CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-236533 Phase 4 Batch 1 DDID 2314-2319 FDS GA GR Phase 4 Batch 1 Eligibility Rules and corresponding NOA Reasons

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR

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1 OVERVIEW

This SCR will implement the financial and non-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 and non-financial functionality for the new solution.

1.3 Overview of Recommendations

1. Add all the required Data Collection elements to implement the financial and non-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 and non-financial rules.

    1. Non-Financial Overall
    2. Indigent Burial

1.4 Assumptions

1. The existing Los Angeles county rules will remain unchanged.
2. This SCR CA-236533 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. The functionality of this SCR CA-236533 will be disabled until activated by the system property flag established in SCR CA-215687 which is part of the 20.11 release. The flag will be enabled when GA/GR go live.
5. Any logic related to San Francisco explicitly called out in relevant WCDS approved use cases will be included in this design. Any, San Francisco sub

program logic independent of the rule will be added in SCR CA-215677 DDID 2374.

6. Alerts will be handled separately outside the Rules design in a separate SCR CA-220119.
7. 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.
8. All Data collection used in EDBC determination is effective for the benefit month.
9. All calculation for computed values will be detailed in the Visio diagram.
10. '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.
11. Logic that checks or creates Sanctions cannot be tested until SCR CA-227328 is implemented.
12. Manual EDBC and negative action EDBC cannot be run with these changes.
13. Changes to the Financial Data Collection pages will be moved to SCR CA-232396.
14. The statement 'Living Arrangement record is applicable for the benefit month' is indicating that the Arrival Date is on or before the benefit month begin date and the Departure Date is either high dated or on or after the benefit month begin date.
15. Earned income county specific logic cannot be tested until 22.03 is implemented for the following counties: San Francisco, Contra Costa, San Diego, Sacramento.

2 RECOMMENDATIONS

2.1 Burial Detail

2.1.1 Overview

A new field 'Request Amount' is added to Burial Detail Page. Worker enters this amount and EDBC will use this amount during Indigent Burial evaluation.

2.1.2 Burial Detail Mockup

Burial Detail

✱- Indicates required fields   [Save and Return] [Cancel]

Name: ✱
[ROWENA, DARREL 19M ⌄]

Reimbursement Agreement Signed: **Cremation Agreement Signed:**
[⌄]   [Yes ⌄]

Payment Agreement Signed: **Burial Request from Administrator/Guardian:**
[⌄]   [Yes ⌄]

Responsible Party acting as Executor of Estate: **Cremation Refusal Reason:**
[Yes ⌄]   [⌄]

County of Burial Plot: **Request Amount: ✱**
[Alameda   ⌄]   [   ]

Begin Date: ✱   **End Date:**
[   ] 📅   [   ] 📅

                                          [Save and Return] [Cancel]

2.1.2.1 Adding Request Amount on Burial Detail page.

2.1.3 Description of Changes

1. Add a new field labeled, "Request Amount:".
    - This field will be a mandatory field.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GA/GR -> Burial → Burial List → add → Burial Detail

2.1.5 Security Updates

  N/A

2.1.6 Page Mapping

  New page mappings are required for the additional fields.

2.1.7 Page Usage/Data Volume Impacts

  No additional page usage is expected from this update.

2.2 CTCR to add Need Types

2.2.1 Overview

Create a Codes Table Change Request (CTCR) to add the Indigent Burial and Indigent Cremation Need Types into the CalSAWS system.

2.2.2 Description of Changes

Create a CTCR to add the following information into the CalSAWS system:

1) Add the "Indigent Burial" and "Indigent Cremation" Need Types (CT164)
2) Associate the "Indigent Burial" and "Indigent Cremation" Need Types with the "GR Non-Recurring Special Need" Need Category on the Need Detail page
3) Associate the "Indigent Burial" and "Indigent Cremation" Need Types with the GA/GR Automated EDBC/CC Counties Program on the Service Arrangement Detail page.

2.3 Need Detail

2.3.1 Overview

Add the 'Indigent Burial' and 'Indigent Cremation' to the dropdown for 'GR Non-reoccurring Special Need' category in 'Need Detail' page.

2.3.2   Need Detail Mockup

2.3.2.1 Category: GR Non-Recurring Special Need with the Type: Indigent Burial

2.3.2.2 Category: GR Non-Recurring Special Need with the Type: Indigent Cremation

2.3.1 Description of Changes

Add the following need type for the Need Category 'GR Non-Recurring Special Need':

- Indigent Cremation
- Indigent Burial

Please Note: Indigent Burial and Indigent Cremation was removed as a recurring special needs type in SCR CA-215672.

2.3.2 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Needs

2.3.3 Security Updates

N/A

2.3.4 Page Mapping

No new page mappings are required for the additional fields.

2.3.5 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.4 EDBC Summary Update

2.4.1 Overview

A new section 'Indigent Burial' is added to 'General Assistance/General Relief EDBC Summary' Page to display the EDBC evaluation result. This section will be displayed only when Indigent Burial Request is processed for a Deceased Individual.

2.4.2 EDBC Summary Mockup

General Assistance/General Relief EDBC Summary

✱- Indicates required fields   Close

Begin Month	End Month	Run Date	Run Status	Accepted By
06/2021	10/2021	04/26/2021	Accepted - Saved	Cheree Dana

EDBC Information

Quarterly Reporting Period Begin Month: 04/2021

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 90 - GA General Relief Independent Living-CNTY

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
ROWENA, DARREL 19M	11/12/2002	MEM		Active	

▸ Reporting Configuration

▸ Work Registration

Property Eligibility	Regular
Final Property Result:	Auto-Pass

Indigent Burial	Regular
Indigent Burial Amount	$ 200.00
Indigent Burial Result:	Pass

General Assistance/General Relief Budget	Regular
Unearned Income	$ 0.00

2.2.2.1 Indigent Burial section after the property Eligibility section

2.4.3 Description of Changes

1. The indigent burial section will be displayed after the Property Eligibility section.
2. The Indigent burial section will show the EDBC computed Amount.
3. The indigent burial section will show the EDBC Result – Pass or Fail

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4. The indigent burial will only display for GA/GR Automated EDBC/CC Counties Solution.
5. The indigent burial section will only display if there is a deceased individual with a deceased date and indigent burial detail entry effective for the benefit month.
6. Add new columns in GR budget table to store the Indigent Burial results:
   - The stored result will be displayed for the Amount and Result.

