

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-205757

MEDS: Add new MEDS alerts 1523, 9577 and update Alert Type fields of existing alert 9504

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sowmya Coppisetty
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/28/2021	1.0	Initial version	Sowmya Coppisetty
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1 OVERVIEW

1.1 Current Design

CalSAWS currently does not display MEDS alert 1523 and 9577 on the MEDS Alert Search page and MEDS Alert Admin page. These alerts are stated under the work effort MEDS Change Cycle letter 437 and 471.

And the Alert Type and Alert Action type of the MEDS Alert ID 9504- Eligibility Redetermination Due in CalSAWS is currently saved as 'ALERT'.

1.2 Requests

1. Add MEDS alert to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS
 - a) 1523 – ALIEN-NO BELONGS TO ANOTHER MEDS-ID
 - b) 9577- ELIGIBILITY REDETERMINATION OVERDUE
2. Update the Alert type and Alert Action type of an existing alert 9504.

1.3 Overview of Recommendations

1. Add new MEDS alert 1523 and 9577 to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS.
2. Update the Alert type and Alert Action Type of an existing alert 9504 to 'PRI-ALT'

1.4 Assumptions

1. The Task Information panel will have an initial Status of 'Inactive' on the MEDS Alert Admin page. If the County activates the Task Information panel, they can complete the configuration options for the Task processing. A page validation will also require the county to select a Task Type to be used.

2 RECOMMENDATIONS

2.1 Add New MEDS Alerts 1523 and 9577 and update MEDS Alert 9504

2.1.1 Overview

Add MEDS Alert 1523 and 9577 into the CalSAWS system. The new MEDS Alerts will be displayed on the MEDS Alert Admin page and MEDS Alert Search page and Update the Alert type and Alert action type of an existing alert 9504.

2.1.2 Description of Change

1. Add new MEDS alert with the following details:
 - a. Alert ID (External Number): 1523
 - b. Internal Number (System use only): 0826
 - c. Alert Description (Title Description): ALIEN-NO BELONGS TO ANOTHER MEDS-ID
 - d. Alert/Alert Action Type: ALERT
 - e. Action Description: Correct and Reenter

2. Add new MEDS alert with the following details:
 - a. Alert ID (External Number): 9577
 - b. Internal Number (System use only): 0994
 - c. Alert Description (Title Description): ELIGIBILITY REDETERMINATION OVERDUE
 - d. Alert/Alert Action Type: PRI-ALT
 - e. Text Description: This alert is generated when the populated Redetermination Completed (RV-COMP) date is greater than 12 months. This alert is a reminder to counties and State Medi-Cal Eligibility workers that an eligibility Redetermination is overdue.
 - f. Action Description: Complete the Redetermination process.
 - g. Save and display the following data elements and its values received in the MEDS Alerts inbound file on the MEDS Alert Detail Page.

Dictionary Number	Data Element
0245	REDETERM_MONTH
0250	REDETERM_DATE
0190	CURR_ELIG_STATUS

3. Set MEDS Alert 1523 and 9577 to 'Active' on the MEDS_ALERT_CONFIG table.
4. Update the Alert type and Alert Action Type of the existing Alert 9504 from 'Alert' to 'PRI-ALT'.

Note- This SCR requires partner testing to test new MEDS Alerts .

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.3.7	The LRS shall provide a method for alerting COUNTY-specified Users when a discrepancy in LRS Data exists. When the LRS discovers a discrepancy, the LRS shall display information to the User for follow-up action, as necessary.	Adding MEDS Alert 1523 and 9577 to alert County Eligibility Workers when there is a discrepancy on Alien Number between MEDS and LRS and to remind eligibility is overdue and updated the Alert type and alert action type of existing alert 9504.

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CA-209502: MEDS: Add Alerts 9070 and 9073 on
MEDS Alert Search page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Carlos Zepeda

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1 OVERVIEW

This SCR outlines the necessary requirements to add the new MEDS alert (9070 and 9073) into CalSAWS.

1.1 Current Design

CalSAWS currently does not display MEDS alert 9070 and 9073 on the MEDS Alert Search page and MEDS Alert Admin page. These alerts are stated under the work effort M4694 - Change Cycle letter 446. This work effort will prevent improper payments for ineligible nonresident beneficiaries when the case becomes active again.

1.2 Requests

Add MEDS alert to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS

- 9070 – MOVED OUT OF STATE PER FEDERAL DATA; ELIG RE-EVAL REQ
- 9073 – RECON ADD REJECTED – OOS TERM ON MEDS; ELIG RE-EVAL REQ

1.3 Overview of Recommendations

1. Add new MEDS alert 9070 and 9073 to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS.

1.4 Assumptions

1. The Task Information panel will have an initial Status of 'Inactive' on the MEDS Alert Admin page. If the County activates the Task Information panel, they can complete the configuration options for the Task processing. A page validation will also require the county to select a Task Type to be used.

2 RECOMMENDATIONS

2.1 Add New MEDS Alerts 9070 and 9073

2.1.1 Overview

Add MEDS Alert 9070 and 9073 into the CalSAWS system. The new MEDS Alerts will be displayed on the MEDS Alert Admin page and MEDS Alert Search page

2.1.2 Description of Change

1. Add new MEDS alert with the following details:
 - a. Alert ID (External Number): 9070
 - b. Internal Number (System use only): 0777
 - c. Alert Description (Title Description): MOVED OUT OF STATE PER FEDERAL DATA; ELIG RE-EVAL REQ
 - d. Alert Type: Critical
 - e. Text Description: This daily alert is generated when beneficiary is closed in MEDS in connection with the residency verification program (PARIS or other).
 - f. Action Description: Reevaluate beneficiary's eligibility and close their case in CalSAWS if the client is not a resident of California
2. Add new MEDS alert with the following details:
 - a. Alert ID (External Number): 9073
 - b. Internal Number (System use only): 0809
 - c. Alert Description (Title Description): RECON ADD REJECTED – OOS TERM ON MEDS; ELIG RE-EVAL REQ
 - d. Alert Type: Critical
 - e. Text Description: This daily alert is generated when beneficiary is closed in MEDS in connection with the residency verification program (PARIS or other). The county did not update SAWS, and SAWS attempted to put the client back on at reconciliation, but it was rejected.
 - f. Action Description: Reevaluate beneficiary's eligibility and close their case in CalSAWS if the client is not a resident of California
3. Set MEDS Alert 9070 and 9073 to 'Active' on the MEDS_ALERT_CONFIG table.

Note: all MEDS Alerts will require interface partner testing.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.3.7	The LRS shall provide a method for alerting COUNTY-specified Users when a discrepancy in LRS Data exists. When the LRS discovers a discrepancy, the LRS shall display information to the User for follow-up action, as necessary.	Adding MEDS Alert 9070 and 9073 to alert County Eligibility Workers when the beneficiary is closed in MEDS

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CA-210527: MEDS Alert Number 9581 for Age 25
years and 9 months old

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
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8/27/2021	1.0	Initial version	Jennifer Muna
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1 OVERVIEW

MEDS installed a new MEDS alert (9581) with Change Cycle Letter 451:

“MEDS shall provide SAWS batch support during the transition of beneficiaries identified, ages 19-25, who meet the criteria as they are placed into specific full scope Medi-Cal aid codes beginning November 22, 2019. The expansion for beneficiaries ages 19-25 into full scope Medi-Cal will have a January 1, 2020, effective date.

A MEDS Alert(s) shall be generated requiring 'redetermination' when an individual (undoc. immigrant regardless of citizenship or immigration status) ages out of Full Scope Medi-Cal at age 26”

This SCR outlines the necessary requirements to add the new MEDS alert (9581) into CalSAWS.

1.1 Current Design

CalSAWS currently does not display MEDS alert 9581 on the MEDS Alert Search page and MEDS Alert Admin page.

1.2 Requests

Add MEDS alert 9581- Potential Eligibility Change – Age 25 years and 9 months, to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS.

1.3 Overview of Recommendations

1. Add MEDS alert 9581 to display on the MEDS Alert Search page and MEDS Alert Admin page in CalSAWS.

1.4 Assumptions

1. The Task Information panel will have an initial Status of 'Inactive' on the MEDS Alert Admin page. If the County activates the Task Information panel, they can complete the configuration options for the Task processing. A page validation will also require the county to select a Task Type to be used.

2 RECOMMENDATIONS

2.1 Add New MEDS Alert 9581

2.1.1 Overview

Add MEDS Alert 9581 into the CalSAWS system. The new MEDS Alert will be displayed on the MEDS Alert Admin page and MEDS Alert Search page.

2.1.2 Description of Change

1. Add new MEDS Alert with the following details:
 - a. Alert ID (External Number): 9581
 - b. Internal Number (System use only): 0819
 - c. Alert Description (Title Description): POTENTIAL ELIGIBILITY CHG-AGE 25 YRS, 9 MOS.
 - d. Alert Type: Action
 - e. Text Description: This renewal alert is generated when client's age is 25 years and 9 months, and the client is approaching the end of the acceptable age limit (26 years old) for this program.
 - f. Action Description: Redetermination needed - initiate action to check the recipient's potential change in Medi-Cal.
2. Set MEDS Alert 9581 to 'Active' on the MEDS_ALERT_CONFIG table.
3. Set the following default values for the Task Information on the MEDS Alert Admin Detail page for the new MEDS Alerts:
 - a. Status: Inactive
 - b. Task Type and Task Sub-Type: Blank
 - c. Long Description: MEDS Alert {Alert ID} – {Alert Description} has been received.
 - d. Due Date: Default Due Date
 - e. Default Due Date: 10 Days
 - f. Initial Assignment: Default Assignment
 - g. Default Assignment: MEDS Alert Task Distribution

Note: All MEDS Alerts will require Interface Partner Testing.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.3.7	The LRS shall provide a method for alerting COUNTY-specified Users when a discrepancy in LRS Data exists. When the LRS discovers a discrepancy, the LRS shall display information to the User for follow-up action, as necessary.	Adding MEDS Alert 9581 to alert County Eligibility Workers that the beneficiary is approaching the acceptable age limit (26 yrs. old) for the Medi-Cal program.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214906

DDID 2233

Task Mgt – General Tasks
(No Case or Application)

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/05/2021	1.0	Initial Revision	Rakan Ali
01/31/2022	1.1	Content Revision <ul style="list-style-type: none"> Updated Figure 2.2.2.1 Task Pop-Up – Task Detail Mockup 	Rakan Ali

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1 OVERVIEW

This design outlines the modifications to Task Management functionality within the CalSAWS System to allow Users to create manual Tasks without the requirement to include a Case Number, Program or application associated with the Task.

1.1 Current Design

The CalSAWS System does not allow Tasks without a Case or application association to be created manually.

1.2 Requests

Update the CalSAWS System Task Management functionality to allow Users to create Tasks without a Case or application association manually.

1.3 Overview of Recommendations

1. Update the following pages to allow Tasks to be manually created without a Case or application association:
 - a. Worklist: Task Detail
 - b. Task Pop-Up: Task Detail

1.4 Assumptions

1. The modifications described in this design only apply to new Tasks during manual creation.
2. There are no impacts/modifications to Task Upload processing.
3. There are no impacts/modifications to Task Reports/Dashboards.
4. A general Task will not be associated with a Case/Program/application. General Tasks will behave similar to existing tasks that are not associated to a Case/Program. They will be accessible through the online pages without the need for modifications.
5. A general Task created by a User will contain sufficient information for the Task to be worked.
6. This enhancement does not impact the Task Successor logic implemented with SCR CA-214915.

2 RECOMMENDATIONS

This section will outline recommendations to adjust the Task Detail pages (Create and View Mode) that are accessible from the Worklist and Task Pop-Up pages to allow a User to create a Task without a Case association.

2.1 Worklist Task Detail – Create and View Mode

2.1.1 Overview

This section will describe updates to the Worklist Task Detail page to allow a Task to be manually created without a Case association.

2.1.2 Worklist Task Detail – Page Mockups

Task Detail

* - Indicates required fields

General

Case Number:

Case Name:

Worker Assigned: * 19LS008J00 **Category: *** Case Update

Type: * Change in Primary Language Designa

Due Date: * 11/23/2021 **Expiration Date:** 12/2/2021

Long Description:

Figure 2.1.2.1 – Worklist Task Detail – Create Mode Page Mockup

Task Detail

*- Indicates required fields

✓ General

Case Number: Re-Open Close

Category: Case Update	Status: Completed	Expedited: No
Type: Change in Primary Language Designation		
Created Date: 10/29/2021	Worker Assigned: * 90LS00HM00	Assigned Date: 10/29/2021
Due Date: * 11/01/2021	Expiration Date: 11/28/2021	
Long Description:		

▶ Task History Re-Open Close

Figure 2.1.2.2 – Worklist Task Detail – View Mode Page Mockup

Task Detail

*- Indicates required fields

✓ General

Case Number:

Save and Return Cancel

Category: Quality Review	Status: Assigned	Expedited: No ▾
Type: Quality Control Corrective	Worker Assigned: * 90LS00HM00 Select	Assigned Date: 11/02/2021
Created Date: 09/28/2021	Expiration Date:	
Due Date: * 10/07/2021 📅		

Long Description:

Mark Task as Complete?

▶ Task History

Save and Return Cancel

Figure 2.1.2.3 – Worklist Task Detail – Edit Mode Page Mockup

2.1.3 Description of Changes

Update the Worklist: Task Detail page to:

1. Add a "General" label with a checkbox to the page in Create mode (See mockup for placement). If the checkbox is selected, the Case Number field will be greyed out allowing a Task to be created without a Case association. When the page is in View mode, if the Task was not created as general, the "General" label and checkmark value will not display at all. If the Task was created as general, a checkmark and the "General" label will display. Once a task is created as a General Task, the "General" attribute is not editable. An existing non-general Task cannot be updated to be general. Similarly, a general Task cannot be updated to be non-general.
2. Remove the Required Icon from the Case Number field. This field will still be enforced as required if the "General" checkbox is not selected.

2.1.4 Page Validations

N/A

2.1.5 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist > Add Task

2.1.6 Security Updates

N/A

2.1.7 Page Mapping

Update Page Mapping to include the General attribute.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Task Pop-Up – Task Detail Create and View Mode

2.2.1 Overview

This section describes updates to the Task Pop-Up Task Detail page to not require a Case Number and a Program when creating a Task.

2.2.2 Task Pop-Up – Task Detail – Create and View Mode Page Mockup

The mockup shows a 'Task Detail' form with a title bar and a 'Help' icon. A legend indicates that asterisks (*) denote required fields. The form is organized into sections: 'General' (checked), 'Case Information', 'Category and Type', 'Due Date', 'Worker Information', and 'Long Description'. Buttons for 'Save and Add Another', 'Save and Return', 'Save', and 'Cancel' are located at the top right and bottom right of the form area.

Task Detail			
*- Indicates required fields			
<input checked="" type="checkbox"/> General			
Case Number:	Case Name:	Program(s):	Status: *
<input type="text"/>	<input type="text"/>	<input type="text"/>	Assigned
Category: *	Type: *	Sub-Type:	Priority:
<input type="text" value="Case Update"/>	<input type="text" value="Change in Primary Language Designation"/>	<input type="text"/>	Expedited:
Due Date: *		Worker Assigned Date:	<input type="text" value="No"/>
<input type="text" value="11/22/2021"/>			
Assign to Program Worker:	Worker ID:	Bank ID:	
<input type="text" value="No"/>	<input type="text" value="90LS001300"/> <input type="button" value="Select"/>	<input type="text"/> <input type="button" value="Select"/>	
Long Description:			
<input type="text"/>			
<input type="button" value="Save and Add Another"/> <input type="button" value="Save and Return"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Figure 2.2.2.1 – Task Pop-Up – Task Detail Create Mode Page Mockup

Task Detail

Result 2 of 1 - 100

*- Indicates required fields

Edit Print Close

Case Number	Case Name:	Program(s):	Status: * Assigned	Reference Number:
Category: * Application Registration	Type: Test Task with Action	Sub-Type: Test Sub	Priority: Medium	Expedited: No
Due Date: * 07/03/2021	Date Created: 07/02/2021	Worker Assigned Date:	Automated Action: Yes	
Assign to Program Worker: No	Worker ID:	Bank ID: 19DP0800CYBK		

Long Description:
Stand up and stretch

▶ Instructions

▶ Task History

Edit Print Close

Figure 2.2.2.2 – Task Pop-Up – Task Detail View Mode Page Mockup

Task Detail

Result 2 of 1 - 100

*- Indicates required fields

Save and Return Save Cancel

Case Number	Case Name:	Program(s):	Status: * Assigned	Reference Number:
Category: * Application Registration	Type: * Test Task with Action	Sub-Type: Test Sub	Priority: Medium	Expedited: No
Due Date: * 07/03/2021	Date Created: 07/02/2021	Worker Assigned Date:	Automated Action: Yes	
Assign to Program Worker: No	Worker ID: <input type="text"/> Select	Bank ID: 19DP0800CYBK Select		

Long Description:
Stand up and stretch

▶ Instructions

▶ Task History

Save and Return Save Cancel

Figure 2.2.2.3 – Task Pop-Up – Task Detail Edit Mode Page Mockup

2.2.3 Description of Changes

Update the Task Pop-Up: Task Detail page to:

1. Add a "General" label with a checkbox to the page in Create mode (See mockup for placement). If the checkbox is selected, the Case Number and Program(s) fields will be greyed out allowing a Task to be created without a Case association. The Assign to Program Worker field will be defaulted to "No" and greyed out because a general Task without a Case/Program association cannot be assigned to the Program Worker. When the page is in View mode, if the Task was not created as general, the "General" label and checkmark value will not display at all. Once a task is created the "General" attribute is not editable; if the Task was created as general, a checkmark and the "General" label will display. An existing non-general Task cannot be updated to be general. Similarly, a general Task cannot be updated to be non-general.
2. Remove the Required Icon from the Case Number and Program(s) fields. These fields will still be enforced as required if the "General" checkbox is not selected.

