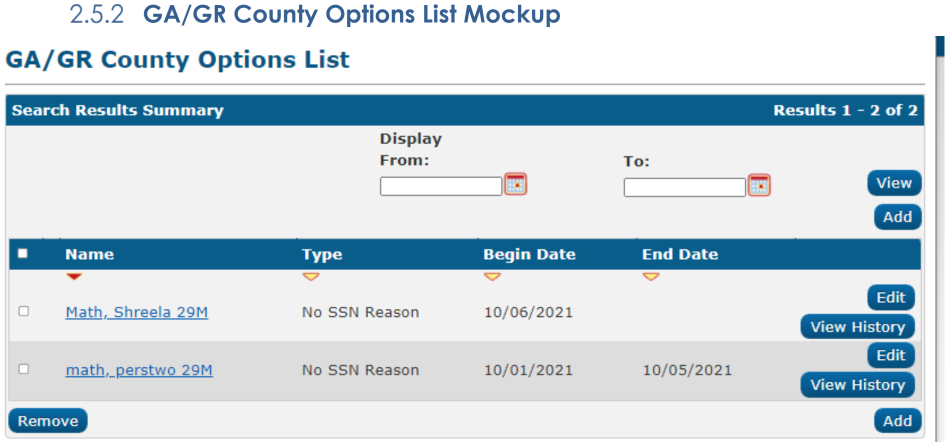


Figure 2.3.2.1 – GA/GR County Options List

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
GAGRCountyOptionDetailEdit	The right to create and Edit GAGR County Option records	GAGR County Option Detail Edit
GAGRCountyOptionDetailView	The right to view GAGR County Option records	GAGR County Option Detail View,

Security Right	Right Description	Right to Group Mapping
		GAGR County Option Detail Edit
GAGRCountyOptionListView	The right to view GAGR County Option List	GAGR County Option List View, GAGR County Option Detail View, GAGR County Option Detail 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 Detail 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 Detail View	This group has the capability to access the GAGR County Option Detail page to view information.	See the Security Matrix for the group to role associations
GAGR County Option List 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 Remove	This group has the capability to remove GAGR County Option records	See the Security Matrix for the

Security Group	Group Description	Group to Role Mapping
		group to role associations

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

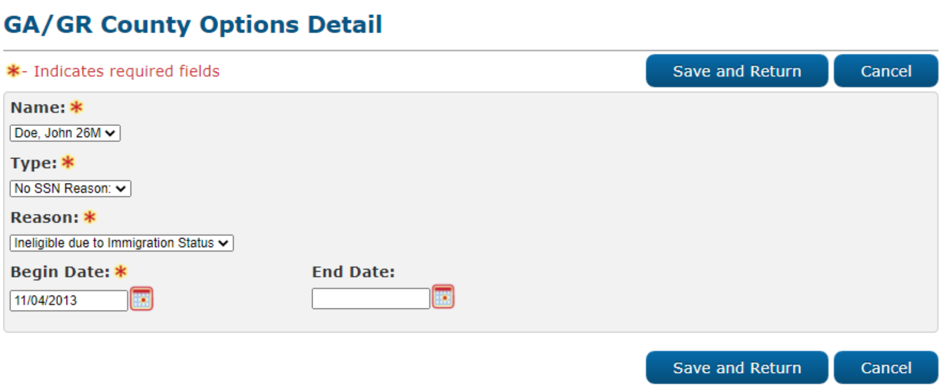


Figure 2.4.2.1 – GA/GR County Options Detail (Create Mode)

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. Catastrophic
      ~~vi. Child less than one~~
      vii. Can't provide info to SSA
      viii. Comatose/Incompetent
      ix. Domestic Abuse
      ~~x. Failed to Obtain Effective MD~~
      xi. Evidence Household has Applied
      xii. Exempt from SSN requirement
      ~~xiii. Expedited Services~~
      ~~xiv. Good Cause~~
      ~~xv. Household Made Effort to Get Info~~
      xvi. Ineligible due to Immigration Status
      xvii. Illness
      ~~xviii. Incarcerated~~
      xix. Incomplete Documents
      xx. Lack of transportation
      ~~xxi. Minor Consent Case~~
      xxii. Not Qualified
      xxiii. Not Required
      ~~xxiv. Not in Satisfactory Immigrant Status~~
      xxv. Other
      ~~xxvi. Refusal to cooperate~~
      ~~xxvii. Refused to State~~
      xxviii. Temporary absence
      ~~xxix. Undocumented~~
      xxx. Undocumented Non-Citizen

~~xxxi. Unwillingness~~

*Please Note: Counties that had Undocumented as an Applicable reason for No SSN will be switched to Undocumented Non—citizen as an applicable reason for No SSN.

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. Records will be effective dated based on the Participant and Type.
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

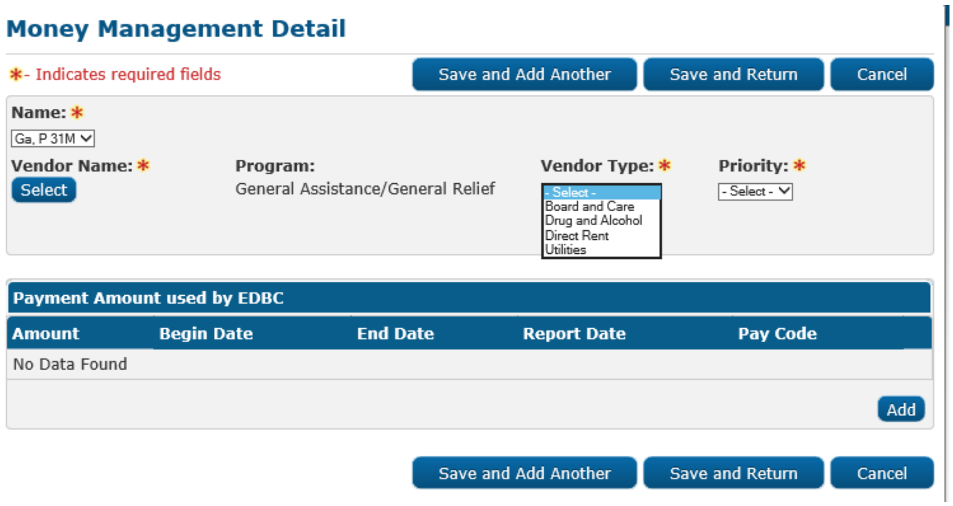


Figure 2.5.2.1 – Money Management Detail (GA/GR Automated EDBC/CC solution)

2.7.3 Description of Changes

1. ~~The "Vendor Type" dropdown will not be displayed for GA/GR Automated EDBC/CC solution counties.~~
2. Display the below mentioned vendor types in the "Vendor Type" drop down for GA/GR Automated EDBC/CC solution program.
    a. Board and Care
    b. Drug and Alcohol
    c. Direct Rent
    d. Utilities

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

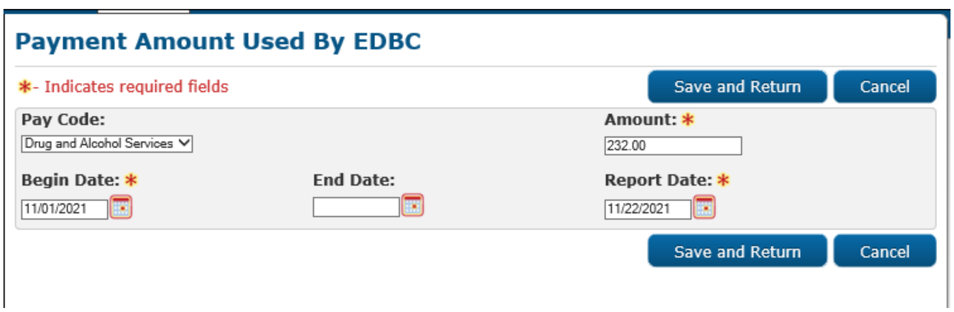


Figure 2.7.2.1 – Payment Amount Used By EDBC

2.8.3 Description of Changes

1. Display the following existing fields for GA/GR Automated EDBC/CC solution counties:
    1. Pay Code – This field will be a dropdown with the following options based on the associated Vendor Type values.
        a. Board and Care
            i. Board and Care
        b. Drug and Alcohol
            i. Drug and Alcohol Services
        c. Direct Rent
            i. Direct Rent
        d. Utilities
            i. Housing/Utilities
    2. Amount – The amount used for the payment.
    3. Begin Date – The date the Payment amount is effective.
    4. End Date – The date the Payment amount is no longer effective.
    5. 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

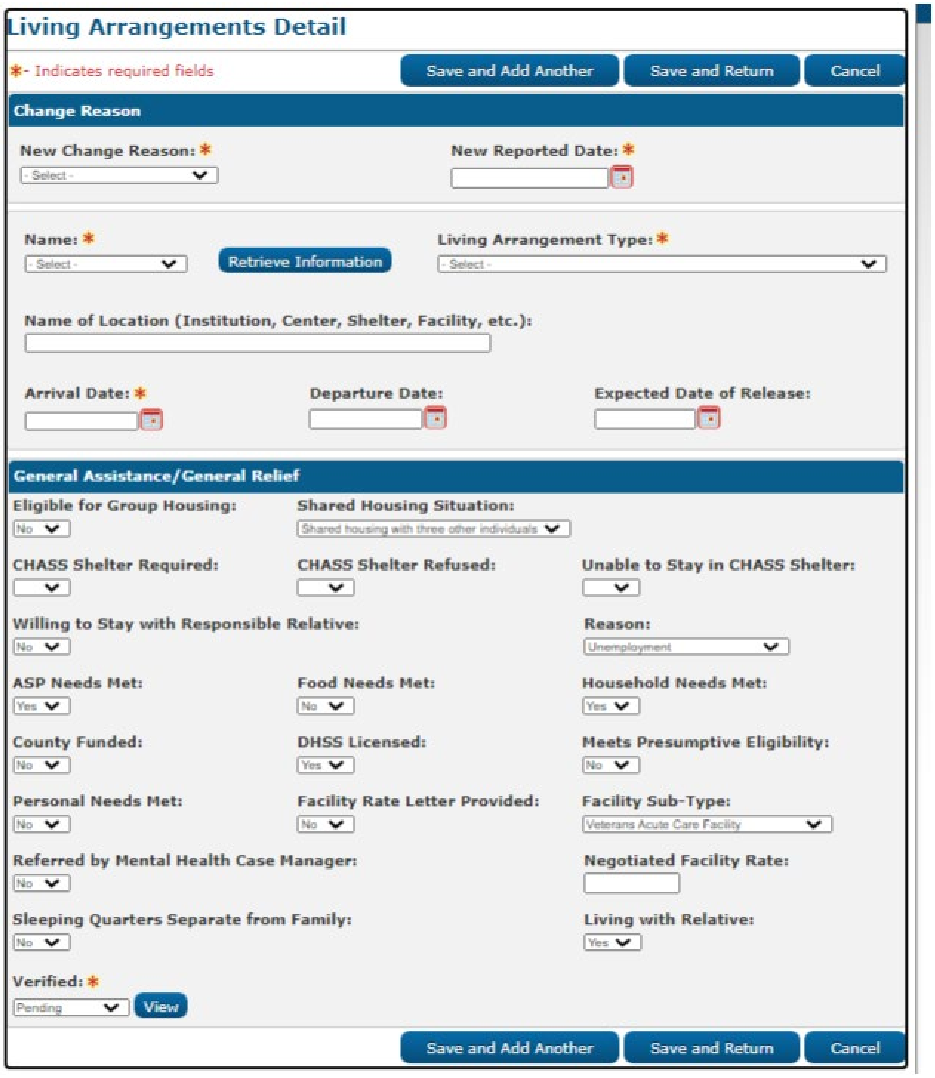


Figure 2.6.2.1 – Living Arrangements Detail

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

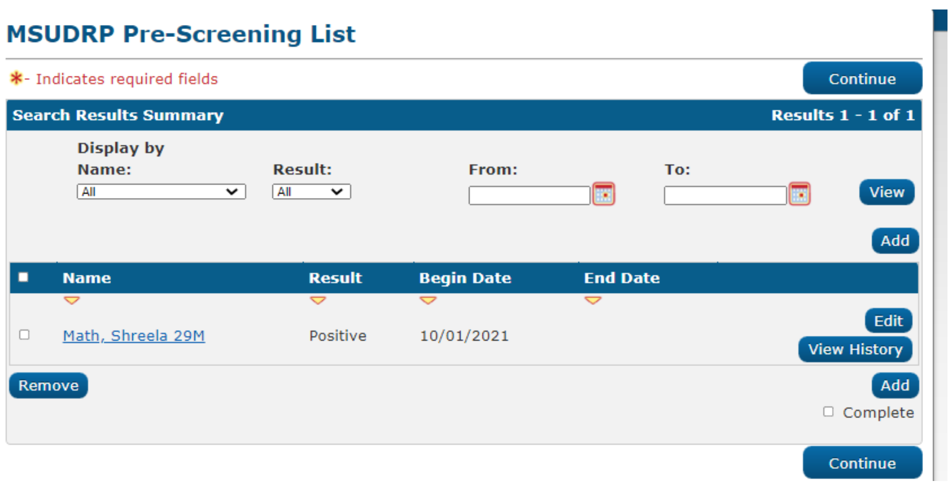


Figure 2.8.2.1 – MSUDRP Pre-Screening List Mockup

2.10.3 Description of Changes

1. Update the MSUDRP Pre-Screening List page to not to display "Generate Appointment" button for 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

