

CalSAWS

California Statewide Automated Welfare System

Design Document

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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

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Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	5
2	Recommendations.....	6
2.1	QA/QC Task Sample Search Page.....	6
2.1.1	Overview	6
2.1.2	QA/QC Task Sample Search Page Mockups.....	6
2.1.3	Description of Changes	7
2.1.4	Page Validations	10
2.1.5	Page Location	10
2.1.6	Security Updates.....	10
2.1.7	Page Mapping.....	11
2.1.8	Page Usage/Data Volume Impacts	11
2.2	QA/QC Task Sample Detail Page.....	11
2.2.1	Overview	11
2.2.2	QA/QC Task Sample Detail Page Mockup	11
2.2.3	Description of Changes – Create/View/Edit Mode.....	14
2.2.4	Description of Changes – Results Mode	21
2.2.5	Page Validations	22
2.2.6	Page Location	25
2.2.7	Security Updates.....	25
2.2.8	Page Mapping.....	26
2.2.9	Page Usage/Data Volume Impacts	26
2.3	QA/QC Task Sample Results List Page.....	26
2.3.1	Overview	26
2.3.2	QA/QC Task Sample Results List Mockup	26
2.3.3	Description of Changes	27
2.3.4	Page Validations	29
2.3.5	Page Location	29
2.3.6	Security Updates.....	29

2.3.7	Page Mapping.....	30
2.3.8	Page Usage/Data Volume Impacts	30
2.4	QA/QC Task Sample Results Export Report	30
2.4.1	Overview	30
2.4.2	QA/QC Task Sample Results Export Mockup.....	30
2.4.3	Description of Changes	30
2.4.4	Report Location	32
2.4.5	Counties Impacted	32
2.4.6	Security Updates.....	32
2.4.7	Report Usage/Performance	32
2.5	QA/QC Task Sample Sweep Job	32
2.5.1	Overview	32
2.5.2	Description of Change.....	32
2.5.3	Execution Frequency.....	33
2.5.4	Key Scheduling Dependencies	33
2.5.5	Counties Impacted	34
2.5.6	Data Volume/Performance.....	34
2.5.7	Failure Procedure/Operational Instructions.....	34
2.6	QA/QC Task Sample Execution Job	34
2.6.1	Overview	34
2.6.2	Description of Change.....	34
2.6.3	Execution Frequency.....	36
2.6.4	Key Scheduling Dependencies	36
2.6.5	Counties Impacted	37
2.6.6	Data Volume/Performance.....	37
2.6.7	Failure Procedure/Operational Instructions.....	37
3	Supporting Documents	38
4	Requirements.....	39
4.1	Migration Requirements.....	39
5	Migration Impacts	40
6	Outreach.....	41
7	Appendix.....	42

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

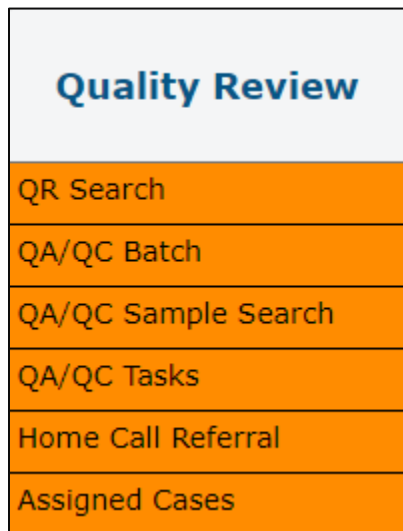


Figure 2.1.2.1 – Task Navigation Panel Mockup

QA/QC Task Sample Search

▼ Refine Your Search Search

Title:

Scheduled By: Rakan Ali Select Clear

Frequency:

Last Run Begin Date:

Status:

Last Run End Date:

Results per Page: Search

Search Results Summary Results 1 - 1 of 1

Add Task Sample

Title	Scheduled By	Frequency	Status	Last Run Date
<input type="checkbox"/> Test	Rakan Ali	One-Time	Active	

Remove
Add Task Sample

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	<ul style="list-style-type: none"> • QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List; 	<ul style="list-style-type: none"> • QA/QC Task View • QA/QC Task Edit
QAQCTaskEdit	<ul style="list-style-type: none"> • QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List; 	<ul style="list-style-type: none"> • QA/QC Task Edit
SelectWorker	<ul style="list-style-type: none"> • Enter Report Parameters; • Select Worker; • Select Unit; • Select Office; • Select Staff; 	<ul style="list-style-type: none"> • 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