2.2.4 Page Validations

N/A

2.2.5 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option.

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

Update Page Mapping to include the General attribute.

2.2.8 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2233	<p>The CONTRACTOR shall update the Task Management solution to allow manual task creation without a case or application reference. Tasks must be accessible through the My Task, Task Search, and Worklist pages using existing search criteria.</p>	<p>There is no associated supervisor workflow for tasks that do not have a case or application reference.</p> <p>This DDID is implemented after, or at the same time as, DDID 655.</p>	<p>This design describes enhancements to allow Tasks to be manually created without a Case or Application reference.</p>

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA - 214918

DDID 2275

Task Mgt – Bundle Case Tasks

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

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11/08/2021	1.0	Initial Revision	Rakan Ali
01/28/2022	1.1	Content Revision <ul style="list-style-type: none"> Added an additional condition in section 2.6.2 – Bundle Case Tasks Processing. 	Rakan Ali

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to include a setting that counties can enable/disable that controls the ability to bundle Case Tasks during Task reassignment.

1.1 Current Design

The CalSAWS System Task Management functionality allows Tasks to be reassigned in the following locations:

- a. Task Pop-Up: Task Search Page
- b. Task Pop-Up: My Tasks Page (Get Next functionality)
- c. Worklist Page (Reassignment and Get Next functionality)
- d. Task Reassignment Detail Page

Positions can be configured to receive specific categories of Tasks on the Position Detail page.

1.2 Requests

Update the CalSAWS System to include a configurable setting that allows each county to enable or disable the ability to bundle Case Tasks during Task Reassignment on the following pages:

- a. Task Pop-Up: Task Search Page
- b. Task Pop-Up: My Tasks Page (Get Next functionality)
- c. Worklist Page (Reassignment and Get Next functionality)
- d. Task Reassignment Detail Page

1.3 Overview of Recommendations

1. Add a new setting to the Task Settings page that allows each county to enable or disable the bundle Case Tasks feature.
2. Update the following pages to include an attribute that will dynamically display to control bundling for Case Tasks during a Task reassignment based on the setting that is added to the Task Settings page:
 - a. Task Pop-Up: Task Search Page
 - b. Task Pop-Up: My Tasks Page (Get Next functionality)
 - c. Worklist Page (Reassignment and Get Next functionality)
 - d. Task Reassignment page
3. Implement the Case Task bundling logic.

1.4 Assumptions

1. SCR CA-214903 implements the Task Settings page in the same release as this enhancement.
2. The security rights/groups implemented by CA-214903 to support the Task Settings page will not be modified.

3. Each county has configured the Position Detail page appropriately for the needed Task Categories that each position can receive.
4. The bundling functionality for Tasks will only be applied to Tasks in an 'Assigned' status (See Section 2.6).
5. The function of the "Remove Bank Assignment" attribute on the Task Pop Up: Task Search and Task Reassignment Detail page is not affected or modified by the introduction of the "Bundle Case Tasks" attribute.
6. The Task Reassignment batch processes and functionality which retrieves the set of Tasks to be reassigned during a reassignment instance will not be modified.

2 RECOMMENDATIONS

This section will outline recommendations to allow each county to enable or disable the option of bundling Case Tasks during Task reassignment.

2.1 Task Settings Page

2.1.1 Overview

This section will describe updates to the Task Settings page to introduce a setting that will control the option of bundling Case Tasks during reassignment.

2.1.2 Task Settings – Page Mockups

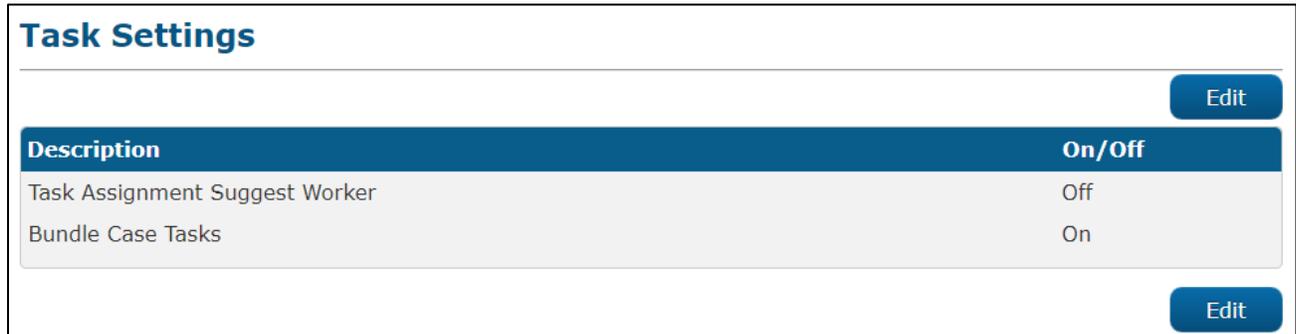
Task Settings

Save
Cancel

Description	On/Off
Task Assignment Suggest Worker	<input type="radio"/> On <input checked="" type="radio"/> Off
Bundle Case Tasks	<input checked="" type="radio"/> On <input type="radio"/> Off

Save
Cancel

Figure 2.1.2.1 – Task Settings Page Mockup - Edit Mode



The image shows a mockup of a 'Task Settings' page in edit mode. At the top left is the title 'Task Settings'. On the top right is a blue 'Edit' button. Below the title is a table with two columns: 'Description' and 'On/Off'. The table contains two rows: 'Task Assignment Suggest Worker' with 'Off' and 'Bundle Case Tasks' with 'On'. At the bottom right is another blue 'Edit' button.

Description	On/Off
Task Assignment Suggest Worker	Off
Bundle Case Tasks	On

Figure 2.1.2.2 – Task Settings Page Mockup - View Mode

2.1.3 Description of Changes

1. Update the "Task Settings" page to include a "Bundle Case Tasks" setting that will default to "Off" for all counties. At a county level, this setting will control the display of a field on the pages described further in this document that will indicate if a particular Task reassignment action bundles Case Tasks or not. If the setting is turned off, the pages within this design will not display any fields to allow bundling of Case Tasks. If the setting is turned on, the appropriate field for bundling Case Tasks will display. (See Sections 2.2 through 2.5)

2.1.4 Page Validations

N/A

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Tasks Settings

2.1.6 Security Updates

N/A

2.1.7 Page Mapping

N/A – No updates to page mapping

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Task Pop-Up – Task Search Page

2.2.1 Overview

This section describes updates to the Task Pop Up: Task Search page to dynamically display a new attribute allowing a user to opt into bundling case Tasks while performing a reassignment action.

2.2.2 Tasks Pop-Up – Task Search Page Mockup

Task Search Help

*- Indicates required fields
▶ Refine Your Search

Search Results Summary Results 1 - 1 of 1

Add Task

	Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	
<input type="checkbox"/>	12/16/2021	B13B686	ROSA HERNANDEZ	MC	CSC	Other Sensitive Services	Assigned	90LS000300		Complete Edit

Action: *

Bundle Case Tasks:

Remove Bank Assignment:

Submit Add Task

Figure 2.2.2.1 – Task Pop-Up – Task Search Page Mockup

2.2.3 Description of Changes

1. Update the Task Search page to display a new “Bundle Case Tasks” attribute with a dropdown menu containing “Yes” and “No” as options with a default value of “No” if:
 - a. The “Bundle Case Tasks” setting on the Task Settings page is “On” for the county
 - b. The value selected in the “Action” dropdown is one of the following:
 - Assign to Me
 - Assign to Program Worker
 - Assign to Position
 - Assign to Eligible Positions

Note: The function of the “Remove Bank Assignment” attribute is not affected or modified by the introduction of the “Bundle Case Tasks” attribute.

Reference Section 2.6 which describes the Bundle Case Task functionality when the value is “Yes” and the “Submit” button is pressed.

2.2.4 Page Validations

N/A

2.2.5 Page Location

N/A

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

N/A – No updates to page mapping

2.2.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 Task Pop-Up – My Tasks Page

2.3.1 Overview

This section describes updates to the Task Pop-Up: My Tasks page to dynamically display a new attribute allowing a user to opt into bundling case Tasks while using the Get Next functionality.

2.3.2 Tasks Pop-Up – My Tasks Page Mockup

Figure 2.3.2.1 – Tasks Pop-Up – My Tasks Page Mockup

My Tasks

Staff: Rakan Ali Worker ID: 90LS000300

Results per Page: 25 Search

Search Results Summary Results 1 - 1 of 1

Bundle Case Tasks: Yes Get Next

Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Date Assigned	Program Worker
12/16/2021	B13B686	ROSA HERNANDEZ	MC	CSC	Other Sensitive Services	Assigned	12/01/2021	19DP047B04

Complete Edit

Get Next

2.3.3 Description of Changes

1. Update the Task Search page to dynamically display a new “Bundle Case Tasks” attribute to the left of the Get Next button above the results panel with a dropdown menu containing “Yes” and “No” as options with a default value of “No”. This attribute will only display if the “Bundle Case Tasks” setting on the Task Settings page is “On” for the county. The value selected in the “Bundle Case Tasks” attribute within this panel will be respected when using the “Get Next” functionality.
Note: Both Get Next buttons (top and bottom) will respect the value selected in the “Bundle Case Tasks” attribute.

2.3.4 Page Validations

N/A

2.3.5 Page Location

N/A

2.3.6 Security Updates

N/A

2.3.7 Page Mapping

N/A – No updates to page mapping

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 Worklist Page

2.4.1 Overview

This section describes updates to the Worklist page to dynamically display a new attribute allowing a user to opt into bundling case Tasks while reassigning Tasks or using the Get Next functionality.

2.4.2 Worklist – Page Mockup

Worklist

*- Indicates required fields Search

Category: All **Status:** Assigned/In Process **Priority:** All

Case Number: Select

Organization Level: Worker **Organization Number:** 90LS000300 Select

Organization Name: Rakan Ali

Search By: Due Date

From: **To:**

Primary Case Language:

- English
- Spanish
- Afghani

Results per Page: 50 Search

Search Results Summary Results 1 - 1 of 1

Add Task

	Type / Sub-Type	Worker ID	Case Number	Status	Assigned Date	Due Date	Language	
<input type="checkbox"/>	Other Sensitive Services	90LS000300	B13B686	Assigned	12/01/2021	12/16/2021	Spanish	Edit

Complete Add Task

Assign: * To Me Reassign **Assign To:** 19LS000G00 Select

Bundle Case Tasks: No

Get Next

Category: All

Bundle Case Tasks: No

Primary Case Language:

- English
- Spanish
- Afghani

Get Next

Figure 2.4.2.1 – Worklist Page Mockup

2.4.3 Description of Changes

1. Update the Worklist page to display a new "Bundle Case Tasks" attribute with a dropdown menu containing "Yes" and "No" as options with a default value of "No" if the "Bundle Case Tasks" setting on the Task Settings page is "On" for the county. This attribute will display in the following sections of the page:
 - a. At the bottom of the Search Results Summary panel beneath the "Assign" attribute. (See mockup for attribute placement). The value selected in the "Bundle Case Tasks" attribute will be respected when one or more Tasks are reassigned via the "Reassign" button.
 - b. In the Get Next panel beneath the "Category" attribute. (See mockup for attribute placement). The value selected in the "Bundle Case Tasks" attribute within this panel will be respected when using the "Get Next" functionality.

Reference Section 2.6 for the bundle processing.

2.4.4 Page Validations

N/A

2.4.5 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist

2.4.6 Security Updates

N/A

2.4.7 Page Mapping

N/A – No updates to page mapping

2.4.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.5 Task Reassignment Detail Page

2.5.1 Overview

This section describes updates to the Task Reassignment Detail page to dynamically display a new attribute allowing a user to opt into bundling case Tasks as part of a Task Reassignment instruction.

2.5.2 Task Reassignment Detail – Page Mockup

Task Reassignment Detail

* - Indicates required fields

Title: *

Scheduled By:
Rakan Ali

Status:
Active

Last Run Date:

Task Source(s)

Source Worker(s)

	Level	Number	Name
<input type="checkbox"/>	Worker	19LS000G00	Rakan Ali

Source Bank(s)

Level	Number	Name
Bank		<input type="button" value="Select"/>

Source Case(s)

Level	Number	Name
Case		<input type="button" value="Select"/>

Reassignment Options

Primary Task Sort: **Secondary Task Sort:**

Reclaim Open Tasks:

Number of Tasks:

Due Date:

Task Priority: **Custom Task Priority: *** Critical High Medium Low

Task Types

Programs

Task Destination(s)

Destination Worker(s)

Reassignment Method: **Bundle Case Tasks:** **Remove Assigned Banks:**

Level	Number	Name
- Select -		

Destination Bank(s)

Reassignment Method: **Remove Assigned Workers:**

Level	Number	Name
Bank		<input type="button" value="Select"/>

Recurrence

Frequency: *

Figure 2.5.2.1 – Task Reassignment Detail Page Mockup – Create/Edit Mode

2.5.3 Description of Changes

1. Update the Task Reassignment Detail page to display a new "Bundle Case Tasks" attribute within the "Destination Workers" panel with a dropdown menu containing "Yes" and "No" as options with a default value of "No" if:
 - a. The "Bundle Case Tasks" setting on the Task Settings page is "On" for the county
 - b. The value selected in the "Number of Tasks" dropdown is "All Assigned Tasks".Note: The function of the "Remove Bank Assignment" attribute is not affected or modified by the introduction of the "Bundle Case Tasks" attribute.

See mockup for attribute placement

2. The Task Reassignment batch processes and functionality which retrieves the set of Tasks to be reassigned during a reassignment instance will not be modified. At the point in the processing where the Destination Workers panel is evaluated to determine the destination worker distribution, the processing will evaluate the "Bundle Case Tasks" attribute. If the value is "No", processing will continue normally. If the value is "Yes", processing will run the bundle processing logic (See section 2.6) to retrieve any additional "bundled" Tasks to include in the Task Reassignment.

The Task Reassignment processing has a limit of 2500 Tasks that can be reassigned for a single execution. If a Task Reassignment instruction results in more than 2500 Tasks to be reassigned, the Task Reassignment Results List Page will display a Run Result of "Processed" with a Run Result Detail value of "Number of Tasks to Reassign (#) is Over Limit (2500)". If a Task Reassignment instruction has a "Bundle Case Tasks" value of "Yes", the total count of Tasks determined to be reassigned (inclusive of the initial Tasks retrieved AND any bundled Tasks) will be considered when evaluating the limit of 2500 Tasks. If the number of Tasks to be reassigned exceeds 2500, processing will log the Run Result Detail value of "Number of Tasks to Reassign (#) is Over Limit (2500)" as normal.

A Task Reassignment instruction with a Reclaim attribute of Yes will evaluate Tasks that have been reassigned by the previous execution that remain in an Assigned status. These Tasks are "reclaimable". Tasks resulting from the bundle Case Tasks functionality that are reassigned are "reclaimable". If a Task Reassignment instruction reclaims Tasks that were previously assigned due to the bundle Case Tasks processing, the subsequent reassignment will evaluate the "Bundle Case Tasks" attribute to determine if the current reassignment will again bundle case Tasks.

Example:

Task #	Case	Task Worker	Task Status
1	1111111	24XXMMNN01	Assigned

2	1111111	24XX999901	Assigned
3	2222222	24XXMMNN01	Assigned
4	2222222	24YYYYYY99	In Process

A very basic Task Reassignment instruction is configured to Reassign All Assigned Tasks from Worker "24XXMMNN01" to Worker "24ZZZZZ01". The instruction is configured to bundle Case Tasks. The Task Reassignment will initially determine that Tasks 1 and 3 need to be reassigned FROM Worker "24XXMMNN01". Processing will then evaluate the Destination Worker information and the value of "Yes" in the Bundle Case Tasks attribute. At this point, processing will bring in any additional Tasks to be reassigned as part of the instruction. Task 2 will be brought in because this Task is in an Assigned Status, and it is associated to Case 1111111 which already has Task 1 queued up to be reassigned. Even though Case 2222222 also has a Task (Task 3) queued up for reassignment, Task 4 will not be included because the Status is NOT Assigned. The result of this instruction is to reassign Tasks 1, 2 and 3.

2.5.4 Page Validations

N/A

2.5.5 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Tasks > Task Reassignment > Click on a hyperlink of the desired result displayed in the Task Reassignment Search page or the "Add Reassignment" button to navigate to the Task Reassignment Detail page.

2.5.6 Security Updates

N/A

2.5.7 Page Mapping

N/A – No updates to page mapping

2.5.8 Page Usage/Data Volume Impacts

N/A

2.6 Bundle Case Tasks Processing

2.6.1 Overview

This section will describe the behavior of the Bundle Case Tasks processing.

2.6.2 Description of Changes

When a Task is being reassigned with a "Bundle Case Tasks" value of "Yes", the Task Bundling processing will evaluate the Case that is associated to the Task being reassigned. Processing will then retrieve all Tasks associated to the same Case that are in a Status of "Assigned". Of the additional Tasks that are retrieved, processing will exclude Tasks with a Task Category that the receiving Position is not configured for. **Of the additional Tasks that are retrieved, processing will exclude Tasks associated to a Program that receiving Position is not configured for.** The resulting group of Tasks will be "bundled" together for reassignment to the new Worker. The result is that the new Worker will receive all Tasks that their position is configured to receive for the Case that have not yet been worked.

If the Task to be reassigned is not associated to a Case, the bundling processing will not retrieve any additional Tasks to be "bundled" for reassignment.