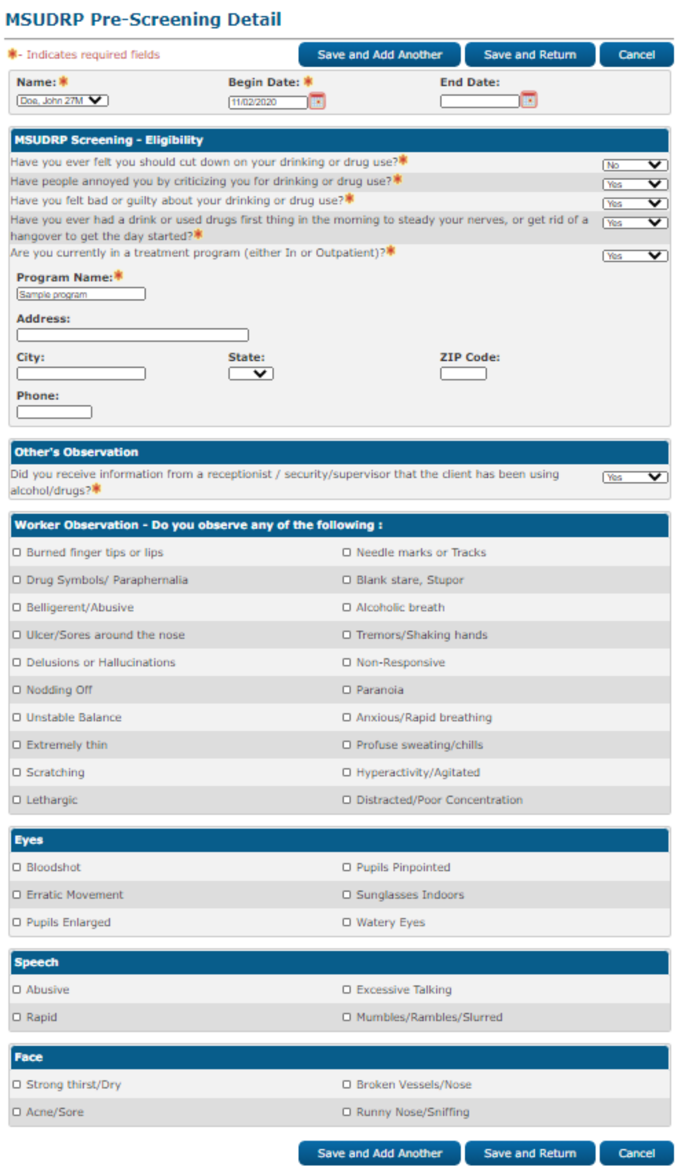


Figure 2.8.2.1 – MSUDRP Pre-Screening Detail

2.11.3 Description of Changes

1. 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".
2. 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

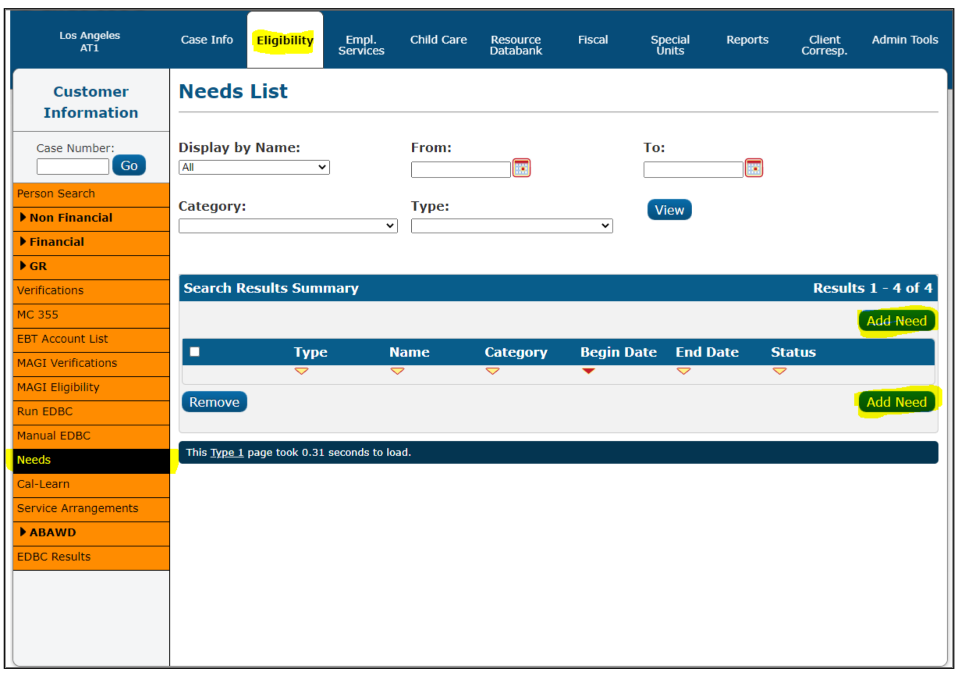
The worker will follow below steps to create the Needs record in CalSAWS:

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.

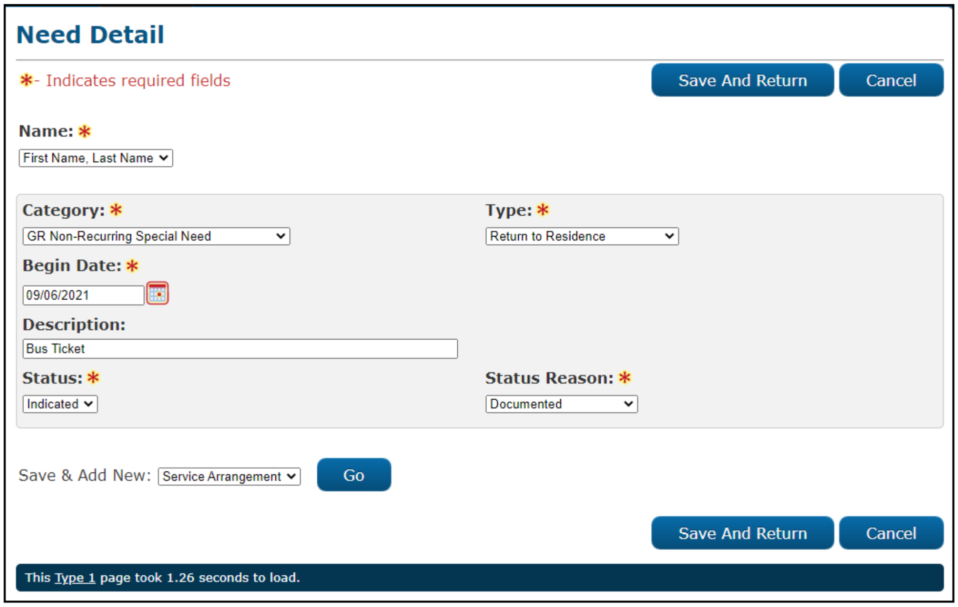


2.9.1.1 Adding a Need on the Needs List page.

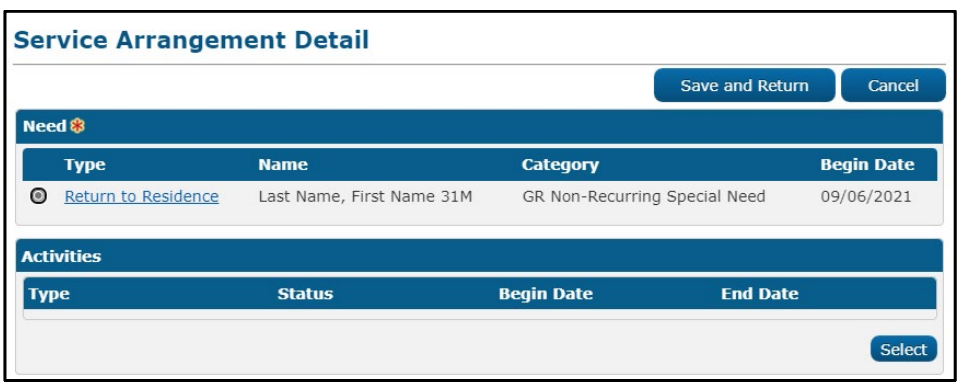
3. **To Add a New Need:**

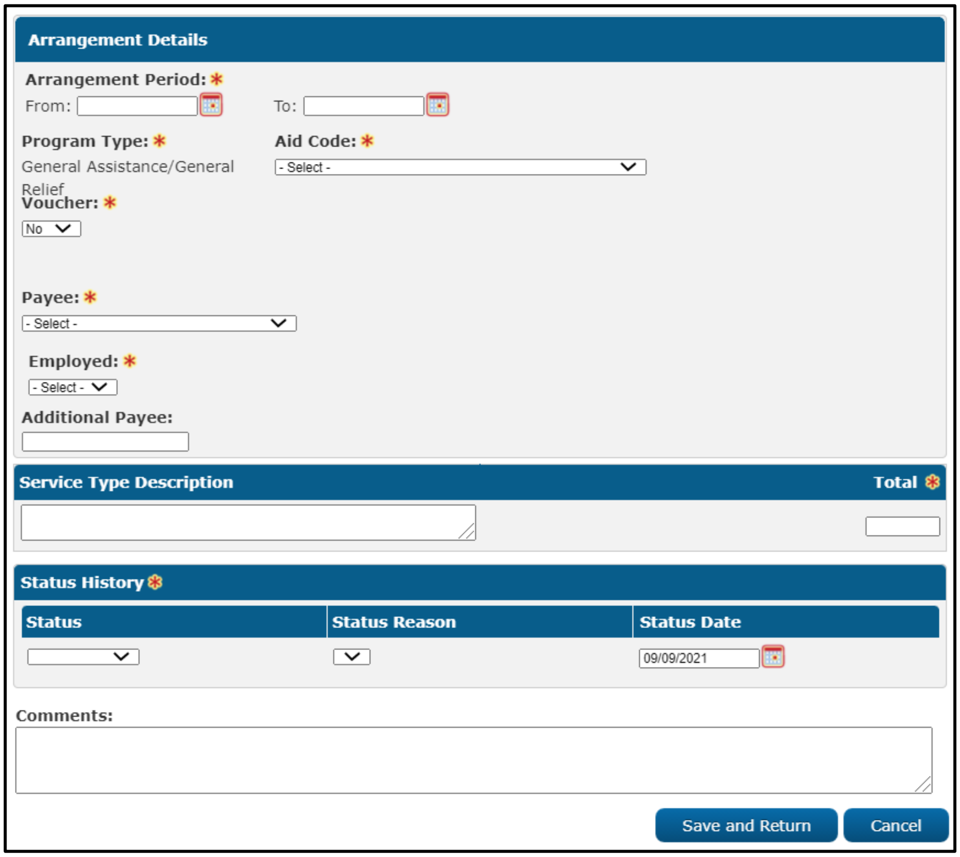
   i. Go to the Need Detail page.
   ii. Enter the appropriate information in Need Detail page.