QA/QC Task Sample Detail

* Indicates required fields

Save and Return Cancel

Title:

Scheduled By: Rakan Ali

Status: Active

Last Run Date:

Task Source(s)

Source Worker(s)

<input type="checkbox"/>	Level	Number	Name
<input type="checkbox"/>	Worker	19LS008300	Rakan Ali
<input type="checkbox"/>	Worker	19AS00009T	Justin Dobbs
<input type="checkbox"/>	Worker	19AS000087	Mayuri Srinivas

Remove Add

Source Bank(s)

<input type="checkbox"/>	Level	Number	Name
<input type="checkbox"/>	Bank	190P0200DBK	MC Redeterminations / MC355

Remove Add

Source Case(s)

<input type="checkbox"/>	Level	Number	Name
<input type="checkbox"/>	Case	TDA4003	Case Name

Remove Add

Sample Options

Number of Tasks: Maximum Number of Tasks:

Task Status: Completed Void

Completed/Void Dates: Begin Date: End Date:

Task Priority: Custom Task Priority: Critical High Medium Low

Task Types

<input type="checkbox"/>	Task Category	Task Type	Task Sub-Type
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Remove Add

Programs

- AAP
- Cal-Learn
- CalWORKs
- CFET
- Child Protective Services
- Diversion
- GA/GR Employment Services
- General Assistance (Non-Managed)
- General Assistance/General Relief (GR)
- Homeless - Perm
- IHSS/CMIPS II
- IV-D Child Support
- LDHP
- Medi-Cal
- Nutrition Benefit
- RCA
- Welfare to Work
- Adult Protective Services
- CalFresh
- CAPI
- Child Care
- Disaster CalFresh
- Foster Care
- General Assistance (Managed)
- General Assistance/General Relief
- GROW
- Homeless - Temp
- Immediate Need
- Kin-GAP
- Linkages Adult Services
- Multipurpose Senior Services
- PCSP
- REP

Recurrence

Frequency:

Save and Return Cancel

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

QA/QC Task Sample Detail

* - Indicates required fields

Copy Edit Close

Title: *
Test

Status:
Active

Scheduled By:
Rakan Ali

Last Run Date:

Task Source(s) ⓘ

▼ Source Worker(s)

Level	Number	Name
Worker	19LS008J00	Rakan Ali
Worker	19AS00009T	Justin Dobbs
Worker	19AS0000B7	Mayuri Srinivas

▼ Source Bank(s)

Level	Number	Name
Bank	19DP0200D8BK	MC Redeterminations / MC355

▼ Source Case(s)

Level	Number	Name
Case	TDA4003	Case Name

Sample Options

Number of Tasks: *
Maximum Number of Tasks

Maximum Number of Tasks: *
1

Task Status:
 Completed Void

Complete/Void Date: Custom

Begin Due Date: 09/23/2021

End Due Date: 09/30/2021

Task Priority: Custom

Custom Task Priority: *
Critical High Medium Low

▼ Task Types

Task Category	Task Type	Task Sub-Type

▼ Programs

AAP	Adult Protective Services
Cal-Learn	CalFresh
CalWORKs	CAPI
CFET	Child Care
Child Protective Services	Disaster CalFresh
Diversion	Foster Care
GA/GR Employment Services	General Assistance (Managed)
General Assistance (Non-Managed)	General Assistance/General Relief
General Assistance/General Relief (GR)	GROW
Homeless - Perm	Homeless - Temp
IHSS/CMIPS II	Immediate Need
IV-D Child Support	Kin-GAP
LHHP	Linkages Adult Services
Medi-Cal	Multipurpose Senior Services
Nutrition Benefit	PCSP
RCA	REP
Welfare to Work	

Recurrence

Frequency: *
One-Time

Begin Date: *
09/20/2021

Copy Edit Close

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. This field will display a text box when the page is in Create or Edit mode with a maximum length of 50 characters. If this field contains the "<" or ">" characters, they will be removed on Save.

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. Task Source(s) (Required):

- 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. Task Types:

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)** – 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. This field displays for any value selected in the Frequency dropdown.

