

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

SCR CA-215922 DDID 2315 FDS GA GR Phase 4 GA GR  
Immediate Need Changes

CalSAWS	DOCUMENT APPROVAL HISTORY	
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## 1 OVERVIEW

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This SCR will implement the financial functionality for the GA/GR Automated EDBC/CC Counties Solution in CalSAWS

### 1.1 Current Design

The GA/GR Automated EDBC/CC Counties 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. Immediate Need

### 1.4 Assumptions

1. The existing Los Angeles County rules will remain unchanged.
2. This SCR CA-215922 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. 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.

5. Alerts will be handled separately outside the Rules design in a separate SCR CA-220119.
6. 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.
7. All Data collection used in EDBC determination is effective for the benefit month.
8. All calculation for computed values will be detailed in the Visio diagram.
9. '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.
10. Logic that checks or creates Sanctions cannot be tested until SCR CA-227328 is implemented.
11. Manual EDBC cannot be run with these changes.
12. EDBC summary page layout will follow current Los Angeles County Immediate Need EDBC summary.

## 2 RECOMMENDATIONS

### 2.1 Program Detail

#### 2.1.1 Overview

The "Program Detail" page is used to add new programs to an existing case.

#### 2.1.2 Program Detail Mockup

The screenshot shows a form titled "Program Detail". Below the title, there is a legend: "\* - Indicates required fields". The form contains a label "Select Program: \*" followed by a dropdown menu with "GA/GR Immediate Need" selected and a "Go" button.

Figure 2.1.1.1 – Program Detail

#### GA/GR Immediate Need Detail

The screenshot shows a form titled "GA/GR Immediate Need Detail". Below the title, there is a legend: "\* - Indicates required fields". A validation error message is displayed: "• [Select Program](#) - This program requires a Pending GA/GR Automated Solution program." Below the message, there is a label "Select Program: \*" followed by a dropdown menu with "GA/GR Immediate Need" selected and a "Go" button.

Figure 2.1.1.2 – Program Detail (Validation Error Message)

## GA/GR Immediate Need Detail

\*- Indicates required fields

- **Select Program** - This program is turned off by your county administrator.

Select Program: \*

GA/GR Immediate Need

Figure 2.1.1.3 – Program Detail (Validation Error Message)

### 2.1.3 Description of Changes

1. Add the "GA/GR Immediate Need" program to the Select Program dropdown. A list of reference table values for the new program can be found in Appendix item A
2. Update the page to trigger the validation, "This program requires a Pending GA/GR Automated Solution program." upon clicking 'Go' if the case does not have a GA/GR Automated Solution program. ]
3. [ Update the page to trigger the validation, "This program is turned off by your county administrator" upon clicking 'Go' if the rule 'Immediate need applies.' is 'N' for that county.

Commented [PE1]: Add condition for the other hard validation

### 2.1.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** New Program

### 2.1.5 Security Updates

No security updates.

### 2.1.6 Page Mapping

Add page mappings for the new page title.

### 2.1.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

## 2.2 Case Summary

### 2.2.1 Overview

The "Case Summary" page displays a short amount of information for all programs and case members based on the view month. This page will be expanded to also display program information for the New GA/GR Immediate Need program.

### 2.2.2 Case Summary Mockup

GA/GR Immediate Need				
<b>Worker:</b>		<b>Primary Applicant/Recipient:</b>	math, sacramento	
<b>Worker ID:</b>		<b>Language:</b>	29M	
<b>Program Status:</b>	Pending	<b>Phone Number:</b>	English	
<b>FBU:</b>	1	<b>Email:</b>		
		<b>Application Date:</b>	12/01/2021	
<b>Name</b>	<b>Role</b>	<b>Role Reason</b>	<b>Status</b>	<b>Status Reason</b>
<a href="#">math_sacramento 29M</a>	MEM		Pending	
				<a href="#">View Details</a>

Figure 2.2.2.1 – Case Summary (GA/GR Immediate Need)

### 2.2.3 Description of Changes

1. Worker: The name of the Staff assigned to the position that is assigned to the program.
2. Worker ID: The Identifier for the position. This field will be a hyperlink to the Worker Detail page for the selected position. When no staff is assigned to the position, this field will be blank.
3. Program Status: The status of the program on the given view Date.
4. FBU: The Family Budget Unit for the program.
5. Primary Applicant/Recipient: The primary applicant of the program on the given view date.
6. Language: The spoken Language of the primary Applicant.
7. Phone Number: The main phone number for the primary Applicant.
8. Email: The email of the primary applicant.
9. Application Date: The application date - the same date as the Sign Date if the application is submitted during regular business hours or the first business day if the application is submitted after regular business hours.

**Commented [JC2]:** This is for CW, does not apply to GR, need to be renamed

**Commented [JC3R2]:** Suggested: Assisted unit size

**Commented [SVM4R2]:** Currently I didn't find anywhere in the code using "Assisted unit size" for the display purpose. [Jennifer Chen](#) Can you please provide any program reference that displays as "Assisted unit size"?

10. Name: This field will list the names of the participant on the program. The name will be a hyperlink to the Program Person History page for the program person selected if the user has the 'PersonHistoryView' right associated to their profile.
11. Role: The Role code of the program person at the given view date.
12. Role Reason: The Reason the role was assigned at the given view date.
13. Status: The status of the participant in the program at the given view date.
14. Status Reason: The status reason of the participant's program status at the given view date.
15. View Details: This button will navigate to the GA/GR Immediate Need Detail page for the associated program.

#### 2.2.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

#### 2.2.5 Security Updates

No security updates.

#### 2.2.6 Page Mapping

Add page mappings for the new page title.

#### 2.2.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

### 2.3 GA/GR Immediate Need Detail

#### 2.3.1 Overview

The "GA/GR Immediate Need Detail" page displays the program information for a given month.

### 2.3.2 GA/GR Immediate Need Detail Mockup

#### GA/GR Immediate Need Detail

\*- Indicates required fields

View History
View GA/GR Immediate Need Summary
Issuance Method
Edit
Close

Date: \*  
01/07/2022

##### Program Information

<b>Status: *</b> Pending	<b>Status Reason:</b>	<b>Source: *</b> Other
<b>Application Date: *</b> <a href="#">01/01/2022</a>	<b>Request Date: *</b> 01/07/2022	

##### Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees
John,Helson 29M	Primary Applicant/Recipient	01/01/2022		
John,Helson 29M	Payee	01/01/2022		

##### Program Persons

Name	Role	Role Reason	Status	Status Reason
<a href="#">John,Helson 29M</a>	MEM		Pending	
<a href="#">John,Nelson 29M</a>	MEM		Pending	