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



2.9.1.2 Entering the information on the Need Detail page.





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

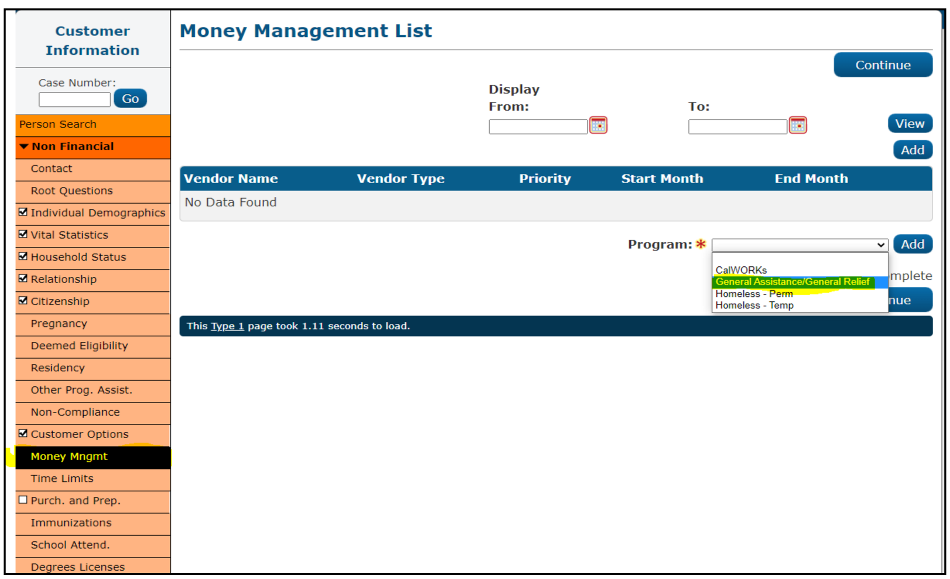
When the participant has Living Arrangement record applicable for the benefit month with Facility Sub-Type as 'Alternative General Assistance Program Drug & Alcohol' or 'Drug and Alcohol Rehab Public Funding' or 'Drug and Alcohol Treatment Private Funding' in Living Arrangements Detail page and a vendor 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 and a vendor payment for Board and Care facility is required 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.

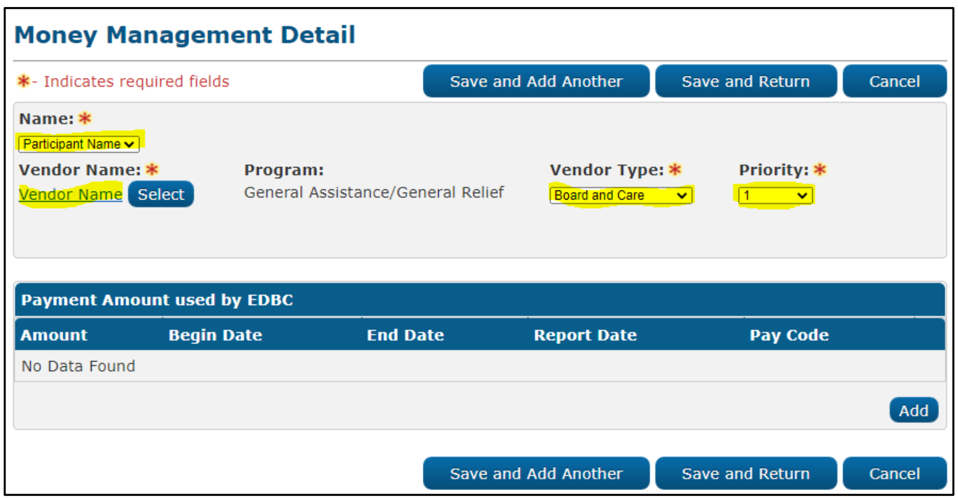
2.13.2 Description of Changes

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.



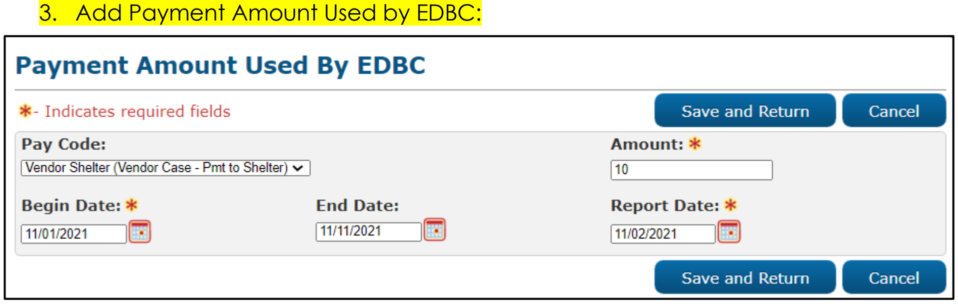
2.13.2.1 Creating a Money Management General Assistance/General Relief on the Money Management List page.

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 the Vendor Type
   v. Select 1 for Priority.
   vi. Add a record for Payment amount used by EDBC with the appropriate vendor split amount that needs to be paid to the vendor/facility.



2.13.2.2 Adding a payment in the Money Management Detail.

3. Add Payment Amount Used by EDBC:



2.13.2.3 Adding a payment amount used by EDBC

4. 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.

5. 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:
Also, when clicked on Amount hyperlink in Money Management section a child page "Vendor payment Calculation" will be displayed with the details as shown below.

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

2.13.2.3 Money Management Section on the EDBC Summary Page.

Vendor Payment Calculation - {Vendor Name}

Close

Details		Amount
Full Month Aid Payment	$	475.00
Dates to Prorate		1-31
Aid Payment	$	475.00

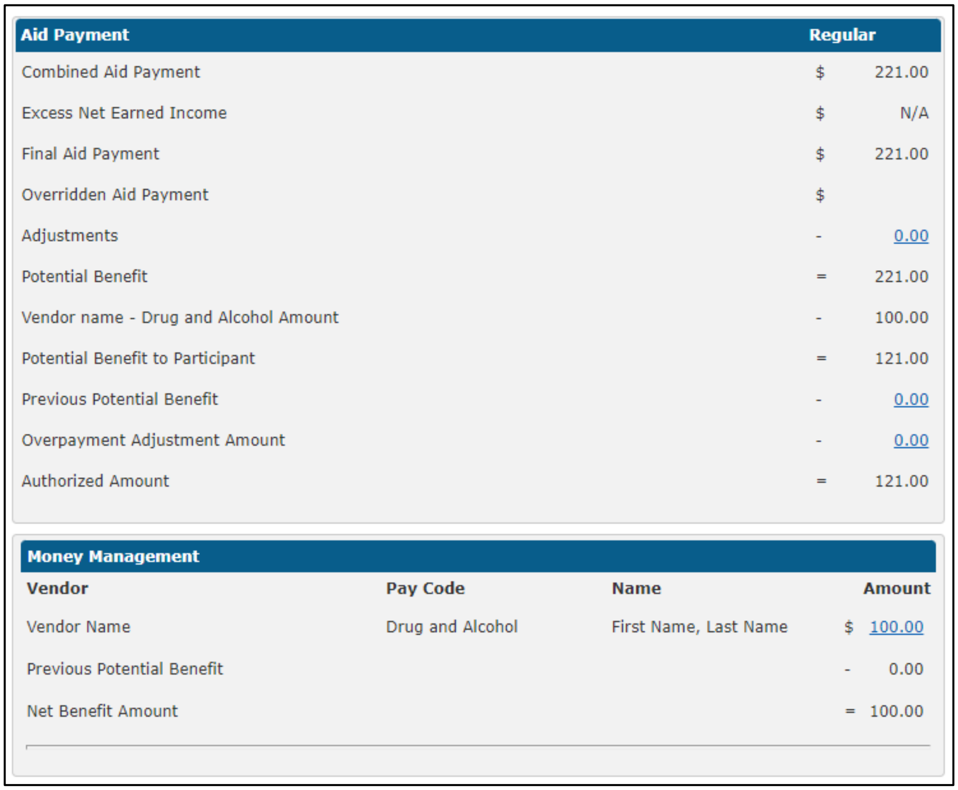
Close

2.13.2.3.1 Vendor Payment Calculation page.

6. EDBC will is 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.
7. 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	-	0.00
Potential Benefit	=	221.00
Vendor Name - Drug and Alcohol Amount	-	100.00
Potential Benefit to Participant	=	121.00
Previous Potential Benefit	-	0.00
Overpayment Adjustment Amount	-	0.00
Authorized Amount	=	121.00

2.13.2.4 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	-	0.00
Potential Benefit	=	221.00
Vendor name - Drug and Alcohol Amount	-	100.00
Potential Benefit to Participant	=	121.00
Previous Potential Benefit	-	0.00
Overpayment Adjustment Amount	-	0.00
Authorized Amount	=	121.00

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

2.13.2.5 EDBC Summary page with Aid payment and Vendor Payment information

2.14 Eligibility Logic: Hard Validation

2.14.1 Overview

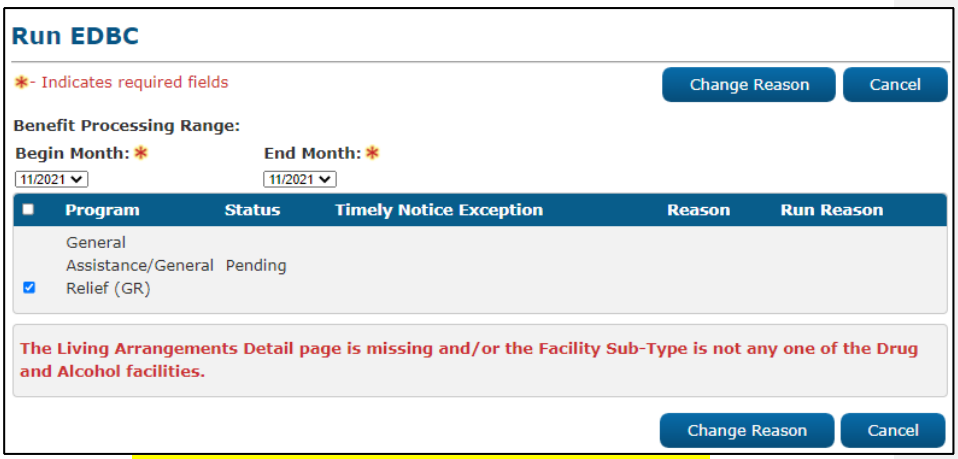
1. For GAGR program, the following validation will be shown on Run EDBC page while running EDBC for any benefit month (it could be a single month run or multi month run) when all the following conditions are met:
   a) There is Money management detail record is added for vendor payment
   b) The payment amount used by EDBC record in Money management detail page is valid for benefit month

c) The vendor type is "Drug and Alcohol' in Money management detail page

d) When there is no Living Arrangement Detail page valid for the benefit month
OR
when there is a Living Arrangement Detail page valid for the benefit month and Facility sub-type is other than the following Drug and alcohol facility types:
   i. Alternative General Assistance Program Drug & Alcohol
   ii. Drug and Alcohol Rehab Public Funding
   iii. Drug and Alcohol Treatment Private Funding

Validation Message:

The Living Arrangements Detail page is missing and/or the Facility Sub-Type is not any one of the Drug and Alcohol facilities.

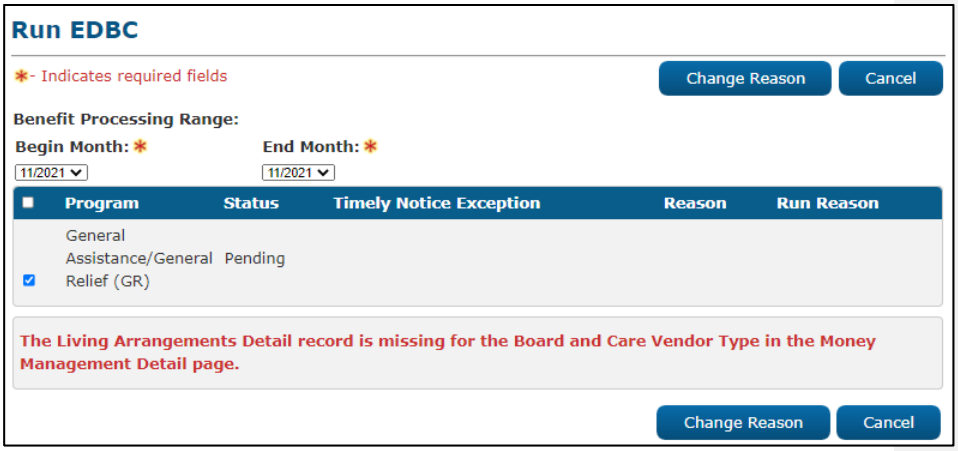


2.14.1.1 Run EDBC page with hard validation message

2. For GAGR program, the following validation will be shown on Run EDBC page while running EDBC for any benefit month (it could be a single month run or multi month run) when all the following conditions are met:
   a) There is Money management detail record is added for vendor payment
   b) The payment amount used by EDBC record in Money management detail page is valid for benefit month
   c) The vendor type is "Board and Care' in Money management detail page
   d) when there is no Living Arrangement Detail page valid for the benefit month ~~OR when there is a Living Arrangement Detail page exists which is valid for the benefit month and Negotiated Rate field is blank~~

Validation Message:

The Living Arrangements Detail record is missing ~~and/or Negotiated Rate is blank~~ for the Board and Care Vendor Type in the Money Management Detail page.