The mockup shows a blue header bar with the word "Recurrence" in white. Below the header, there are two fields. The first field is labeled "Frequency: *" and has a dropdown menu with "One-Time" selected. The second field is labeled "Begin Date: *" and contains the date "09/16/2021" next to a calendar icon.

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.

The mockup shows a blue header bar with the word "Recurrence" in white. Below the header, there are three fields. The first field is labeled "Frequency: *" and has a dropdown menu with "Daily (M-F)" selected. The second field is labeled "Begin Date: *" and contains the date "09/16/2021" next to a calendar icon. The third field is labeled "End Date: *" and contains the date "09/16/2022" next to a calendar icon.

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.

The mockup shows a blue header bar with the word "Recurrence" in white. Below the header, there are three fields. The first field is labeled "Frequency: *" and has a dropdown menu with "Weekly" selected. The second field is labeled "Begin Date: *" and contains the date "09/16/2021" next to a calendar icon. The third field is labeled "End Date: *" and contains the date "09/16/2022" next to a calendar icon. Below these fields, there is a section labeled "Weekday(s): *" with five checkboxes: Monday, Tuesday, Wednesday, Thursday, and Friday, all of which are currently unchecked.

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 for any value selected in the Frequency dropdown.

- 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

Recurrence		
Frequency: * Monthly	Begin Month: * 08/02/2021	End Month: * 08/02/2022
Day of the Month: First 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.

QA/QC Task Sample Detail

*- Indicates required fields

Close

<p>Title: * Test</p> <p>Scheduled By: Rakan Ali</p> <p>Run Result: Processed</p> <p>Run Result Detail:</p>	<p>Status: Inactive</p> <p>Run Date: 07/07/2021</p> <p>Tasks Sampled: 7</p>
--	--

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

11. "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.

12. "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.

13. "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.

14. "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.

15. "Number of Tasks per Worker – Input value must be a number from 1 – 2500. Please enter a different value."
- 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	<ul style="list-style-type: none"> • QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List; 	<ul style="list-style-type: none"> • QA/QC Task View • QA/QC Task Edit
QAQCTaskEdit	<ul style="list-style-type: none"> • QA/QC Task Sample Search; • QA/QC Task Sample Detail; • QA/QC Task Sample Results List; 	<ul style="list-style-type: none"> • QA/QC Task Edit
SelectWorker	<ul style="list-style-type: none"> • Enter Report Parameters; • Select Worker; • Select Unit; • Select Office; • Select Staff; 	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • View Only

Security Group	Group Description	Group to Role Mapping
QA/QC Task Edit	View and Edit QA/QC Task Sample details. Access to Select pages for Worker, Unit, Office and Staff.	<ul style="list-style-type: none"> • 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

QA/QC Task Sample Results List

[Close](#)

▼ Refine Your Search [Search](#)

Run Begin Date: Tasks Sampled Min:

Run End Date: Tasks Sampled Max:

Run Result:

Results per Page: [Search](#)

Search Results Summary			Results 1 - 1 of 1
Run Date	Run Result	Run Result Detail	Tasks Sampled
07/07/2021	Processed		7

[Close](#)

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. Refine Your Search: 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. Processed
 - ii. Not Processed

4. Search Results Summary: 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.
Status	The Status of the Task.
Priority	The Priority of the Task.

Column Name	Description
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. QA/QC Task Sample Processing:

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. QA/QC Task Detail:

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%20Report.xlsx
2	Security	Security Matrix	 CA-214916 DDID 2252 Security Matrix.xlsx

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. Immediate Need
 - p. IHSS/CMIPS II
 - q. Kin-GAP
 - r. Linkages Adult Services
 - s. Medi-Cal
 - t. Multipurpose Senior Service
 - u. Nutrition Benefit
 - v. RCA
 - w. REP
 - x. 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	<ol style="list-style-type: none"> a. GROW b. General Assistance/General Relief
<ol style="list-style-type: none"> 1. Alpine 2. Amador 3. Butte 4. Calaveras 5. Colusa 6. Del Norte 7. El Dorado 8. Glenn 9. Humboldt 10. Imperial 11. Inyo 12. Kern 	<ol style="list-style-type: none"> a. General Assistance (Managed) b. General Assistance (Non-Managed)