##### Secondary Assignment

Worker

View History
View Immediate Need Summary
Issuance Method
Edit
Close

**Figure 2.3.2.1 – GA/GR Immediate Need Detail (View Mode)**

### GA/GR Immediate Need Detail

\*- Indicates required fields

Date: \*

#### Program Information

Status: *	Status Reason:	Source: *
Pending		Other
Application Date: *	Request Date: *	
<input type="text" value="12/01/2021"/> <input type="button" value="Edit"/>	<input type="text" value="12/01/2021"/> <input type="button" value="View Date"/>	

#### Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees
math, sacramento 29M	Primary Applicant/Recipient	12/01/2021		

#### Program Persons

Name	Role	Role Reason	Status	Status Reason
<a href="#">math, sacramento 29M</a>	MEM		Pending	

#### Secondary Assignment

Worker

Figure 2.3.2.2 – GA/GR Immediate Need Detail (Edit Mode)

### 2.3.3 Description of Changes

1. View History button: This button will navigate the worker to the "GA/GR Immediate Need History" page.
2. View GA/GR Immediate Need Summary: this button will navigate to "GA/GR Immediate Need Summary Page". This button is available on Create and Edit Mode. This button will only display when the user has the "GAGRImmediateNeedSummaryView" right.
3. Issuance Method: This button will appear in view mode. The button will display only if there is a pyee as administrative role and the user has 'IssuanceMethodDetailView' right.

4. Edit button: This button will refresh the page in 'Edit' mode. This button is only available in 'View' mode.
5. Close button: This button will navigate the worker to the Case Summary page. This button is only available in 'View' mode.
6. Save and Return button: Saves the changes that have been made to the "GA/GR Immediate Need" page and will navigate the worker to the Case Summary page. This button is only available in 'Edit' mode.
7. Cancel button: Returns the worker to the Case Summary page. This button is only available in 'Edit' mode.
8. Date: The view date of the program information. This is a required field. By default, display first day of the come-up month.
9. View Date button: Pressing this button will refresh the page with the program information as of the Date. This button is only available in 'Create'/'Edit' mode.
10. Program Information Section
  - a. Status: Status of the program as of the Date. This field is required.
  - b. Status Reason: Reason for the value displayed in the Status column.
  - c. Source: Source of the Application that is tied to the Status as of the Date. This field is required.
  - d. Application Date: The date the county was informed about the Customer's request for aid.
  - e. Requested Date: The date when a request is done.
11. Administrative Roles section
  - a. Name: Name of the person assigned to the Administrative Roles as of the Date.
  - b. Administrative Role: Administrative Role that is assigned to the person in the Name column.
  - c. Begin Date: Date that the person in the Name column was assigned to the Administrative Role.
  - d. End Date: Date that the person in the Name column ended the Administrative Role.
  - e. Use Between Payees: The word "and", "or", "for" to be used between a program payee and the secondary payee on a warrant.
  - f. Edit button: Navigate the worker to the Administrative Role Detail page in 'Edit' mode. This button is only available in 'Create'/'Edit' mode.

- g. Add button - Navigate the worker to the Administrative Role Detail page in 'Create' mode. This button is only available in 'Create'/'Edit' mode.

#### 12. Program Persons section

- a. Name: Name of the Program Person. This field will be a hyperlink that navigates the user to the GA/GR Immediate Need Person Detail page in view mode.
- b. Role: Role of the Person as of the Date.
- c. Role Reason: Reason for the value displayed in the Role column.
- d. Status: Status of the Person as of the Date.
- e. Status Reason: Reason for the value displayed in the Status column.

#### 13. Secondary Assignment section

- a. Worker: Name of the Worker that is assigned as a secondary assignment. Clicking on the Worker will navigate the worker to the Worker Detail page.
- b. Select button: Pressing button will navigate the worker to the Select Worker page to find a worker for the secondary assignment. This button is only available in 'Create'/'Edit' mode.
- c. Remove button: Pressing the button will Remove the secondary assignment. This button is only available in 'Create'/'Edit' mode.

### 2.3.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

### 2.3.5 Security Updates

No security updates.

### 2.3.6 Page Mapping

Add page mappings for the new page title.

### 2.3.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

## 2.4 GA/GR Immediate Need Summary

### 2.4.1 Overview

The "GA/GR Immediate Need Summary" page is used to record the Immediate needs required. The page has a set of questions and responses are used in the EDBC rules.

### 2.4.2 GA/GR Immediate Need Summary Mockup

The screenshot shows a web form titled "GA/GR Immediate Need Summary". At the top right, there are two buttons: "Save and Return" and "Cancel". Below the title, a legend indicates that an asterisk (\*) denotes required fields. The form contains three main sections: 1. "Is the Household Eligible for Immediate Need: \*" with a dropdown menu set to "Yes". 2. "Immediate Need Amount to be Issued: \*" with a text input field containing "\$200". 3. "Aid Code: \*" with a dropdown menu set to "90 - GA General Relief Independent Living-CNTY". At the bottom right, there are two buttons: "Save and Return" and "Cancel".

Figure 2.4.2.1 – GA/GR Immediate Need Summary (Create or Edit Mode)

This screenshot is identical to the previous one, showing the "GA/GR Immediate Need Summary" form. The only difference is that the dropdown menu for "Is the Household Eligible for Immediate Need: \*" is now set to "No".

Figure 2.4.2.2 – GA/GR Immediate Need Summary (Create or Edit Mode)

### 2.4.3 Description of Changes

1. Add a new Yes/No dropdown field labeled, "Is the Household Eligible for Immediate Need:". This field will default to "Yes". This field will only be editable in create and edit modes.

2. Add a new input text field "Immediate Need Amount to be Issued:". The field will have the Money Constraint. The field will only be visible when "Is the Household Eligible for Immediate Need:" is "Yes".
3. Add the new dropdown field labeled, "Aid Code". The field will only be visible when "Is the Household Eligible for Immediate Need:" is "Yes". The dropdown contains below GA/GR Aid Codes (Refer CT184 and 'Third Program' is 'GR') :
  - a. 90 - GA General Relief Independent Living-CNTY
  - b. 91 - GA General Relief-B/C Non Independent Living-CNTY
  - c. 92 - GA General Relief-R/B Non Independent Living-CNTY
  - d. 93 - GA General Relief-MFG Child-CNTY
  - e. 94 - GRI Emergency Assistance
  - f. 95 - Unemployable, Independent Living, Single
  - g. 96 - Unemployable, Facility, Family Group
  - h. 97 - Unemployable, Facility, Single
  - i. 98 - Aid In Kind
  - j. 9A - SF AGEX
  - k. 9G - Return to Residence
  - l. 9H - Healthy Families Child
  - m. 9I - SF CALM
  - n. 9J - SF PAES
  - o. 9B - Indigent Burial
  - p. RE - SF Retention
4. Save and Return button: Saves the changes that have been made to the "GA/GR Immediate Need Summary" page and will navigate the "GA/GR Immediate Need Detail" page. This button is available in 'Create' or 'Edit' mode.
5. Cancel button: Returns to "GA/GR Immediate Need Detail" page. This button is available in 'Create' or 'Edit' mode.
6. Edit – This button will take the user to the "GA/GR Immediate Need Summary" page in Edit mode for the associated record. This button will only display when the user has the "GAGRImmediateNeedSummaryEdit" right. This button will only display in View Mode.
7. Close – This button will take the user to the "GA/GR Immediate Need Detail" page. This button will only display in View mode.