2.14.1.2 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 E10021 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 following is false: 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 ‘Previously requested RTR’ 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 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	Previously requested RTR

6. 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 not active.
    c. The rule ' Previously received RTR.' is not active.
    d. The rule ' Signed RTR letter.' is active.
    e. There are no previous Return to Residence Record exists with Begin Date prior to the current record begin date.
    f. The individual has 'Signed Return Letter' as 'No' (This is determined from 'Signed Return Letter' in Return to Residence Detail page)

Category	Short Description
73	Did not sign the RTR letter

7. 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 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 person is intended to reside in the county ('Intent to Reside' is checked in Residency Detail page).

Category	Short Description
73	Resident of County

8. 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

9. 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 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 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

10. 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 run) GAGR program was approved for Return to Residence, or Return to Residence amount is granted in the previous month.

Category	Short Description
73	Previously Granted RTR Amt

11. 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
	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

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[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
	[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 conditionally	Y	Y	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	Y	N	Y	Y
Landlord requirements for housing	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX319C001	Housing applicable	Housing applicable.
EDX319C005	Allow housing conditionally	Allow housing conditionally.
EDX319C007	Landlord requirements for housing	Landlord requirements for housing.

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
EDX319C002	Allow housing and utilities up to the max	This rule being active or not will not affect the flow of the logic or the result of the EDBC
EDX319C004	Allow housing always	This rule being active or not will not affect the flow of the logic or the result of the EDBC
EDX319C006	Allow housing when in house	This rule being active or not will not affect the flow of the logic or the result of the EDBC
EDX319C008	Proof of rental agreement	This rule being active or not will not affect the flow of the logic or the result of the EDBC
EDX319C009	Proof of housing cost	This rule being active or not will not affect the flow of the logic or the result of the EDBC
EDX319C011	Legal tenant	This rule being active or not will not affect the flow of the logic or the result of the EDBC

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 Arrangemen	Living Arrangement Detail

	t Type = "Homeless"	
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. A 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 not active, OR all 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.
    e. The rule 'Landlord requirements for housing.' is active.
    f. The following is not true:
        i. 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~~

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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.
		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.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[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 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).
   l. 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.
	[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.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[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.
	[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

a. 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
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
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.
	[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.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[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.
	[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.

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. Vendor Type (Vendor Type in Living Arrangements Detail page) = 'Board and Care'.
    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. The rule 'CHASS Shelter options.' is active.
    c. 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.
    c. 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 is not 'Y' in Living Arrangements Detail page)

    e. Unable to Stay in CHASS Shelter is NOT true (Unable to Stay in CHASS Shelter is not ‘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. The Living Arrangement record is applicable for the benefit month.
    d. The Living Arrangement Type = ‘Homeless’ (Living Arrangement Type in Living Arrangements Detail page).
    e. 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.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[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.
	[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.

DDID 2686/2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[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.	MSUDRP Screening – Eligibility	MSUDRP Questions_updated_v1 with spelling correction.xlsx	MSUDRP Questions_updated_v´
2.			

4 REQUIREMENT

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2314	The CONTRACTOR shall update the CalSAWS Software to determine the benefit levels, resource limits and benefit allocation amounts (housing, utility, etc.) based on each counties GA/GR eligibility determination rules with updates through security rights. Eligibility determination rules shall include the following: 1) Residency 2) Income 3) Aid paid pending 4) Immediate need 5) Property/resource 6) Deductions 7) Household composition/Assistance Unit 8) Aid codes 9) Hearings 10) Sanctions 11) Non-compliances 12) Living Arrangement 13) Citizenship 14) Expenses 15) Special Need	Eligibility: The existing 705 rules/attributes shared by DXC will be consolidated by functionality into 110 rules in CalSAWS but still providing the existing flexibility available to the County Admin to turn on or off a functionality specific to their county. The breakdown of the complexity is as shown below Create new • 21 Difficult rules • 24 Medium rules • 13 Easy rules Modify existing • 14 Difficult rules • 23 Medium rules • 15 Easy rules Batch/Interfaces Up to 20 new Batch sweeps will be created in CalSAWS to handle the MU triggers that is currently existing for CalWIN GR program Note: This does not include data collection MU trigger since CalSAWS as a system does not support Data Collection batch triggers for all programs including GR.	The following subsequent Rules migrated in this SCR will met these requirements.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		Fiscal Existing CalSAWS Fiscal framework will be leveraged for the new CalWIN GR program for benefit Issuance, Claiming and Adjustments.	

5 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.

6 OUTREACH

NONE

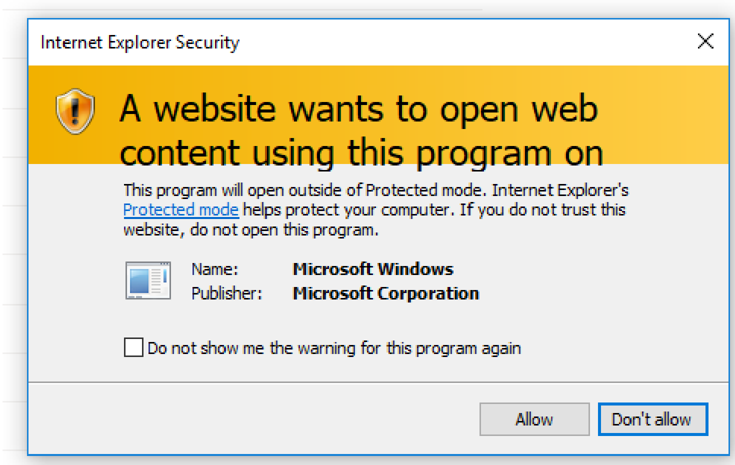
7 APPENDIX

7.1 Rules Flow Diagram

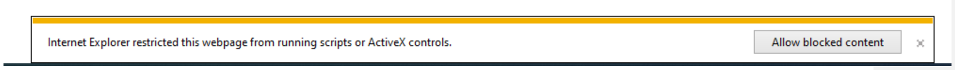
<u>Viewing Visio Document in Internet Explorer</u>

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.

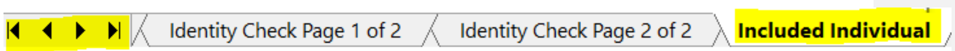


5. Click 'Allow' to open the file on Internet Explorer.
6. The internet Explorer will open with the below pop up in the bottom of the page

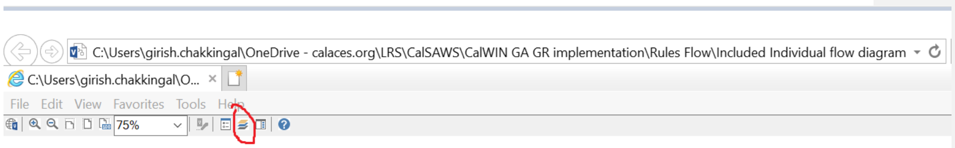


7. Click Allow Blocked Content.

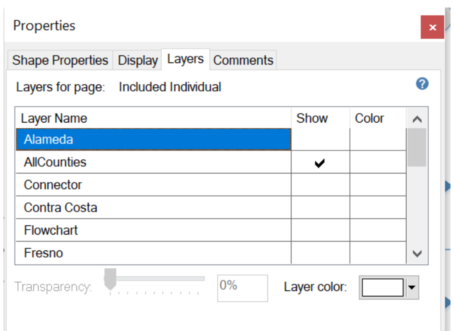
8. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



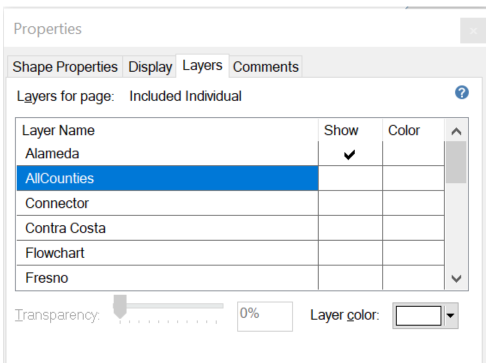
9. Click the layer icon circled in red color below



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



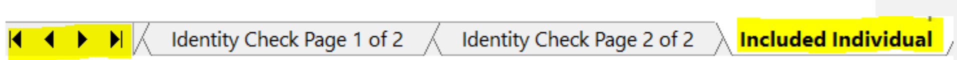
12. Once you select Alameda and close the properties pop up (by clicking the x button at top right corner like closing a tab or window) the flow diagram will show only the rules /functionalities applicable to Alameda.

<u>Viewing Visio Document in Microsoft Visio</u>

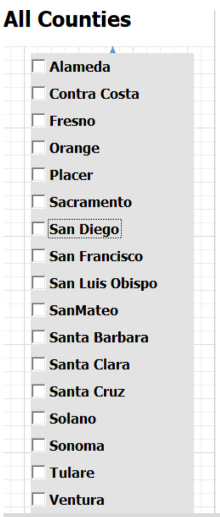
1. This is applicable for Laptops/Desktops that do have Microsoft Visio software installed

2. Once you double click the attachment or right click and open with Visio then it will open in Microsoft Visio

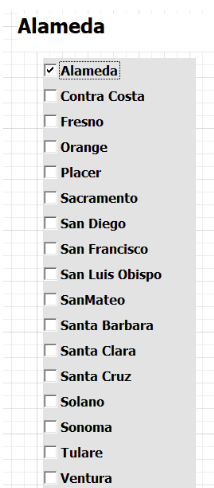
3. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



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



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

7.2 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

CalWIN Status	GR Priority	CalSAWs Status (Status Reason)	GA/GR Program Role	GA/GR Close Person	GA/GR Close Program	General Relief
verification	7065	FTP Proof Shelter				Y
XAF614	4620	Previously Granted RTR Amt		Y		Y

XAF398	4600	Has condition must Reside Outside of County		Y		Y
XAF393	4560	Not Res of County for at least 15 but less than 30 days		Y		Y
XAF392	4540	Resident of County		Y		Y
XAF391	4520	Did not Sign the RTR letter		Y		Y
XAF390	4500	Previously Requested RTR		Y		Y
XAF389	4480	Previously Received RTR		Y		Y
XAF388	4460	Self–Sufficiency at Place of Return not Verified		Y		Y
XAF387	4440	Connection to the Place of Return not Verified		Y		Y
XAF386	4420	Not Elig for Pgm		Y		Y
E10021	4400	Approved for RTR Pmt as Greyhound Bus Ticket				Y
XAF352	4060	Housing Unverified		Y		Y
	4055	Shelter Cost not Allowed for Property Manager or Agent				Y
XAF350	4050	No Proof of Tenant		Y		Y
XAF376	2460	In Drug and Alcohol Trtmnt Facility Funded by County			Y	Y
XAF371	2420	In Drug and Alcohol trtmnt facility funded by County			Y	Y
E10061	2400	Resident in a Board and Care or Room and Board facility				Y
XAN331	2380	Eligible for the CHASS Program				Y

XAN383	2360	Residing in an alternative GA program facility				Y
XAF302	2340	Monthly Housing Exp Exceeded Maximum Grant Amt			Y	Y
XAR231	2320	Net Monthly Housing Exp Exceeded Monthly Inc for More Than 30 Days			Y	Y
E10047	2300	Has Rent that Exceeds Monthly Grant Amt				Y
	4410	Cash on Hand to Meet the Needs			Y	Y