The following types of Tasks will be excluded from the bundle processing:

- a. Tasks that result from a "Clearance" Automated Action. These Tasks are not associated to Cases, they are associated to things such as an ICT or e-Application.
- b. "CSC" Category Tasks that originated from a Customer Service Center Ticket.
- c. Authorization Tasks that were created through the Authorization process.
- d. Tasks that resulted from the "Customer Appointment: Scheduled" Automated Action. These Tasks are not associated to a Case and have specific handling to follow the assignment of the associated appointment.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
3392	<p>The CONTRACTOR shall update the Task Management solution so that whenever a worker is assigned or self-assigns a task, the worker is simultaneously assigned all available tasks they can work for that same case. This feature must be configurable to be enabled or disabled by county administrators. This functionality must apply to the following reassignment methods:</p> <ol style="list-style-type: none"> 1) Manual task reassignment 2) Automated task reassignment 3) Get Next reassignment 	<ul style="list-style-type: none"> - County configuration applies to all Offices, Units, Positions within the county. - Task grouping only applies to task types defined by county administrators. - Administrative staff will set up and maintain position and staff configurations for the system to determine what skills and classifications a worker has. 	<p>This design describes system modifications to bundle case tasks through manual task reassignment, automated reassignment, and Get Next reassignment per the requirement.</p>

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-221711

Case Linkage between CalHEERS and SAWS

(CH-171387)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Cynthia Ridley
	Reviewed By	Maksim Volf, Geetha Ramalingam, William Baretzky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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09/07/2021	0.2	Reviewed with Build and Test	Cynthia Ridley
09/13/2021	1.0	Draft Review for Consortium	Cynthia Ridley
09/14/2021	1.1	Updated Automated Regression Test section	William Baretzky
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09/23/2021	2.1	Added additional Clarifications to sections: <ul style="list-style-type: none"> • 2.3.3 - #7 • 2.6.3 - #6 	Cynthia Ridley
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01/07/2022	3.1	Submitted for Build/Test Review	Cynthia Ridley
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1 OVERVIEW

The purpose of this document is to satisfy functional specification in support of changes with CalHEERS Change Request CH-171387 (Case Linkage: Phase I)

1.1 Current Design

When a CalSAWS user wants to review MAGI case, application, or person information known only to CalHEERS, the user must utilize the CalHEERS Web Portal search functionality because there is currently no way to search CalHEERS directly from CalSAWS.

CalSAWS and CalHEERS communicate case linkage between a CalSAWS case and a MAGI case via eHIT (Electronic Health Information Transfer) transactions. CalSAWS sends an Eligibility Determination Request (EDR) or Disposition to CalHEERS, and CalHEERS locks the linkage between the two systems' cases. When a Medi-Cal program is denied or discontinued, CalSAWS communicates that information through a Disposition transaction to CalHEERS. CalHEERS processes the Disposition and enables the County of Responsibility (COR) on the MAGI case in CalHEERS. However, CalHEERS will save the CalSAWS-MAGI Case linkage in history for a reapplication. CalHEERS allows reapplications from CalSAWS cases already established in history. When an individual reapplies on a closed MAGI case from a county not in the case history, CalHEERS requires the user to reapply from the CalHEERS Web Portal and send a DER-U to the new county. The user can establish the linkage to the CalSAWS case in the new county.

Likewise, CalSAWS also locks the linkage between the cases in the two systems per current requirements in eHIT. Once the CalSAWS-MAGI case linkage is established in a CalSAWS county, CalSAWS does not allow the user to link the MAGI case to any other CalSAWS case in the same county.

When CalHEERS is unable to process the Disposition transaction on a discontinued or denied MAGI case, the COR between the CalSAWS and MAGI case remains locked in CalHEERS. If the individual reapplies on that MAGI case on the CalHEERS web portal and moved to a new county, CalHEERS sends the Unsolicited Determination of Eligibility Response (DER-U) to the old county. In this instance, the user must follow an established COR enablement process outside of the systems through a submission of a CalHEERS help desk ticket. The user then submits a Report a Change (RAC), and the DER-U is sent to the correct County.

CalSAWS allows a user to specify CalSAWS-CalHEERS person association information before sending an EDR, when needed, but CalHEERS will only accept the CalSAWS-CalHEERS person associations they already have established for the CalSAWS-CalHEERS linked case.

When an individual applies for health insurance through the CalHEERS Web Portal, the individual can choose the county in which they reside. CalHEERS assigns the MAGI case's County of Responsibility (COR) based on the residence county for the primary applicant. CalHEERS will send a DER-U to the assigned COR. If the CalSAWS user determines the COR is not correct, the user is required to process the DER-U as a courtesy application, then complete the Inter County Transfer (ICT) process to send the case to the correct County of Responsibility because eHIT does not currently support a way to change the COR on the new application

1.2 Requests

With CalHEERS Change Request 171387, CalHEERS will add a new CalHEERS-SAWS Search Interface to allow CalSAWS to search MAGI case, application and person information known to CalHEERS and they will send back the information to CalSAWS.

CalHEERS will now allow CalSAWS to update the CalSAWS-MAGI case linkage with 'Case Linkage Override' functionality in an EDR. CalHEERS will now have functionality in eHIT to accept updated CalSAWS-CalHEERS person associations in an EDR. Lastly, CalHEERS will add functionality for CalSAWS to cancel a DER-U and change the COR if received by the incorrect county; CalHEERS will update the COR for the MAGI case and then trigger a DER-U to the correct county.

1. Create a real-time CalHEERS-SAWS Search Interface to send a search request to CalHEERS and receive a response with MAGI case, application, and person information known in CalHEERS.
2. Add new MAGI search pages to CalSAWS for users to search and view MAGI case, application, and person-level information known to CalHEERS.
3. Add new MAGI case linkage update functionality that allows users to update case linkage between a CalSAWS and MAGI case directly from CalSAWS.
4. Add functionality to allow a user to cancel a DER-U and inform CalHEERS of the correct County of Responsibility.
5. Update the eHIT interface to send case linkage update information and person association updates in an EDR and to send a CancelDER transaction with 'Update COR' reason and the new county.

1.3 Overview of Recommendations

1. Create a new real-time CalHEERS-SAWS Search Interface that sends a search request to CalHEERS and receives a search response from CalHEERS with MAGI case, application and person information known to CalHEERS.
2. Create a new 'MAGI Case Search' page to allow a user to search and view MAGI case, application, and person-level information known to CalHEERS.
3. Create a new MAGI Search Response Case Detail page to display MAGI case-level and summary person-level information provided in the search response from the CalHEERS-SAWS Search transaction.
4. Create a new 'MAGI Search Response Person Detail' page for a user to view person-level information provided in the search response from the CalHEERS-SAWS Search transaction.
5. Create new MAGI-SAWS Case Linkage Update functionality to allow CEW to perform a Case Linkage Update between a CalSAWS and CalHEERS case.
6. Update the 'MAGI Determination List' page to display the 'Request Case Linkage Update' field along with the selected new MAGI Case number. The Request Case Linkage Update will remain on the MAGI Determination List page until the user sends an EDR, cancels the Request Case Linkage Update, navigates away and performs a new MAGI Case Search, the user's session times out, or the user logs off the system.
7. Update the 'MAGI Request Detail' page to display the 'Request Case Linkage Update' and show 'Confirm Associations' button when the user is requesting a case linkage update.
8. Update the 'Person Association List' page to allow a user to update the CalHEERS Person number associated to the CalSAWS person only on the first EDR of an EDR companion set. Also, update the page to display a 'Confirm' button when the user is going through the process to update the case linkage.
9. Update the 'MAGI Referral Detail' page to allow a user to cancel a MAGI Referral or Determination Change when it belongs to a different county.
10. Create a new real-time CalHEERS-SAWS Search Interface using REST/JSON technology as a synchronous transaction between CalSAWS and CalHEERS.
11. Update eHIT mappings for Case Linkage Updates, Person Association updates, to add a new Cancel DER reason to update the COR, and to change the logic for a duplicate person in an EDR.
12. Create a MAGI Search Emulator. The MAGI Search Emulator is used for testing purposes only to emulate a Search Response transaction returned from CalHEERS. The MAGI Search Emulator is used in a test/training environment that is not directly connected to a CalHEERS integration test environment.

1.4 Assumptions

1. The CancelDER functionality added to update County of Responsibility will only be used when the CalSAWS case has no pending or ongoing MAGI Medi-Cal eligibility.
 - a. If an Unsolicited DER is linked to a CalSAWS case with pending or ongoing Medi-Cal, the user will complete the ICT process to send the MAGI case information to the correct county.
2. The CalHEERS-SAWS Search Interface has a limit of 20 MAGI cases in the search response. If the search response returns an error due to too many MAGI cases matching the criteria, the user can edit the search criteria to return fewer MAGI cases or use the CalHEERS Web Portal to review all the MAGI case information.
3. After the MAGI Case Linkage is updated in a CalSAWS case, all future eHIT transactions will be sent to CalHEERS with the new MAGI case number. This includes EDRs sent for a month prior to the MAGI Case Linkage update.
4. Case Lock functionality will not be updated for this change, as Case Linkage Updates volume is estimated to be minimal.
5. A CalHEERS-SAWS Search by MAGI Application Number will return MAGI Case information if the MAGI Application is associated to a MAGI Case; otherwise, if the MAGI Application was never submitted in CalHEERS and there is no MAGI Case, CalHEERS will return an error of 'No Results Found'.
6. The eHIT Schema will be updated with CA-229919 in the same release.

2 RECOMMENDATIONS

2.1 CalHEERS-SAWS Search Interface – Functional Design

2.1.1 Overview

Create a new real-time CalHEERS-SAWS Search Interface to send a search request to CalHEERS and to receive a search response from CalHEERS with MAGI case, application and person information known to CalHEERS.

2.1.2 Description of Changes

1. Create a real-time CalHEERS-SAWS Search and Response transaction to send and receive with CalHEERS. The CalHEERS-SAWS Search Request transaction allows the user to search and view MAGI case, application, and person information. The user (with specific security rights) may use the CalHEERS-SAWS Response transaction MAGI case, application, and person information in the Case Linkage Update process flow as described in section 2.3.
 - a. CalHEERS-SAWS Search Response Transaction information is view-only.
 - b. CalHEERS-SAWS Search Response Transaction information performed inside the context of a case may be used to perform a Case Linkage Update for users with MAGIUpdateCaseLinkage security right.
 - c. CalHEERS-SAWS Search Response Transaction information will display either the response details, or an error message returned from CalHEERS.
 - d. CalHEERS-SAWS Search Response Transaction information is saved to the user's session. Refer to Section 3 supporting document "HttpSession Utilization"
 - i. The CalHEERS-SAWS Search Response Transaction information will remain available to the user until one of the following actions occurs:
 1. the user sends an EDR, or
 2. the user cancels the MAGI Case Linkage update request, or
 3. the user performs a new MAGI Search, or
 4. after 10 minutes of not actively working the MAGI Case Linkage update, or
 5. the user logs out of CalSAWS.

Technical Note: The CalHEERS-SAWS Search Interface will be a new real-time synchronous interface and will use REST/JSON technology. See section 2.9 for technical details.

2.1.3 Counties Impacted

All counties

2.1.4 Interface Partner

CalHEERS

2.2 MAGI Case Search Page

2.2.1 Overview

Create a new 'MAGI Case Search' page to allow a user to search and view MAGI case, application, and person-level information known to CalHEERS.

2.2.2 MAGI Case Search Page Mockups

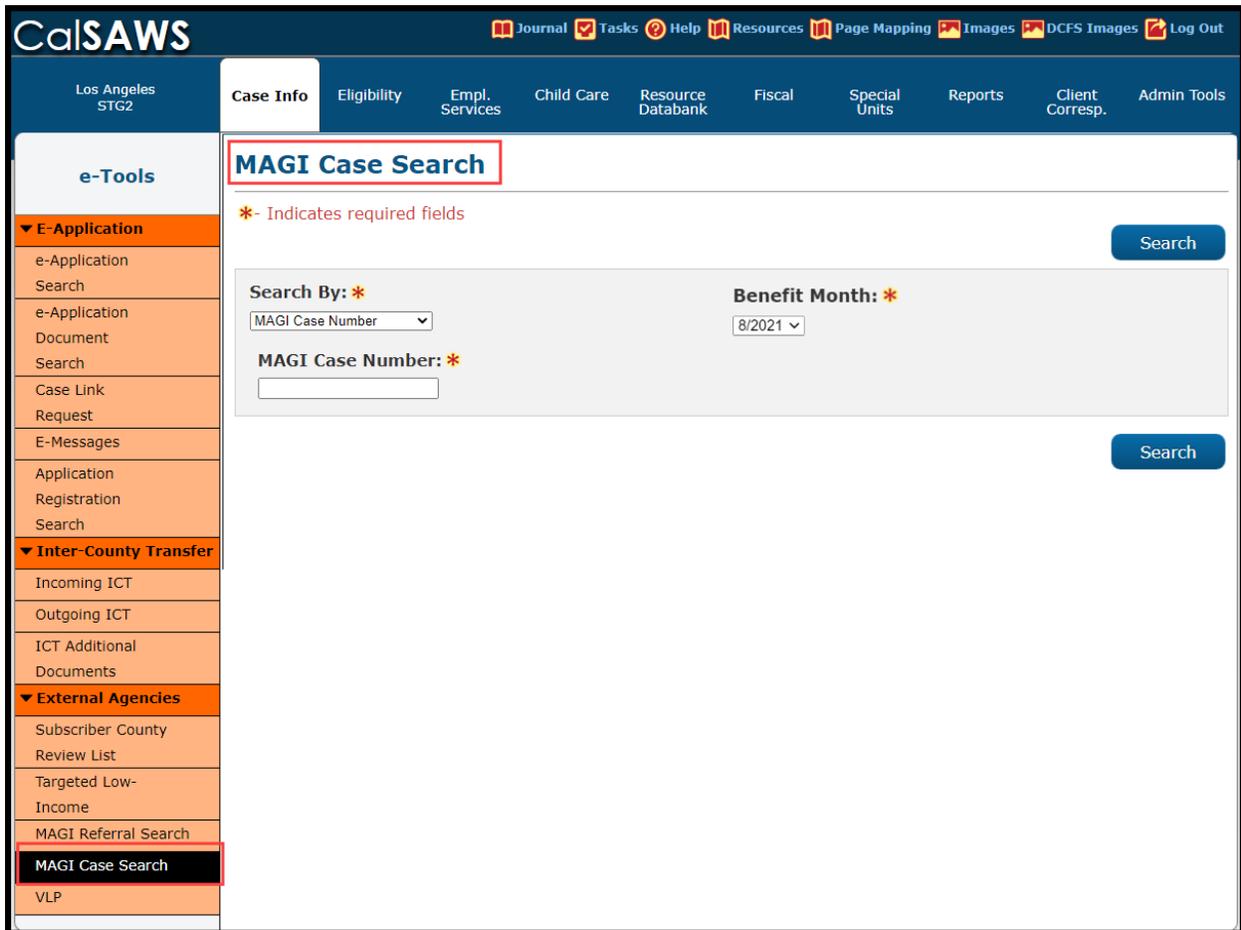


Figure 2.2.1 – MAGI Case Search Page - Initial Page Load Outside Context of a Case with Search by MAGI Case Number

CalSAWS Case Name: Tom Hardy Case Number: L204101

[Journal](#) [Tasks](#) [Help](#) [Resources](#) [Page Mapping](#) [Images](#) [DCFS Images](#) [Log Out](#)

Los Angeles CH2 Global TS

[Case Info](#) [Eligibility](#) [Empl. Services](#) [Child Care](#) [Resource Databank](#) [Fiscal](#) [Special Units](#) [Reports](#) [Client Corresp.](#) [Admin Tools](#)

MAGI Case Search

*- Indicates required fields

Case Number:

Search By: * **Benefit Month: ***

MAGI Case Number: *

- Person Search
- EBT Account Search
- Application Registration
- Case Summary
- Contact
- Authorized Representative
- Application Questions
- Negative Action
- New Program
- New Person
- Hide Person
- EBT Account List
- Issuance History
- Auxiliary Authorization List
- Expungement History
- Child Support Collections
- Time Limit Aid Summary
- Case Flag
- Legacy Case
- Confidentiality
- ICT Summary
- IAT Summary
- MAGI Case Search**
- Customer Contact History
- SB 87
- Invoice History

Figure 2.2.2 MAGI Case Search Page - Initial Page Load Inside the Context of a Case with Search by MAGI Case Number

MAGI Case Search

*- Indicates required fields

Search By: * **Benefit Month: ***

MAGI Application Number 8/2021

MAGI Application Number: *

Figure 2.2.3 MAGI Case Search Page – Search by MAGI Application Number

MAGI Case Search

*- Indicates required fields

Search By: * **Benefit Month: ***

Person Information 8/2021

Last Name: **First Name:** **Date of Birth:** **CIN:**

SSN: **ATIN:** **ITIN:**

Figure 2.2.4 MAGI Case Search Page – Search by Person Information

MAGI Case Search

*- Indicates required fields

[Search](#)

Search By: * **Benefit Month: ***

SAWS Case and County ▼ 8/2021 ▼

SAWS Case Number: * **SAWS County: ***

▼

[Search](#)

Figure 2.2.5 MAGI Case Search Page – Search by SAWS Case and County

MAGI Case Search

*- Indicates required fields

► Refine Your Search

Search Results Summary

MAGI Case Number	MAGI Case Status	SAWS Case Number	SAWS Case County
CalHEERS Error:Internal exception occurred			

Figure 2.2.6 MAGI Case Search Page with CalHEERS Error Response Returned

MAGI Case Search

*- Indicates required fields

Your Search request has timed out.