2.4.4 Page Location
- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** EDBC Summary

2.4.5 Page Mapping
No page mapping is required.

2.4.6 Page Usage/Data Volume Impacts
No additional page usage is expected from this update.

2.5 Indigent Burial Logic Overview

2.5.1 Overview
When Indigent Burial/Cremation Request is received from Relative, Responsible relative, Public Administration or Guardian for a deceased person, worker enters the Burial record from the "Burial Detail' page and runs EDBC to verify the person's eligibility to issue the Indigent Burial amount. The worker enters the GA/GR Non-reoccurring Special Need from 'Needs' page to pay for the 'Indigent Burial' amount outside of EDBC to the Public Administration/Guardian.

2.5.2 Pre-EDBC Steps
The worker will follow the below steps to create the Burial record in CalSAWS:
- From Eligibility:

  o Place the cursor over Eligibility on the Global navigation bar.
  o Select 'Customer Information' from the Local navigator.
  o Select 'GA/GR' from Left Navigation menu
  o Select 'Burial' from 'GA/GR' dropdown
  o Click 'Add' button.

Then the user can enter the burial detail information and make a burial entry.

2.5.2.1 Burial List and Burial Detail

Burial List

✱- Indicates required fields

Search Results Summary		Results 1 – 1 of 1

Display

From: _____ To: _____ View

Add

■	Name	Begin Date ▽	End Date ▽
☐	ROWENA, DARREL 19M	12/01/2021	Edit / View History

Remove   Add

This Type 1 page took 0.46 seconds to load.

2.3.2.1.1 Adding Burial Entry.

Burial Detail

✱- Indicates required fields   Save and Return   Cancel

Name: ✱
ROWENA, DARREL 19M ▾

Reimbursement Agreement Signed: Cremation Agreement Signed:
▾   Yes ▾

Payment Agreement Signed: Burial Request from Administrator/Guardian:
▾   Yes ▾

Responsible Party acting as Executor of Estate: Cremation Refusal Reason:
Yes ▾   ▾

County of Burial Plot: Request Amount: ✱
Alameda ▾   _____

Begin Date: ✱   End Date:
_____   _____

                                         Save and Return   Cancel

1.3.2.1.2   Entering the information for Burial Detail.

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Transaction History Detail

Begin Date: *	End Date: *	Staff ID:		
11/06/2021	12/06/2021		Select	

Transaction Record / Field	Old Value	New Value	Date Time Stamp	Staff ID	Change Reason	Report
▾ Burial Detail						
Name		ROWENA, DARREL	2021-12-06 12:02:55	987013		
End Date		11/30/2021	2021-12-06 12:02:55	987013		
Begin Date		01/01/2021	2021-12-06 12:02:55	987013		

1.3.2.1.3   History detail.

2.5.3 Eligibility Logic

Existing GA/GR Application with one person:

- If the program person is deceased and Indigent Burial record is entered
  - The program is active (not discontinued yet)
    - The Benefit amount is already issued
      - Regular GA/GR Program:
        - Follow the existing GA/GR logic.
        - Set regular GA/GR aid code
      - Indigent Burial: Regular GA/GR logic calls Indigent Burial rule after Resources Overall Flow to determine Indigent Burial Amount allowed and result.

    - The Benefit month is future (Benefit is not issued)
      - Regular GA/GR Program:
        - Follow the existing GA/GR logic and set the zero benefit without discontinuing the program.
        - Set regular GA/GR aid code.

      - Indigent Burial:
        - If Indigent Burial benefit result is Pass in previous month, Set status reason 'Indigent Burial Amount Has Been Granted Already'.
        - Else, regular GA/GR logic calls Indigent Burial rule after Resources Overall Flow to determine Indigent Burial Amount allowed and result.

  - The program is discontinued and reapplied
    - Regular EDBC:

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- follow the existing GA/GR rules and set the zero benefit without discontinuing the program.
- Set aid code '9B'

  o Indigent Burial:
  - Calls Indigent Burial rule after Resources Overall Flow to determine Indigent Burial Amount allowed and result.

Existing GA/GR Application with Two person:

- If one program person is deceased and Indigent Burial record is entered
  o Regular GA/GR Program:
    - Follow the existing GA/GR logic.
    - Set regular GA/GR aid code

  o Indigent Burial:
    - Regular GA/GR logic calls Indigent Burial rule after Resources Overall Flow to determine Indigent Burial Amount allowed and result.

New GR Application (Intake/Person is Unknown to GA/GR program):

- If program person is deceased and Indigent Burial record is entered
  o Regular EDBC:
    - Set zero Benefit amount without discontinuing the program.
    - Set aid code '9B'
  o Indigent Burial:
    - Call Indigent Burial rule after Resources Overall Flow to determine Indigent Burial Amount allowed and result.

Update the new column in GR budget table with Indigent Burial results:

- For all Indigent Burial scenarios, Populate EDBC evaluated Indigent Burial Amount and Result Code in GA/GR budget table which will be displayed on EDBC summary page.

  Note:
  1. If GA/GR program is already in discontinued or denied Status, user must reapply GA/GR application to process Indigent Burial Request.
  2. If the deceased person has never been applied to GA/GR application, user must add new GA/GR application for Deceased Person.
  3. The deceased person should be a program person with Household status 'In the Home'.

Commented [PE4]: Add a global note stating the person needs to be in the home for indigent burial

Commented [PB5R4]: Added to 2.5.2 Pre EDBC_steps

2.5.4 Post EDBC steps

The worker will follow below steps to create the Needs record in CalSAWS:
- From Eligibility:
    - o Place the cursor over Eligibility on the Global navigation bar.
    - o Select Customer Information from the Local navigator.
    - o Click the Needs link on the Task navigation bar to access the Needs List page.
    - o Click 'Add Need' button.

2.5.4.1 Needs List Page

2.3.4.1.1 Adding a Need on the Needs List page.

The worker will then add the need details.
- o Enter the appropriate information in Need Detail page.
- o Select 'Service Arrangement' for Save and Add New and then click 'Go' button to add new service arrangement record.
- o The 'Save & Add New' field option will only display when a select type is chosen from the 'Category' field.

Please Note:

When Selecting 'Go' to create the Service Arrangement the program type will be defaulted to 'General Assistance/General Relief'.

2.5.4.2 Needs Detail and Service Arrangement Page

Need Detail

✳- Indicates required fields   [Save And Return] [Cancel]

Name: ✳
[- Select -   ▼]

Category: ✳   **Type:** ✳
[GR Non-Recurring Special Need   ▼]   [Indigent Burial   ▼]

Begin Date: ✳
[11/22/2021] [📅]

Description:
[   ]

Status: ✳   **Status Reason:** ✳
[Indicated ▼]   [Documented   ▼]

Save & Add New: [▼]   [Go]

                                                [Save And Return] [Cancel]

This Type 1 page took 0.23 seconds to load.