#### 2.4.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

#### 2.4.5 Security Updates

##### Security Rights

Security Right	Right Description	Right to Group Mapping
GAGRImmediateNeedSummaryView	GAGR Immediate Need Summary View	GAGR Immediate Need Summary View,  GAGR Immediate Need Summary Edit
GAGRImmediateNeedSummaryEdit	GAGR Immediate Need Summary Edit	GAGR Immediate Need Summary Edit

##### Security Groups

Security Group	Group Description	Group to Role Mapping
GAGR Immediate Need Summary View	This group has the capability to access the GA/GR Immediate Need Summary page to view the record.	See the Security Matrix for the group to role associations
GAGR Immediate Need Summary Edit	This group has the capability to access the GA/GR Immediate Need Summary page to view and edit the information.	See the Security Matrix for the group to role associations

## 2.4.6 Page Mapping

Add page mappings for the new page title.

## 2.4.7 Page Usage/Data Volume Impacts

No page usage or data volume impacts.

## 2.5 Immediate Need - Eligibility Logic

### 2.5.1 Overview of Changes

1. The GA/GR Immediate Need program is created through the Application Registration process. A validation will prevent GA/GR Immediate Need program from being added unless a GA/GR Automated EDBC/CC Counties Solution is also being added or already exists on the case.
2. If the applicant requests GA/GR Immediate Need after the GA/GR Automated EDBC/CC Counties Solution added to the case, then the User will add the GA/GR Immediate Need program separately to the case. A validation will prevent the User from adding the GA/GR Immediate Need program unless there is a Pending GA/GR Automated EDBC/CC Counties Solution program in the current case.
3. The Beginning Date of Aid (BDA) for GA/GR Immediate Need program should be on or after the BDA for GA/GR Automated EDBC/CC Counties Solution.
4. If GA/GR Immediate Need program is applied, then all program persons from GA/GR Automated EDBC/CC Counties Solution must be part of the GA/GR Immediate Need program.
5. GA/GR Immediate Need program cannot be created without corresponding GA/GR Automated EDBC/CC Counties Solution in the same case.
6. To run EDBC for GA/GR Immediate Need program, GA/GR Automated EDBC/CC Counties Solution should be in pending status. The GA/GR Immediate Need program will not be available in Run EDBC program list to run EDBC once the GA/GR Automated EDBC/CC Counties Solution is active. However, the EDBC for GA/GR Immediate Need program can be re-run until GA/GR Automated EDBC/CC Counties Solution is in pending status.
7. The eligibility for GA/GR Immediate Need program is **not** dependent on apparent eligibility of GA/GR Automated EDBC/CC Counties Solution.
8. The GA/GR Immediate Need Program will have the Aid Code set by the worker and it can be different from Aid Code for GA/GR Automated EDBC/CC Counties Solution.

9. The GA/GR Immediate Need Program will always be one-month program. The program will pass and the benefit will be issued only for the BDA month and the program will be discontinued in the month after the BDA month.
10. When Pending GA/GR Immediate Need Program exists, then EDBC for GA/GR Immediate Need program should be run activated prior to running EDBC for GA/GR Automated EDBC/CC Counties Solution.

#### 2.5.1.1 Treatment of Immediate Need Benefit Amount in GAGR program

1. The following new admin rules are added for GA/GR Immediate Need program.
  - Immediate need applies.
  - Deduct Immediate Need Amount from GA/GR Grant.
  - Issue Full GA/GR Grant in Addition to Immediate Need Amount.
  - Issue Only Immediate Need Amount and Zero out GA/GR Grant.
2. When the Rule 'Immediate need applies' is active for any county then **only** one of the following rules should be active for that county.
  - Deduct Immediate Need Amount from GA/GR Grant.
  - Issue Only Immediate Need Amount and Zero out GA/GR Grant.
  - Issue Full GA/GR Grant in Addition to Immediate Need Amount.
3. When the Rule 'Immediate need applies' is active for any county and none of the following admin rules are active
  - Deduct Immediate Need Amount from GA/GR Grant.
  - Issue Only Immediate Need Amount and Zero out GA/GR Grant.
  - Issue Full GA/GR Grant in Addition to Immediate Need Amount.
 then set the rule 'Deduct Immediate Need Amount from GA/GR Grant' to active for that county.
4. When the Rule 'Immediate need applies' is active for any county and the rule 'Deduct Immediate Need Amount from GA/GR Grant' is active then set the following rules to not active.
  - Issue Only Immediate Need Amount and Zero out GA/GR Grant.
  - Issue Full GA/GR Grant in Addition to Immediate Need Amount.

5. When the Rule 'Immediate need applies' is active for any county and the rule 'Issue Only Immediate Need Amount and Zero out GA/GR Grant' is active then set the following rule is not active.
  - Issue Full GA/GR Grant in Addition to Immediate Need Amount.
6. When the rule 'Deduct Immediate Need Amount from GA/GR Grant' is active then deduct the GA/GR Immediate Need benefit amount from GAGR potential Benefit amount. The benefit amount issued for GAGR Immediate Need program is shown as 'Previous Potential Benefit' in Aid Payment Section. If the GAGR Immediate Need benefit amount is greater than GAGR potential Benefit amount, then it will be treated as over payment as per the current CalSAWS functionality.
7. When the rule 'Issue Only Immediate Need Amount and Zero out GA/GR Grant' is active then GA/GR Automated EDBC/CC Counties Solution will pass with Zero Benefit for BDA month.
8. When the rule 'Issue Full GA/GR Grant in Addition to Immediate Need Amount' is active then GA/GR Automated EDBC/CC Counties Solution will pass with the actual allowed benefit amount for BDA month.

## 2.6 Run EDBC Page, Negative Action Page

### 2.6.1 Overview

The run EDBC page and Negative Action Page is used to process EDBC for GA/GR Immediate Need Program. This program will always be a one month EDBC run for the BDA month only.