Search By: *
 MAGI Case Number

Benefit Month: *
 8/2021

MAGI Case Number: *

Search

Figure 2.2.7 MAGI Case Search Page with CalSAWS time out error displayed

MAGI Case Search

*- Indicates required fields

► Refine Your Search

Search Results Summary Results 1 - 3 of 3

MAGI Case Number	MAGI Case Status	SAWS Case Number	SAWS Case County
500000008	Inactive	1B0H38Z	San Bernardino
500000009	Inactive	1C98H22	San Francisco
500000010	Inactive	1B00YY2	Los Angeles

Figure 2.2.8 MAGI Case Search Page with Successful Response

2.2.3 Description of Changes

1. Create a new page named: 'MAGI Case Search'.
 - a. Display this link on the Task Navigation when outside of the context of a case.
 - b. Display this link on the Task Navigation only when there is a Medi-Cal program when inside the context of a case.
2. Add a section named 'Refine Your Search' as follows:

Section Header	Description
Refine Your Search	<p>On page load, this section header 'Refine Your Search' does not display.</p> <p>After the user performs a search, this section header displays collapsed.</p> <p>The user can expand the section to modify the search criteria and perform a new search. When user expands the section, the previous search criteria is displayed.</p>

3. Add an unnamed filter subsection with the following:

Field Label	Description
Select Search Criteria	<p>A drop-down menu with the following values in this order:</p> <ul style="list-style-type: none"> • MAGI Case Number • MAGI Application Number • Person Information • SAWS Case Number and County <p>The drop-down defaults to 'MAGI Case Number' option on page load.</p> <p>This field is required</p>
Benefit Month	<p>A drop-down menu with the following values in this order:</p> <ul style="list-style-type: none"> • Current Month thru Come-Up Month <p>The drop-down defaults to 'Come-Up Month' option on page load.</p>

4. Dynamically display the search criteria fields below based on the drop-down value selected in 'Select Search Criteria':

Select Search Criteria	Field Label	Description
MAGI Case Number	MAGI Case Number	Field allows 10-digit alpha numeric value. This field is required
MAGI Application Number	MAGI Application Number	Field allows 30-digit alpha numeric value. This field is required
Person Information	First Name	Field allows a maximum of 50 characters. 1. Allow letters (a-z, A-Z) 2. Allow following special characters: a. apostrophe (') b. space () c. period (.) d. hyphen (-) 3. Allow maximum 50 characters. This field is conditionally required if either Last Name or DOB is populated. The conditional requirement is handled with a page validation.
	Last Name	Field allows a maximum of 50 characters. 1. Allow letters (a-z, A-Z) 2. Allow following special characters: a. apostrophe (') b. space () c. period (.) d. hyphen (-) 3. Allow maximum 50 characters. This field is conditionally required if either First Name or DOB is populated. The conditional requirement is handled with a page validation.

Select Search Criteria	Field Label	Description
	Date of Birth	Date field in MM/DD/YYYY format. The calendar icon will show with the date picker. This field is conditionally required if either First or Last Name is populated. The conditional requirement is handled with a page validation.
	SSN	Field allows 9 digits. This field is not required.
	ATIN	Field allows a maximum of 9 digits. This field is not required.
	ITIN	Field allows a maximum of 9 digits. This field is not required.
	CIN	Field allows a 9-character alpha-numeric value. This field is not required.
SAWS Case Number and County	SAWS Case Number	Field allows for a maximum 7-character alpha-numeric value. This field is required.
	County	Drop-down field with county name in alpha order (CT_15). This field is required.

5. Button

Field Label	Description
Search	The 'Search' button sends the search criteria information to CalHEERS. On click, the label on the button will change to 'Processing' and grey out until a response is returned from CalHEERS.

6. Add a section named, "Search Results Summary" with the following columns:

Column Label	Description
MAGI Case Number	<u>For a Successful Response:</u>

Column Label	Description
	<p>Display the MAGI Case Number returned in the CalHEERS-SAWS Search Response transaction.</p> <p>The Hyperlink navigates to the 'MAGI Search Response Case Detail' page.</p> <p>OR</p> <p><u>For an Error Response:</u> Display the Error Message returned in the CalHEERS-SAWS Search Response transaction in the following format: "CalHEERS Error: < Response Error Message>" (The Error Message text can span all columns and wrap if needed.)</p>
MAGI Case Status	<p>Display the MAGI Case Status returned in the CalHEERS-SAWS Search Response transaction.</p>
SAWS Case Number	<p>Display the actively linked SAWS Case number returned in the CalHEERS-SAWS Search Response transaction. If no actively linked SAWS case is returned, display the last associated SAWS Case number.</p> <p>If no actively linked SAWS case number or last associated SAWS case number is returned, display in the order returned from the CalHEERS-SAWS Search Response transaction.</p> <p>Add a Hyperlink to the SAWS Case Number if the SAWS Case/County is known to CalSAWS; otherwise, do not hyperlink.</p>

Column Label	Description
	The Hyperlink navigates to the Case Summary page for the known CalSAWS case number.
SAWS Case County	Display the actively linked SAWS Case County returned in the CalHEERS-SAWS Search Response transaction. If no actively linked SAWS Case County is returned, display the last associated SAWS Case County.

7. CalHEERS will keep the CalHEERS-SAWS Search Request/Response synchronous transaction open for 30 seconds. If CalHEERS has not provided a response transaction after 35 seconds, CalSAWS will stop waiting for CalHEERS and display the below Error Message as shown in Figure 2.2.7.
 - a. Error Message: Your Search request has timed out.
 - i. Display in Red text on the top of the MAGI Case Search page.
8. Add the following page validations, and do not send a search request when the minimum search criteria are not met when the 'Select Search Criteria' is "Person Information"
 - a. **Criteria:** If more than one of CIN, SSN, ATIN, or ITIN are populated and none of First Name, Last Name, and DOB are populated
Validation message: Search By – Narrow search to only one of the following: CIN, SSN, ATIN, or ITIN.
 - b. **Criteria:** If either First Name, Last Name or DOB are populated, then First Name, Last Name and DOB are required.
Validation message: Search By – For search by Name or DOB, First Name, Last Name and DOB are required.
 - c. **Criteria:** If First Name, Last Name and DOB are populated and more than one of CIN, SSN, ATIN, or ITIN are populated
Validation message: Search By – Narrow search to Name, DOB, and either CIN, SSN, ATIN or ITIN.
 - d. **Criteria:** If all field values are blank.
Validation message: Search By – enter search criteria.
9. Add AMP bar
10. Update label 'MAGI' on the Navigation Task bar to 'MAGI Referral Search' as shown in Figure 2.2.1.

2.2.4 Page Location

Outside the context of case in Figure 2.2.1

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Case Search

Inside the context of case in Figure 2.2.2

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

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
MAGICaseSearchEdit	User has rights to change Search Type, add search criteria and click [Search] button.	MAGI Edit
MAGICaseSearchView	User has view only rights	MAGI View

2.2.6 Page Mapping

Add Page Mappings for the new page.

2.2.7 Page Usage/Data Volume Impacts

Based on the average number of Medi-Cal applications created in a day, the page is expected to have a volume of 2,000 searches in a day. No impact to data volume.

2.3 MAGI Search Response Case Detail Page

2.3.1 Overview

Create a new MAGI Search Response Case Detail page to display MAGI case-level and summary person-level information provided in the search response from the CalHEERS-SAWS Search transaction.

2.3.2 MAGI Search Response Case Detail Page Mockup

MAGI Search Response Case Detail

Close

MAGI Case Number: 5000000009	MAGI Case Status: Inactive	Initiated Date: 05/26/2021 1:13 PM
MAGI Application Number: 198000	MAGI Application Status: Completed	County of Responsibility: Riverside
Actively Linked SAWS Case Number:	Active SAWS Case County:	
Last Associated SAWS Case Number: 1B0H387	Last Associated SAWS County: San Bernardino	

▼ MAGI Case Members

Name	DOB	SSN	CIN
Hardy, Tom 45	01/22/1987	444-44-4444	39319735A
Hardy, Danielle 11	06/01/2010	675-30-0702	31419735A

Close

Figure 2.3.1 – MAGI Search Response Case Detail Outside Context of a Case (View-only Mode)

MAGI Search Response Case Detail

Link to Case
Close

MAGI Case Number: 5000000009	MAGI Case Status: Inactive	Initiated Date: 05/26/2021 1:13 PM
MAGI Application Number: 198000	MAGI Application Status: Completed	County of Responsibility: Riverside
Actively Linked SAWS Case Number:	Active SAWS Case County:	
Last Associated SAWS Case Number: 1B0H387	Last Associated SAWS County: San Bernardino	

▼ MAGI Case Members

Name	DOB	SSN	CIN
Hardy, Tom 45	01/22/1987	444-44-4444	39319735A
Hardy, Danielle 11	06/01/2010	675-30-0702	31419735A

Link to Case
Close

Figure 2.3.2 – MAGI Search Response Case Detail Inside Context of a Case (Edit Mode)

2.3.3 Description of Changes

1. Create a new page named 'MAGI Search Response Case Detail'
 - a. 'MAGI Search Response Case Detail' page will be a view-only page when navigated to from outside the context of a case as shown in Figure 2.3.1.
 - b. 'MAGI Search Response Case Detail' page will be in edit mode and allow a user to link the MAGI case to the CalSAWS case when inside the context of a case as shown in Figure 2.3.2.
2. Add an unnamed header section with the following fields:

Field Label	Description
MAGI Case Number	Displays the MAGI case number as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
MAGI Case Status	Displays the MAGI case status as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

Field Label	Description
Initiated Date	Displays the date of the response as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
MAGI Application Number	Displays the MAGI Application Number as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
MAGI Application Status	Displays the MAGI Application status provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
County of Responsibility	Displays the County of Responsibility as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Actively Linked SAWS Case Number	<p>Displays the Active SAWS Case Linkage as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>This field can be 'blank' if the CalHEERS-SAWS Search Response does not return a value.</p>
Active SAWS Case County	<p>Displays the Active SAWS County for the SAWS Case as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>This field can be 'blank' if the CalHEERS-SAWS Search Response does not return a value.</p>
Last Associated SAWS Case Number	<p>Displays the last known SAWS Case number for the MAGI Case as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>This field can be 'blank' if the CalHEERS-SAWS Search Response does not return a value.</p>

Field Label	Description
Last Associated SAWS County	<p data-bbox="943 247 1414 422">Displays the last known SAWS County for the SAWS case as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p data-bbox="943 464 1414 552">This field can be 'blank' if the CalHEERS-SAWS Search Response does not return a value.</p>

3. Add the 'MAGI Case Members' section with the following columns:

Column Label	Description
Name	<p>Displays the standard CalSAWS name format "Last Name, First Name <age in years> using the DOB of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>The hyperlink opens the 'MAGI Response Person' Detail page for the individual.</p>
DOB	Displays the Date of Birth of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
SSN	Displays the Social Security Number of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
CIN	Displays the Client Index Number of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

4. Buttons

Field Label	Description
Close	The 'Close' button will close the 'MAGI Case Summary' page and navigate user back to the 'MAGI Search Response' page.
Link to Case	<p>The 'Link to Case' button will navigate user to the 'MAGI Determination List' page.</p> <p>This button has special security rights so that only users with the MAGIUpdateCaseLinkage security right will see the button and have the rights to perform a case linkage update.</p> <p>The button displays only when there is a Pending or Active Medi-</p>

	Cal program on the CalSAWS case.
--	----------------------------------

Note: All Validations are only applicable when the MAGI Search Response Case Detail Page is accessed within the context of a case.

5. Add a page validation to prevent a user from linking the CalSAWS case to a different MAGI case if the CalSAWS case has ongoing MAGI Medi-Cal eligibility and the new MAGI case is closed. (Refer to Figure 2.3.3)
 - a. **Criteria:** All the following are true:
 - i. 'Link to Case' button is clicked
 - ii. the CalSAWS case has a Medi-Cal program with at least one Active MAGI beneficiary
 - iii. the selected MAGI case is closed.
 - b. **Validation message: Close** – Unable to Request Case Linkage Update to the selected MAGI case because the CalSAWS case has ongoing MAGI Medi-Cal and the selected MAGI case is closed.

This is a hard validation.

6. Add a page validation to prevent a user from linking the CalSAWS case to a MAGI case if the CalSAWS case has pending or ongoing MAGI Medi-Cal eligibility and the new MAGI case County of Responsibility is different and the MAGI case has any individuals with pending, conditional eligible, or eligible MAGI Medi-Cal eligibility. (Refer to Figure 2.3.3)
 - a. **Criteria:** All the following are true:
 - i. 'Link to Case' button is clicked
 - ii. the CalSAWS case has at least one Pending or Active Medi-Cal program
 1. If the MC program is active, there is at least one Active MAGI beneficiary
 - iii. the selected MAGI case's COR is not the same county as the CalSAWS case
 - iv. the selected MAGI case has at least one individual with 'Pending', 'Conditionally Eligible', or 'Eligible' MAGI Medi-Cal status.
 - b. **Validation message: Close** – Unable to Request Case Linkage Update to the selected MAGI case because the CalSAWS case has pending or ongoing Medi-Cal eligibility and the selected MAGI case is in a different county with pending, conditionally eligible, or active MAGI beneficiaries.

This is a hard validation.

7. Add a page validation to prevent a user from linking the CalSAWS case to the selected MAGI case if the selected MAGI case has more individuals with pending, conditionally eligible, or eligible MAGI eligibility, than in the CalSAWS case. (Refer to Figure 2.3.3)
 - a. **Criteria:** All the following are true:
 - i. 'Link to Case' button is clicked
 - ii. the number of individuals with 'Pending', 'Conditionally Eligible', or 'Eligible' MAGI Medi-Cal status in the selected MAGI case is greater than the number of individuals in the CalSAWS case household.

1. CalSAWS Case Household is defined as any Case person with a household status other than permanently out of the home.

- b. **Validation: Close** – Unable to Request Case Linkage Update to the selected MAGI case because the MAGI case has more pending, conditionally eligible or eligible MAGI Medi-Cal individuals than in the CalSAWS case household.

This is a hard validation.

8. Add a page validation to prevent a user from linking the CalSAWS Case to the selected MAGI Case if the MAGI case is currently linked to the CalSAWS case. (Refer to Figure 2.3.3)
 - a. **Criteria:** All the following are true:
 - i. 'Link to Case' button is clicked
 - ii. The CalSAWS case is currently linked to the New MAGI Case.

- b. **Validation: Close** – Unable to Request Case Linkage Update to the selected MAGI case because the MAGI case is already linked to the CalSAWS case.

This is a hard validation.

9. Add a warning message to display upon page load when the MAGI case in the MAGI Search Response has pending, conditionally eligible, or eligible MAGI Medi-Cal eligibility in the same county as the CalSAWS Case. (Refer to Figure 2.3.3)
 - a. **Criteria:** The MAGI case has the same COR as the CalSAWS case and the MAGI case has pending, conditionally eligible, or eligible MAGI beneficiaries.
 - b. **Warning Message:** The MAGI case has at least one individual pending, conditionally eligible or eligible on MAGI Medi-Cal in the same county as the CalSAWS case.

User is still able to select the 'Link to Case' button.

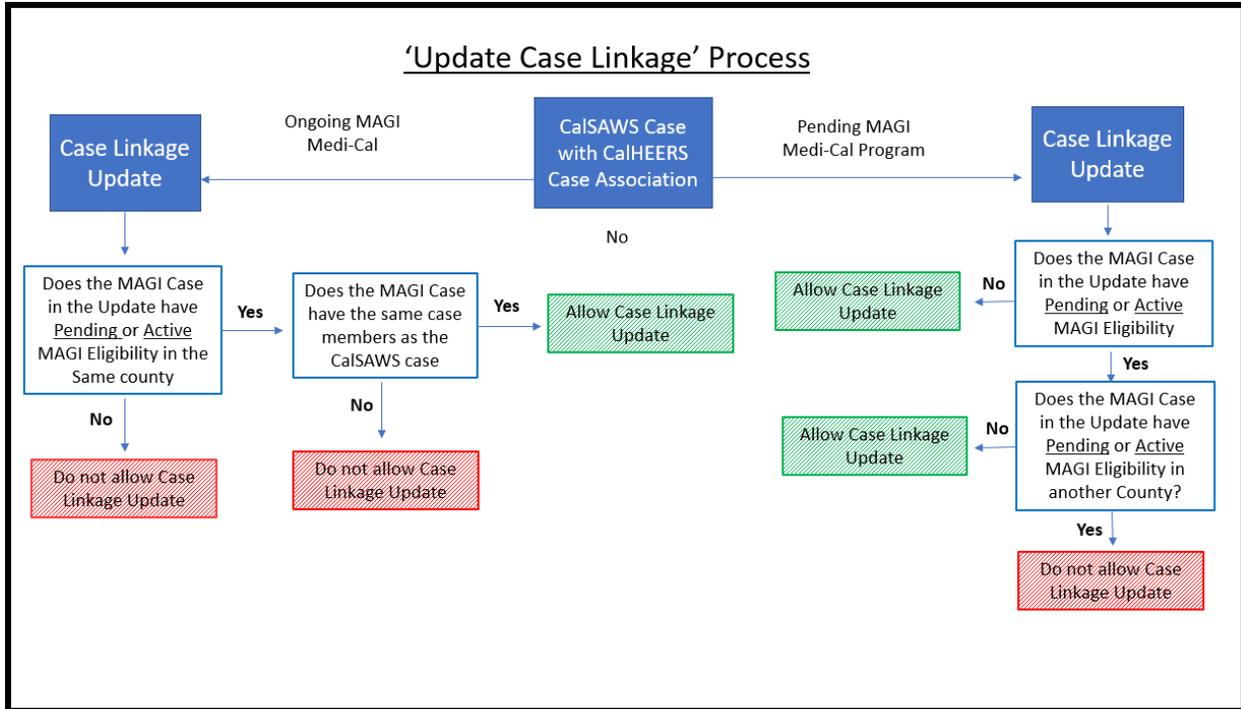


Figure 2.3.3 Case Linkage Update Process Flow Chart

2.3.4 Page Location

Outside context of a case as shown in Figure 2.3.1

- **Global:** Case Info
- **Local:** New Application
- **Task:** MAGI Search -> 'MAGI Case Number' hyperlink

Inside context of case as shown in Figure 2.3.2

- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** MAGI Search -> 'MAGI Case Number' hyperlink

2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
MAGIUpdateCaseLinkage	This Security Right allows the 'Link to Case' button to initiate a MAGI case linkage update.	MAGI Update Case Linkage
MAGISearchResponseCaseDetailEdit	Allows the Person Name 'hyperlinks' to open MAGI Search Response Person Detail Page	MAGI Edit
MAGICaseSearchView	User has view only rights	MAGI View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
MAGI Update Case Linkage	This Security group allows the 'Link to Case' button to initiate a MAGI case linkage update.	System Admin

2.3.6 Page Mapping

Add Page Mapping for the new page.