2.3.4.2.1 Entering the information on the Need Detail page.

Service Arrangement Detail

                                                [Save and Return] [Cancel]

Need ✳

	Type	Name	Category	Begin Date
○	Indigent Burial	ROWENA, DARREL 19M	GR Non-Recurring Special Need	11/30/2021

Activities

Type	Status	Begin Date	End Date

                                                              [Select]

2.3.4.2.2 Service Arrangement Detail page.

2.6 Financial

2.6.1 Indigent Burial

2.6.1.1 County Admin Detail – Indigent Burial Functionality

2.6.1.1.1 Overview

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

2.6.1.1.2   Description of Changes

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Indigent Burial Applicable.	N	Y	N	Y	Y	N	N	N	Y	N	N	N	N	N	N	Y	N	N
Burial arrangements – Placer Only.	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Burial arrangements – Orange Only.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Burial arrangements – Contra Costa and San Luis Obispo.	N	Y	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N
Burial plot on county.	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N
Religious reason for burial.	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Burial arrangements – Tulare Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX302C001	Indigent Burial Applicable	Indigent Burial Applicable.
EDX302C002	Burial arrangements method 1	Burial arrangements – Placer Only.
EDX302C003	Burial arrangements method 2	Burial arrangements – Orange Only.

EDX302C004	Burial arrangements method 3	Burial arrangements – Contra Costa and San Luis Obispo.
EDX302C005	Burial plot on county	Burial plot on county.
EDX302C006	Religious reason for burial	Religious reason for burial.
EDX302C007	Burial arrangements method 4	Burial arrangements – Tulare Only.

2.6.1.2 EDBC Changes

2.6.1.2.1 Overview

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

2.6.1.2.2 Description of Change

Indigent Burial Rules Flow Diagram:

A Consolidated Rules Flow Visio document will be provided as a separate Attachment in addition to this design Document that will depict the rules for a selected County.

The following Data Collection elements will be used by this Rule Flow.

Field (CalWIN)	Field (CalSAWS)	Location Details
case special need request amount	Request Amount	Burial Detail

Please refer the Rules Flow Diagram in the Appendix section on how to open and navigate the Visio diagram.

Form Reason

1. The status reason CT73 'Eligible for Indigent Burial Benefits' will be set to the form E10006 when all the following conditions are met (Note: this status is only used for triggering the Form, this status will not be displayed on the EDBC):
   a. The following is not true: the indigent burial result is 'Pass'.
   b. The rule 'Burial arrangements – Placer Only.' is not active.
   c. The rule 'Burial arrangements – Orange Only.' is active.
   d. The Individual's County of Residence is the current county.
   e. The individual is a US citizen or Legal Permanent Resident.

Category	Short Description
73	Eligible for Indigent Burial Benefits

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 'Deceased not Resident of County' will be set as a program failure reason when all the following conditions are met in A, B, C, or D:
   A. All the following:
      a. The following is not true: the indigent burial result is 'Pass'.
      b. The rule 'Burial arrangements – Placer Only.' is active.
      c. Any of the following is not true:
         - 'Intent to reside' is checked.
         - 'Arrival date' is earlier than 'Decease Date'.
   B. All the following:
      a. The following is not true: the indigent burial result is 'Pass'.
      b. The rule 'Burial arrangements – Placer Only.' is not active.
      c. The rule 'Burial arrangements – Orange Only.' is active.
      d. The following is not true:
         - The Individual's County of Residence is the current county.
   C. All the following:
      a. The following is not true: the indigent burial result is 'Pass'.
      b. The rule 'Burial arrangements – Placer Only.' is not active.
      c. The rule 'Burial arrangements – Orange Only.' is not active.
      d. The rule 'Burial arrangements – Contra Costa and San Luis Obispo.' is active.
      e. Any of the following is not true:
         - The individual's County of Residence is the current county.
         - 'Arrival Date' is prior to the individual deceased date.
         - 'Intent to reside' is checked.
   D. All the following:
      a. The following is not true: the indigent burial result is 'Pass'.
      b. The rule 'Burial arrangements – Placer Only.' is not active.
      c. The rule 'Burial arrangements – Orange Only.' is not active.
      d. The rule ' Burial arrangements – Contra Costa and San Luis Obispo.' is not active.

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e. The rule ' Burial arrangements – Tulare Only.' is active.

f. Any of the following is not true:
- The individual's County of Residence is the current county.
- The 'County Where Death Occurred' is the current county.

Category	Short Description
73	Deceased not Resident of County

2. The new program status reason CT73 'Not a Citizen or Legal Permanent Resident' will be set as a program failure reason when all the following conditions are met:

a. The following is not true: the indigent burial result is 'Pass'.

b. The rule 'Burial arrangements – Placer Only.' is not active.

c. The rule ' Burial arrangements – Orange Only.' is active.

d. The 'Individual's County of Residence is current county.

e. The following is not true:
- The individual is a US citizen or Legal Permanent Resident.

Category	Short Description
73	Not a Citizen or Legal Permanent Resident

3. The new program status reason CT73 'Surviving Relative Signed Payment Agreement' will be set as a program failure reason when all the following conditions are met:

a. The following is not true: the indigent burial result is 'Pass'.

b. The rule 'Burial arrangements – Placer Only.' is not active.

c. The rule 'Burial arrangements – Orange Only.' is active.

d. The individual's County of Residence is current county.

e. The individual is a US citizen or Legal Permanent Resident.

f. The following is not true:
- The individual does not have any relationship records.

g. The 'Payment Agreement signed' is YES.

Category	Short Description
73	Surviving Relative Signed Payment Agreement

4. The new program status reason CT73 'Burial Assistance not Requested by Public Admin/Guardian' will be set as a program failure reason when all the following conditions are met:
   a. The following is not true: the indigent burial result is 'Pass'.
   b. The rule 'Burial arrangements – Placer Only.' is not active.
   c. The rule 'Burial arrangements – Orange Only.' is active.
   d. The individual's County of Residence is the current county.
   e. The individual is a US citizen or Legal Permanent Resident.
   f. The individual does not have any relationship records.
   g. The following is not true:
      - 'Burial Request from Public Administrator/Guardian' is yes.