### 2.6.2 Description of Changes

1. Soft validations on run EDBC page:
  - a. Name/Identity verification is the only required verification for GA/GR Immediate Need program which is treated as follows:
    - i. When name/identity verification is 'Pending' during run EDBC the following validation message will be given  
Message:  
The following verification(s) have not been received:  
    {Person Name}  
    Name/Identity  
Trigger: Name/Identity verification is 'Pending'

- ii. When Name/Identity verification is 'Refused' then the following validation message will be given
    - Message:  
The following verification(s) have been refused.  
    {Person Name}  
        Name/Identity
    - Trigger: Name/Identity verification is 'Refused'
2. Hard validations that stop the worker from processing the EDBC for GA/GR Immediate Need program:
- a. Add a new hard validation on Run EDBC and Negative Action Detail Page when EDBC is being run for any month but the BDA month. This validation will be thrown upon selecting the begin or end month on the Run EDBC page or Benefit month on Negative action page.
    - Message:  
Immediate Need program is a one-month EDBC run with BDA as begin month.
    - Trigger: when any of the following conditions are satisfied
      - i. EDBC begin month is not same as BDA month on Run EDBC Page.
      - ii. Benefit Month is not same as BDA month on Negative Action Detail page.
  - b. Add a new hard validation on Run EDBC page when clicked on Run EDBC in the left navigation:
    - Message:  
GA/GR Immediate Need Program cannot be Pending to run EDBC for General Assistance/General Relief (GR) program. Run EDBC and Activate the GA/GR Immediate Need Program.
    - Trigger: when the following conditions are satisfied
      - i. When General Assistance/General Relief (GR) program is in pending status
      - ii. When GA/GR Immediate Need program is in pending status
      - iii. When the BDA for both programs is in the benefit month
      - iv. Worker is running EDBC for General Assistance/General Relief (GR) program only
3. Add a new validation on GA/GR Immediate Need EDBC Summary page when the Authorized amount is greater than issuance threshold amount while accepting the GA/GR Immediate Need EDBC.
- Message:  
The authorization amount of your issuance exceeds the county limit. Please correct the EDBC authorization amount or see your supervisor for assistance.

4. Add the existing hard validation on Run EDBC, Negative Action Detail pages that prevents the user from running EDBC for GA/GR Immediate Need Program when there is no worker assigned to the program for the benefit month.
5. Add the existing hard validation on Run EDBC, Negative Action Detail pages that prevents the user from running EDBC for GA/GR Immediate Need Program when administrative roles (Primary applicant or payee) information is missing for the program for the benefit month.
6. Timely notice exception does not apply to Immediate Need program.
7. GA/GR Immediate Need program is issued always for BDA month and the program and program persons are discontinued the month after BDA month with the reason "One Month Immediate Need".

#### Program Detail History

Program Detail History				
App #	Status	Status Reason	Begin Month	End Month
1	Discontinued	One Month Immediate Need	01/2022	
1	Active		12/2021	12/2021

Figure 2.6.2.1 - Showing Program Detail History in GA/GR Immediate Need History page.

#### Event History

Event Date	Event Type	Reason	Effective Date	Updated By
12/03/2021	Discontinued	One Month Immediate Need	01/01/2022	<a href="#">513396</a>
12/03/2021	Approved		12/01/2021	<a href="#">513396</a>
12/03/2021	Pended		12/01/2021	<a href="#">520315</a>

Figure 2.6.2.2 - Showing Event history in Program History Detail page.

#### Program Persons Section

Program Persons				
Name	Role	Role Reason	Status	Status Reason
<a href="#">IN First Name</a>	MEM		Discontinued	One Month Immediate Need
<a href="#">IN Second Name</a>	MEM		Discontinued	One Month Immediate Need

**Figure 2.6.2.3 - Showing Program Persons section in GA/GR Immediate Need Detail page.**

8. The following status reasons are used as Negative Action Reasons for GA/GR Immediate Need program in Negative Action Detail page to run Negative Action EDBC:
  - a. Application Opened in Error
  - b. Written Withdrawal
  - c. Verbal Withdrawal

**2.6.3 Programs Impacted**

GA/GR Immediate Need

**2.6.4 Performance Impacts**

None

**2.7 GA/GR Immediate Need EDBC Summary Page**

**2.7.1 Overview**

A new GA/GR Immediate Need EDBC summary page will be added to the system which will have the following Sections:

- a. EDBC Information
- b. Program Configuration
- c. Reporting Configuration
- d. Aid Payment

**2.7.2 GA/GR Immediate Need EDBC summary Mockup**

### GA/GR Immediate Need EDBC Summary

\*- Indicates required fields Close

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2021	12/2021	12/03/2021	Accepted - Saved	<a href="#">Worker Name</a>

**EDBC Information**

Type: Regular  
 Recalculation: No

**Program Configuration**

**System Determination**  
 EDBC Source: Online EDBC Rules  
 Aid Code: XX - Aid Code  
 Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
<a href="#">IN First Name</a>	05/29/2020	MEM		Active	
<a href="#">IN Second Name</a>	04/15/1997	MEM		Active	

**Reporting Configuration**

Name	Role	Adult/Child	Claiming	Deprivation
IN First Name	MEM	Adult	Non Federal	
IN Second Name	MEM	Adult	Non Federal	

Figure 2.7.2.1 GA/GR Immediate Need EDBC summary - Active

IN Payment	Regular	
IN Aid Payment	\$	200.00
IN Previous Potential Benefit	-	40.00
IN Potential Benefit	=	160.00
Overridden Aid Payment	\$	
Authorized Amount	\$	160.00
<b>Pay Code:</b> <input type="text"/>		
<b>Delivery Method:</b> *	<b>Immediacy Indicator:</b> *	<b>Issuance Method:</b>
<input type="text" value="Mail"/>	<input type="text" value="Routine"/>	EBT
<input type="button" value="Change Reason"/>		<input type="button" value="Accept"/> <input type="button" value="Cancel"/>

Figure 2.7.2.2 GA/GR Immediate Need EDBC summary – Aid Payment section

### 2.7.3 Page Location

- Global: Eligibility
- Local: Customer Information
- Task: EDBC Results

### 2.7.4 Security Updates

#### Security Rights

Security Right	Right Description	Right to Group Mapping

#### Security Groups

Security Group	Group Description	Group to Role Mapping

### 2.7.5 Page Mapping

Add page mapping for the new fields

### 2.7.6 Page Usage/Data Volume Impacts

No expected impacts to page usage or data volume impacts

## 2.8 GA/GR Immediate Need Program Functionality

### 2.8.1 County Admin Detail – Immediate Need Functionality

#### 2.8.1.1 Overview

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

#### 2.8.1.2 Description of Changes

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Immediate need applies.	Y	N	N	Y	Y	Y	N	N	Y	N	N	Y	Y	N	N	N	N	N

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX401C001	Immediate need applies to	Immediate need applies.

Below are the new rules introduced in CalSAWS for GA/GR Immediate Need Program.

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
Deduct Immediate Need Amount from GA/GR Grant.	N	N	N	Y	Y	Y	N	N	Y	N	N	Y	N	N	N	N	N	N
Issue Full GA/GR Grant in Addition to Immediate Need Amount.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Issue Only Immediate Need Amount and Zero out GA/GR Grant.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

The following CalWIN rules has been removed for this functionality.