2.3.7 Page Usage/Data Volume Impacts

Based on the average number of Medi-Cal applications created in a day, the page is expected to have a volume of 2,000 searches in a day. No impact to data volume.

2.4 MAGI Search Response Person Detail Page

2.4.1 Overview

Create a new MAGI Search Response Person Detail page for a user to view person-level information provided in the search response from the CalHEERS-SAWS Search transaction.

2.4.2 MAGI Search Response Person Detail Mockup

MAGI Search Response Person Detail

Close

Name			
Last Name: Hardy	First Name: Tom	Primary Contact: Yes	

CalHEERS Admin Information			
CalHEERS Person Number: 01	SAWS Person Number: 01	CalHEERS Account Created: Yes	Active in CalHEERS: Yes

Individual Demographics			
Social Security Number: 564-79-6743		ATIN:	ITIN:
Date of Birth: 01/12/1990		CIN: 826535117	

Medi-Cal Eligibility Information			
MAGI Status: Discontinued		Non-MAGI Status: Ineligible	

Covered California Eligibility Information			
Active Enrollment: No			
APTC Status: Ineligible	CSR Status: Ineligible	QHP Status: Ineligible	Title XXI (MCAP/CCHIP Status): Ineligible

Close

Figure 2.4.1 – MAGI Search Response Person Detail

2.4.3 Description of Changes

1. Create a new view-only page named: 'MAGI Search Response Person Detail'
2. Add an unnamed header section and display the following fields:

Field Label	Description
Last Name	Last Name of individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
First Name	First Name of individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Primary Contact	Displays the Primary Contact information of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

3. Add a 'CalHEERS Admin Information' section and display the following fields:

Field Label	Description
CalHEERS Person Number	Displays the CalHEERS Person Number for the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
SAWS Person Number	Displays the SAWS Person Number for the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
CalHEERS Account Created	Displays a 'Yes' or 'No' value if a CalHEERS account was created for the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Active in CalHEERS	Displays a 'Yes' or 'No' value if the individual is active in CalHEERS as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

4. Add the 'Individual Demographics' section and display the following xfields:

Field Label	Description
Social Security Number	<p>Displays the Social Security Number of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>Note: If there is no SSN returned, the value will display blank.</p>
ATIN	<p>Displays the ATIN of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>Note: If there is no ATIN returned, the value will display blank.</p>
ITIN	<p>Displays the ITIN of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p> <p>Note: If there is no ITIN returned, the value will display blank.</p>
Date of Birth	<p>Displays the Date of Birth of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p>
CIN	<p>Displays the CIN of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.</p>

5. Add the 'Medi-Cal Eligibility Information' section and display the following fields:

Field Label	Description
MAGI Status	Displays the MAGI Eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Non-MAGI Status	Displays the Non-MAGI Eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

6. Add the 'Covered California Eligibility Information' section and display the following fields:

Field Label	Description
Active Enrollment	Displays active enrollment to a Covered CA plan for the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction. Note: Value of 'Yes' indicates Active Enrollment. Value of 'No' indicates no active enrollment
APTC Status	Displays APTC eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
CSR Status	Displays CSR eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
QHP Status	Displays the QHP eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.
Title XXI (MCAP/CCHIP) Status	Displays the Title XXI (MCAP/CCHIP) eligibility status of the individual as provided by CalHEERS in the CalHEERS-SAWS Search Response transaction.

7. Button

Field Label	Description
Close	The 'Close' button will navigate user back to the 'MAGI Search Response Case Detail' page.

2.4.4 Page Location

Outside the context of case

- **Global:** Case Info
- **Local:** New Application
- **Task:** MAGI Search -> MAGI Search Response Case Detail -> 'Case Member' Hyperlink

Inside the Context of case

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** MAGI Search -> MAGI Search Response Case Detail -> 'Case Member' Hyperlink

2.4.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
MAGICaseSearchView	Allows the Person Name 'hyperlinks' to open MAGI Search Response Person Detail Page	MAGI View

- 2. Security Groups
No changes

2.4.6 Page Mapping

Add Page Mappings for the new page.

2.4.7 Page Usage/Data Volume Impacts

Based on the average number of Medi-Cal applications created in a day, the page is expected to have a volume of 2,000 searches in a day. No impact to data volume.

2.5 MAGI Determination List Page

2.5.1 Overview

Update the 'MAGI Determination List' page to display the 'Request Case Linkage Update' field along with the selected new MAGI Case number. The Request Case Linkage Update will remain on the MAGI Determination List page until the user sends an EDR, cancels the Request Case Linkage Update, navigates away and performs a new MAGI Case Search, the user's session times out, or the user logs off the system.

2.5.2 MAGI Determination List Detail Mockup

The screenshot shows a web form titled "MAGI Determination List". Below the title is a legend: "*- Indicates required fields". The form is divided into a blue header "Request MAGI Determination" and a main content area. The content area contains several fields: "Begin Date:" with a red asterisk and a value of "09/2021"; "End Date:" with a red asterisk and a value of "09/2021"; "Program Identifier:" with a red asterisk and a dropdown menu showing "Medi-Cal"; "Request Case Linkage Update:" with a value of "5000000009" and a "Cancel" button; and "Life Change Event:" with an empty dropdown menu. A "Request MAGI" button is located at the bottom right of the form.

Figure 2.5.1 – MAGI Determination List Page – Request Case Linkage Update

MAGI Determination List

*- Indicates required fields

Request MAGI Determination

Begin Month: *

End Month: *

Program Identifier: *

Life Change Event:

Bypass Primary Contact Matching Criteria

Request Lift Options

Request Negative Action Determination

Restart VLP e-Verification

Request Case Linkage Update:
Recover Case Linkage

Figure 2.5.2 – MAGI Determination List Page – Recover Case Linkage Update

2.5.3 Description of Changes

1. Add a field named 'Request Case Linkage Update' on the MAGI Determination List page as shown in Figure 2.5.1.
 - a. Display the 'Request Case Linkage Update' field when the 'MAGI Determination List' page is navigated to from the 'MAGI Search Response Case Detail' page.
 - i. Display the 'Request Case Linkage Update' field to the right of the 'Program Identifier' field.
 - b. Display the new MAGI case number under the 'Request Case Linkage Update' field.
 - c. Add a 'Cancel' button to the right of the 'MAGI Case Number' as shown in Figure 2.5.1.
2. When the 'MAGI Determination List' page is navigated to from the 'MAGI Search Response Case Detail' page and the 'Request Case Linkage Update' field is populated:
 - a. Default the 'Begin Month' and 'End Month' to the come-up month and display as 'read-only' as shown in figure 2.5.1.
 - b. Hide the following fields:
 - i. Bypass Primary Contact Matching Criteria
 - ii. Request Lift Options
 - iii. Request Negative Action Determination
 - iv. Restart VLP e-Verification
3. When the 'Cancel' button is clicked, hide the 'MAGI Case Number', and 'Cancel' button, and display a new button named: 'Recover Case Linkage' as shown in Figure 2.5.2
 - a. Upon Page re-load with the 'Recover Case Linkage' button, remove the case linkage update, and display the following fields:
 - i. Begin Date and End Date as editable fields.
 - ii. Primary Contact Matching Criteria
 - iii. Request Lift Options
 - iv. Request Negative Action Determination
 - v. Restart VLP e-Verification
4. If the 'Recover Case Linkage' button is clicked, hide the 'Recover Case Linkage' button, and display the MAGI Case Number under the 'Request Case Linkage Update' field along with the 'Cancel' button and display the fields as stated in 2.5.3.2 (a-b).
 - a. If the 'Recover Case Linkage' button remains, and user clicks the 'Request MAGI' button, remove the Case Linkage Update information from the user's session and use current MAGI case information in the EDR

5. When the 'Request Case Linkage Update' field is populated, and the user clicks the 'Request MAGI' button:
 - a. Populate 'Case Linkage Override Indicator' = 'Yes' on the EDR for the Come-Up month.
 - b. Populate the new MAGI case number in the EDR
 - c. Populate the CalHEERS Person Number for the New MAGI Case as follows:
 - i. If the New MAGI Case has a previous CalSAWS-MAGI Case association and the CalSAWS person is in the latest 'reviewed', or 'completed' DER transaction
 1. Use the CalHEERS Person number from that DER
 2. Otherwise, do not populate the CalHEERS Person number for the individual and leave the field blank.

Note: If user wants to process prior benefit months, it can be done after the Case Linkage has been updated.

2.5.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** MAGI Search -> MAGI Case Summary -> 'Link to Case' -> MAGI Determination List

2.5.5 Security Updates

No Changes

2.5.6 Page Mapping

Add Page Mappings for the updated page.

2.5.7 Page Usage/Data Volume Impacts

No Change

2.6 MAGI Request Detail Page

2.6.1 Overview

Update the 'MAGI Request Detail' page to display the 'Request Case Linkage Update' and show 'Confirm Associations' button when the user is requesting a case linkage update.

2.6.2 MAGI Request Detail Page Mockup

MAGI Request Detail

[Confirm Associations](#) [Cancel](#)

MAGI Case Number: 5000000009	MAGI Case Name: Hardy	Request ID: 10000004628
Case Number: L300C70	Case Name: Tom Hardy	Request Case Linkage Update: Yes
Type:	Status: Pending	
Run Reason: Continuing	Benefit Month: 08/01/2021	Program: * Medi-Cal

▼ Application

Application Date: 04/06/2021	Primary Applicant/Recipient: Tom Hardy	Application Source: SAWS
Life Change Event:	Life Change Event Date:	Requested Retro: No
Maintain Verifications: 5	Consent for Verifications: Yes	R&R Agreed: Yes
Signed Status/Date: Signed on 04/06/2021		

▼ Case Members

Name	MEDS PN	DOB	SSN	CIN	Non-Compliance
Tom Hardy	01	02/04/1987	564-98-0705	39319735A	
Danielle Hardy	02	06/01/2010	675-30-0702	31419735A	

Figure 2.6.1 – MAGI Request Detail with 'Request Case Linkage Update' and 'Confirm Associations' Button

MAGI Request Detail

Send All Cancel

MAGI Case Number: 5000000009	MAGI Case Name: Hardy	Request ID: 10000004628
Case Number: L300C70	Case Name: Tom Hardy	Request Case Linkage Update: Yes
Type:	Status: Pending	
Run Reason: Continuing	Benefit Month: 08/01/2021	Program: * Medi-Cal

▼ Application

Application Date: 04/06/2021	Primary Applicant/Recipient: Tom Hardy	Application Source: SAWS
Life Change Event:	Life Change Event Date:	Requested Retro: No
Maintain Verifications: 5	Consent for Verifications: Yes	R&R Agreed: Yes
Signed Status/Date: Signed on 04/06/2021		

▼ Case Members

Name	MEDS PN	DOB	SSN	CIN	Non-Compliance
Tom Hardy	01	02/04/1987	564-98-0705	39319735A	
Danielle Hardy	02	06/01/2010	675-30-0702	31419735A	

View Associations

Figure 2.6.2 – MAGI Request Detail with ‘Request Case Linkage Update’

2.6.3 Description of Changes

1. Add a field named: ‘Request Case Linkage Update’ in the MAGI Request Detail Page as shown in Figure 2.6.1.
 - a. Display ‘Request Case Linkage Update’ to the right of ‘Case Name’ field.
 - b. Display the field only when an EDR is created from a Case Linkage Update and has ‘Case Linkage Override Indicator’ = ‘Yes’.
2. When the ‘MAGI Request Detail’ page has ‘Case Linkage Override Indicator’ = ‘Yes’ as shown in Figure 2.6.1:
 - a. Hide the ‘Send All’, ‘View Next’, and ‘View Associations’ buttons

- b. Display a new button titled: 'Confirm Associations' to the left of the 'Cancel' button.
3. If user clicks on the 'Cancel' button, return to the 'MAGI Determination List' page and retain the Case Linkage Update information and display page as shown in figure 2.5.1.
4. When user clicks on the 'Confirm Associations' button navigate to the 'Person Association List' page.
5. When the 'MAGI Request Detail' page is navigated back to from the 'Person Association List' Page:
 - a. Display the 'View Next' (If applicable), 'View Previous' (If applicable), 'Send All', 'Cancel', and 'View Associations' buttons as shown in figure 2.6.2.
6. When the user clicks the 'Send All' button, clear the CalHEERS-SAWS Search Response transaction information from the user's session.

Note: If CalHEERS does not successfully process the EDR and return a DER with the new linkage, CalSAWS considers the Case linkage incomplete and will retain current Case linkage. Any subsequent EDRs will be sent with the current Case Linkage until a user initiates a new Case Linkage Update.

Technical Note: Once EDR is sent to CalHEERS the 'MAGI Determination List' page loads per current functionality.

7. Once DER transaction is received for the Case Linkage update, perform a mass update to link 'Referrals' or 'Determination Changes' that have no prior linkage and are in the same county in 'Received' or 'In Process' status for the same MAGI Case number to the CalSAWS case.

Note: If user hits the 'Cancel' button, the Case Linkage Update information will remain in the user session.

2.6.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Info
- **Task:** MAGI Eligibility -> Request MAGI

2.6.5 Security Updates

1. No Changes

2.6.6 Page Mapping

Add Page Mappings for the updated page.

2.6.7 Page Usage/Data Volume Impacts

No Change

2.7 Person Association List Page

2.7.1 Overview

Update the Person Association List page to allow a user to update the CalHEERS Person number associated to the CalSAWS person only on the first EDR of an EDR companion set. Also, update the page to display a 'Confirm' button when the user is going through the process to update the case linkage.

2.7.2 MAGI Referral Detail Page Mockup

The mockup shows a page titled "Person Association List". At the top right is a "Confirm" button. Below the title is a section for "MAGI Case Number:" with the value "5000000009". A dropdown menu is set to "Persons included in the Request". Below this is a table with four columns: "CalSAWS Person", "MEDS PN", "CalHEERS Person", and "CalHEERS PN". The table contains two rows of data. The first row shows "Hardy, Tom" for both CalSAWS and CalHEERS Person, with "01" for both MEDS PNs. The second row shows "Hardy, Danielle" for both. To the right of each row is a "View Details" button. At the bottom right of the page is another "Confirm" button.

CalSAWS Person	MEDS PN	CalHEERS Person	CalHEERS PN	
Hardy, Tom	01	Hardy, Tom	01	View Details
Hardy, Danielle	02	Hardy, Danielle	02	View Details

Figure 2.7.1 – MAGI Referral Detail

2.7.3 Description of Changes

1. Update the 'View Details' button to open the 'Person Association Detail' page with the 'Edit' button available for the first EDR, and without the 'Edit' button for all companion EDRs.
 - a. Person Association details for the first EDR will be copied for all EDRs in a companion set.
2. Replace the 'Close' button with a button titled: 'Confirm' when the 'Person Association List' page is navigated to from the 'Request MAGI' Detail page during a Case Linkage Update as shown in Figure 2.7.1.

2.7.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI-> Initiated Date

2.7.5 Security Updates

No Changes

2.7.6 Page Mapping

No Change

2.7.7 Page Usage/Data Volume Impacts

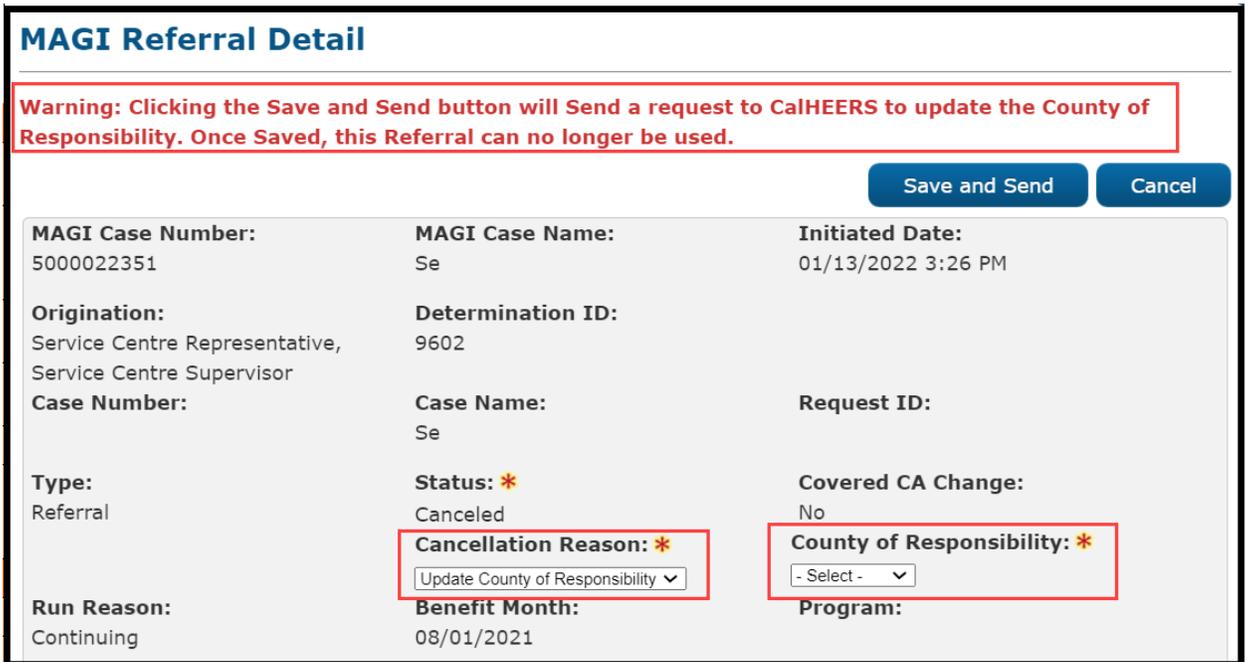
No Change

2.8 MAGI Referral Detail Page

2.8.1 Overview

Update the 'MAGI Referral Detail' page to allow a user to cancel a MAGI Referral or Determination Change when it belongs to a different county.