7.3 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

Shared Housing Housing Test	GA Deduction Type	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. The code number indentifier is used to retrieve the deduction and percentage amount. 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'. Note - [County Name] is a placeholder for whatever county being searched for.	Example: Get Alameda (01) defined 'deduction disregard amount' and deduction disregard percentage for 'Applicant earned income' for Alameda. Search: Code number identifier = 'AE' From: Code Detail Table Where: Code number identif = 'AE' Category Id = 10663 Result: Alameda disregard allowed amount = 0 Alameda disregard allowed percentage = 75 Meaning: Alameda disregard allowed amount for 'Applicant earned income' is 0 and Alameda disregard allowed percentage for 'Applicant earned income' is 75.	10663	

Special Need Eligibilty	Special Need expense	The table 'GAGR Special Need expense' is used to retrieve the grant amount for a CalWIN County. The county code (CT 18) and the Need type (CT 200) will be used to retrieve the GA Amount.	Example: Get Contra Costa (07) defined 'maximum cremation cost amount'/ 'GR budget net grant amount' for the need type: 'Indigent cremation' (IC). Search: Grant Amount From: Code Detail Table Where: Need Type: IC County: 07 Result: Grant Amount = 825 Contra Costa (07) 'maximum cremation cost amount'/ 'GR budget net grant amount' for the need type: 'Indigent cremation' (IC) is 825.	10662

Room and Board Shelter	GAGR Living Arrangement County Reference Table	This table 'GAGR Living Arrangement County Reason' (CT 10657) is to determine what category a CalWIN GAGR county set for their living arrangement type. 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' . 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. The reference column 'Category' was brought in 'As is' from the CalWIN Database.	Example to determine what Alameda categorized the facility sub type ' Group Home': Search: Reference Column: Category From: Code Detail Table Where: Reference Column: County Code = 01 Reference Column: Group Home = 'GH' Category Id = 10657 Result Category = 1 Meaning: The county Alameda (01) categorize the facility sub type 'Group Home' (GH) as category '1' .	10657

Return to Residence	County Defined Time Limit	The table 'County Defined Time Limit' (CT 10634) will provide the time limit duration for the CalWIN GAGR CalWIN County. Seach based on the Code number identif 'EL' . Retrieve the following reference columns: 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). These two values will give the duration of 'County Defined Specific Period'. Note - [County Name] is a placeholder for whatever county being searched for.	Example for Searching the time limit table for Max age limit for the county of Alameda : Seach: Reference Column: Alameda Time Limit Reference Column: Alameda Unit of measurement From: Code Detail table Where: Code number identif = EL Category Id = 10634 Result: "Alameda Time Limit" = 65 "Alameda Unit of measurement" = Y *Alameda time limit duration for 'Max age limit' is 65 Years	10634

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-232562

Updates to the CPS Fields

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tiffany Huckaby
	Reviewed By	Priya Sridharan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/08/2021	1.0	Initial Draft	Tiffany Huckaby
12/21/2021	1.1	Content Revision 1 updates	Tiffany Huckaby

Table of Contents

1 OVERVIEW

CalSAWS currently has NOAs and Forms with 'CPS' Name and Number fields. Not all counties have specifically an organization referred to as 'CPS'.

1.1 Current Design

The following Forms/NOAs have a 'CPS' field and are viewable/usable for all counties:

- NA 1261
- NA 1277
- FC NOAs
- KG NOAs
- AAP COLA NOA
- ARC 1
- ARC 2

1.2 Requests

Update the existing Forms/NOAs that are viewable/usable for all counties that have 'CPS' fields. These fields should only be viewable when applicable.

1.3 Overview of Recommendations

1. Update the NOAs/Forms that generate through EDBC to hide the 'CPS' fields when not applicable.
2. Update the NOAs/Forms that generate through Template Repository to hide the 'CPS' fields when not applicable.

1.4 Assumptions

1. NOAs/Forms in Template Repository that are generated as a 'Blank Template' will still show the 'CPS' fields, however it will be updated to be editable so that the field can be removed if not required.
2. Only the 'CPS' fields will be updated with this effort. No other Header or Template variables will be updated with this effort.
3. No changes will be made to the generation conditions of any of the NOAs/Forms being updated in this effort.
4. No changes will be made to NOAs/Forms that have 'CPS' fields when only viewable/usable for LA County.
5. No new threshold languages will be added with this effort. This will only update the existing language version of the Forms/NOAs in the system.

2 RECOMMENDATIONS

2.1 Update NOAs/Forms that generate through EDBC

2.1.1 Overview

Update the existing NOAs/Forms that generate through EDBC.

2.1.2 Description of Change

This recommendation will update the NOA templates that generate through EDBC with 'CPS' fields.

NOA Template Impacted	File Name	Available Languages
AAP COLA NOA Template	AA_COLA_NOA_TEMPLATE	English
FC NOA Template	FC_NOA_TEMPLATE	English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Lao, Korean, Russian, Tagalog, Vietnamese
KG NOA Template	KG_NOA_TEMPLATE	English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Lao, Korean, Russian, Tagalog, Vietnamese

The below existing 'CPS CASE NUMBER' field on the above listed NOA Templates will be made dynamic and only display when there is an available CPS Case Number.

NOTICE DATE:
CASE NAME:
CPS CASE NUMBER:
CASE NUMBER:
WORKER NAME:
WORKER NUMBER:
TELEPHONE NUMBER:

See Supporting Documents #1 for Examples of new dynamic Header.

Note: The CPS Case Number will be moved to the last line item.

2.2 Update NOAs/Forms available in Template Repository

2.2.1 Overview

Update the existing NOAs/Forms that generate through Template Repository.

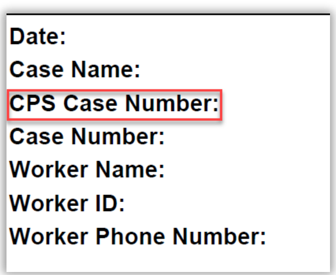
2.2.2 Description of Change

This recommendation will update the Forms/NOAs available in Template Repository.

Form #	File Name	Available Languages
ARC 1	ARC1 (uses Header 1 LOGO DCFS)	English
ARC 2	ARC2 (uses Header 1 LOGO DCFS)	English
NA 1261	NA1261	English
NA 1277	NA1277	English

1. When one of the Forms listed above are generated via 'Generate Form' button, the below 'CPS Case Number' and 'CPS Case Name' fields will be dynamic and only display when there is an available CPS Value.

ARC 1 and ARC 2 (page 1):


Date:
Case Name:
CPS Case Number:
Case Number:
Worker Name:
Worker ID:
Worker Phone Number:

NA 1261 (page 1):

Date:
Case Name:
Case Number:
Worker Name:
Worker ID:
Worker Phone Number:
Customer ID:
CPS Case Name:

NA 1261 (page 3 and 4):

Placement I.D.
Name of Child
Case No.
Case Name
CPS Case Name

NA 1277 (page 1):

Date:
Case Name:
Case Number:
Worker Name:
Worker ID:
Worker Phone Number:
Customer ID:
CPS Case Name:

'CPS Case Name' on the First Page of NA 1261 and NA 1277 will be updated in Bold Font to match the rest of the Header line items.

See Supporting Documents #2 for Examples of new dynamic Header.
Note: The CPS Case Number will be moved to the last line item.

2. When one of the Forms listed above are generated via 'Generate Blank Template' button, the Templates will generate with the CPS field editable for the worker to remove the field if not applicable.

   See Supporting Documents #3 for Examples of a Blank Form with editable 'CPS' fields.
   Note: The CPS Case Number will be moved to the last line item.

3 SUPPORTING DOCUMENTS

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

Number	Functional Area	Description	Attachment
1	NOA	Examples of NOA Header generated from EDBC.	With CPS information: NOA_Example.pdf Without CPS information: NOA_Example_No_CPS.pdf
2	Form	Examples of a Form Header when using the 'Generate Form' button in Template Repository.	With CPS information: Form_Example.pdf Without CPS information: Form_Example_No_CPS.pdf
3	Form	Example of a Form Header when using the 'Generate Blank Template' button in Template Repository.	Form_Example_Blank.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.11 CAR-1247	The LRS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	This SCR will update the NOAs and Forms to only populate fields when applicable and available for that county.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-235285

Allow EDBC to be Accepted when processing Aid Paid Pending cases

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/19/2021	1.0	Initial Draft	T. Lazio
12/15/2021	2.0	Content Revision: Added recommendation to suppress '***Accept – The redetermination needs to be completed'*** validation message based on defect found in County system testing	T. Lazio

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1 OVERVIEW

The purpose of this SCR is to allow users to 'Accept' EDBCs that are overridden using the "Aid Paid Pending" override reason without the current customer reporting packet having to be flipped to 'Not Applicable' status.

1.1 Current Design

Currently in CalSAWS per CA-210926, the following EDBC validation message prevents the user from Accepting the benefit month EDBC after the current customer reporting packet due date where the status of the customer reporting packet is not 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable':

Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC

Also, the following validation message prevents the user from 'Accepting' a manual EDBC when the redetermination has not completed:

Accept – The redetermination needs to be completed

1.2 Requests

1. Prevent the EDBC validation message "***Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC***" from displaying and allow the user to 'Accept' the benefit month EDBC when the manual or regular EDBC is overridden using the "Aid Paid Pending" override reason.

2. Prevent the EDBC validation message "***Accept – The redetermination needs to be completed***" from displaying and allow the user to 'Accept' the benefit month EDBC when a manual EDBC is overridden using the "Aid Paid Pending" override reason.

1.3 Overview of Recommendations

1. When regular or manual EDBC is overridden for "Aid Paid Pending" override reason after the current customer reporting packet due date, do not require customer reporting packet status to be 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable' in order for the user to 'Accept' the EDBC.

2. When a manual EDBC is overridden for "Aid Paid Pending" override reason after the RE Due month, do not display validation error that's says that the RE needs to be complete and let the user 'Accept' the EDBC.

1.4 Assumptions

1. There will be no Batch Run for this SCR.
2. This SCR change will apply to all counties.
3. If EDBC is being processed for "Aid Paid Pending" scenario for a month after the SAR 7 due month and the SAR 7 packet is not in the appropriate status or EDBC is being processed for a month after the RE due month, the user will have to set the "Immediacy Indicator" to "Rush" on the EDBC Summary page to prevent the benefits from being skipped.
4. Accepting the EDBC with override status of "Aid Paid Pending" will not update the customer reporting packet status.

2 RECOMMENDATIONS

2.1 Update EDBC Customer Reporting Packet Validation Logic

2.1.1 Overview

Allow the user to 'Accept' overridden EDBCs that are after customer reporting packet due date using the override reason "Aid Paid Pending" without the customer reporting packet being flipped to 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable' status.

Allow the user to 'Accept' overridden manual EDBCs that are on or after the RE due moth using the override reason "Aid Paid Pending".

2.1.2 Description of Changes

1. Update the current regular EDBC 'Accept' validation message ***"Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC***" to be suppressed when EDBC is being overridden with "Aid Paid Pending" override reason.

2. Update the current manual EDBC 'Accept' validation message ***"Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC***" to be suppressed when EDBC is being overridden with "Aid Paid Pending" override reason.

3. Update the current manual EDBC 'Accept' validation message ***"Accept – The redetermination needs to be completed***" to be suppressed when EDBC is being overridden with "Aid Paid Pending" override reason.

2.1.3 Programs Impacted

CW

CF

GA

RCA

CAPI

TNB

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.1	The LRS shall fully automate and perform all aspects of the eligibility determination process and benefit level calculations for all categories of public assistance in a single pass without manual intervention.	This SCR will allow users to 'Accept' overridden EDBC using the override reason "Aid Paid Pending" without having to manually update the customer reporting packet status.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-236204

Outbound Text and Email for EBT Scam Issue

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Michael Barillas
	Reviewed By	Eric Perkins; Himanshu Jain; Shilpa Suddavanda; Balakumar Murthy;

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/3/2021	1.0	Initial Draft	Michael Barillas
12/15/2021	2.0	Content Revision 1: Update Email Data Volume, Added Email Requirement under 2.2.2.1.b, Added Assumption	Michael Barillas

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1 OVERVIEW

Active and Pending persons opted into receiving Text or Email messages will need to be notified of a potential EBT Scam. Send a one-time Text and Email message to all Active or Pending persons opted into Text or Email regarding a potential EBT scam.