CalWIN Number	CalWIN Description	Reason
EDX401C002	Immediate need for Shelter or Utilities	based on the agreed design, the following rules are no longer needed
EDX401C003	Individual is homeless	based on the agreed design, the following rules are no longer needed
EDX401C004	Individual is an applicant and requesting for EA	based on the agreed design, the following rules are no longer needed

EDX401C005	Immediate need greater than 25% of GA/GR grant amount	based on the agreed design, the following rules are no longer needed
EDX401C006	Client is an applicant and client has a history of non-cooperation	This rule is not used in any of the copybook.
EDX401C007	Client's valid need been identified	based on the agreed design, the following rules are no longer needed
EDX401C008	Individual is an applicant and requesting for EA	This rule is not used in any of the copybook.
EDX401C009	Client has a history of non-cooperation	based on the agreed design, the following rules are no longer needed

## 2.8.2 EDBC Changes

### 2.8.2.1 Overview

This section will provide the Eligibility Rules flow for Immediate Need that can be filtered for each CalWIN County.

### 2.8.2.2 Description of Change

#### **Immediate Need 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.

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 program status reason CT73 'Not Eligible' will be set as a program failure reason when any of the following conditions are met:
  - a. The rule 'Immediate need applies.' is not active.
  - b. The following is not true: 'Is the Household Eligible for Immediate Need' is true ('Is the Household Eligible for Immediate Need' in GA/GR Immediate Need Summary Page).

Category	Short Description
73	Not Eligible

2. The new display-only status reason CT73 'Imm Need Approved' will be set as a display-only reason when all the following conditions are met:
  - a. The rule 'Immediate need applies.' is active.
  - b. 'Is the Household Eligible for Immediate Need' is true ('Is the Household Eligible for Immediate Need' in GA/GR Immediate Need Summary Page).

Category	Short Description
73	Imm Need Approved

**2.9 Issuance Threshold updates**

**2.9.1 Overview**

Issuance thresholds are established to determine the amount of benefits or service payments that can be approved by an Eligibility worker without requiring a supervisor override. A Data Change Request (DCR) will insert the initial GA/GR Immediate Need Issuance Threshold values. Once loaded into the CalSAWS system, the Issuance Threshold values will be maintained by the county via the County Benefit Issuance Threshold list.

**2.9.2 Description of Changes**

Create a Codes Table Change Request (CTCR) to:

- a) Insert the GA/GR Automated EDBC/CC Counties solution program Issuance Threshold values for the GA/GR Immediate Need program into the county\_fiscal\_auth program table.

- b) Update the system to allow the GA/GR Immediate Needs program Issuance Thresholds to be modified by the counties on the County Benefit Issuance Thresholds page.

## 2.10 Administrative Role Detail page

### 2.10.1 Overview

The Administrative Role Detail page for the GA/GR Immediate Need program allows the user to view, edit and add Administrative.

### 2.10.2 Description of Changes

Create a CTCR to enable the following Administrative Roles (CT255) for GA/GR Immediate Need program:

- Primary Applicant/Recipient
- Payee
- Secondary Payee

### 2.10.3 Page Location

- **Global:** Case
- **Local:** Case Summary
- **Task:** Program Detail

### 2.10.4 Security Updates

No Change.

### 2.10.5 Page Mapping

No Change

### 2.10.6 Page Usage/Data Volume Impacts

No Change.

## 2.11 Issuance Method Detail page

### 2.11.1 Overview

The Issuance Method Detail page allows the user to choose a method of payment for the issuance which can be EBT, Warrant or Direct Deposit. This update is to allow EBT, Direct Deposit and Warrant to be used by the GA/GR Immediate Need program

### 2.11.2 Description of Changes

Update the Issuance Method Detail page to only allow EBT, Direct Deposit and Warrant as selectable issuance methods for the GA/GR Immediate Need program.

Create a CTCR to:

- a. Create an entry in the Issuance Method category (Category 112) for the GA/GR Immediate Need program
- b. Enable the EBT, Direct Deposit, and Warrant Issuance Methods to be available for the GA/GR Immediate Need program
- c. Create an entry in the Issuance Method Status Reason category (Category 10110) for the GA/GR Immediate Need program.
- d. Enable the following Issuance Method Status Reasons for the GA/GR Immediate Need program:
  - Bank Account Closed
  - Client Has Limited Access
  - Client in Public Housing
  - Client is Aged
  - Client is Incapacitated
  - Client Lives Out of State
  - Client Lives Outside County
  - Direct Deposit - Stop (Customer Request)
  - Direct Deposit - Stop (Bank Account Closed)
  - Direct Deposit - Start
  - Eviction Threat/Lndlord Hrdshp
  - EBT Host-to-Host Failure
  - EBT Host-to-Host Successful
  - Client Request
  - Administrative Decision
  - CAPi Customer
  - Payee Change

Note: Issuance Method Status Reasons are used when changing issuance method.

### 2.11.3 Page Location

- **Global:** Fiscal

- **Local:** Case Summary
- **Task:** View Details (Under Program Block)

#### **2.11.4 Security Updates**

No Change.

#### **2.11.5 Page Mapping**

No Change

#### **2.11.6 Page Usage/Data Volume Impacts**

No Change

### **2.12 Update Previous Potential Benefit Logic**

#### **2.12.1 Overview**

The Previous Potential Benefit logic calculates the total amount of benefits previously issued for a given Program and Benefit Month.

#### **2.12.2 Description of Changes**

Update the logic used to calculate the Previous Potential Benefits issued for the GA/GR Immediate Need program.

### **2.13 Update Overpayment Adjustment Logic**

#### **2.13.1 Overview**

The EDBC Overpayment Adjustment Amount represents a benefit reduction due to any open recovery accounts. The System will not suggest benefit reductions towards a recovery account associated to GA/GR Immediate Need Program. Those Recovery Accounts will be marked as Terminated/Suspended on the night they are created.

#### **2.13.2 Description of Changes**

Add logic to set the EDBC Overpayment Adjustment Amount to \$0 for the GA/GR Immediate Need Program.

## 2.14 Issuance Detail Page

### 2.14.1 Overview

The Issuance Detail page allows the user to view and edit benefit issuance information. Additionally, for warrant and EBT issuances in "Ready for Issuance" status, the user can issue the benefits from the Issuance Detail page.

### 2.14.2 Description for Changes

Update the logic on the Issuance Detail page to process issuances for the GA/GR Immediate Need program as follows:

- a. Update the Issuance Detail page to make the Pay Code field required.
- b. Update the page to send an EBT Benefit Type of "GA" via host to host when rushing a "GR" issuance.
- c. Update the Issuance Detail page to assign the 'GA' EBT Benefit Type for GA/GR Immediate Need program lost or stolen benefits when rushing benefits.