Category	Short Description
73	Burial Assistance not Requested by Public Admin/Guardian

5. The new program status reason CT73 'Deceased did not Meet Eligibility' will be set as a program failure reason when all the following conditions are met:
   a. The following is not true: the indigent burial result is 'Pass'.
   b. The rule 'Burial arrangements – Placer Only.' is active.
   c. 'Intent to reside' is checked.
   d. 'Arrival date' is earlier than 'Decease Date'.
   e. The following is not true: the person did not fail the non-financial determination.

Category	Short Description
73	Deceased did not Meet Eligibility

6. The new program status reason CT73 'Personal Property > Burial Limit' will be set as a program failure reason when all the following conditions are met:
   a. The following is not true: the indigent burial result is 'Pass'.
   b. The rule 'Burial arrangements – Placer Only.' is active.
   c. The ' Intent to reside' is checked.
   d. 'Arrival date' is earlier than 'Decease Date'.
   e. The person did not fail non-financial determination.
   f. The person has a relationship record.
   g. The following is not true:

- The 'personal property value' (computed in the Visio) is less than the 'personal property burial max amount (Determined in the Visio).

Category	Short Description
73	Personal Property > Burial Limit

7. The new program status reason CT73 'Surviving Relative not Signed Lien' will be set as a program failure reason when all the following conditions are met:
    a. The following is not true: the indigent burial result is 'Pass'.
    b. The rule 'Burial arrangements – Placer Only.' is active.
    c. ' Intent to reside' is checked.
    d. 'Arrival date' is earlier than 'Decease Date'.
    e. The person did not fail non-financial determination.
    f. The person has a relationship record.
    g. The 'personal property value' (Determined in the Visio) is less than the 'personal property burial max amount.
    h. The following is not true:
        - The individual's 'opted for the Reimbursement Agreement signed by surviving relative' is yes.

Category	Short Description
73	Surviving Relative not Signed Lien

8. The new program status reason CT73 'Relative Resources > Max Allowable Cremation Cost' will be set as a program failure reason when all the following conditions are met in A or B:
    A. All the following:
        a. The following is not true: the indigent burial result is 'Pass'.
        b. The rule 'Burial arrangements – Placer Only.' is not active.
        c. The rule ' Burial arrangements – Orange Only.' is not active.
        d. The rule 'Burial arrangements – Contra Costa and San Luis Obispo.' is not active.
        e. The rule 'Burial arrangements – Tulare Only.' is active.
        f. The individual's County of Residence is the current county or 'County Where Death Occurred' is the current county.
        g. Any of the following is not true:
            - The individual resource summary liquid asset value is greater than the GR budget net grant amount.

- The 'Responsible Party acting as Executor of Estate' is set as "YES".
   h. The individual has a responsible relative, and the responsible relative does not have a deceased date.
   i. Individual resource control liquid assets values are greater than the GR budget net grant amount. (Determined in the Visio)
B. All the following:
   a. The following is not true: the indigent burial result is 'Pass'.
   b. The rule ' Burial arrangements – Placer Only.' is not active.
   c. The rule 'Burial arrangements – Orange Only.' is not active.
   d. The rule ' Burial arrangements – Contra Costa and San Luis Obispo.' is active.
   e. All the following is true:
      - Individual's County of Residence is the current county
      - The 'Arrival Date' is prior to the individual deceased date
      - The 'Intent to reside' is checked.
   f. The 'person total resource values' are less than the maximum cremation resource amount or the person's total resource values is ZERO.
   g. The person's total resource value is greater than the 'Maximum cremation resource' amount.

Category	Short Description
73	Relative Resources > Max Allowable Cremation Cost

9. The new program status reason CT73 'Applicant's Resources > Max Cremation Allowance' will be set as a program failure reason when all the following conditions are met:
   a. The following is not true: the indigent burial result is 'Pass'.
   b. The rule 'Burial arrangements – Placer Only.' is not active.
   c. The rule 'Burial arrangements – Orange Only.' is not active.
   d. The rule ' Burial arrangements – Contra Costa and San Luis Obispo.' is not active.
   e. The rule 'Burial arrangements – Tulare Only.' is active.
   f. The individual's County of Residence is the current county or 'County Where Death Occurred' is the current county.
   g. The individual resource summary liquid asset value is greater than the GR budget net grant amount.

h. 'Responsible Party acting as Executor of Estate' is set as "YES".

Category	Short Description
73	Applicant's Resources > Max Cremation Allowance

10. The new program status reason CT73 'Deceased's Resources > Cost of Cremation' will be set as a program failure reason when all the following conditions are met:
    a. The following is not true: the indigent burial result is 'Pass'.
    b. The rule ' Burial arrangements – Placer Only.' is not active.
    c. The rule ' Burial arrangements – Orange Only.' is not active.
    d. The rule ' Burial arrangements – Contra Costa and San Luis Obispo.' is active.
    e. Any of the following is true:
       • Individual's County of Residence is the current county.
       • 'Arrival Date' is prior to the individual deceased date.
       • 'Intent to reside' is checked.
    f. The following is not true: the 'person total resource values' are less than the maximum cremation resource amount or the person's total resource values is ZERO.

Category	Short Description
73	Deceased's Resources > Cost of Cremation

11. The new program status reason CT73 'Responsible Party Can Act as Executor of Estate' will be set as a program failure reason when all the following conditions are met:
    a. The following is not true: the indigent burial result is 'Pass'.
    b. The rule 'Burial arrangements – Placer Only.' is not active.
    c. The rule 'Burial arrangements – Orange Only.' is active.
    d. The Individual's County of Residence is the current county.
    e. The individual is a US citizen or Legal Permanent Resident.
    f. The individual does have a relationship record.
    g. The following is not true: 'Payment Agreement signed' is YES.
    h. The individual has Liquid property type Burial Funds.
    i. All the following in A or B:
       A. All the following:
          i. Any of the following is not true:

- The individual has a responsible relative from the relationship.
- The responsible relative is either a 'spouse' or a 'parent'.
- The responsible relative does not have a decease date.
- The deceased individual is less than 18 years old.
  ii. The following is not true:
- The 'burial assets request' amount is less than the 'max cremation cost'.
  B. All the following:
  i. The individual has a responsible relative from relationship and the responsible relative is either a 'spouse' or a 'parent' and does not have a decease date.
  ii. Any of the following is true:
- The responsible relative is a spouse.
- The responsible relative is a parent and the deceased individual is less than 18 years old.
  iii. Any of the following is not true:
- The individual is receiving SSI/SSP.
- The 'burial assets request' amount is less than the 'max cremation cost'.