1.1 Current Design

CalSAWS does not have an existing EBT Scam notification for Text and Email.

1.2 Requests

Send a one-time Text message and Email notification to all Active or Pending persons opted into Text or Email regarding a potential EBT scam.

1.3 Overview of Recommendations

1. Schedule a one-time Text message batch job to all Customers opted into Text messaging regarding a potential EBT scam.
2. Schedule a one-time Email batch job to all Customers opted into Email notification regarding a potential EBT scam.

1.4 Assumptions

1. Text messages will only be sent in English.
2. Due to the daily outgoing Email limit, Emails will be sent in the span of two days.

2 RECOMMENDATIONS

2.1 Create One-Time Text Message - Potential EBT Scam

2.1.1 Overview

Schedule a one-time Text message batch job to all Customers opted into Text messaging regarding a potential EBT scam.

2.1.2 Description of Change

1. Text Message Verbiage:
    a. Message Name: EBT Scam Issue
    b. Message Verbiage:
        i. "CalSAWS: EBT scams reported. State/County will NEVER ask for EBT info via text. Please help, send screenshots to CDSSEBT@dss.ca.gov Questions? (844) 859-2100."
    c. Target Population:
        i. Active or Pending Persons
        ii. Is Opted-In to receiving Text Messages
    d. Run Dates: One-Time Run
    e. Programs: All Programs
    f. Applicable Counties: All Counties
    g. Character County English: 157
    h. Automated Action Scenario: N/A
    i. Contact History Reason: EBT Scam Issue – All Counties

2.1.3 Execution Frequency

On Demand

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

All Counties

2.1.6 Data Volume/Performance

Roughly 700,000 Outgoing Texts

2.1.7 Failure Procedure/Operational Instructions

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

2.2 Create One-Time Email - Potential EBT Scam

2.2.1 Overview

Schedule a one-time Email batch job to all Customers opted into Email notification regarding a potential EBT scam. Currently the maximum number of Outgoing Emails is limited to 131,600 per day.

2.2.2 Description of Change

1. Create a new Batch Job to:
    a. Send an Email
        i. To all Active or Pending Persons
        ii. Opted into Email Notifications
    b. Limit the number of emails sent per day to no more than 131,600.
    c. Email Subject:
        i. "EBT SCAM ALERT- AVISO DE ESTAFA DE EBT"
    d. Email Body:

> Beware of EBT Text Message Scam
>
> The Department is aware of a text messaging scam aimed at obtaining EBT card information, including PIN numbers. State and county officials would NEVER request such information via text. Please do not share any EBT information with anyone outside of your county welfare department or the EBT customer service center. The Department is working closely with our county and vendor partners on additional security measures.
>
> If you have received a message requesting such information, please forward a screenshot of the text to CDSSEBT@dss.ca.gov.
>
> Reminder: Never give your EBT card number or PIN to anyone or your benefits may be stolen. Do not trust texts or phone calls that ask for this information. Use only the number on the back of your EBT card to get more information.

2.2.3 Execution Frequency

On Demand

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

All Counties

2.2.6 Data Volume/Performance

Roughly 180,000 Outgoing Emails

2.2.7 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.17	The LRS shall set up alerts and send messages to other program specified users.	CalSAWS is sending customers messages regarding a potential EBT Scam for all programs.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-236577

Update Office Selection Functionality for eICTs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	G. Limbrick
	Reviewed By	Michael Wu, Alexia England, Himanshu Jain, Angela Zhao, Sivagami Nachiyappan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/19/2021	1.0	Initial	G. Limbrick
12/10	2.0	Added Batch logic for ICT Request requested from L.A. by CalWIN	G. Limbrick

Table of Contents

1 OVERVIEW

This SCR will update CalSAWS logic to associate both a sending county Office and a receiving county Office to an eICT (electronic Inter-County Transfer). The Incoming/Outgoing ICT Search pages will now search and display the Office based on the associated receiving county office when searching for received eICTs on the Incoming ICT Search page and based on the sending county office when searching for an outgoing eICT on the Outgoing ICT Search page.

1.1 Current Design

The logic to associate an Office to an eICT was designed for a one county solution so at times the sending Office or Receiving Office is stored in the system, but never both.

1.2 Requests

Update the eICT functionality to allow for a sending and receiving Office when an eICT is an internal transfer.

1.3 Overview of Recommendations

1. Add validation to ensure the address(es) are updated before an ICT can be sent.
2. Update the ICT Detail page logic to now associate e-ICTs to both a sending county Office and a receiving county Office.
3. Update the Incoming/Outgoing ICT Search page to now search based on the associated receiving county Office when searching for received eICTs on the Incoming ICT Search page, and based on the sending county Office when searching for an outgoing eICT on the Outgoing ICT Search page.
4. The Incoming/Outgoing ICT Search Detailed Results page will now display the Office associated to the receiving county when viewing received/incoming eICTs on the Incoming ICT Search Detailed results page and display the Office associated to the sending county when viewing outgoing eICTs on the Outgoing ICT Search Detailed Results page.

1.4 Assumptions

1. Office Boundaries are currently available only for L.A. County; other counties will not have the receiving county Office set or be able to search for incoming ICTs by County.

2 RECOMMENDATIONS

2.1 ICT Detail page

2.1.1 Overview

The ICT Detail page allows users to create, view, and edit details about an eICT Transfer or Request to/from another county.

E-ICT records are associated to only 1 office based on the highest priority CalSAWS Program (using predefined logic, see below) and further based on whether the eICT was a requested eICT, an unsolicited (unrequested) received eICT, or an unsolicited sent eICT. This assignment is based on the inter-consortium file transfer process which does not account for eICT transfers, within the CalSAWS system, that do not utilize the inter-consortium file transfer process.

E-ICTs will now be associated to both a sending county Office and a receiving county Office.

E-ICTs will now be validated to ensure that the address was updated and that each transferred Program has an assigned Worker

2.1.2 ICT Detail page Mockup

2.1.3 Description of Changes

1. Update the validation to ensure the address of the Persons being transferred was updated before an ICT can be saved:
    a. Update the validation to check for an address outside of the current county for any sending county, instead of just for L.A. County.
    b. Show the validation message as: "Cancel - Case address zip code is not outside " + {county_name} + " county. Please update new address information" e.g., "Cancel - Case address zip code is not outside San Bernardino county. Please update new address information"
2. Add validation to ensure that an eICT Transfer record being sent from any county has a Worker assigned to each Program before it can be saved; show the validation message as: "Cancel - ICT cannot be sent because one or more programs are not assigned to a worker."
3. Update the CalSAWS system to hold associations between an eICT and both a sending county Office and a receiving county Office.

4. Update the logic used to associate an Office to an eICT record, when an eICT record is created thru the ICT Detail page, instead of thru an inter-consortium file transfer (Batch process) so that both a sending county Office and a receiving county Office are associated to the eICT:
    a. When an eICT **Transfer** record is created:
        i. Duplicate or re-use the logic used by Batch to decide the highest priority Active/Pending program **Note:** The pre-existing Batch, logic prioritizes Programs in the following order:
            1. CW
            2. RC
            3. FS
            4. MC
            5. NB
        ii. Set the **sending county Office** as the office of the Worker assigned to the highest priority Program
        iii. Duplicate or re-use the logic used by Batch which sets the **receiving county Office**:
            1. If the Transfer is in response to a request
                a. If any (one or more) Program(s) on the Receiving county Case are both Active/Pending and assigned to a Worker, at the time of saving the eICT Transfer record, set the **receiving county Office** as the Office of the Worker assigned to the highest priority Program (Active/Pending Program)
                b. If none of the Programs on the receiving county case are both Active/Pending and assigned to a Worker, set the **receiving county Office** as the closest receiving county **District** Office designated for the highest priority Active/Pending Program **on the Sending county Case**, based on the Primary Applicant's address (Physical if available or Mailing Address if Physical is not available) and the pre-defined Office Boundaries (when available i.e., for L.A. County addresses). **Tech Note:** Office Boundaries are pre-defined in the OFFICE_BOUNDARIES table.
            2. If the Transfer is NOT in response to a request, set the **receiving county Office** as the closest receiving county **District** Office designated for the highest priority Active/Pending Program, based on the Primary Applicant's address (Physical if available or Mailing Address if Physical is not

available) and the pre-defined Office Boundaries (when available i.e., for L.A. County addresses). **Tech Note:** Office Boundaries are pre-defined in the OFFICE_BOUNDARIES table.

   b. When an eICT **Request** is created:
      i. If the request is not internal, the system will not be able to associate a sending county Office
      ii. If the Case that was entered in the request (sending county case) has any Active/Pending Program from the hierarchy
         1. CW
         2. RC/RCA
         3. FS
         4. MC

         Note: Current Batch logic selects from these Programs randomly.

      set the **sending county Office** as the Office of the Program Worker currently assigned to the highest priority Program

      iii. If no currently assigned worker is found using the entered Case, find a Case using the SSN (of the Primary Applicant), or CIN if SSN is not available, and set the sending county Office using the highest priority Active/Pending Program's Worker's Office from the matched case
      iv. If no currently assigned Worker is found on any Active/Pending Program (of the above types) leave the **sending county Office** BLANK/EMPTY
      v. Set the **receiving county Office** as the Office of the Worker selected in the 'Requesting Information' panel

5. Update the 'Assigned Office' field to display the receiving county Office, when available and update the 'Reassign' button to reassign the receiving county Office.
6. For ICTs viewed by the sending county:
   a. Hide the 'Reassign Office' field, including the 'Select' button and
   b. Hide the 'Reassign' button

   Note: The 'Assigned Office' field will remain visible as read-only for Outgoing ICTs even though it shows the receiving county Office.

2.1.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Incoming ICT (or Outgoing ICT)**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping with new and updated fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Incoming/Outgoing ICT Search page

2.2.1 Overview

The Incoming/Outgoing ICT Search page allows users to search for and view eICT records. The page name is updated dynamically based on whether the user is searching for an incoming or outgoing eICT.

E-ICTs will now be associated to both a sending county office and a receiving county office. The Incoming/Outgoing ICT Search page will now search based on the associated receiving county Office when searching for received eICTs on the Incoming ICT Search page and based on the sending county Office when searching for an outgoing eICT on the Outgoing ICT Search page.

2.2.2 Incoming/Outgoing ICT Search page Mockup

N/A. There are no visible changes to the elements on this page.

2.2.3 Description of Changes

1. Update the logic used to search by office:
    a. On the incoming ICT Search page, search for an eICT record by receiving county office
    b. On the Outgoing ICT Search page, search by sending county office

2.2.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Incoming ICT (or Outgoing ICT)**

2.2.5 Security Updates

Update page mapping with new and updated fields.

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Incoming/Outgoing ICT Search Detailed Results page

2.3.1 Overview

The Incoming/Outgoing ICT Search Detailed Results page allows users to view additional information about eICT records, that does not fit on the Incoming/Outgoing ICT Search page. The page name is updated dynamically based on whether the user is searching for an incoming or outgoing eICT.

The Incoming/Outgoing ICT Search Detailed Results page will now display the Office associated to the receiving county when viewing received/incoming eICTs on the Incoming ICT Search Detailed results page and display the Office associated to the sending county when viewing outgoing eICTs on the Outgoing ICT Search page.

2.3.2 Incoming/Outgoing ICT Detailed Results page Mockup

N/A. There are no visible changes to the elements on this page.

2.3.3 Description of Changes

1. Update the logic used to display the 'Office ID' column:
    a. On the Incoming ICT Search Detailed Results page, show the destination county Office ID
    b. On the Outgoing ICT Search Detailed Results page, show the sending county Office ID

2.3.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Incoming ICT (or Outgoing ICT) > (execute a search) > Click the 'View Detailed Results' button**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update page mapping with new and updated fields.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Batch PICWE100

2.4.1 Overview

Currently when CALWIN sends an eICT request to LA county, the batch job (PICWE100) updates the office_id column in the ICT table. The batch job only populates the Office for L.A. County. The eICT is available on the Outgoing ICT Search page. As part of CA-236577 the Outgoing ICT Search page has been modified to pull data from a new send_office_id column instead of the office_id column.

Update Batch logic to populate the new send_office_id column so that the worker is able to filter eICT Request records received from the CALWIN consortium for their Office.