### 2.14.3 Page Location

- **Global: Case Info**
- **Local: Case Information**
- **Task: Issuance History > Issuance Detail**

### 2.14.4 Security Update

N/A

### 2.14.5 Page Mapping

N/A

### 2.14.6 Page Usage/Data Volume Impacts

N/A

## 2.15 Recovery Account Detail

### 2.15.1 Overview

The Recovery Account Detail page allows the user to Create, View, Edit the recovery account. The recovery account page displays the information related to the Cause Code, Reason, Status, Balance information and the responsible party associated to the account. This update is to configure the page to allow recovery accounts for the GA/GR Immediate Need program.

### 2.15.2 Description of Changes

Update the Issuance Method Detail page to only allow EBT, Direct Deposit and Warrant as selectable issuance methods for the GA/GR Immediate Need program.

Create a CTR to:

- a. Update the program category (CT 18) to display the GA/GR Immediate Need program in the Recovery Account Program Type drop-down menu.
- b. Update the Code Hierarchy table used to display the Cause Code drop down menu values on the Recovery Account Detail page.

### 2.15.3 Page Location

- **Global:** Fiscal
- **Local:** Collections
- **Task:** Recovery Account Search

### 2.15.4 Security Updates

No Change.

### 2.15.5 Page Mapping

No Change

### 2.15.6 Page Usage/Data Volume Impacts

No Change.

## 2.16 Expungement Detail page

### 2.16.1 Overview

The Expungement Detail displays information about Expunged issuances. Additionally, for GA/GR expunged issuances, the user can use the Reactivate button to set the Expungements to "Pending Reactivation", so that the nightly batch issuance process will reactivate and create a reactivated issuance for this expungement. This update is to make the "Reactivate" button available for GA/GR Immediate Need Expungements.

### 2.16.2 Description for Changes

Update the logic used to enable the Reactivate button to display the button when all the following conditions are met:

- a. The Expunged Benefit Type is "General Assistance".

- b. The County is a CalWIN county, and the expungement is for a GA/GR Immediate Need Issuance
- c. The Expungement Status is "Received".
- d. The latest EBT Cash Account Type on the case is "Active".
- e. The user has the "Expungement Reactivate" security group.

### 2.16.3 Page Location

- **Global:** Case Summary
- **Local:** Case Info
- **Task:** Expungement History

### 2.16.4 Security Updates

No Change.

### 2.16.5 Page Mapping

No Change

### 2.16.6 Page Usage/Data Volume Impacts

No Change

## 2.17 Update Issuance Batch Skip Issuance logic

### 2.17.1 Overview

Issuance Batch is responsible for creating an Issuance record for each authorization that is subject to be paid on a Monthly/Nightly basis. This update is to configure the Issuance Batch to process authorizations for the GA/GR Immediate Need program.

### 2.17.2 Description of Changes

Update the Skip Issuance logic in the Issuance Batch to apply the following skip issuance reasons to the EDBC authorizations associated to GA/GR Immediate Need program:

- a. Future Month Issuance Cannot be Created Before Last Business Day.
- b. Payee Mailing Address Cannot be Determined.
- c. Aid Code Does Not Exist on Authorization Record.

### 2.17.3 Execution Frequency

PB00F400-PB00F499 – Daily.

#### **2.17.4 Key Scheduling Dependencies**

There are no changes to the scheduling dependencies.

#### **2.17.5 Counties Impacted**

CalWIN Counties.

#### **2.17.6 Data Volume/Performance**

Cannot be determined prior to CalWIN migration.

#### **2.17.7 Failure Procedure/Operational Instructions**

The jobs can be resubmitted after setting the flag to use restart data has been set to true.

### **2.18 Update EBT Benefit Writer Batch (POXXF403-Daily, POXXF404-Monthly)**

#### **2.18.1 Overview**

The EBT Benefit Writer batch jobs create interface files to be sent to the EBT Vendor. These files contain information of benefits to be posted to customer EBT Accounts.

#### **2.18.2 Description of Changes**

Update the EBT Cash Benefit Writer logic to assign the 'GA' EBT Benefit Type for GA/GR Immediate Need program lost or stolen benefits.

#### **2.18.3 Execution Frequency**

POXXF403 - Daily

POXXF404 – Monthly.

#### **2.18.4 Key Scheduling Dependencies**

There are no changes to the scheduling dependencies.

#### **2.18.5 Counties Impacted**

CalWIN Counties.

### **2.18.6 Data Volume/Performance**

Cannot be determined prior to CalWIN migration.

### **2.18.7 Failure Procedure/Operational Instructions**

The jobs can be resubmitted after setting the flag to use restart data has been set to true.

## **2.19 Uncollectable Recovery Batch (PB00F310)**

### **2.19.1 Overview**

The Uncollectable Recovery Account Batch (PB00F310) finds and updates Recovery Accounts that need to be Terminated or Suspended. This update is to configure the batch to Terminate recovery accounts for the GA/GR Immediate Need program.

### **2.19.2 Description of Changes**

Update the Uncollectable Recovery Account Batch to terminate all GA/GR Immediate Need in Pending or Active status that have been created since the last success date of the batch job.

This batch job will:

- a. Pick up all GA/GR Immediate Need Recovery Accounts in Pending or Active status that have been created since the last success date of the batch job.
- b. Create a Terminated transaction to zero out the Recovery Account balance.
- c. Set the status of the Recovery Account to "Terminated", and the status reason to "Cost".

### **2.19.3 Execution Frequency**

No Change.

### **2.19.4 Key Scheduling Dependencies**

No Change.

### **2.19.5 Counties Impacted**

All CalWIN Counties

### **2.19.6 Data Volume/Performance**

Cannot be determined prior to CalWIN migration.

### **2.19.7 Failure Procedure/Operational Instructions**

No Change

## **2.20 Benefit Issuance Claiming (PBXXF204)**

### **2.20.1 Overview**

The Benefit Issuance Claiming process picks up Benefit Issuances, Benefit Issuance Adjustments, and Expungement issuances and calculates the benefit claiming information. This update will add the GA/GR Immediate Need program to the Issuance Claiming logic.

### **2.20.2 Description for Changes**

- a. Update the Non-Foster Care Benefit Issuance Claiming module to include benefit issuances for the GA/GR Immediate Need program.
- b. Update the Non-Foster Care Benefit Issuance Adjustment Claiming module to include benefit issuances for GA/GR Immediate Need program.
- c. Update the Issuance Expungement Claiming module to include benefit issuances for the GA/GR Immediate Need program

### **2.20.3 Execution Frequency**

PBXXF204 – Daily.

### **2.20.4 Key Scheduling Dependencies**

There are no changes to the scheduling dependencies.

### **2.20.5 Counties Impacted**

CalWIN Counties.

### **2.20.6 Data Volume/Performance**

Cannot be determined prior to CalWIN migration.

### **2.20.7 Failure Procedure/Operational Instructions**

No Change.

## 2.21 Recovery Account Claiming (PBXXR203)

### 2.21.1 Overview

The Recovery Account Claiming process picks up Recovery Account Transactions and calculates the benefit claiming information. This update will add the GA/GR Immediate Need program to the Recovery Account Claiming logic.