County	Programs
13. Kings 14. Lake 15. Lassen 16. Madera 17. Marin 18. Mariposa 19. Mendocino 20. Merced 21. Modoc 22. Mono 23. Monterey 24. Napa 25. Nevada 26. Plumas 27. Riverside 28. San Benito 29. San Bernardino 30. San Joaquin 31. Shasta 32. Sierra 33. Siskiyou 34. Stanislaus 35. Sutter 36. Tehama 37. Trinity 38. Tuolumne 39. Yuba	
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 15. Sonoma 16. Tulare 17. Ventura 18. Yolo	a. General Assistance/General Relief b. GA/GR Employment Services

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226308

Updates for the CalFresh SSA COLA

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Michael Barillas
	Reviewed By	Dana Peterson; Caroline Bui; Edgars Reinholds; Himanshu Jain;

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/30/2021	1.0	Initial Draft	Michael Barillas
11/9/2021	2.0	ContentRevision1: Adding new processing requirement for 2.2 CalFresh SSA COLA Inbound. Adding File name details for SSA COLA Outbound/Inbound.	Michael Barillas
12/8/2021	3.0	ContentRevision2: Modifying the 'SSP Paid Amount is greater than amount' in 2.2 CalFresh SSA COLA Inbound Description of change.	Michael Barillas

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 CalFresh SSA COLA Outbound	5
	2.1.1 Overview	5
	2.1.2 Description of Change.....	5
	2.1.3 Execution Frequency.....	6
	2.1.4 Key Scheduling Dependencies.....	6
	2.1.5 Counties Impacted	6
	2.1.6 Data Volume/Performance.....	6
	2.1.7 Interface Partner.....	6
	2.1.8 Failure Procedure/Operational Instructions.....	6
	2.2 CalFresh SSA COLA Inbound.....	7
	2.2.1 Overview	7
	2.2.2 Description of Change.....	7
	2.2.3 Execution Frequency.....	9
	2.2.4 Key Scheduling Dependencies.....	9
	2.2.5 Counties Impacted	9
	2.2.6 Data Volume/Performance.....	10
	2.2.7 Interface Partner.....	10
	2.2.8 Failure Procedure/Operational Instructions.....	10
	2.3 Create an Exceptions Table.....	10
	2.3.1 Overview	10
	2.3.2 Description of Change.....	10
	2.3.3 Estimated Number of Records Impacted/Performance.....	11
3	Requirements.....	11
	3.1 Project Requirements.....	11

1 OVERVIEW

Supplemental Security Income (SSI) and State Supplementary Payment (SSP) income, recorded on the Other Program Assistance (OPA) page, is not automatically updated when the Social Security Administration (SSA) Cost of Living Adjustments (COLA) changes are applied to the Systems.

AB 1811 reversed the CalFresh (CF) eligibility policy known as “cash-out,” under which SSI/SSP recipients were ineligible for CF. SSI/SSP income is now countable as Unearned Income in the CF budget determination.

This SCR will update the OPA records of types ‘SSI/SSP’, ‘SSI Only’ and ‘SSP Only’ with the SSI and/or SSP income information received from MEDS.

1.1 Current Design

SSI/SSP assistance is not automatically updated when SSA COLA changes are applied to CalSAWS.

1.2 Requests

CalSAWS will generate and send a file to MEDS containing CalFresh persons receiving SSI/SSP Income. After sending the file, MEDS will provide a response file that includes elements in the initial outbound file, as well as additional SSI/SSP payment amounts.

CalSAWS will process the inbound file and update OPA records with the new SSI/SSP amounts.

CalSAWS will create an exceptions table to store all unprocessed records in the Inbound MEDS SSI/SSP COLA Response File.

1.3 Overview of Recommendations

1. Create a batch job that will generate a file for CalFresh persons receiving SSI only, SSP only, or SSI/SSP Income and send to MEDS.
2. Create a batch job that will process a MEDS SSI/SSP COLA Response File containing the data in the CalSAWS outbound file as well as additional SSI and/or SSP Payment Amounts.
3. Create an exceptions table to store all unprocessed records in the Inbound MEDS SSI/SSP COLA Response File.

1.4 Assumptions

1. Exceptions List will be a manual process and not be automated.

2 RECOMMENDATIONS

2.1 CalFresh SSA COLA Outbound

2.1.1 Overview

Create a new batch job that will generate a file to send to MEDS containing CalFresh persons receiving SSI, SPP, or SSI/SSP income.