2.4.2 Description of Change

1. Update Batch logic to populate the new send_office_id column when an eICT Request is received, so that CalSAWS Consortium workers are able to search and filter Requests received from the CALWIN consortium by their own office.
   Note: As per existing logic, Office assignment completed thru Batch i.e., for CalWIN/External Transfers will only be applicable for L.A. County. Internal (CalSAWS to CalSAWS) Transfers will have an Office assigned using this new logic (see above) and will be searchable for all counties.

2.4.3 Execution Frequency

No Change

2.4.4 Key Scheduling Dependencies

No Change

2.4.5 Counties Impacted

L.A. County only

2.4.6 Data Volume/Performance

No Change

2.4.7 Failure Procedure/Operational Instructions

No Change

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.7.2.3	The LRS shall complete the electronic transfer of cases between workers and/or Local Offices Sites using County-specified criteria consisting of: a. Geographic location of the participant; b. Specialized Local Office Site operations that need to replenish caseloads; c. Customer service (e.g. a participant may live in one area and work in another); and d. Caseload types and programs supported in the receiving location.	This SCR sets an Office to be associated to an eICT based on the participant address (part a. Geographic location) and based on the Programs supported by the Office (part d. Caseload types and programs)

3.2 Migration Requirements

N/A

4 MIGRATION IMPACTS

N/A

5 OUTREACH

5.1 Lists

Create a List of eICTs that were Sent to L.A. County that are not associated to an L.A. County Office.

List Name: ICTs_to_LA_without_LA_County_Office
List Criteria:

- The receiving county = L.A. County
- and the ICT is not associated to an L.A. County Office (as the receiving county Office)

Standard Columns:

- Case Name (Primary Applicant)
- Case Number (Sending Case Number)

Additional Column(s): Initiated Date (Batch Date), ICT ID, Request ID, Programs (comma separated list), Zip Code (Zip)
Frequency: One-time

The list will be posted to the following location:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CA-236577

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237144

Outbound IVR for EBT Scam Issue

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Michael Barillas
	Reviewed By	Jared Kuester; Himanshu Jain; Shilpa Suddavanda; Balakumar Murthy;

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/29/2021	1.0	Initial Draft	Michael Barillas
12/15/2021	2.0	Content Revision 1: Added Data Volume, Added 'Outbound IVR File Requirements' under Section 2.1.2.1, Updated Assumptions.	Michael Barillas

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1 OVERVIEW

Active and Pending persons opted into receiving IVR messages will need to be notified of a potential EBT Scam. Send a one-time IVR message to all Active or Pending persons opted into IVR regarding a potential EBT scam.

1.1 Current Design

CalSAWS does not have an existing EBT Scam IVR notification.

1.2 Requests

Send a one-time IVR message to all Active or Pending persons opted into IVR regarding a potential EBT scam.

1.3 Overview of Recommendations

1. Schedule a one-time IVR message batch job to all Customers opted into IVR regarding a potential EBT scam.

1.4 Assumptions

1. File does not require a header.
2. IVR EBT Scam Contact History will be done in future SCR CA-238282.

2 RECOMMENDATIONS

2.1 Create One-Time IVR - Potential EBT Scam

2.1.1 Overview

Schedule a one-time IVR message batch job to all Customers opted into IVR regarding a potential EBT scam.

2.1.2 Description of Change

1. Outbound IVR File Requirements
   a. Batch will generate files containing no more than 100,000 records each.
      i. File Name Format: 'EBTScamCallingList[Number].csv'
      ii. File Record Fields:

Data Element	Format / Logic / Values	Required	Description
Row Number	n/a	Yes	IVR's MASS_ID
First Name	n/a	Yes	Persons First Name
Last Name	n/a	Yes	Persons Last Name
Phone Number	n/a	Yes	Person Phone Number
Case Person Id	n/a	Yes	SAWS Case Person ID
County Code	n/a	Yes	Persons County Code

2. IVR Message Verbiage:
   a. IVR Message Name: EBT Scam Issue
   b. IVR Message Verbiage:

Beware of EBT Text Message Scam

The Department is aware of a text messaging scam aimed at obtaining EBT card information, including PIN numbers. State and county officials would NEVER request such information via text. Please do not share any EBT information with anyone outside of your county welfare department or the EBT customer service center. The Department is working closely with our county and vendor partners on additional security measures.

If you have received a message requesting such information, please forward a screenshot of the text to CDSSEBT@dss.ca.gov.

c. Target Population:
    i. Active or Pending Persons
    ii. Is Opted-In to receive IVR messages
d. Run Dates: One-Time Run
e. Programs: All Programs
f. Applicable Counties: All Counties
g. Character County English: 577
h. Automated Action Scenario: N/A
i. Contact History Reason: EBT Scam Issue – All Counties

2.1.3 Execution Frequency

On Demand

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

All Counties

2.1.6 Data Volume/Performance

~2.4 Million Records

2.1.7 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.17	The LRS shall set up alerts and send messages to other program specified users.	CalSAWS is sending customers messages regarding a

		potential EBT Scam for all programs.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-203793

MEDS: Create EW32 Transaction for Daily Batch

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sowmya Coppisetty
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/08/2020	1.0	Initial Draft	Sowmya Coppisetty
12/17/2020	1.1	Revisions based on BA review	Sowmya Coppisetty
1/20/2021	1.2	Updates from the committee review and Analysts	Sowmya Coppisetty.
12/15/2021	1.3	Design clarification added to section 2.1.2.	Sowmya Coppisetty
01/07/2022	1.4	Design clarification added to section 2.3	Sowmya Coppisetty
01/11/2022	1.5	Content revision updates added to section 2.1.2	Sowmya Coppisetty

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1 OVERVIEW

The Medi-Cal Eligibility Data System (MEDS) system tracks individual eligibility and supports the delivery of health care services for the Medi-Cal program. Depending on the transaction type, the update information in the transaction record may include new or changed eligibility and/or demographic information.

There are variety of transaction types in a single MEDS outbound batch file. The business rules used to populate a given batch file varies by transaction type. With this SCR a new transaction type of 'EW32' will be created for the Med-Cal program to report incarceration details in CalSAWS to MEDS.

1.1 Current Design

Currently in CalSAWS, there does not exist an automated process to report the incarceration status or updates to the incarceration status of an individual in CalSAWS to MEDS in the daily MEDS outbound file. The EW32 transaction is currently online only and initiated by a worker outside of the CalSAWS.

1.2 Requests

1. Add a new transaction type of 'EW32' to the MEDS daily outbound file that will report the incarceration status and updates to the incarceration status to MEDS.
2. Add new MEDS Alerts to the existing list of MEDS Alerts in CalSAWS related to EW32.
3. Update the living arrangement detail page fields 'Name' and 'Living Arrangement Type' to be non-editable in edit mode.

1.3 Overview of Recommendations

1. Create a new streams job for the EW32 transaction to retrieve information on incarceration status and any updates to the incarceration status of an individual Active on a Medi-Cal program in CalSAWS and send this information to MEDS as part of the daily MEDS outbound file.
2. Add new MEDS Alerts to the existing list of MEDS Alerts in CalSAWS related to the EW32 transaction.
3. Update the living arrangement detail page fields 'Name' and 'Living Arrangement Type' to be non-editable in edit mode.

1.4 Assumptions

1. Workers will continue to have the option to submit an online EW32 transaction manually to MEDS when appropriate.
2. There are no changes with this SCR to the automated data collection updates (e.g., Household Status) made by the Los Angeles County Probation interface. Future changes are planned with SCR CA-50091.

2 RECOMMENDATIONS

2.1 Create a new EW32 transaction to the MEDS daily outbound file

2.1.1 Overview

The EW32 transaction will report information pertaining to incarceration (initiating suspension), reporting a release (ending suspension), and to correct previously reported suspension start and/or release dates in CalSAWS to MEDS as part of the daily MEDS outbound file for persons Active on the Medi-Cal program.

With this SCR, a new daily streams job will be created to generate and save the EW32 transaction data in the CalSAWS database, and once all the types of transactions are generated and saved, the final MEDS outbound job will retrieve the records from the database and send them to MEDS in the daily MEDS outbound file.

2.1.2 Description of Change

1. Create a new daily streams job for the EW32 transaction that will generate and save the EW32 transaction information in the CalSAWS database and send them to MEDS in the daily MEDS outbound file.

   The EW32 transactions will be used to report an incarceration date (Arrival Date), report a release date (Departure Date), and to correct previously reported incarceration arrival and/or departure dates of the individual from the Living Arrangement Detail page (refer to figure 2.1.1) to MEDS in the daily outbound file.

Figure 2.1.1 Living Arrangement Detail Page

2. Trigger the EW32 transaction when any of the following conditions are met for the individual who is in 'Active' status with a role of 'Member' on a Medi-Cal program with a 'Incarcerated' Living Arrangement Type:
   a. A new incarceration record with an Arrival Date is entered on the Living Arrangement Detail page.
   b. A Departure Date has been entered into an existing incarcerated Living Arrangement Detail record.
   c. An update is made to the Arrival Date field of an existing incarceration record on the Living Arrangement Detail page.
   d. An update has been made to the Departure Date of an existing incarceration record on the Living Arrangement Detail page.
3. The below data specific to the EW32 transactions will be sent to MEDS. Please refer to the detailed list of data elements sent in the EW32 transaction in Section 2.2.

   Required Data to be sent in the transaction:

   a. Last Name: Last name of the incarcerated individual
   b. First Name: First Name of the incarcerated individual
   c. Initial: Initial or the first alphabet of the incarcerated individual
   d. Incarceration date: This date refers to the Arrival Date entered and saved on the Living Arrangement Detail page. The arrival/incarceration date is a mandatory field and will be sent as follows:
      - Data Element Number- 9345
      - Format: CCYYMMDD
      - Be greater than or equal to 01/01/2010
        Be equal to or lesser than batch Date
      - Cannot overlap an existing incarceration period

   Optional data to be sent in the transaction:

   e. Case Name
   f. District Code
   g. EW Code: Eligibility Worker (EW) Code
   h. Release date: This date refers to the Departure Date entered and saved in the Living Arrangement Detail page for an incarcerated record and it will be sent as follows:
      - Data Element Number-9350
      - Format: CCYYMMDD
      - Equal to or greater than the INCARCERATION-DATE or CORRECTION INCARCERATION DATE
      - Equal to or lesser than batch date

   i. CORRECTION INCARCERATION DATE: When the Arrival date is updated in the Living Arrangement Detail Page, the updated Arrival date will be sent in this data element and it will be sent as follows:

- Data Element Number -9360
- Format: CCYYMMDD
- This date must be equal to or lesser than batch date or the original arrival/incarceration date
- If correction Incarceration Date is on a transaction, then Incarceration date should be a required field.

j. CORRECTION RELEASE DATE: When the Departure date is updated in the Living Arrangement Detail Page, the updated Departure date will be sent in this data element and it will be sent as follows:
   - Data Element Number -9365
   - Format: CCYYMMDD
   - This date must be equal to or lesser than batch date or the original departure/release date
   - If Correction release Date is on a transaction, then release date should be a required field.

4. When the Arrival/Incarcerated date is updated more than once on the Living Arrangement Detail page the last reported Correction Incarceration date to MEDS will be populated in the Incarceration date data element in the EW E32 Transaction.
5. When the Departure/Release date is updated more than once on the Living Arrangement Detail page the last reported Correction Release date to MEDS will be populated in the release date data element in the EW32 Transaction.
6. When an existing open period of incarceration (incarceration with no release date) is updated with a release/departure date in the Living Arrangement Detail page and a new open period of incarceration is reported and added for the individual on the same day then 2 separate EW32 transactions will be sent to MEDS.
7. When a 'Incarcerated' living arrangement type record with a Departure/Release date is removed from the living arrangement list page a batch EW32 transaction will be triggered and sent with a Correction Release Date equal to the Incarceration/Arrival Date to MEDS.
8. When a 'Incarcerated' living arrangement type record without a Departure/Release date is removed from the living arrangement list page A batch EW32 transaction will be triggered and sent with a Release Date equal to the Incarceration/Arrival Date to MEDS.

Note: CalSAWS will display incarcerated data received from partner systems on the Living Arrangement Detail page.

2.2 Event Streaming for EW32 Transactions

2.2.1 Overview

The EW32 transactions will be architected to leverage the "Stream Processing Architecture" and run the job during business hours.