### 2.21.2 Description for Changes

Update the Recovery Account Claiming module to include Recovery Account transactions for the CalWIN counties' GA/GR program.

### 2.21.3 Execution Frequency

PBXXR203 – Daily.

### 2.21.4 Key Scheduling Dependencies

There are no changes to the scheduling dependencies.

### 2.21.5 Counties Impacted

CalWIN Counties.

### 2.21.6 Data Volume/Performance

Cannot be determined prior to CalWIN migration.

### 2.21.7 Failure Procedure/Operational Instructions

Set the use restart data flag to true and resubmit the job.

- i. This form generates for the applicable counties when the program was "**Pending**" prior to the EDBC run and is now "**Active**" on the current EDBC with the reason "Imm Need Approved".
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Santa Clara	Approval	GA Approval of Emergency Payment	GA 101	610983

## 2.22 Project Requirements

DDID 2315	DDID Description	How DDID Requirement Met	Rule Flow diagram
	<b>[Business Rule: {Immediate Need Applies} CalSAWS must determine whether immediate need applies to a GA/GR case.]</b>	The rule 'Immediate need applies.' Will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix.

### 3 REQUIREMENT

#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2315	<p>The CONTRACTOR shall update the CalSAWS Software to provide the following GA/GR functionality for the 58 Counties:</p> <p>1) Prorate benefit amounts based upon the Beginning Date of Aid for the GA/GR Program</p> <p>2) Add a hard validation message at EDBC when the GA/GR residency arrival date field on the Residency Detail Page is not completed. The validation message shall only display for those counties that opt into the 15-day residency rule. The CalSAWS Software should not allow the user to run EDBC when this validation occurs. Add a batch exception reason when the case is ran in batch.</p> <p>3) Update the Pre-Screening-Mandatory Substance Use Disorder Recovery Program (MSUDRP) page to allow the 58 Counties</p>	<p>Requirement 1:</p> <p>Online: Prorate benefit amounts based upon the BDA for the GA/GR Program will be determined by the Eligibility rules in CalSAWS system.</p> <p>Requirement 2:</p> <p>Online: Validation for GA/GR Residency arrival date is included on the GA/GR Request page</p> <p>Eligibility: Pre-EDBC Validation rule to check for Residency Batch/Interfaces - Batch Programs: Add new batch Skip logic for null arrival date</p> <p>Requirement 3:</p> <p>Online: a. The questions per county must be defined at the time of design and by default, the LA questions shall be used. b. The configuration of the questions for the MSUDRP Pre-Screening page will be through a code table on the back end of the application.</p>	<p>The following subsequent Rules migrated in this SCR will met these requirements.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p>to add additional pre-screening questions based on each of the 58 Counties GA/GR eligibility rules. The CalSAWS Software shall only display the Pre-Screening questions based on the county of the logged in user.</p> <p>4) Add the ability to display prior GA/GR aid received in other counties within the CalSAWS Software (sanctions, Unemployable, Employable status, BDA, reapplication within a 12-month period and their time on aid in GR). Note: The requirement is contingent upon county agreement and legal review</p> <p>5) Create an automatic task when a participant has applied for SSI for the GA/GR program. The task shall be customizable by county and all 58 Counties shall have the ability to opt in/opt out of the task</p> <p>6) Add the ability to issue a GA/GR need or supplement prior to approving the GR</p>	<p>Batch/Interfaces - Batch Programs: No batch Skip logic for MSUDRP</p> <p>Requirement 4: TBD</p> <p>Requirement 5: Online: The trigger for the SSI application task will be from the SSI/SSP Page. It will be controlled based on the automated action page which will be part of the unified task solution.</p> <p>Batch/Interfaces - Batch Programs: It will be controlled based on the automated action page which will be part of the unified task solution.</p> <p>Requirement 6: Online: There will be a new GR Immediate Need program in order to segment the logic for County and State immediate Need Requirements</p> <p>Eligibility: A New GR Immediate Need Rules and EDBC Summary page will be developed to address this requirement.</p> <p>Correspondence:</p>	

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p>program (i.e. immediate need).            7) Add the ability to determine eligibility for GA/GR aid paid pending based on the eligibility rules of each of the 58 Counties.            8) Add the ability to allow each county to determine the income multiplier based on each of the 58 Counties GA/GR eligibility rules.            9) Add a verification field on the GR Work Requirement page when a work requirement type has been selected. If the verification field is left pending it shall populate on the county specific verification checklist for GA/GR. This functionality for the 58 Counties shall be opt in/out.            10) Create an automated task when the vendor for GA/GR is no longer going to get paid based on the Money Management Detail page end month. This functionality will be based on each</p>	<p>Add NOA call to DXC service in template repository for Immediate Need. As per current logic, there is no known NOA in CalWIN for Immediate Need.</p> <p>Fiscal:            Changes for deducting Immediate Need grant.</p> <p>1. The Functionality for new GA/GR Immediate Need Program would only be available to 18 CalWIN Counties at migration. Therefore, no changes are required for LA County or 39 CIV Counties Auditor Controller Process/files.</p> <p>2. No Updates Required to 18 CalWIN Counties Warrant Templates.</p> <p>3. No Updates Required to CIV or LA County Warrant Templates.</p> <p>4. The System will not Suggest Grant Reductions towards a recovery account associated to GA/GR Immediate Need Program. Those Recovery Accounts will be marked as Terminated/Suspended on the night they are created.</p> <p>Requirement 8:            Eligibility:            The income multiplier must be defined by county at the time of design and will be implemented in the CalSAWS code tables. This</p>	

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p>counties GA/GR program rules</p> <p>11) Add GA/GR specific page(s) to capture physical and mental disability details as it relates to GA/GR assessment screening. The new page(s) shall be controlled via security to allow the 58 counties to opt in/out. NOTE: Page(s) should function similar to the MSDURP Assessment page.</p> <p>12) Add the ability to automatically create a CalFresh CFET record when the customer is already participating in GA/GR for reporting purposes. The CalSAWS Software should not have the user enter a CFET record when GA/GR exists. The 58 Counties must have the ability to opt in/out of this functionality</p> <p>13) Update all GA/GR related supportive services need types on the Needs List and Need Detail pages when the category of GROW is selected to be inclusive of all 58 counties.</p> <p>14) Auto create and register a GA/GR ES</p>	<p>cannot be modified through the County Admin</p> <p>Auto creation of CFET and ESP will be handled in CalSAWS Eligibility Authorization logic</p> <p>Requirement 9: Online: The verification field will be consistent across the page for all counties. The rules will determine if the value is used or not based on county</p> <p>Requirement 10: Online: The automated task on the Money Management page shall be part of the unified task solution. Batch/Interfaces - Batch Programs: Batch will be using task management solution for all task creation.</p> <p>Requirement 11: Online: The new page will be available for all people with the appropriate security.</p> <p>Requirement 12, 14 and 15: Eligibility</p>	