2.1.2 Description of Change

1. Create a new batch job
 - a. Find all CalFresh persons receiving SSI, SSP, or SSI/SSP income
 - i. Have an open (high-dated) OPA record of type SSI Only, SSP Only, or SSI/SSP.
 - b. Generate a pipe delimited flat text file containing information about the CalFresh persons receiving SSI, SSP, or SSI/SSP income
 - i. File Name
 1. [CONSORTIUM(CalSAWS/CalWIN)]_Annual SSI COLA_DHCS REQUEST
 - ii. File Header
 1. [CONSORTIUM]_Annual SSI COLA_YYYY_MMDDYY
 - a. [CONSORTIUM] (CalSAWS/CIV/CalWIN)
 - b. YYYY (Calendar Year)
 - c. MMDDYY (File Process Date)
 - iii. File Body

Outbound Data Elements	Description	Field Length and Formatting
Case ID	This column can be used by each SAWS to identify the person or case within the SAWS System. C-IV and CalSAWS will use this element to pass in the Person Unique ID.	10 – Pad with trailing spaces to meet fixed length of 10
County Code	County Code of the County of Responsibility	2
Last Name	Beneficiary's Last Name	Variable
First Name	Beneficiary's First Name	Variable
Middle Initial	Beneficiary's Middle Initial	Variable
Social Security Number (SSN)	Beneficiary's SSN	9

Outbound Data Elements	Description	Field Length and Formatting
CIN	Beneficiary's CIN	9
DOB	Beneficiary's DOB	8(MMDDYYYY)

- c. The File will have a Trailer section in the following format:
 - i. Annual SSI COLA_[Record Count]
 - 1. [Record Count] - The number of records in the file's body section.

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

N/A

2.1.7 Interface Partner

MEDS

2.1.8 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 CalFresh SSA COLA Inbound

2.2.1 Overview

Create a new inbound batch job that will receive and process a response file and update OPA records. File will include the elements outlined in the 'CalFresh SSA COLA Outbound' file, as well as additional SSI and/or SSP Payment Amounts.

2.2.2 Description of Change

1. Create a new batch job that will retrieve a file from Meds, process records within the file and update the OPA records for persons Active on a CF program.
 - a. Retrieve a pipe delimited flat text file.
 - i. File Name
 1. [CONSORTIUM(CalSAWS/CalWIN)]_ANNUAL_SSI_COLA_YYYY_MMDDYYYY_DHCS_RESPONSE.txt
 - ii. File Header
 1. <CONSORTIUM>_ANNUAL_SSI_COLA_<YEAR>_<FILEDATE>_DHCS RESPONSE
 - a. <CONSORTIUM> (CalSAWS)
 - b. <YEAR> - 2022
 - c. <FILEDATE> - Date of File Creation
 - iii. File Body

Inbound Data Elements	Description	Field Length and Formatting
Case ID	This column can be used by each SAWS to identify the person or case within the SAWS System. C-IV and CalSAWS will use this element to pass in the Person Unique ID.	Up to 10 – DHCS will remove trailing spaces
County Code	County Code of the County of Responsibility	2
Last Name	Beneficiary's Last Name	Variable
First Name	Beneficiary's First Name	Variable
Middle Initial	Beneficiary's Middle Initial	Variable
SSN	Beneficiary's SSN	9
CIN	Beneficiary's CIN	9

DOB	Beneficiary's DOB	8(MMDDYYYY)
MEDS SSI Paid Amt	This data element identifies the cumulative Federal SSI payment(s) actually paid to the recipient under Title XVI.	7 xxxx.xx
MEDS SSP Paid Amt	This data element identifies the cumulative State supplementation payment(s) actually paid to the recipient in the current SDX month.	7 xxxx.xx

iv. File Trailer

1. Annual SSI Cola_<record count>
 - a. <record count> - The number of records in the file's body section
- b. Process records within the inbound file and update the OPA records for persons who are Active on a CF program and have a high-dated OPA record.
 - i. Requirements to Process Record
 1. MEDS Record Types must match the nature of the systems record type. Example: If the existing record in the System is SSI Only, the MEDS SSI Paid Amt must not be blank and the MEDS SSP Paid Amt must be blank or 0.
 2. If the SSI and/or SSP Paid amounts from MEDS match the amounts currently captured in CalSAWS, do not update the existing high dated OPA record and do not add to the exceptions table.
Note: Only CF programs with a person for whom the data change is processed will be included in the Batch EDBC run
 3. If SSI Paid Amount is greater than \$841 or the SSP Paid Amount is greater than \$736, do not process and add to exceptions table.
 4. For any records that do not fall under the categories above, the record will be added to the exceptions table.
 - ii. Batch Process
 1. End-Date the existing OPA Record with an end-date since last batch run.
 2. Copy the data elements from the previous OPA record, making the following updates:
 - a. Set the Begin Date to the 1st of the run month.