2.8.2 MAGI Referral Detail Page Mockup



The mockup shows a form titled "MAGI Referral Detail". At the top, a red-bordered warning box contains the text: "Warning: Clicking the Save and Send button will Send a request to CalHEERS to update the County of Responsibility. Once Saved, this Referral can no longer be used." Below the warning are two buttons: "Save and Send" and "Cancel". The form fields are arranged in a grid:

MAGI Case Number: 5000022351	MAGI Case Name: Se	Initiated Date: 01/13/2022 3:26 PM
Origination: Service Centre Representative, Service Centre Supervisor	Determination ID: 9602	
Case Number:	Case Name: Se	Request ID:
Type: Referral	Status: * Canceled	Covered CA Change: No
Run Reason: Continuing	Benefit Month: 08/01/2021	County of Responsibility: * - Select -

Two red boxes highlight the "Cancellation Reason: *" field (with a dropdown menu showing "Update County of Responsibility") and the "County of Responsibility: *" field (with a dropdown menu showing "- Select -").

Figure 2.8.1 – MAGI Referral Detail

2.8.3 Description of Changes

1. Update the 'Cancellation Reason' field to no longer use drop down values from Status Reason code table (CT_73) and to use the new Cancel DER Reason code table created in 2.10.2.4. This will add a new Cancellation Reason option to the dropdown named, 'Update County of Responsibility'.
2. Add a new drop-down named, "County of Responsibility:" as shown in Figure 2.8.1.
 - a. Display 'County of Responsibility' to the right of the 'Cancellation Reason' field.
 - b. Display 'County of Responsibility' as a required field when Cancellation Reason "Update County of Responsibility" is selected.
 - c. Drop-Down options:
 - i. Display the full county name from the County Code Table (CT_15)
3. Add logic to allow a user to update the status of a Determination Change to 'Canceled' **only for the reason of 'Update County of Responsibility'** when the DER meets all the following criteria:
 - a. The DER is linked to a CalSAWS case
 - b. The Type is Determination Change
 - c. The CalSAWS case to which the DER is linked has no open Medi-Cal programs

Note: The above logic will not display the drop-down options for Cancellation Reasons of 'Application opened in Error', 'Duplicate Application'.
4. Update the existing page warning to display when the Cancellation Reason selected is either 'Application Opened in Error' or 'Duplicate Application'.
 - a. **Criteria:** the user selected Cancellation Reason of 'Application Opened in Error' or 'Duplicate Application'
 - b. **Warning message:** Warning: Clicking the Save and Send button will Send a Cancellation request to CalHEERS. Once Saved, this Referral and the MAGI Case Number can no longer be used. This warning message will not stop the user from sending a CancelDER transaction.
5. Add a new page warning to display when the Cancellation Reason selected is 'Update County of Responsibility'.
 - c. **Criteria:** the user selected Cancellation Reason 'Update County of Responsibility'.
 - d. **Warning message:** Warning: Clicking the Save and Send button will send a request to CalHEERS to update the County of Responsibility. Once Saved, this Referral can no longer be used. This warning message will not stop the user from sending a CancelDER transaction.

2.8.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Referral Search-> Initiated Date

2.8.5 Security Updates

No Changes

2.8.6 Page Mapping

1. Update Page Mapping to the new code table for the Cancellation Reason and for Updated County of Responsibility.

2.8.7 Page Usage/Data Volume Impacts

No Change

2.9 CalHEERS-SAWS Search Interface

2.9.1 Overview

Create a new real-time CalHEERS-SAWS Search Interface to allow a user to request MAGI case, application, and person information from CalHEERS while in CalSAWS. The Interface uses REST/JSON technology and is a synchronous transaction between CalSAWS and CalHEERS.

NOTE: IDD – CalHEERS SAWS Search document is embedded in this Design Document for reference.

2.9.2 Description of Change

1. Create a Search Request and Response transaction for the CalHEERS-SAWS Search Interface using the CalHEERS-SAWS IDD, (Refer to section 3, Supporting Documents for the CalHEERS-SAWS IDD).
2. Determine the Search Type Code to send in the Search Request transaction per the table below:

MAGI Case Search page Select Search Criteria	MAGI Case Search page Search Data Information	Search Request Transaction Search Type Code
MAGI Case Number	MAGI Case Number	01
MAGI Application Number	MAGI Application ID	02
Person Information	SSN, or ATIN, or ITIN	03
Person Information	CIN	04
Person Information	First Name, Last Name, and DOB	05
Person Information	First Name, Last Name, DOB, and either CIN, SSN, ATIN, or ITIN	06
SAWS Case Number and County	SAWS Case Number and County	07

2.9.3 Execution Frequency

N/A

2.9.4 Key Scheduling Dependencies

N/A

2.9.5 Counties Impacted

All Counties

2.9.6 Data Volume/Performance

Based on the average number of Medi-Cal applications created in a day, the page is expected to have a volume of 2,000 searches in a day. No impact to data volume.

2.9.7 Interface Partner

CalHEERS

2.9.8 Failure Procedure/Operational Instructions

Technical Operations staff will evaluate errors/failures and determine the appropriate resolution.

2.10 eHIT

2.10.1 Overview

Update eHIT mappings for Case Linkage Updates, Person Association updates, to add a new Cancel DER reason to update the COR, and to change the logic for a duplicate person in an EDR.

2.10.2 Description of Change

1. Update eHIT outbound logic to send 'CaseLinkageOverrideInd' = 'Yes' when the 'Request Case Linkage Update' = 'Yes' on the MAGI Request Detail Page.
2. Update eHIT outbound logic to send 'CaseLinkageOverrideInd' = 'Yes' along with the 'InterCountyTransferInd' = 'Yes', when the Incoming ICT is linked to the receiving County with prior CalHEERS case linkage.
3. Update eHIT outbound logic to send the 'UpdateSAWSPersonAssociationInd' = 'Yes' in an EDR when
 - a. The Person Number in the 'Edit Person Number' page is updated, or
 - b. The CalHEERS Person number in the 'Person Association Detail' page is updated.
 - c. 'UpdateSAWSPersonAssociationInd' element is in the Person Node.
4. Create a new Cancel DER Reason code table with the following values:

Code	Description
01	Application Opened in Error
04	Duplicate Application
05	Update COR

5. Update Status Reason code table to no longer use the CancelDER column ('CDR' CT73_146) and free it up for future use.
6. Update eHIT outbound logic to send Cancel DER Reason code in the CancelDER transaction based on the new Cancel DER Reason code table (and not CT_73).
7. Update eHIT outbound logic to send the 'Updated County of Responsibility' when the Cancel DER Reason Code of 05 – 'Update COR' is selected.
 - a. 'UpdatedCountyOfResponsibility' element is in the 'CancelDER' node.
 - b. Populate FIPS County code from CT_15 Column 6 for 'CountyofResponsibility' element.
8. ~~Update eHIT logic to inform CalHEERS when an individual is marked as a duplicate in CalSAWS if they have Pending or Active MAGI Medi-Cal eligibility in CalHEERS.~~

- a. ~~If the Individual has 'Pending', 'Conditionally Eligible', or 'Eligible' status for MAGI Medi Cal on the last DER transaction, and~~
- b. ~~The Individual does not have the following on the last EDR~~
 - i. ~~'RemovedPersonInd' = 'Yes'~~
 - ii. ~~'RemovalReason', = 'OOH' (Out of Household)~~
 - iii. ~~'RemovalDate' = 'System Date'~~
 - iv. ~~'ApplyingForHealthCoverageInd' = 'No', then~~
- c. ~~Set the values of the following elements on EDR:~~
 - i. ~~'RemovedPersonInd' = 'Yes'~~
 - ii. ~~'RemovalReason' = 'OOH' (Out of Household)~~
 - iii. ~~'RemovalDate' = 'System Date'~~
 - iv. ~~'ApplyingForHealthCoverageInd' = 'No'~~

2.10.3 Interface Partner

CalHEERS

2.10.4 eHIT Schema Version

Version 18

2.11 MAGI Search Emulator

2.11.1 Overview

Create a MAGI Search Emulator. The MAGI Search Emulator is used for testing purposes only to emulate a Search Response transaction returned from CalHEERS. The MAGI Search Emulator is used in a test/training environment that is not directly connected to a CalHEERS integration test environment.

2.11.2 Description of Change

1. The MAGI Search Response emulated results will return the MAGI case/person information from the MAGI Search page when the following information is entered.
 - a. For Successful Response:
 - i. **MAGI Case Number** – Enter a MAGI Case Number and click the 'Search' button
 1. The MAGI Search Emulator will return the MAGI case information and any CalSAWS case information associated to the MAGI case number known in CalSAWS.

For example: Create a CalSAWS case A in county A linked to MAGI Case 1. ICT those individuals (and the MAGI Case 1) to County B/CalSAWS Case B. If you search for MAGI Case 1, the MAGI Search Response emulator will return two rows.

MAGI Case 1 – County A – CalSAWS Case A

MAGI Case 1 – County B – CalSAWS Case B

- ii. **SAWS Case and County** – Enter a CalSAWS case and county and click the 'Search' button
 1. The MAGI Search Emulator will return MAGI case information known to that CalSAWS case number.
 - b. For Error Response:
 - i. **Person Information** – Enter data in person information related fields and click the 'Search' button
 1. The MAGI Search Emulator will return the following error message: **Request timeout occurred**
 - ii. **MAGI Application Number** – Enter data in MAGI Application Number and click the 'Search' button
 1. The MAGI Search Emulator will return the following error message: **No results found**

2. The MAGI Search Response Emulator will return MAGI Case Status defaulted to Inactive.
 - a. To return MAGI Case Status 'Active', enter the Middle Name 'Active' for the Primary Applicant in Individual Demographics.

Example: Create a CalSAWS Case A and enter all data collection fields you wish to return in the MAGI Search Response. Once Case A is set up and linked to MAGI Case A1, log into a different county and create Case B. While in the context of Case B, perform a MAGI Search using Case A information and the Search criteria above. The MAGI Search emulator will return response data based on the persons and case info for Case A.

2.12 Automated Regression Test

2.12.1 Overview

Create new automated regression test scripts to verify in-county and cross-county MAGI Case Search functionality against the new MAGI Search Emulator.

2.12.2 Description of Change

Create new regression test scripts to cover each of the following scenarios:

1. Create a new Medi-Cal case with active MAGI eligibility and linkage, with a primary applicant who has no middle name. Submit two separate MAGI Case Search with the linked MAGI Case Number and verify that the results match the information of the case in context, with a MAGI Case Status of Inactive.
2. Create a new Medi-Cal case with active MAGI eligibility and linkage, with a primary applicant whose middle name is 'Active'. Submit a MAGI Case Search with the linked MAGI Case Number and verify that the results match the information of the case in context, with a MAGI Case Status of Active.
3. Create a new Medi-Cal case with active MAGI eligibility and linkage, with a primary applicant whose middle name is not 'Active'. Create a second Medi-Cal case in another CalSAWS county with the same primary applicant. Submit two separate MAGI Case Search requests from within the context of the second case with:
 - a. The MAGI Case Number from the first case. Verify the results match the information from the first case, with a MAGI Case Status of Inactive.
 - b. The SAWS Case Number and SAWS County from the first case. Verify the results match the information from the first case, with a MAGI Case Status of Inactive.

4. Create a new Medi-Cal case with active MAGI eligibility and linkage, with a primary applicant whose middle name is 'Active'. Create a second Medi-Cal case in another CalSAWS county with a different primary applicant. Submit two separate MAGI Case Search requests from within the context of the second case, with:
 - a. The MAGI Case Number from the first case. Verify the results match the information from the first case, with a MAGI Case Status of Active.
 - b. The SAWS Case Number and SAWS County from the first case. Verify the results match the information from the first case, with a MAGI Case Status of Active.
5. Create a new Medi-Cal case with active MAGI linkage. Submit a MAGI Case Search with Person Information matching the primary applicant. Verify a "Request timeout occurred" error message is displayed.
6. Within the context of a new or existing Medi-Cal case with active MAGI linkage, submit a MAGI Case Search with a MAGI Application Number populated. Verify a "No results found" result is displayed.
7. Outside the context of a case, submit separate MAGI Case Search requests with the following details:
 - a. A MAGI Case Number matching an existing case in the same county with active MAGI linkage. Verify the results match the details of the linked case, and the MAGI Case Status is:
 - a. Inactive if the primary applicant's middle name is not 'Active'
 - b. Active if the primary applicant's middle name is 'Active'
 - b. The SAWS Case Number and SAWS County of an existing case in the same or another county with active MAGI linkage. Verify the results match the details of the linked case, and the MAGI Case Status is:
 - a. Inactive if the primary applicant's middle name is not 'Active'
 - b. Active if the primary applicant's middle name is 'Active'
 - c. Person Information matching an existing case in the same county with active MAGI linkage. Verify that a "Request timeout occurred" error message is displayed.
 - d. A MAGI Application Number populated. Verify that a "No results found" result is displayed.
8. Within the context of a new or existing Medi-Cal case, submit a MAGI Case Search with each of the following Person Information details provided. Verify that the appropriate validation message displays.
 - a. CIN and SSN
 - b. First Name and Last Name
 - c. Last Name and DOB
 - d. First Name, Last Name, DOB, CIN, and SSN
 - e. No details – all fields left blank

9. Outside the context of a case, submit a MAGI Case Search with each of the following Person Information details provided. Verify that the appropriate validation message displays.
 - a. CIN and SSN
 - b. First Name and Last Name
 - c. Last Name and DOB
 - d. First Name, Last Name, DOB, CIN, and SSN
 - e. No details – all fields left blank
10. Within the context of a new or existing Medi-Cal case, attempt to submit MAGI Case Search requests with at least one required field left blank, Verify that the required field validation message displays.
 - a. By MAGI Case Number: No MAGI Case Number populated
 - b. By MAGI Application Number: No MAGI Application Number populated
 - c. By Person Information:
 - a. First Name not populated, and either Last Name or DOB populated
 - b. Last Name not populated, and either First Name or DOB populated
 - c. DOB not populated, and either First Name or Last Name populated
 - d. By SAWS Case Number and County:
 - a. No SAWS Case Number populated
 - b. No SAWS County populated

Note: The details for each successful search should be verified on the MAGI Case Search, MAGI Response Case Detail, and MAGI Search Response Person Detail pages. When in the context of a case, verify the “Link to Case” button displays. When outside the context of a case, verify the “Link to Case” button does not display.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IDD – CalHEERS SAWS Search	CalHEERS-SAWS Search Transaction Interface Design Document	 IDD - CalHEERS SAWS Search.pdf
2	Http Session Utilization	User Session Time Frame diagram	 Session%20Utilization.pptx
3	Security Updates	Security Matrix	 CA%20221711%20Case%20Linkage%20S

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.9	The LRS Shall display summary and detailed interface LRS Data that has been received from external systems, as specified by COUNTY.	CalSAWS will send, receive, and display MAGI case, application, and person information via the CalHEERS-SAWS Interface with CalHEERS.
2.20.1.14	The LRS shall include direct access and online inquiry to other systems, as required by COUNTY.	CalSAWS will create a new real-time CalHEERS-SAWS Interface to send and receive MAGI case, application, and person information with CalHEERS.
2.20.1.19	The LRS shall have the ability to receive data from external sources (e.g., State, SACWID system and COUNTY-approved agencies/partners) for the purposes of establishing and maintaining a case.	CalSAWS will allow Case Linkage Updates to be performed for a CalSAWS to CalHEERS case. CalSAWS will allow a Cancel DER to be sent to CalHEERS to

		update the County of Responsibility to CalHEERS.
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CalSAWS

California Statewide Automated Welfare System

Design Document

ACL 20-120, ACL 21-45 AB 79 Revised and
Obsolete CW and WTW Forms and NOAs

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/29/2021	1.0	Original Draft	Nithya Chereddy
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1 OVERVIEW

1.1 Current Design

CalWORKs time limit for adult recipients is 48 months in CalSAWS currently. As of the ACL 20-113 the CalWORKs time limit for adult recipients has been changed from 48 months to 60 months.

1.2 Requests

This effort is to obsolete the forms listed in the ACL 21-45 as the CalWORKs time limit for adult recipients is getting updated from 48 months to 60 months.

This effort will also update the forms/NOAs listed in ACL 21-45 to update the forms to the latest versions.

1.3 Overview of Recommendations

1. End date the forms as of **April 30, 2022**, which are listed in ACL 21-45 as obsolete forms.
2. Add the latest version of forms listed in ACL 21-45 with the 60-month time limit verbiage and end date the previous version of the forms as of May 1, 2022, which has the 48-month time limit verbiage.
3. Obsolete the NOAs with the 48-month time limit verbiage as of May 1, 2022.
4. Add the NOAs which are listed in the ACL 21-45 with the 60-month time limit to the system.