Category	Short Description
73	Responsible Party Can Act as Executor of Estate

12. The new program status reason CT73 'Burial Cost > Max Cremation Allowance' will be set as a program failure reason when all the following conditions are met:
    a. The following is not true: the indigent burial result is 'Pass'.
    b. The rule 'Burial arrangements – Placer Only.' is not active.
    c. The rule 'Burial arrangements – Orange Only.' is active.
    d. The Individual's County of Residence is the current county.
    e. The individual is a US citizen or Legal Permanent Resident.
    f. All the following is not true:
    - The individual does not have any relationship records.
    - The 'Payment Agreement signed' is YES.
    - The individual has Liquid property type Burial Funds.

Category	Short Description
73	Burial Cost > Max Cremation Allowance

13. The new <mark>person</mark> status reason CT73 'Indigent Burial Amount Has Been Granted Already' will be set as a <mark>person</mark> level failure reason when all the following conditions are met:
    a. The indigent burial result is 'Pass'.

Category	Short Description
73	Indigent Burial Amount Has Been Granted Already

2.6.1.3 Correspondence

2.6.1.3.1 Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed on the distributed documents page. The template column determines how notices are grouped when generated.

2.6.1.3.2 Description of Change

1. **Reason Code: E10006 – Eligible for Indigent Burial Benefits**
   a. Trigger Condition
      i. This form generates for the applicable counties when the current EDBC has the reason 'Eligible for Indigent Burial Benefits' and the previous EDBC did not.
   b. County-specific information:

County	Action	Document Description	Number	Template
Orange	N/A	GR Burial/Cremation Approval Notification	F063-26-54 (07/99)	502339

2.6.1.4 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Indigent Burial Applicable} CalSAWS must determine whether Indigent Burial is applicable in a GA/GR case.]	The rule 'Indigent Burial Applicable.' meets this requirement.	This is determined in the Visio.
	[Business Rule: {Indigent Burial Resident} CalSAWS must determine whether a deceased individual was a county resident and meets all eligibility requirements for GA/GR Indigent Burial assistance.]	The rule 'Burial arrangements – Placer Only. meets this requirement.	This is determined in the Visio.
	[Business Rule: {Indigent Burial Public Guardian} CalSAWS must determine whether a deceased individual had the resources to cover burial expenses when Public Guardian requested GA/GR Indigent Burial assistance.]	The rule 'Burial arrangements – Orange Only. meets this requirement.	This is determined in the Visio.
	[Business Rule: {Indigent Burial Cremation 1} CalSAWS must determine whether a deceased individual resided in the county and had the resources to cover cremation for GA/GR Indigent Burial assistance.]	The rule 'Burial arrangements – Contra Costa and San Luis Obispo. meets this requirement.	This is determined in the Visio.
	[Business Rule: {Indigent Burial Plot in County} CalSAWS must determine whether a deceased individuals burial plot is in the county for GA/GR Indigent Burial assistance.]	The rule 'Burial plot on county. meets this requirement.	This is determined in the Visio.

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Indigent Burial Religious Reason Refusal} CalSAWS must determine whether a relative has refused cremation based on religious grounds for GA/GR Indigent Burial assistance.]	The rule 'Religious reason for burial. meets this requirement.	This is determined in the Visio.
	[Business Rule: {Indigent Burial Cremation 2} CalSAWS must determine whether a deceased individual resided in the county and had the resources to cover cremation for GA/GR Indigent Burial assistance when there is no estate executor.]	The rule 'Burial arrangements – Tulare Only. meets this requirement.	This is determined in the Visio.

2.6.2 Financial Income Test (adjustment)

The following rules, introduced by SCR CA- 224578, will be removed from this functionality.

CalWIN Number	CalSAWS Rule	Reason
EDX320C001	Test in kind income.	rule being applicable or not will have the same result
EDX320C002	Do not test in kind income.	rule being applicable or not will have the same result
EDX320C006	Income test on adjusted amount.	rule being applicable or not

		<mark>will have the same result</mark>

2.7 Non-Financial

2.7.1 Non-Financial Overall Functionality (Complete version)

2.7.1.1 County Admin Detail - Non-Financial Overall Functionality

Leverage Rule

Below is the corresponding leveraged CalWIN rule County Admin Matrix and the CalWIN number mapped to CalSAWS rules

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Grant greater than $5.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N
Indigent Burial applicable.	N	Y	N	Y	Y	N	N	N	Y	N	N	N	N	N	N	Y	N	N
Return to residence applicable.	N	Y	Y	Y	Y	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX321C005	Grant greater than $5.	Grant greater than $5.
EDX302C001	Indigent Burial applicable.	Indigent Burial applicable.
EDX307C001	Return to residence applicable.	Return to residence applicable.

2.7.1.2 EDBC Changes

2.7.1.2.1 Overview

This section will provide the Eligibility Rules flow for non-financial overall that can be filtered for each CalWIN County.

2.7.1.2.2 Description of Change

Non-Financial Overal 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.

Existing Person Status:

The following reasons will set to the person level when the following conditions are met:

1. The existing person status reason CT73 'HH Mem Not Met Program Req.' will be updated to set as a person failure status reason when the following conditions are met in either A or B:
   A. All the following:
      a. The person is not marked 'orange exclude' and not marked as 'Ineligible -Inc/Res Counted' and not marked as 'Responsible Relative'.
      b. Either a, b or c:
         a. The individual is Return to resident Granted (determined in the Return to Resident functionality).
         b. The individual is granted for Indigent burial (determined in the Indigent Burial functionality).
         c. All the following:
            • The following is not true: the individual is Return to resident Granted (determined in the Return to Resident functionality).
            • The following is not true: the individual is granted for Indigent burial (determined in the Indigent Burial functionality).
            • The individual deceased date is in the benefit month or the program is intake and deceased date is less than or equal to individual application date.

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- An individual date of deceased date is before benefit month begin date
- The individual is not marked as 'excluded'.

B. The individual is failed.

Category	Short Description
73	HH Mem Not Met Program Req.

New Program/Person Status:

New Program/Person Status Reasons will be added to be used by this Rule Flow. The following reasons will set to the program/person level when the following conditions are met:

1. The new person status reason CT73 'Aided in Same County' will be set as a person failure status reason when all the following conditions are met:

   a. The person is not marked 'orange exclude', 'Ineligible -Inc/Res Counted', or 'Responsible Relative'.

   b. The individual is currently aided in General Assistance General Relief from a different case in the same county.