- b. Set the End Date to "High Date" (Record will be open-ended)
 - c. If the existing OPA record is of either type: "SSI Only" or "SSP Only":
 - i. Set the 'Amount or Value of Services' (DOLLAR_AMT) to the MEDS SSI Paid Amt. A value of 0 is acceptable for 'MEDS SSI Paid Amt'.
 - d. If the existing OPA record is of type: "SSI/SSP":
 - i. Set the SSI Payment to the MEDS SSI Paid Amt.
 - ii. Set the SSP Payment to the MEDS SSP Paid Amt.
 - iii. Set the 'DEEM_INC_AMT' with the total sum of 'SSI_PMT' and 'SSP_PMT'.
 - e. Create a Verification record associated to the OPA record
 - i. Set the Verification Status to 'Verified'
 - ii. Set the Verification Request Date, Due Date, and Received Date to system date.
- c. Create a Journal Entry for cases in which the data change was processed for at least one person. The Journal will have the following details. One journal entry per case will be made:
- i. Short Description: SSA COLA Other Program Assistance Record Update
 - ii. Long Description: Other Program Assistance entries for <Person Names> have been automatically updated via Batch to reflect data received from MEDS for the <YEAR> CalFresh SSI/SSP COLA on <Process Date>.
 - iii. Type Code: Interfaces
 - iv. Filter Code: Interfaces

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

N/A

2.2.7 Interface Partner

MEDS

2.2.8 Failure Procedure/Operational Instructions

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

2.3 Create an Exceptions Table

2.3.1 Overview

CalSAWS will create an exceptions table to store all unprocessed records in the Inbound 'MEDS SSI/SSP COLA Response File' whose SSI/SSP information does not match the between MEDS and the System.

For example, the person has an 'SSI Only' OPA record in the System but the return file included an SSP Paid Amount. Also includes records that could not be automatically updated due to some other reason, such as the System has more than one ongoing type of OPA record, and the System is unable to determine which OPA record to update.

2.3.2 Description of Change

1. MEDS SSI/SSP COLA Exception Table Columns
 - a. Case Name
 - b. Case Number
 - c. County
 - d. Unit
 - e. Unit Name
 - f. Office Name
 - g. Worker
 - h. Benefit Month
 - i. CIN
 - j. Last Name
 - k. First Name
 - l. Middle Initial
 - m. MEDS SSI Paid Amount
 - n. MEDS SSP Paid Amount

2.3.3 Estimated Number of Records Impacted/Performance

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.4	The LRS shall match LRS Data from external interfaces to an applicant s or participant s case record and update the LRS database when appropriate.	This SCR is updating SSI only and SSI/SSP amount values in accordance to the values returned by MEDS.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-230841

One-time Batches for Postpartum Care
Extension

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tisha Mutreja
	Reviewed By	Renee Gustafson, Chad Quan, Appalaraju Indala, Suneetha Minnekanti, Geetha Ramalingam, Prashant Goel, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/30/2021	0.1	Original Draft	Tisha Mutreja
11/24/2021	1.1	Content Revision 1: Added Preg End Date/Due Date cutoff of Jan 31, 2022, for new 365-day PP calculation. Pregnancies prior qualify only for 60-day PP rules.	Tisha Mutreja
12/02/2021	1.2	Content Revision 1: Clarified 2.1.2.1.a and 2.1.2.2.ii.a is either: still preg, or not preg and meets PP.	Renee Gustafson
12/07/2021	1.3	Content Revision 1: Added reference to ACWDL 20-14	Renee Gustafson

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 One-Time Batch.....	5
	2.1.1 Overview	5
	2.1.2 Description of Changes	5
	2.1.3 Execution Frequency.....	7
	2.1.4 Key Scheduling Dependencies	8
	2.1.5 Counties Impacted	8
	2.1.6 Data Volume/Performance.....	8
3	Supporting Documents	8
4	Outreach.....	9
5	Requirements.....	10
	5.1 Project Requirements.....	10

1 OVERVIEW

This SCR will automate the extension of postpartum coverage from 60 to 365 days for Medi-Cal eligible pregnant/postpartum individuals.