2.2.2 Description of Changes

1. A connector will be set up to gather the individual's arrival and departure dates from the Living Arrangement Detail page for the incarcerated record type.
2. Below is the list of source tables from which connector will be gathering and sending corresponding IDs (System generated primary key for the tables) to the source topics for downstream processing. No PII data will be stored in the source topics.
    a. LIVING_ARRGMT

3. A streaming application will monitor the source topics, process the data, and send the IDs of cases that need to be sent to MEDS to a sink topic.
4. A consumer application will process the data from the sink topic, generate EW32 transactions using the processing logic, and stage them in the MEDS transaction table for the final job to create an outbound file.

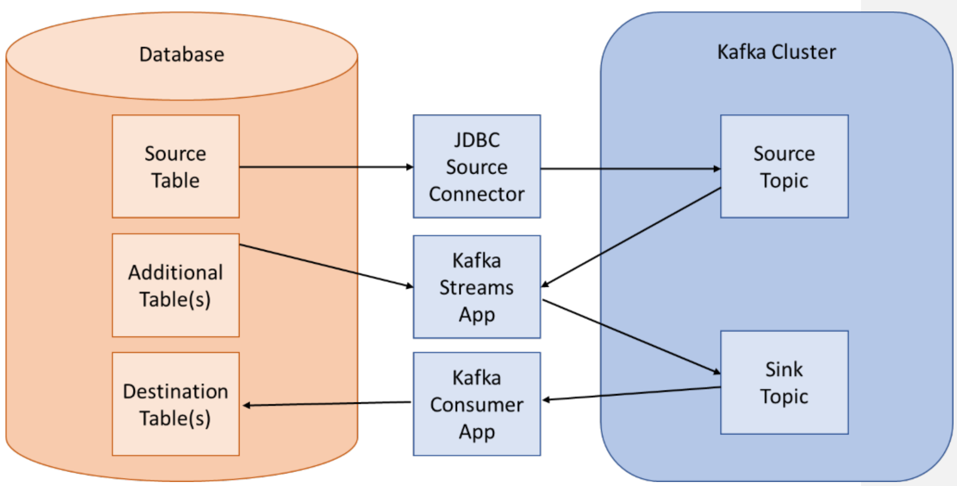

Figure 2.2.1 Streams Processing Architecture for EW32 Transaction

2.2.3 Execution Frequency

Source Connector and Streams Application will be running 24X7.
Consumer Applications will be scheduled to run every hour.

2.2.4 Key Scheduling Dependencies

Consumer Application will be set as the predecessor to the MEDS outbound writer job.

2.2.5 Counties Impacted

All counties.

The 57 Migration Counties will inherit this functionality at the time of migration.

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

The Batch/Tech Operation Support Team will evaluate errors, diagnose the issue and work with the appropriate teams to resolve the failure.

2.3 File/Record layout and Data mapping for EW32 transaction

MEDS TRANSACTION HEADER RECORD					
FIELD NAME	FIELD DESCRIPTION	TYPE	POSITION	LENGTH	REQUIRED
TRANSACTION_CODE	Transaction code	AN	1	4	Y
SOURCE_SYSTEM_ID_CIV	Source ID	AN	5	2	Y
SOURCE_SYSTEM_ID_COUNTY	County code	AN	7	2	Y
FORMAT_INDICATOR	Field format indicator	AN	9	1	Y
FILLER	N/A	AN	10	24	Y
CREATION_DATE	Date component of record time stamp. YYYYMMDD	N	34	8	Y

MEDS TRANSACTION HEADER RECORD					
FIELD NAME	FIELD DESCRIPTION	TYPE	POSITION	LENGTH	REQUIRED
CREATION_TIME	Time component of record time stamp. HHMMSSTT	N	42	8	Y
BATCH_NUMBER	Batch number	AN	50	3	Y
FILLER	N/A	AN	53	1	Y
MEDS_ID	Social Security Number	AN	54	9	Y
MEDS_ID_CHECK_DIGIT	SSN check digit	AN	63	1	Y
CLIENT_INDEX_NUMBER	Client Identification Number (CIN)	AN	64	9	Y
CIN_CHECK_DIGIT	CIN check digit	AN	73	1	Y
COUNTY	County code	AN	74	2	Y
AID_CODE	Aid code	AN	76	2	Y
SERIAL	Serial number	AN	78	7	Y
FAMILY_BUDGET_UNIT	Family Budget Unit (FBU)	AN	85	1	Y
PERSON_NUMBER	Person number	AN	86	2	Y
BIRTHDATE	Date of birth. YYYYMMDD	N	88	8	Y
CUSTOMER_KEY	Customer key	AN	96	9	Y
FILLER	N/A	AN	105	11	Y
VARIABLE_DATA_LENGTH	Length of key / value pair section following this field in this record	N	116	5	Y

* The AID_CODE data element in the MEDS transaction header will be sent as 'IE' for the EW32 transaction.

*The FAMILY_BUDGET_UNIT data element in MEDS transaction header will be sent as '0' for the EW32 transaction

* CREATION_TIME data element in the MEDS transaction header will be sent as '00000000' for the EW32 transaction

EW32: Report Incarceration and Suspension status					
FIELD NAME	FIELD DESCRIPTION	TYPE	POSITION	LENGTH	REQUIRED
LAST-NAME*	Last name	AN		20	Y
FIRST-NAME*	First name	AN		15	Y
INITIAL*	Initial	AN		1	Y
INCARCERATION-DATE	Incarceration/Arrival date of the individual	N		8	Y
CASE-NAME	Case Name	AN		18	N
DISTRICT	District Code	AN		3	N
EW_CODE	Eligibility Worker (EW) Code	AN		4	N
RELEASE_DATE	Release date of the individual	N		8	N
CORRECTION INCARCERATION DATE	Updated incarcerated/arrival date	N		8	N
CORRECTION RELEASE DATE	Updated release/departure Date	N		8	N

2.4 Add new MEDS Alerts related to EW32 Transactions into CalSAWS

2.4.1 Overview

This SCR will add new MEDS Alerts related to the EW32 transactions into CalSAWS.

2.4.2 Description of Changes

1. Add the new MEDS Alerts below to the existing list of MEDS Alerts on the MEDS Alert Admin Detail page.
   - The new MEDS Alerts will be in 'Active' status by default for all counties unless an Admin User updates the status of the Alert to 'Inactive' on the MEDS Alert Admin Detail page.
   - The Task Information section in the MEDS Alert Admin Detail page for each Alert will be available as follows:
     a. Set the Status to 'Inactive'.
     b. The Task Type and Task Sub-Type values will initially be set to blank. If an Admin User updates the Status field in this section to be 'Active', page validation will enforce the selection of a Task Type value. This approach will allow each county to specify a

county specific Task Type as needed rather than a prescribed Task Type.

c. The Long Description associated to each of these tasks:
   MEDS Alert {Alert ID} – {Alert Description} has been received.
   Due Date: Default Due Date
   Default Due Date: 10 Days
   Initial Assignment: Default Assignment
   Default Assignment: MEDS Alert Task Distribution

Alert 0506

Internal Alert ID	0813
Alert Description (TITLE_DESCR)	INDIVIDUAL RELEASED FROM INCARCERATION. RE-EVALUATE
Explanation (TEXT_DESCR)	A Release Date was added to MEDS to indicate an individual is no longer incarcerated.
Automation Indicator	No
Task Creation	No
Action Type	Action
Action (ACTN_DESCR)	Confirm contact information (mailing address, residence address, etc.) is current. Determine if individual's Medi-Cal has been reactivated. If not, re-evaluate to determine if the individual is eligible for Medi-Cal benefits.

Alert 1109

Internal Alert ID	0816
Alert Description (TITLE_DESCR)	RELEASE DATE CANNOT BE EARLIER THAN INCARCERATION DATE
Explanation (TEXT_DESCR)	User has entered an Incarceration Date or Correction Incarceration Date that is greater than the Release Date on the EW32 transaction.
Automation Indicator	No
Task Creation	No
Action Type	*PRI-REJ**
Action (ACTN_DESCR)	User must evaluate dates and re-enter date(s) so that the Incarceration or Correction Incarceration Date is prior to the Release Date or Correction Release Date (if also entered).

Alert 2206

Internal Alert ID	0812
Alert Description (TITLE_DESCR)	INCARCERATION PERIOD ALREADY ACTIVE ON MEDS
Explanation (TEXT_DESCR)	A transaction was submitted to add an Incarceration Date to a record with an active incarceration. If the Incarceration Date needs to be corrected, follow correct procedures.
Automation Indicator	No
Task Creation	No
Action Type	*PRI-REJ**
Action (ACTN_DESCR)	N/A

Alert 2207

Internal Alert ID	0814
Alert Description (TITLE_DESCR)	NO ACTIVE INCARCERATION TO RELEASE
Explanation (TEXT_DESCR)	A transaction was submitted to add a Release Date to a record without an active Incarceration. Determine if you are updating the correct record and confirm if you also need to add an Incarceration Date
Automation Indicator	No
Task Creation	No
Action Type	*PRI-REJ**
Action (ACTN_DESCR)	N/A

Commented [TT1]: From MEDS: A transaction was submitted to add a Release Date to a record without an active Incarceration. Determine if you are updating the correct record and confirm if you also need to add an Incarceration Date.

Commented [CS2R1]: Updated to the what is in MEDS

2.5 Living Arrangements Detail page

2.5.1 Overview

The Living Arrangements Detail page allows workers to add or edit a living arrangement. With the introduction of the new EW 32 MEDS batch transaction, which sends updates about the status of an "Incarcerated" type of Living Arrangement to MEDS, it is no longer appropriate to allow workers to edit the 'Name' or 'Living Arrangement Type' fields. These fields will be updated to be non-editable, after a record is initially created; if these fields are entered incorrectly workers will be required to remove the incorrectly added record and create a new one from the Living Arrangements List page.

2.5.2 Living Arrangement Detail Mockup

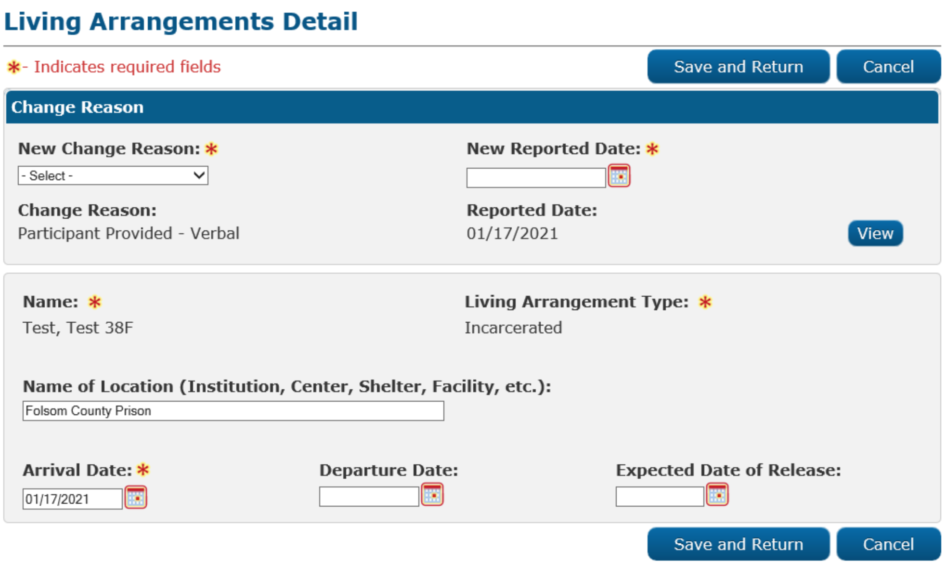

Figure 2.1.1 – Mockup Name

2.5.3 Description of Changes

1. Update fields to be non-editable text when the page is in Edit mode:
   a. 'Name'
   b. 'Living Arrangement Type'

2.5.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Living Arrgmt**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.2	The LRS shall trigger automated requests for LRS Data exchange of information with other systems, based on information captured during the application registration, application evaluation, intake, case maintenance, and referral processes.	Create a new transaction type ‘EW32’ to report incarceration information of individuals in CalSAWS to MEDS.
2.20.1.6	The LRS shall parse and display interface Alerts by system-related and User-related errors and generate reports for analysis and corrective actions by CONTRACTOR and for review by COUNTY.	Add new MEDS Alerts to the CalSAWS system