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p>program for employable individuals when there is a GA/GR/CF combo case when a county does not have CFET program active in their county. This functionality shall be made configurable for counties to opt in or out.</p> <p>15) Auto create and register a GA/GR ES program for employable individuals who are on a GA/GR program only. This functionality shall be made configurable for counties to opt in or out</p> <p>16) Add additional non-compliance types for GA/GR on the GA/GR Non-Compliance page. The Non-Compliance types shall be specific to each of the 58 Counties GA/GR policy rules</p> <p>17) Migrate the existing C-IV GA/GR Functionality into the CalSAWS Software</p>	<p>Auto Creation of CFET and/or GA-GR Employment Service program will be handled as part of CalSAWS Authorization logic.</p> <p>Requirement 12: Batch/Interfaces - Batch Programs: Add the ability to automatically create a CalFresh CFET record through batch when the customer is already participating in GA/GR for reporting purposes</p> <p>Requirement 13: Fiscal: All existing need types at point of migration will be added to CalSAWS</p> <p>Requirement 14/15: Batch/Interfaces - Batch Programs: Automatic new Employment service program creation for GA/GR/CR combo case through batch</p> <p>Requirement 16: Online: a. The Non-Compliance Detail page shall show different values and fields based on the new GR program for CalWIN Solution type selected.</p>	

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		<p>b. Existing CalWIN Rules for new eligibility non-compliance types will be developed in CORE CalSAWS system.</p> <p>Batch/Interfaces - Batch Programs:</p> <p>Add new non-compliance category to existing non-compliance sweeps.</p> <p>Requirement 17:</p> <p>The effort to port the C-IV solution is part of SCR CA 201377</p>	

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

#### 4 MIGRATION IMPACTS

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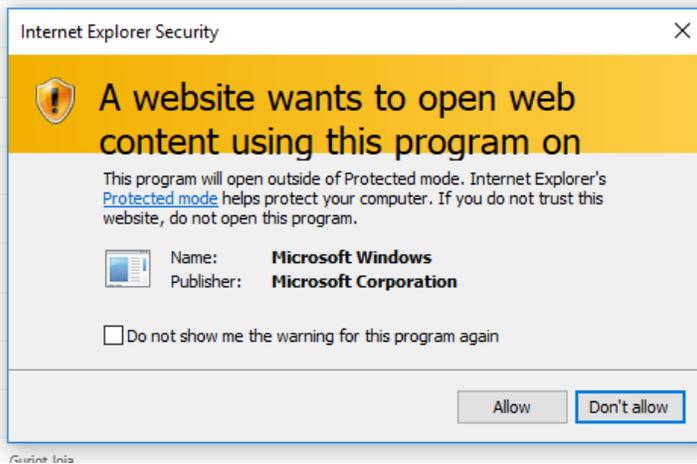
General Assistance/General Relief functionality will be implemented as a new program for the 57 counties excluding Los Angeles county. Los Angeles GA/GR functionality will not be modified.

## 5 APPENDIX

### 5.1 Rules Flow Diagram

#### Viewing Visio Document in Internet Explorer

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



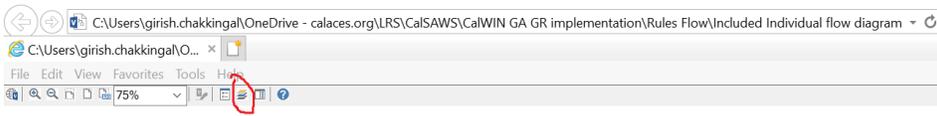
5. Click 'Allow' to open the file on Internet Explorer.
6. The internet Explorer will open with the below pop up in the bottom of the page



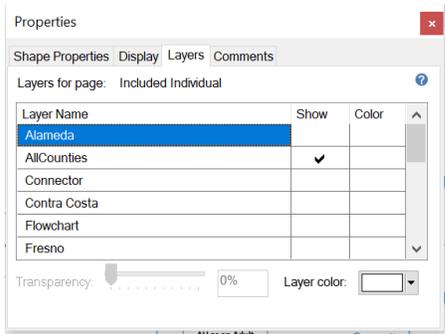
7. Click Allow Blocked Content.
8. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



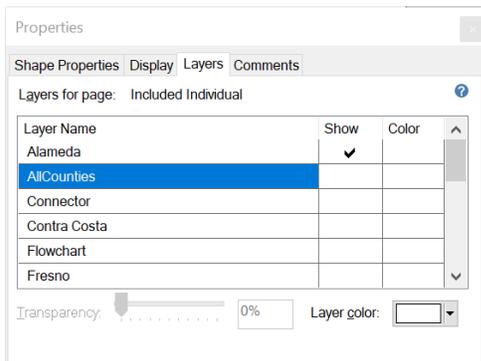
9. Click the layer icon circled in red color below



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



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

#### Viewing Visio Document in Microsoft Visio

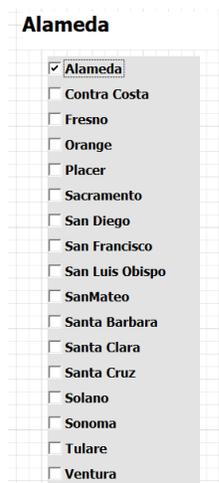
- This is applicable for Laptops/Desktops that do have Microsoft Visio software installed
- Once you double click the attachment or right click and open with Visio then it will open in Microsoft Visio
- Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



- 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.

## 5.2 List of Affected pages.

- 1) Distributed Documents Search
- 2) Findings Detail
- 3) Fiscal History Search
- 4) Foster care Recovery Account Detail
- 5) Hearing Detail
- 6) Invoice Search
- 7) Office Detail
- 8) Other Program Assistance Detail
- 9) Pending Authorizations
- 10) Pending Workload Assignment List
- 11) Performance Analysis detail
- 12) Quality Review Detail
- 13) Receipt Mass Upload Search
- 14) Recovery Account Search
- 15) Recovery Account Workload Inventory
- 16) Service Arrangements List
- 17) Special Investigation Detail
- 18) Special Investigations Referral
- 19) Standards Detail
- 20) Template Repository Search
- 21) Unreimbursed Assignment pool
- 22) Valuable Request Search
- 23) Verification Detail
- 24) Workload Reassignment Detail

## 5.3 Immediate Need Threshold

County	Immediate Need Threshold
Alameda	
Contra Costa	N/A
Fresno	N/A
Orange	<b>\$88.75</b>
Placer	130

Sacramento	\$326.64
San Diego	N/A
San Francisco	N/A
San Luis Obispo	\$200.00
San Mateo	N/A
Santa Barbara	N/A
Santa Clara	
Santa Cruz	N/A
Solano	N/A
Sonoma	N/A
Tulare	N/A
Ventura	N/A
Yolo	N/A