1.1 Current Design

In Release 22.02, CalHEERS and CalSAWS were updated to extend postpartum coverage from 60 days to 365 days for eligible pregnant/postpartum individuals starting April 2022 with CA-212145 and CalHEERS Change Request CH-182474 per ACWDL 20-14, ACWDL 21-15 and MEDIL I 21-13.

CalSAWS has pregnant/postpartum individuals still receiving 60 days postpartum coverage instead of 365 days.

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

Journal Category: Eligibility

Journal Type: Batch EDBC

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

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

There is no Batch EDBC Sub-Type Code for Postpartum Care Extension one-time batch processing, so CalSAWS will automatically create the journal entry with a missing reason in the Long Description.

1.2 Requests

1. Automate the transition of eligible pregnant/postpartum individuals from 60 days postpartum coverage to 365 days.
2. Provide one-time County lists for County Eligibility Workers to follow-up on any pregnant/postpartum individual not processed after the one-time batch processing is complete.

1.3 Overview of Recommendations

1. Initiate a one-time process to send Eligibility Determination Requests (EDRs) to CalHEERS and run Batch EDBC for identified pregnant/postpartum individuals.
2. Generate one-time County lists to aid the counties to provide postpartum care extension to eligible pregnant/postpartum individuals from 60 days to 365 days after Batch EDBC completes.

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 One-Time Batch

2.1.1 Overview

Initiate a one-time process to send EDRs to CalHEERS and run Batch EDBC for identified pregnant/postpartum who are receiving 60 days postpartum coverage instead of 365 days. Individual's whose 60 days postpartum ended prior to April 1, 2022, do not qualify for the extended postpartum benefits. This means any individual whose pregnancy ended prior to January 31, 2022 (or Due Date if the End Date is not yet populated) will not be processed because their 60-day postpartum end date is March 31, 2022, or prior.

2.1.2 Description of Changes

1. Batch MAGI

a. Identify Medi-Cal programs that meet all the following conditions for one-time Batch MAGI processing:

i. The Medi-Cal program contains at least one Medi-Cal beneficiary that meets either of all the following conditions:

I. At least one individual is pregnant, and the Pregnancy Due Date is on or after January 31, 2022,

or

II. At least one individual is no longer pregnant, and the Pregnancy End Date is on or after January 31, 2022, ~~the postpartum end date is on or after April 01, 2022~~ and

The individual received Medi-Cal including CalWORKs, Foster Care, Refugee Cash Assistance, and SSI (does not include Dialysis, TB, TPN, or MSP) in the month of birth/pregnancy termination during any pregnancy month

Technical Note:

- Includes OPA records, if exists
- Includes retroactive months

ii. The program contains at least one MAGI Medi-Cal beneficiary.

iii. The CEW has not already processed MAGI and a corresponding Medi-Cal EDBC for April 2022 benefit month since the start date of the rules updated in CA-212145.

- iv. The Medi-Cal EDBC effective April 2022 is not an overridden, read-only, or manual EDBC.
- b. Send an EDR with "CO" Run Reason for the benefit month of April 2022 based on the Medi-Cal program assigned to the most recent EDR. If there is no prior EDR, then assign the Medi-Cal program for the EDR based on the Medi-Cal program assigned to the most recent DER.

2. Batch EDBC

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

- a. Identify MAGI Medi-Cal and mixed MAGI/Non-MAGI Medi-Cal programs that meet all the following conditions for one-time Batch EDBC processing:
 - i. The DER is received from Recommendation 1 and all the following conditions are true:
 - I. There are no 'Pending Eligible' MAGI Medi-Cal individuals on the DER.
 - II. No individual was discontinued or ineligible for MAGI Medi-Cal who was previously a recipient of MAGI Medi-Cal.
 - III. There are no individuals on Soft Pause on the DER.
 - ii. Medi-Cal EDBC has not been processed against the DER from Recommendation 1 or any subsequent DER for the April 2022 benefit month.
 - iii. The Medi-Cal EDBC effective April 2022 is not an overridden, read-only, or manual EDBC.
- b. Run Batch EDBC for April 2022 benefit month for the Medi-Cal program in Targeted Program mode with Type Code "Batch Eligibility" (BE). Include the Batch EDBC Sweep Code CT_942 from recommendation 2.1.2.3.