1.4 Assumptions

1. The existing NA BACK 9 will be used on the updated forms and notices.
2. If a form is being end dated all the corresponding languages in which the form is available will be end dated. The updated form will be available in the languages listed in the 'Form/NOA Verbiage' section of each form update recommendation.
3. All the form population remains same unless listed in the form update recommendations.
4. SCR CA-233816 will add the updated forms in Spanish.
5. SCR CA- 235922 will add pre-population to CW 2186B form.
6. SCR CA-235957 will add the NOAs/Forms listed in the ACL 21-45 and ACL 20-113 which currently do not exist in the system.
7. SCR CA-206553 will add WTW 51 to the system.
8. SCR CA-234211 will updated Header_1 to have all the fields in the header editable.
9. The header (HEADER_1) and body variables will be editable for all the forms added/updated as part of this SCR.

10. Batch job which currently triggers CW 2186A and WTW 43 will be turned off as part of this SCR. CW 2186A will not be generated through Batch after the go-live of this SCR.
11. For Los Angeles County, the forms are attached to the RE packets at the Central Print Facility. Hence the Central print facility should be made aware of the updated CW 2166, CW 2184 for the updated version to be included as part of the RE packets.
12. NA 1239 SAR will be used on Time Limit NOAs being added as part of this SCR in place of NA 531 or NA 532 Budgets.
13. SCR CA-236475 has been created to add the Budgets NA 531 and NA 532.
14. A separate Time Limit NOA will be generated per each person in the EDBC if the trigger conditions for the NOA are met. The NOAs will not be merged for persons although the same reason fragment applies to multiple persons as the exempt months could potentially be different. The exempt months are populated on Page 3 and Page 4 (only if there are child support exempt months) of the Time Limit Template.
15. SCR CA- 238815 will update the CW 2166 form to the latest version (11/2021) in CW RE Packet, CW/CF RE Packets for migration counties.
16. SCR CA- 238818 will update the CW 2184 form to the latest version (04/2021) in CW RE Packet, CW/CF RE Packets for migration counties.
17. If the user reruns the EDBC, the last notification date and the months exhausted as of the notification date values will not be updated in the backend (Rec 2.24) if a NOA does not get generated during EDBC rerun. A NOA will only generate during the EDBC rerun if the trigger conditions are met for a NOA to be generated. i.e., if the user runs the EDBC during the 60th month and there are no extenders the appropriate NOA will generate, if the user goes back and adds an exempt month and reruns the EDBC a NOA will only generate if a NOA one exists for that scenario.

2 RECOMMENDATIONS

2.1 Updates to obsolete forms

2.1.1 Overview

The following forms should be made obsolete in CalSAWS as the WTW 24-MTC is being revoked as of May 1, 2022, and CalWORKs 48-MTC is being updated to 60-MTC as of May 1, 2022.

2.1.2 List of forms to obsolete

1. Obsolete (end date) the following forms as of April 30, 2022.

Form Name	Form Number (DOC_TEMPL_ID)	Template Repository Visibility	Batch Job
Your Welfare-To-Work (WTW) 24-Month Time Clock	CW 2208 (5249)	Yes	PB00R1956
Welfare-to-Work 24-Month Time Clock Notice	WTW 38 (5997)	Yes	PB00R1994
Notice of your welfare-to-work (wtw) 24-month time clock ending soon	WTW 43 (6067)	Yes	N/A
WTW 43 and CW 2186A Set	WTW 43 Set (6101)	No	PB00R1972
WELFARE-TO-WORK (WTW) 24-MONTH TIME CLOCK EXTENSION REQUEST FORM	WTW 44 (6061)	Yes	N/A
WELFARE-TO-WORK (WTW) 24-MONTH TIME CLOCK EXTENSION DETERMINATION	WTW 45 (6062)	Yes	N/A
END OF WELFARE-TO-WORK 24-MONTH TIME CLOCK REVIEW APPOINTMENT LETTER	WTW 46 (6072)	Yes	N/A
WTW 46 and WTW 44 Set	WTW 46 Set (6128)	No	N/A

NOTICE OF ACTION WELFARE-TO-WORK 24-MONTH TIME CLOCK LIMIT NOTICE	NA 1276 (6068)	Yes	PB00R1971
NOTICE OF YOUR CalWORKs TIME LIMIT-42nd MONTH ON AID	CW 2189 (5911)	Yes	N/A
CW Time on Aid at 42 and 46 Months (CW TL Child Support Exemptions) Note: This is the M40-107C form	CW TL A980I (5798)	Yes	PB00R1941
CW Time on Aid at 42 and 46 Months (We Exemptions-Non Child Support) Note: This is the M40-107C form	CW TL A979I (5797)	Yes	PB00R1940
CW Time on Aid between 42 and 46 Month (No Exemptions) Note: This is the M40-107C form	CW TL A981I (5799)	Yes	PB00R1942

2. Turn off the batch jobs listed in the table above as of April 27th, as the corresponding forms are made obsolete.
Following is the schedule for April 2022.

Form Number	Batch Job Name	April
CW 2208	PB00R1956	Daily M-S
WTW 38	PB00R1994	4/27, 3 business days before EOM
WTW 43 Set	PB00R1972	4/11, 10 th day of the month (No Sundays)
NA 1276	PB00R1971	4/11, 10 th day of the month (No Sundays)
CW TL A980I	PB00R1941	4/18 (10 days before EOM)

CW TL A979I	PB00R1940	4/18 (10 days before EOM)
CW TL A981I	PB00R1942	4/18 (10 days before EOM)

2.2 Updates to CW 2166 form

2.2.1 Overview

This effort is end dating the existing version of CW 2166 (07/2019) form and adding the latest revision of CW 2166 (11/2021) form based upon the ACL 21-45.

Current State Form: CW 2166 (07/2019)

Current Form Title: Work Pays Notice

Current Programs: CalWORKs, Welfare to Work, Refugee Employment Program

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All County

Existing Languages: English, Spanish

Generated by Batch: N

Current Print Options: Print Local Form

Current Imaging Form Name: Work Pays Notice

Current Imaging Document Type: CalWORKs (CW)

Existing Imaging Case/Person: Case

2.2.2 Form/NOA Verbiage

This form has a minor update to the verbiage from ACL 21-45.

Form Header: N/A

Updated State Form: CW 2166 (11/2021)

Updated Form Title: Work Really Pays! Here's How

Updated Languages: English

Include NA Back 9: N

Form Mockups/Examples: See Supporting Document #1

Body Variables Editable: Y

2.2.3 Form/NOA Generation Conditions

1. Turn off the old versions of the Form

This effort is turning off the existing CW 2166 form versions (07/2019) in the System as of May 31st, 2022.

DOC_TEMPL_ID: 6429

Form languages to end date: English, Spanish

2. Add Latest versions of the Form

This effort is adding the latest version of CW 2166 (11/2021) to the System as of June 1st, 2022.

2.3 Updates to CW 2184 form

2.3.1 Overview

This effort is end dating the existing version of CW 2184 (08/2016) form and adding the latest revision of CW 2184 (04/2021) form based upon the ACL 21-45.

Current State Form: CW 2184 (08/2016)

Current Form Title: CalWORKs 48-Month Time Limit

Current Programs: CalWORKs

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All County

Existing Languages: English, Spanish

Generated by Batch: N

Current Print Options: Print Local Form

Current Imaging Form Name: CW 48-Month Time Limit

Current Imaging Document Type: Time Limit Documents

Existing Imaging Case/Person: Case

2.3.2 Form/NOA Verbiage

This form has a minor update to the verbiage from ACL 21-45.

Form Header: N/A

Updated State Form: CW 2184 (04/2021)

Updated Form Title: CalWORKs 60-Month Time Limit

Updated Imaging Form Name: CW 60-Month Time Limit

Updated Languages: English

Include NA Back 9: N

Form Mockups/Examples: See Supporting Document #2

Header and Body Variables Editable: N/A

2.3.3 Form/NOA Generation Conditions

1. Turn off the old versions of the Form

This effort is turning off the existing CW 2184 form versions (08/2016) in the System as of April 30th, 2022.

DOC_TEMPL_ID: 5350

Form languages to end date: English, Spanish

2. Add Latest versions of the Form

This effort is adding the latest version of CW 2184 (04/2021) to the System as of May 1st, 2022.

2.4 Updates to CW 2186A form

2.4.1 Overview

This effort is end dating the existing version of CW 2186A (12/2012) form and adding the latest revision of CW 2186A (04/2021) form based upon the ACL 21-45.

Current State Form: CW 2186A (12/2012)

Current Form Title: CalWORKs Exemption Request Form

Current Programs: CalWORKs, Welfare to Work, Refugee Employment Program

Current Attached Forms: N/A

Current Forms Category: Application

Current Template Repository Visibility: All County

Existing Languages: English, Spanish, Armenian, Cambodia, Chinese, Farsi, Filipino, Korean, Russian, Vietnamese

Generated by Batch: N (Currently CW 2186A gets generated with WTW 43 with the Batch Job PB00R1972, but the Batch Job is being made obsolete with this SCR)

Current Print Options: Print Central, Print Local

Current Imaging Form Name: CW Exemption Request Form

Current Imaging Document Type: CalWORKs (CW)

Existing Imaging Case/Person: Case

2.4.2 Form/NOA Verbiage

This form has a minor update to the verbiage from ACL 21-45.

Form Header: Header_1 (See Supporting Document #3)

Updated State Form: CW 2186A (04/2021)

Updated Languages: English

Include NA Back 9: N

Form Mockups/Examples: See Supporting Document #3

Header and Body Variables Editable: Y

Note: At the bottom of the first page of the actual form the sentence 'PLEASE READ PAGE THREE TO FIND OUT ABOUT MORE EXEMPTIONS.' is replaced with 'PLEASE READ THE BACK OF THIS FORM TO FIND OUT ABOUT MORE EXEMPTIONS.' A header will be added to the CW 2186A form which will update the page numbers on the implemented form. The verbiage is updated to account for the difference in page number due to the implementation of the form.

2.4.3 Form/NOA Generation Conditions

1. Turn off the old versions of the Form

This effort is turning off the existing CW 2186A form versions (12/2012) in the System as of April 30th, 2022.

DOC_TEMPL_ID: 5948

Form languages to end date: English, Spanish, Armenian, Cambodia, Chinese, Farsi, Filipino, Korean, Russian, Vietnamese

2. Add Latest versions of the Form

This effort is adding the latest version of CW 2186A (04/2021) to the System as of May 1st, 2022.

2.5 Updates to CW 2186B form

2.5.1 Overview

This effort is end dating the existing version of CW 2186B (12/2012) form and adding the latest revision of CW 2186B (04/2021) form based upon the ACL 21-45.

Current State Form: CW 2186B (12/2012)

Current Form Title: CalWORKs Exemption Determination

Current Programs: CalWORKs, Welfare to Work, Refugee Employment Program

Current Attached Forms: N/A
Current Forms Category: Forms
Current Template Repository Visibility: All County
Existing Languages: English, Spanish
Generated by Batch: N
Current Print Options: Print Local, Print Central
Current Imaging Form Name: CW Exemption Determination
Current Imaging Document Type: CalWORKs (CW)
Existing Imaging Case/Person: Case

2.5.2 Form/NOA Verbiage

This form has a minor update to the verbiage from ACL 21-45.

Form Header: Header_1 (See Supporting Document #4)
Updated State Form: CW 2186B (04/2021)
Updated Languages: English
Include NA Back 9: Y
Form Mockups/Examples: See Supporting Document #4
Header and Body Variables Editable: Y

2.5.3 Form/NOA Generation Conditions

1. Turn off the old versions of the Form
This effort is turning off the existing CW 2186B form versions (12/2012) in the System as of April 30th, 2022.
DOC_TEMPL_ID: 5353
Form languages to end date: English, Spanish
2. Add Latest versions of the Form
This effort is adding the latest version of CW 2186B (04/2021) to the System as of May 1st, 2022.

2.6 Updates to CW 2187 form

2.6.1 Overview

This effort is end dating the existing version of CW 2187 (04/2011) form and adding the latest revision of CW 2187 (04/2021) form based upon the ACL 21-45.

Current State Form: CW 2187 (04/2011)
Current Form Title: YOUR CalWORKs 48-MONTH TIME LIMIT
Current Programs: CalWORKs
Current Attached Forms: N/A
Current Forms Category: Forms
Current Template Repository Visibility: All County
Existing Languages: English, Spanish
Generated by Batch: N
Current Print Options: Print Local, Print Central
Current Imaging Form Name: YOUR CW 48-MONTH TIME LIMIT
Current Imaging Document Type: Time Limit Documents
Existing Imaging Case/Person: Case

2.6.2 Form/NOA Verbiage

This form has a minor update to the verbiage from ACL 21-45.

Form Header: Header_1 (See Supporting Document #5)
Updated State Form: CW 2187 (04/2021)
Updated Form Title: YOUR CalWORKs 60-MONTH TIME LIMIT
Updated Imaging Form Name: YOUR CW 60-MONTH TIME LIMIT
Updated Languages: English
Include NA Back 9: Y
Form Mockups/Examples: See Supporting Document #5
Header and Body Variables Editable: Y

2.6.3 Form/NOA Generation Conditions

1. Turn off the old versions of the Form
This effort is turning off the existing CW 2187 form versions (04/2011) in the System as of April 30th, 2022.
DOC_TEMPL_ID: 6010
Form languages to end date: English, Spanish
2. Add Latest versions of the Form
This effort is adding the latest version of CW 2187 (04/2021) to the System as of May 1st, 2022.
Note: The existing form population will continue and remain the same.

2.7 Updates to CW 2190A form

2.7.1 Overview

This effort is end dating the existing version of CW 2190A (04/2016) form and adding the latest revision of CW 2190A (04/2021) form based upon the ACL 21-45.

Current State Form: CW 2190A (04/2016)

Current Form Title: CalWORKs 48-Month Time Limit Extender Request Form

Current Programs: CalWORKs, Welfare to Work, Refugee Employment Program

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All County

Existing Languages: English, Spanish, Armenian, Cambodia, Chinese, Farsi, Filipino, Korean, Russian, Vietnamese

Generated by Batch: N

Current Print Options: Print Local, Print Central

Current Imaging Form Name: CW 48-Month Time Limit Extender Request

Current Imaging Document Type: Time Limit Documents

Existing Imaging Case/Person: Case

2.7.2 Form/NOA Verbiage

This form has a minor update to the verbiage from ACL 21-45.

Form Header: Header_1 (See Supporting Document #6)

Updated State Form: CW 2190A (04/2021)

Updated Form Title: CalWORKs 60-Month Time Limit Extender Request Form

Updated Imaging Form Name: CW 60-Month Time Limit Extender Request

Updated Languages: English

Include NA Back 9: N

Form Mockups/Examples: See Supporting Document #6

Header and Body Variables Editable: Y

2.7.3 Form/NOA Generation Conditions

1. Turn off the old versions of the Form

This effort is turning off the existing CW 2190A form versions (04/2016) in the System as of April 30th, 2022.

DOC_TEMPL_ID: 5719

Form languages to end date: English, Spanish, Armenian, Cambodia, Chinese, Farsi, Filipino, Korean, Russian, Vietnamese

2. Add Latest versions of the Form

This effort is adding the latest version of CW 2190A (04/2021) to the System as of May 1st, 2022.

2.8 Updates to CW 2190B form

2.8.1 Overview

This effort is end dating the existing version of CW 2190B (05/2016) form and adding the latest revision of CW 2190B (04/2021) form based upon the ACL 21-45.

Current State Form: CW 2190B (05/2016)

Current Form Title: CalWORKs 48-Month Time Limit Extender Determination Form

Current Programs: CalWORKs, Welfare to Work, Refugee Employment Program

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All County

Existing Languages: English, Spanish, Armenian, Cambodia, Chinese, Farsi, Filipino, Korean, Russian, Vietnamese

Generated by Batch: N

Current Print Options: Print Local, Print Central

Current Imaging Form Name: CW 48-Month Time Limit Extender Determ

Current Imaging Document Type: Time Limit Documents

Existing Imaging Case/Person: Case

2.8.2 Form/NOA Verbiage

This form has a minor update to the verbiage from ACL 21-45.

Form Header: Header_1 (See Supporting Document #7)

Updated State Form: CW 2190B (04/2021)

Updated Form Title: CalWORKS 60- Month Time Limit Extender Determination Form

Updated Imaging Form Name: CW 60-Month Time Limit Extender Determ

Updated Languages: English

Include NA Back 9: Y

Form Mockups/Examples: See Supporting Document #7

Header and Body Variables Editable: Y

2.8.3 Form/NOA Generation Conditions

1. Turn off the old versions of the Form

This effort is turning off the existing CW 2190B form versions (05/2016) in the System as of April 30th, 2022.

DOC_TEMPL_ID: 6316

Form languages to end date: English, Spanish, Armenian, Cambodia, Chinese, Farsi, Filipino, Korean, Russian, Vietnamese

2. Add Latest versions of the Form

This effort is adding the latest version of CW 2190B (04/2021) to the System as of May 1st, 2022.

2.9 Updates to FSP 2 form

2.9.1 Overview

This effort is end dating the existing version of FSP 2 (08/2014) form and adding the latest revision of FSP 2 (01/2021) form based upon the ACL 21-45.

Current State Form: FSP 2 (08/2014)

Current Form Title: Family Stabilization Program Denial Notice

Current Programs: CalWORKs, Welfare to Work, Refugee Employment Program

Current Attached Forms: N/A

Current Forms Category: NOA

Current Template Repository Visibility: All County

Existing Languages: English, Spanish

Generated by Batch: N

Current Print Options: Print Local Form

Current Imaging Form Name: Family Stabilization Program Denial

Current Imaging Document Type: Family Stabilization

Existing Imaging Case/Person: Case

2.9.2 Form/NOA Verbiage

This form has a minor update to the verbiage from ACL 21-45.

Form Header: N/A

Updated State Form: FSP 2 (01/2021)

Updated Languages: English

Include NA Back 9: Yes

Form Mockups/Examples: See Supporting Document #8

Header and Body Variables Editable: Y

2.9.3 Form/NOA Generation Conditions

1. Turn off the old versions of the Form

This effort is turning off the existing FSP 2 form versions (08/2014) in the System as of April 30th, 2022.