Category	Short Description
73	Aided in Same County

2. The new person status reason CT73 'Aided in Different County' will be set as person failure status reason when all the following conditions are met:

   a. The person is not marked 'orange exclude' and not marked as 'Ineligible -Inc/Res Counted' and not marked as 'Responsible Relative'.

   b. The Individual is currently aided in General Assistance General Relief from a different county or has an OPA record of General Assistance General Relief effective for the benefit month.

Category	Short Description
73	Aided in Different County

3. The new person status reason CT73 'Aided in Cash Program' will be set as a person failure status reason when all the following conditions are met:
    a. The person is not marked 'orange exclude' and not marked as 'Ineligible -Inc/Res Counted' and not marked as 'Responsible Relative'.
    b. The individual is currently aided in the following programs: CalWORKs, KIN-GAP, FOSTER CARE, RCA, CAPI for the benefit month.

Category	Short Description
73	Aided in Cash Program

4. The new display-only status reason CT73 'Gets CAPI' will be set as a display-only status reason when all the following conditions are met:
    a. The person is not marked 'orange exclude' and not marked as 'Ineligible -Inc/Res Counted' and not marked as 'Responsible Relative'.
    b. The individual is currently aided in the following programs: CalWORKs, KIN-GAP, FOSTER CARE, RCA, CAPI for the benefit month.
    c. The individual is aided in 'CAPI'.

Category	Short Description
73	Gets CAPI

5. The new display-only status reason CT73 'Aided in CalWORKs' will be set as a display-only status reason when all the following conditions are met:
    a. The person is not marked 'orange exclude' and not marked as 'Ineligible -Inc/Res Counted' and not marked as 'Responsible Relative'.
    b. The individual is currently aided in the following programs: CalWORKs, KIN-GAP, FOSTER CARE, RCA, CAPI for the benefit month.
    c. The individual is aided in CalWORKs.

Category	Short Description
73	Aided in CalWORKs

6. The new person status reason CT73 'Aided with Aid Code 98' will be set as a person failure status reason when all the following conditions are met:
    a. The person is not marked 'orange exclude' and not marked as 'Ineligible -Inc/Res Counted' and not marked as 'Responsible Relative'.
    b. The individual is currently aided in General Assistance General Relief with aid code '98'.

Category	Short Description
73	Aided with Aid Code 98

7. The new person status reason CT73 'CW Time Limit >= 48' will be set as a person failure status reason when all the following conditions are met:
    a. The person is not marked 'orange exclude' and not marked as 'Ineligible -Inc/Res Counted' and not marked as 'Responsible Relative'.
    b. The individual is a parent (biological or step) and the child's age is less than 18 and does not have a deceased date.
    c. The CW time limit is greater than or equal to 48 months.

Category	Short Description
73	CW Time Limit >= 48

8. The new person status reason CT73 'Not Eligible for CALM' will be set as a person failure status reason when all the following conditions are met:
    a. The person is not marked 'orange exclude' and not marked as 'Ineligible -Inc/Res Counted' and not marked as 'Responsible Relative'.
    b. The rule 'Grant greater than $5.' is active.
    c. GA/GR sub program is 'Cash Aid Link to Medical'
    d. All the following in A or B:
        A. All the following:
            • The program is ongoing.
            • The individual is currently aided in Medical and has one of the following aid codes:
              '13', '14', '16', '17', '1U', '23', '24', '26', '27', '36', '63', '64', '66', '67', '6A', '6C', '6H', OR '6U'
        B. All the following:

- The program is intake.
- The following is not true: the individual is currently aided in Medical and has one of the following aid codes:
'13', '14', '16', '17', '1U', '23', '24', '26', '27', '36', '63', '64', '66', '67', '6A', '6C', '6H', OR '6U'

Category	Short Description
73	Not Eligible for CALM

9. The new person status reason CT73 'Spouse or Parent Has no Medi-Cal Eligibility' will be set as a person failure status reason when all the following conditions are met:
    a. The person is not marked 'orange exclude' and not marked as 'Ineligible -Inc/Res Counted' and not marked as 'Responsible Relative'.
    b. All the following:
        1. The rule 'Grant greater than $5.' is active.
        2. GA/GR sub program is 'Cash Aid Link to Medical' and the program is ongoing.
        3. The following is not true: the individual is currently aided in Medical and has one of the following aid codes:
            - '13', '14', '16', '17', '1U', '23', '24', '26', '27', '36', '63', '64', '66', '67', '6A', '6C', '6H', OR '6U'

Category	Short Description
73	Spouse or Parent Has no Medi-Cal Eligibility

2.7.1.3 Correspondence

2.7.1.3.1   Overview

This section describes the Notice of Action (NOA) triggers that will be created depending on the resulting EDBC reason code in the previous sections. Notices only trigger from certain reason codes listed in this section.

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC Display Reason>. The trigger condition describes the statuses and reasons in which the notice will trigger for. The county-specific information describes which counties and actions the notices will generate for, as well as the document name and number that will be displayed

on the distributed documents page. The template column determines how notices are grouped when generated.

2.7.1.3.2 Description of Change

2. **Reason Code: XAN101 – Aided in Same County**

      a. Trigger Condition

- This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Aided in Same County'.

      or

- This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Aided in Same County'.

      b. Person Level Reason

      c. County-specific information:

County	Action	Document Description	Number	Template
San Francisco	Discontinuance	CAAP Fraud Discontinuance (Duplicate Aid)	2160E	12608
Yolo	Denial	General Assistance Denial - Needs met by Other Source	131-3	12215

3. **Reason Code: XAN463 - Aided in Different County**

  b. Trigger Condition

      i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Aided in Different County'.

      or

      ii. This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Aided in Different County'.

  c. Person Level Reason

  d. County-specific information:

County	Action	Document Description	Number	Template
Alameda	Denial	GA Denial - Receiving Public Assistance In Another CA County	245 1 (10/10)	11462
Santa Barbara	Denial	GR - Deny - On Aid in Another County/State	166-0	12332
San Francisco	Discontinuance	CAAP Fraud Discontinuance (Duplicate Aid)	2160E	12608
San Francisco	Denial	CAAP Denial - On Aid in Another County/State	2155-08	12604

County	Action	Document Description	Number	Template
Yolo	Denial	General Assistance Denial - Needs met by Other Source	131-3	12215

4. **Reason Code: XAN006 - Aided on Cash Program**
   a. Trigger Condition
      i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Aided on Cash Program'.

      or

      ii. This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Aided on Cash Program'.
   b. Person Level Reason
   c. County-specific information:

County	Action	Document Description	Number	Template
Alameda	Denial	GA Denial - Receiving Public Assistance In Another CA County	245 1 (10/10)	12645
Fresno	Denial	General Relief Denial - Various Reasons	241-A	610728
Orange	Discontinuance	GR Disc. Approved for Other Cash Assistance	074 A	11611
Orange	Denial	GR Denial - Cash Recipient	128/232 A	11608
San Francisco	Discontinuance	CAAP Discontinuance: Other Public Assistance	019 1	12599
San Francisco	Discontinuance	CAAP Fraud Discontinuance (Duplicate Aid)	2160E	12608
San Mateo	Discontinuance	GA Discontinuance - other public assistance	001 0	607392
San Mateo	Denial	GA Denial - Other Program, Agency, or County	112 0	11953
Solano	Denial	GA - Denial Eligible for CalWORKs	153	12112
Yolo	Discontinuance	General Assistance Discontinuance - Needs Met by Another Source	022-3	12247
Yolo	Denial	General Assistance Denial - Needs met by Other Source	131-3	12215
Yolo	Discontinuance	General Assistance Discontinuance - Needs Met by Another Source	022-3	611480

5. **Reason Code: XAN088 - Gets CAPI**
   a. Trigger Condition

   i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Gets CAPI'.

    or

   ii. This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Gets CAPI'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Alameda	Discontinuance	GA Disc - Approved for CAPI or SSI/SSP	023 0 (10/10)	12652
Alameda	Denial	GA Denial - Receiving CAPI or SSI/SSP	137 1 (10/10)	11462
Contra Costa	Discontinuance	GA Discontinuance - CAPI Granted	042 1	11525
Contra Costa	Denial	GA Denial - CAPI Eligible	142 2	11519
Sacramento	Discontinuance	DISCONTINUANCE-Various Reasons	CDS 013-1	12450
Santa Clara	Discontinuance	GA Discontinuance - Receiving CAPI	GA 028	12013
Santa Clara	Denial	GA Denial - receiving CAPI	GA 144	12038
San Francisco	Discontinuance	CAAP Fraud Discontinuance (Duplicate Aid)	2160E	12608

6. **Reason Code: XAN200 - Aided in CalWORKs**

a. Trigger Condition

   i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Aided in CalWORKs'.

    or

   ii. This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Aided in CalWORKs'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Santa Barbara	Discontinuance	GR - Disc - Other Cash Program	053-1	12334

Santa Barbara	Denial	GR - Deny - Eligible to CalWORKs/Honor CalWORKs POI/Sanction	153-0	12332
San Francisco	Denial	CAAP Denial - CalWORKs Eligible/Recipient	2155-17	12604
Solano	Discontinuance	GA - Discontinuance - Eligible for CalWORKs	053	12141

7. **Reason Code: XAN944 - CW Time Limit >= 48**
   a. Trigger Condition
      i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'CW Time Limit >= 48'.

      or

      ii. This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'CW Time Limit >= 48'.
   b. Person Level Reason
   c. County-specific information:

County	Action	Document Description	Number	Template
Alameda	Denial	GA Denial - Ineligible Due to CalWORKs Time Limits	133 0 (12/11)	11462
Fresno	Discontinuance	General Relief Discontinuance - Various Reasons	022-B	11539
Fresno	Denial	General Relief Denial - Various Reasons	241-A	610728
Orange	Denial	GR Denial - Ineligible Due to CalWORKs Time Limits	180	609372
Sacramento	Discontinuance	GA Denial/Disc - Ineligible Due to CalWORKs Time Limits	GA 3000_34N	608042
Sacramento	Denial	GA Denial/Disc - Ineligible Due to CalWORKs Time Limits	GA 3000_34N	608041
San Diego	Denial	GR Person/Case Denied Due to CalWORKs Ineligibility	143-2	12733
Solano	Denial	Denial - Timed-Out for CalWORKs	GA 174A	607583
Sonoma	Denial	GA Denial - 48 Months Cash Aid	145-2 (09/98)	12539

8. **Reason Code: XAN998 - Not Eligible for CALM**
   a. Trigger Condition
      i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Not Eligible for CALM'.

or

ii. This notice generates for the applicable counties when the person was 'Pending' and is now 'Denied' on the current EDBC with the reason 'Not Eligible for CALM'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
San Francisco	Discontinuance	CALM Discontinuance - Not Eligible for ABD Medi-Cal	007 0 (09/03)	12633
San Francisco	Denial	CAAP Denial - Not Eligible for ABD Medi-Cal	2155-37	610705

9. **Reason Code: XAN921 – Spouse or Parent Has no Medi-Cal Eligibility**

a. Trigger Condition

i. This notice generates for the applicable counties when the person was 'Active' in the previous saved EDBC and is now 'Discontinued' on the current EDBC with the reason 'Spouse or Parent Has no Medi-Cal Eligibility'.

b. Person Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
San Francisco	Discontinuance	CALM Discontinuance - Not Eligible for ABD Medi-Cal	007 0 (09/03)	12633

3 REQUIREMENT

3.1 Migration Requirements

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

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

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2319	The CONTRACTOR shall update the CalSAWS Software with current available automated CalWIN county specific NOA's and Forms associated to their GA/GR program. The CONTRACTOR shall update the CalSAWS software to trigger and generate county specific NOAs and Forms based upon each counties eligibility rules.	Batch/Interfaces: 1. The DXC correspondence service will have the ability to return a generated unflattened blank form/notice. 2. The CalSAWS template repository will manually be kept in sync with DXC's inventory manually. (Considering 2 services) 3. The Assumption is based on the below count and complexity 74 Non-State forms triggers (online/batch) that will be built in CalSAWS and will call DXC service to generate form (20% will be difficult , 50% will be medium and 30% will be easier). DBCR: New web service will utilize new staging tables separate from other services. Correspondence- Forms: 1.There are a total of 180 non EDBC triggered forms of which •53 forms will be manually generated from template repository. •93 forms will be triggered from CalSAWS and generated through DXC service. •34 forms will use current CalSAWS triggers and the corresponding version available. 2. All GA/GR specific and combo program State forms will	The following subsequent Rules migrated in this SCR will met these requirements.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		be triggered/generated through CalSAWS except if any form is customized by county already in CalWIN. In that case, DXC service will be called just for that county alone to generate the form PDF. 3. All GA/GR specific and combo program Non-State forms will be generated through DXC service. Whenever required CalSAWS will call the GA/GR Correspondence service with all the data related to the case. 4. New functionality will be added to CalSAWS to determine form generation based on county. 5. All CalSAWS generated state forms will not have capability to add/modify data elements by user. The existing CalSAWS capability to append text to the NOA pdf will be available to the user. 6.If any manual variables are needed, print queue will be accessed through iFrame by calling DXC service where user will be able to add manual variables. Entire case data including office related information will be sent	