ii. Non-MAGI Medi-Cal

- a. Identify Non-MAGI Medi-Cal cases that meet all the following conditions for one-time Batch EDBC processing:
 - i. The program does not contain a MAGI Medi-Cal beneficiary.
 - ii. The program contains at least one Medi-Cal beneficiary where either of all the following are true:
 - I. At least one individual is pregnant, and the Pregnancy Due Date is on or after January 31, 2022,
 - or
 - II. At least one individual is no longer pregnant, and the Pregnancy End Date is on or after January 31,

2022, the postpartum end date is on or after April 01, 2022

and

The individual received Medi-Cal including CalWORKs, Foster Care, Refugee Cash Assistance, and SSI (does not include Dialysis, TB, TPN, or MSP) in the month of birth/pregnancy termination during any pregnancy month

Technical Note:

- Includes OPA records, if exists
- Includes retroactive months

- iii. Medi-Cal EDBC has not been processed for April 2022 benefit month since the start date of the rules updated in CA-212145.
 - iv. The Medi-Cal EDBC effective April 2022 is not an overridden, read-only, or Manual EDBC.
- b. Run Batch EDBC for April 2022 benefit month only for the Medi-Cal program in Targeted Program mode with Type Code 'BE' (Batch Eligibility). Include the Batch EDBC Sweep Code CT_942 from recommendation 2.1.2.3.

3. Journal Entry

Add Batch EDBC Eligibility Sub-Type Sweep Code (CT_942) for "Postpartum Care Extension one-time batch" to the code table.

Code Table	Description
New/Update	New
Category ID	942
Short Decode	Postpartum Care Extension one-time batch
Long Decode	Postpartum Care Extension one-time batch

This will allow CalSAWS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for 04/2022.

Long Description: Batch EDBC ran for 04/2022. Batch EDBC processed for the Medi-Cal program for the following reason: Postpartum Care Extension one-time batch.

2.1.3 Execution Frequency

This is a one-time batch.

2.1.4 Key Scheduling Dependencies

- Friday 02/25/2022
Batch operations team will run the Data Change Request (DCR) for Batch MAGI before regularly scheduled batch. Then Friday's regularly scheduled batch will send the EDRs during Batch MAGI.
- Saturday 02/26/2022
Batch operations will run the DCR for Batch EDBC before regularly scheduled batch processing. Then Saturday's regularly scheduled batch will process the cases through Batch EDBC before the nightly batch is run.




2.1.5 Counties Impacted

All counties

2.1.6 Data Volume/Performance

Approximately 75K individuals will be processed with this change. At least one Notice of Action is expected for each of the cases processed in Batch EDBC.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	ACWDL 21-15	 21-15.pdf
2	Eligibility	MEDIL I21-13	 MEDIL I21-13.pdf
3	Eligibility	ACWDL 20-14	 ACWDL 20-14.pdf

4 OUTREACH

Generate one-time County lists to aid the counties to provide the postpartum care extension to eligible pregnant/postpartum individuals from 60 days to 365 days after Batch EDBC completes.

The lists will display the below columns:

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

List will be posted on February 28, 2022, at the following location:
CalACES Web Portal>System Changes>SCR and SIR Lists>2022>CA-230841

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

Generate a list of cases where the Medi-Cal program was discontinued due to the one-time Batch EDBC processing.

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

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

Generate a list of cases where an individual was discontinued from the Medi-Cal program due to the one-time Batch EDBC processing.

Additional Columns:

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

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

3. **List Name:** Pregnant/Postpartum individual not processed

Generate a list of cases where a pregnant/postpartum individual remains in restricted, or SOC, or premium Medi-Cal without aid code 76 eligibility after the one-time Batch EDBC processing. Include a column for the reason they did not transition.

Additional Columns:

- CIN
- Aid Code
- DOB
- Reason*

***Known reasons:**

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

County Action: County workers should review the case for the pregnant/postpartum individual on the list and determine why they were not processed in the one-time batch. Then, take the appropriate action.

5 REQUIREMENTS

5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.2	The LRS shall determine an applicant's/participant's eligibility for a program or programs.	CalSAWS will display the information received via eHIT on MAGI Determination Detail Page and update rules to extend postpartum coverage from 60 days to 365 days.