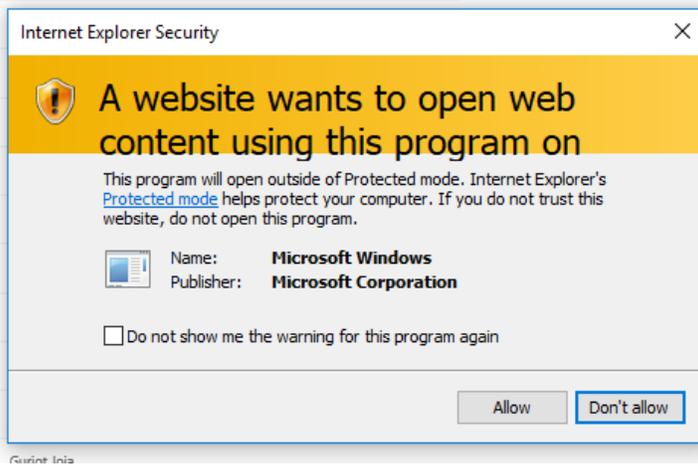| DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		to DXC service for each form/NOA trigger.	
		Correspondence - NOAs:	
		1.The triggers for 164 NOAs will be developed in CalSAWS and DXC Correspondence Service will be called with the case/program information to render the NOA pdf.	
		2.If any manual variables are needed, print queue will be accessed through iFrame by calling DXC service where user will be able to add manual variables.	
		Entire case data including office related information will be sent to DXC service for each form/NOA trigger.	
		Correspondence - Central Print: CalSAWS nightly batch will prepare print bundles for GA/GR NOAs and Forms generated by DXC.	

4   MIGRATION IMPACTS

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

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
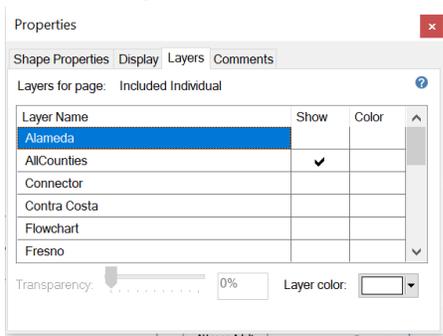

7. Click Allow Blocked Content.

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)
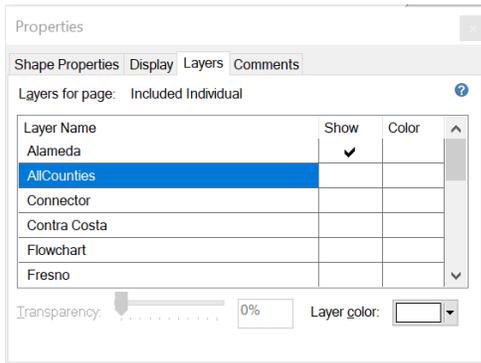

9. Click the layer icon circled in red color below

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

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

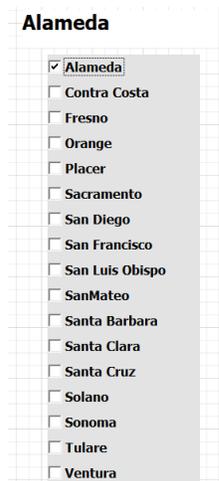Viewing Visio Document in Microsoft Visio

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

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

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

4. On the right side of the flow diagram the counties names will be displayed as shown below

All Counties

- ☐ Alameda
- ☐ Contra Costa
- ☐ Fresno
- ☐ Orange
- ☐ Placer
- ☐ Sacramento
- ☐ San Diego
- ☐ San Francisco
- ☐ San Luis Obispo
- ☐ SanMateo
- ☐ Santa Barbara
- ☐ Santa Clara
- ☐ Santa Cruz
- ☐ Solano
- ☐ Sonoma
- ☐ Tulare
- ☐ Ventura

5. Then click the county name that is applicable to you, in this case Alameda as shown below

Alameda

- ☑ Alameda
- ☐ Contra Costa
- ☐ Fresno
- ☐ Orange
- ☐ Placer
- ☐ Sacramento
- ☐ San Diego
- ☐ San Francisco
- ☐ San Luis Obispo
- ☐ SanMateo
- ☐ Santa Barbara
- ☐ Santa Clara
- ☐ Santa Cruz
- ☐ Solano
- ☐ Sonoma
- ☐ Tulare
- ☐ Ventura

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

5.2   Reference Table

Reference table for CT73 (Program status reason) and corresponding status reason in this design document. This table shows the values for the new columns added.

a.   Key:
   i.   GR Priority
      01.   The lower the number the higher the priority
   ii.   GR Program Role
      01.   FE – This indicator means the status reason will change the person role to FRE - 'Financially Responsible – Excluded'
      02.   FI – This indicator means this status reason will change the person role to FRI 'Financially Responsible – Included'
      03.   MM – This indicator means this status reason will change the person role to MMO 'Medi-Cal Member Only'
      04.   UP – This indicator means this status reason will change the person role to UP 'Unaided Person'
   iii.   GR Close Person
      01.   CanCloseBoth – Indicator means this status reason can close both person and program level.
      02.   Y – indicator means this status reason can close the person.
   iv.   GR Close Program
      01.   CanCloseBoth – Indicator means this status reason can close both person and program level.
      02.   Y – Indicator means this status reason can close the program.
   v.   General Relief
      01.   Y -Indicator means this status reason will be applicable for CalWINs General Relief Program

CalWIN Status	GR Priority	CalSAWs Status (Status Reason)	Set by Eligibility	GA/GR Program Role	GA/GR Close Person	GA/GR Close Program	General Relief	Use Case
XAN101	3720	Aided in Same County			Y		Y	non-financial overall flow

XAN463	3740	Aided in Different County			Y		Y	non-financial overall flow
XAN006	3760	Aided in Cash Program			Y		Y	non-financial overall flow
XAN088	3780	Gets CAPI					Y	non-financial overall flow
XAN200	3800	Aided in CalWORKs					Y	non-financial overall flow
XAN407	3820	Aided with Aid Code 98			Y		Y	non-financial overall flow
XAN944	3840	CW Time Limit >= 48			Y		Y	non-financial overall flow
XAN998	3860	Not Eligible for CALM			Y		Y	non-financial overall flow
XAN921	3880	Spouse or Parent Has no Medi-Cal Eligibility			Y		Y	non-financial overall flow