DOC_TEMPL_ID: 6349

Form languages to end date: English, Spanish

2. Add Latest versions of the Form

This effort is adding the latest version of FSP 2 (01/2021) to the System as of May 1st, 2022.

2.10 Updates to WTW 5 form

2.10.1 Overview

This effort is end dating the existing version of WTW 5 form (09/2013) form and adding the latest revision of WTW 5 (01/2021) form based upon the ACL 21-45.

Current State Form: WTW 5 (09/2013)

Current Form Title: Welfare To Work Program Notice

Current Programs: Welfare to Work

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All County

Existing Languages: English, Spanish, Armenian, Arabic, Cambodia, Chinese, Farsi, Filipino, Korean, Russian, Vietnamese

Generated by Batch: N

Current Print Options: Print Local Form

Current Imaging Form Name: WTW Program Notice

Current Imaging Document Type: Welfare to Work (WTW)

Existing Imaging Case/Person: Case

2.10.2 Form/NOA Verbiage

This form has a minor update to the verbiage from ACL 21-45.

Updated State Form: WTW 5 (01/2021)

Updated Languages: English

Updated Programs: Welfare to Work and Refugee Employment Program

Include NA Back 9: N

Form Mockups/Examples: See Supporting Document #9

Header and Body Variables Editable: Y

2.10.3 Form/NOA Generation Conditions

1. Turn off the old versions of the Form

This effort is turning off the existing WTW 5 form versions (09/2013) in the System as of April 30th, 2022.

DOC_TEMPL_ID: 5340

Form languages to end date: English, Spanish, Armenian, Arabic, Cambodia, Chinese, Farsi, Filipino, Korean, Russian, Vietnamese

2. Add Latest versions of the Form

This effort is adding the latest version of WTW 5 (01/2021) to the System as of May 1st, 2022.

2.11 End date the existing 48-month Time on Aid Reason Fragments

2.11.1 Overview

The existing 48-month Time on Aid reason fragments should be end dated as of April 30th, 2022, as the 60-month Time Limit takes effect as of May 1st, 2022.

2.11.2 List of 48-month Time on Aid Reason Fragments

Below is the list of the reason fragments which should be turned off as of April 30th, 2022.

Fragment ID	Fragment Name
6411	CW_CH_TL_GRANT_REDUCED_NO_EXEMPTS_NO_CS_A937

6412	CW_CH_TL_GRANT_REDUCED_EXEMPTS_NO_CS_A938
6413	CW_CH_TL_GRANT_REDUCED_EXEMPTS_CS_A939
6423	CW_DN_TL_PREG_NO_EXEMPTIONS_A949
6424	CW_DN_TL_PREG_EXEMPTIONS_NO_CS_A950
6425	CW_DN_TL_PREG_EXEMPTIONS_AND_CS_A951
6418	CW_TN_TL_48_EXEMPTIONS_NON_CS_A944
6433	CW_AP_TL_PARTICIPANT_MET_CONDITION_A987
6435	CW_AP_TL_OVERPAY_REPAID_APPROVED_A989
6437	CW_AP_TL_REPAID_CS_PRORATE_APPROV_AFTER_48_A991
6438	CW_AP_TL_REPAID_OVERPAY_PRORATE_AP_AFTER_48_A992
6420	CW_AP_TL_PA_NO_EXEMPTIONS_NO_CS_A946
6421	CW_AP_TL_PA_EXEMPTIONS_NO_CS_A947
6422	CW_AP_TL_PA_EXEMPTIONS_AND_CS_A948
6439	CW_CH_TL_CS_INCR_GRANT_TIME_ADJUST_A982
6440	CW_CH_TL_OVERPAY_INCR_GRANT_A983
6416	CW_IN_TL_EXTENDED_EXEMPTS_CS_A942
6415	CW_IN_TL_EXTENDED_EXEMPTS_NO_CS_A941
6414	CW_IN_TL_EXTENDED_NO_EXEMPTS_A940
6442	CW_IN_TL_REDETERM_EXEMPTS_AND_CS_A985
6441	CW_IN_TL_REDETERM_EXEMPTS_NO_CS_A984
6443	CW_IN_TL_REDETERM_NO_EXEMPTIONS_A986
6429	CW_TN_TL_EX_INC_EXTENDR_EXPIRE_EXEMPTS_AND_CS_A957
6428	CW_TN_TL_EX_INC_EXTENDR_EXPIRE_EXEMPTS_NO_CS_A956
6427	CW_CH_TL_EXTENDER_END_EXEMPTS_NO_CS_A953
6426	CW_CH_TL_48_EXTEND_TIME_OUT_PARTICIPANT_A977
6434	CW_AP_TL_CS_REPAID_A988

See Supporting document #11 for the fragment's verbiage.

2.12 Add New Time Limit NOA Template

2.12.1 Overview

This effort is adding the Template for the newly added Time Limit NOAs. The verbiage has provided via ACL 21-45.

State Form/NOA: NA 530 (Revision 4/21)

Program(s): CalWORKs

Includes NA Back 9: Yes

Languages: English

Note: The Spanish Template is not being added with this SCR as the new reasons that populate are not available in Spanish. The SCR CA-233816 has been created to add the Spanish Forms/NOAs/Templates related to Time Limits.

2.12.2 Form/NOA Verbiage

1. Create a New Time Limit NOA Template XDP

Add a new Time Limit Template for Approvals, Changes, Denials, Discontinuances.

2. Template Layout – Main Page (Page 1)

The first page of the NOA will contain a standard CalSAWS header and footer. The State Hearing information will be under the header. There will be a dynamic NOA title that populates based on the NOA fragments that are generated. There is a main section where the NOA fragments will generate. Above the footer and below the main section will be a regulations section for Time Limit regulations to populate.

<ADDRESS1>	COUNTY OF <COUNTY>	STATE OF CALIFORNIA HEALTH AND WELFARE AGENCY DEPARTMENT OF SOCIAL SERVICES												
		<table border="0"> <tr> <td>NOTICE DATE:</td> <td><NOTICE_DATE></td> </tr> <tr> <td>CASE NAME:</td> <td><CASE_NAME></td> </tr> <tr> <td>CASE NUMBER:</td> <td><CASE_NUM></td> </tr> <tr> <td>WORKER NAME:</td> <td><WORKER_NAME></td> </tr> <tr> <td>WORKER ID:</td> <td><WORKER_NUM></td> </tr> <tr> <td>TELEPHONE NUMBER:</td> <td><PHONE_NUM></td> </tr> </table>	NOTICE DATE:	<NOTICE_DATE>	CASE NAME:	<CASE_NAME>	CASE NUMBER:	<CASE_NUM>	WORKER NAME:	<WORKER_NAME>	WORKER ID:	<WORKER_NUM>	TELEPHONE NUMBER:	<PHONE_NUM>
NOTICE DATE:	<NOTICE_DATE>													
CASE NAME:	<CASE_NAME>													
CASE NUMBER:	<CASE_NUM>													
WORKER NAME:	<WORKER_NAME>													
WORKER ID:	<WORKER_NUM>													
TELEPHONE NUMBER:	<PHONE_NUM>													
NOTICE OF ACTION <NOA ACTION TITLE> 60-MONTH TIME LIMIT		<ADDRESS2>												
		Questions? Ask your worker.												
		State Hearing: If you think this action is wrong, you can ask for a hearing. The back page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.												
<FOOTER>		Page 1 of X												

3. Template Layout – NA Back 9 (Page 2)

The back of the first page, also known as the second page, the existing NA Back 9 will generate. The page number and page total will generate at the bottom of the page.

YOUR HEARING RIGHTS

You have the right to ask for a hearing if you disagree with any county action. You have only 90 days to ask for a hearing. The 90 days started the day after the county gave or mailed you this notice. If you have good cause as to why you were not able to file for a hearing within the 90 days, you may still file for a hearing. If you provide good cause, a hearing may still be scheduled.

If you ask for a hearing before an action on Cash Aid, Medi-Cal, CalFresh, or Child Care takes place:

- Your Cash Aid or Medi-Cal will stay the same while you wait for a hearing.
- Your Child Care Services may stay the same while you wait for a hearing.
- Your CalFresh will stay the same until the hearing or the end of your certification period, whichever is earlier.

If the hearing decision says we are right, you will owe us for any extra Cash Aid, CalFresh or Child Care Services you got. To let us lower or stop your benefits before the hearing check below:

Yes, lower or stop: Cash Aid CalFresh Child Care

While You Wait for a Hearing Decision for:

Welfare to Work:

You do not have to take part in the activities.

You may receive child care payments for employment and for activities approved by the county before this notice.

If we told you your other supportive services payments will stop, you will not get any more payments, even if you go to your activity.

If we told you we will pay your other supportive services, they will be paid in the amount and in the way we told you in this notice.

- To get those supportive services, you must go to the activity the county told you to attend.
- If the amount of supportive services the county pays while you wait for a hearing decision is not enough to allow you to participate, you can stop going to the activity.

Cal-Learn:

- You cannot participate in the Cal-Learn Program if we told you we cannot serve you.
- We will only pay for Cal-Learn supportive services for an approved activity.

OTHER INFORMATION

Medi-Cal Managed Care Plan Members: This action on this notice may stop you from getting services from your managed care health plan. You may wish to contact your health plan membership services if you have questions.

Child and/or Medical Support: The local child support agency will help collect support at no cost even if you are not on cash aid. If they now collect support for you, they will keep doing so unless you tell them in writing to stop. They will send you current support money collected but will keep past due money collected that is owed to the county.

Family Planning: Your welfare office will give you information when you ask for it.

Hearing File: If you ask for a hearing, the State Hearing Division will set up a file. You have the right to see this file before your hearing and to get a copy of the county's written position on your case at least two days before the hearing. The state may give you hearing file to the Welfare Department and the U.S. Departments of Health and Human Services and Agriculture. (W&I Code Sections 10850 and 10950.)

NA BACK 9 (REPLACES NA BACK 8 AND EP 5)(REVISED 4/2013) - REQUIRED FORM - NO SUBSTITUTE PERMITTED

Page 2 of X

TO ASK FOR A HEARING:

- Fill out this page.
- Make a copy of the front and back of this page for your records. If you ask, your worker will get you a copy of this page.
- Send or take this page to:

Appeals & Hearing Section
P.O. Box 18890
Los Angeles, CA 90018

OR

- Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.

To Get Help: You can ask about your hearing rights or for a legal aid referral at the toll-free state phone numbers listed above. You may get free legal help at your local legal aid or welfare rights office.

Legal Aid Foundation of Los Angeles (LAFLA)
(800) 399-4529

If you do not want to go to the hearing alone, you can bring a friend or someone with you.

HEARING REQUEST

I want a hearing due to an action by the Welfare Department of LOS ANGELES County about my:

- Cash Aid CalFresh Medi-Cal
 Other (List) _____

Here's Why: _____

- If you need more space, check here and add a page.
- I need the state to provide me with an interpreter at no cost to me. (A relative or friend cannot interpret for you at the hearing.)

My language or dialect is: _____

NAME OF PERSON WHOSE BENEFITS WERE DENIED, CHANGED OR STOPPED

BIRTH DATE _____ PHONE NUMBER _____

STREET ADDRESS _____

CITY _____ STATE _____ ZIP CODE _____

SIGNATURE _____ DATE _____

NAME OF PERSON COMPLETING THIS FORM _____ PHONE NUMBER _____

- I want the person named below to represent me at this hearing. I give my permission for this person to see my records or go to the hearing for me. (This person can be a friend or relative but cannot interpret for you.)

NAME _____ PHONE NUMBER _____

STREET ADDRESS _____

CITY _____ STATE _____ ZIP CODE _____

4. Template Layout – Continuous Pages (Page 3 and ongoing)

The third page, and all pages following the third page, will generate on the NOA Continuation page, which is NA 270, unless otherwise specified in the recommendations below. This will generate on the front and back of all pages starting the third page. The Continuation page will generate

with a standard header. Footer on these continuation pages will be "NA 270 (1/100) CONTINUATION PAGE"

NOTICE OF ACTION	COUNTY OF <COUNTY>	STATE OF CALIFORNIA HEALTH AND WELFARE AGENCY DEPARTMENT OF SOCIAL SERVICES
Continued		
	NOTICE DATE:	<NOTICE_DATE>
	CASE NAME:	<CASE_NAME>
	CASE NUMBER:	<CASE_NUM>
	WORKER NAME:	<WORKER_NAME>
	WORKER ID:	<WORKER_ID>
	TELEPHONE NUMBER:	<PHONE_NUM>

NA 270 (1/100) CONTINUATION PAGE Page 3 of X

After all the NOA Action, Reason, Messages are populated, on the next page, the exempt months verbiage will populate.

For example: If the Action, Reason, Message verbiage did not fit in the first page, then the text will flow on the third page and so on (as second page will have NA BACK 9). Once the Action, Reason and Message has been populated on the NOA, the next page will contain the following text.

Description	Text
<Static Section>	The following <ExemptionMonthsNotCounted> months did not count toward your CalWORKs 60-month time limit:
<Dynamic Section>	<Year> - <Months>

The <Dynamic Section> mentioned above will create a new line for each year where the exempt months exist.

<p>NOTICE OF ACTION</p> <p>Continued</p>	<p>COUNTY OF <COUNTY></p>	<p>STATE OF CALIFORNIA HEALTH AND WELFARE AGENCY DEPARTMENT OF SOCIAL SERVICES</p>
		<p>NOTICE DATE: <NOTICE_DATE> CASE NAME: <CASE_NAME> CASE NUMBER: <CASE_NUM> WORKER NAME: <WORKER_NAME> WORKER ID: <WORKER_ID> TELEPHONE NUMBER: <PHONE_NUM></p>
<p>The following <ExemptionMonthsNotCounted> months did not count toward your CalWORKs 60-month time limit:</p>		
<Year> - <Months>	<Dynamic Section>	
<p style="font-size: small; margin: 0;">NA 270 (1/100) CONTINUATION PAGE Page Y of X</p>		

3. Add the Addendum 1

If the Addendum 1 is applicable for the generated reason, the Addendum 1 will populate on the page following the exempt months. The triggers for the Addendum 1 (if applicable) will be listed in the corresponding reason fragment recommendations.

Description	Text
-------------	------

<Static Section>	<p>Child Support Collection for CalWORKs 60-month Time Limit Exemption.</p> <p>Child support collection is used to exempt months of aid. A month is exempt if the aid for that month is fully repaid by child support collected since 1998. All child support amounts since 1998 are added together so when the total child support amount can repay a month of aid, that month does not count toward the CalWORKs 60-month time limit.</p> <p>The following information tells you how the child support was collected and applied to repay months on aid.</p> <p>As of <NotificationDate>, the amount of child support collected is <AmountOfChildSupportCollected>.</p> <p>The child support amount was applied to exempt the following <Number_of_Exempt_Months> months:</p>
<Dynamic Section>	<Month_and_Year1> Amount of Aid Repaid by Child Support <Aid_Repaid_by_Child_Support>
<Static Section>	The remaining amount of child support is <RemainingChildSupport> and will be applied to months of aid that have not yet been repaid.

The <Dynamic Section> mentioned above will create a new line for each exempt month that exists.

NOTICE OF ACTION
Continued

COUNTY OF <COUNTY>

STATE OF CALIFORNIA
HEALTH AND WELFARE AGENCY
DEPARTMENT OF SOCIAL SERVICES

NOTICE DATE: <NOTICE_DATE>
CASE NAME: <CASE_NAME>
CASE NUMBER: <CASE_NUM>
WORKER NAME: <WORKER_NAME>
WORKER ID: <WORKER_ID>
TELEPHONE NUMBER: <PHONE_NUM>

Child Support Collection for CalWORKs 60-month Time Limit Exemption.

Child support collection is used to exempt months of aid. A month is exempt if the aid for that month is fully repaid by child support collected since 1998. All child support amounts since 1998 are added together so when the total child support amount can repay a month of aid, that month does not count toward the CalWORKs 60-month time limit.

The following information tells you how the child support was collected and applied to repay months on aid.

As of <NotificationDate>, the amount of child support collected is <AmountOfChildSupportCollected>.

The child support amount was applied to exempt the following <Number_of_Exempt_Months> months:

<Month_and_Year1> Amount of Aid Repaid by Child Support <Aid_Repaid_by_Child_Support> <Dynamic Section>

The remaining amount of child support is <RemainingChildSupport> and will be applied to months of aid that have not yet been repaid.

4. Add Addendum 2

If the Addendum 2 is applicable for the generated reason, the Addendum 2 will populate on the page following the exempt months. The triggers for the Addendum 2 (if applicable) will be listed in the corresponding reason fragment recommendations.

Description	Text
<Static Section>	<p>Child Support Collection for CalWORKs 60-month Time Limit Exemption.</p> <p>Child support collection is used to exempt months of aid. A month is exempt if the aid for that month is fully repaid by child support collected since 1998. All child support amounts since 1998 are added together so when the total child support amount can repay a month of aid, that month does not count toward the CalWORKs 60-month time limit.</p> <p>The following information tells you how the child support was collected and applied to repay months on aid.</p> <p>As of <LastTLNOASentDate>, the amount of child support since your last notice is <AmountOfChildSupportCollected>.</p> <p>On the last time limit notice, the remaining amount of child support that was not yet used was: + <RemainingChildSupport >.</p> <p>The total amount of child support applied to repay aid since your last notice is: = <AmountSinceLastTL>.</p> <p>The child support amount was applied to exempt the following <Number_of_Exempt_Months> months:</p>
<Dynamic Section>	<Month_and_Year1> Amount of Aid Repaid by Child Support <Aid_Repaid_by_Child_Support>
<Static Section>	The remaining amount of child support is <RemainingChildSupport> and will be applied to months of aid that have not yet been repaid.

The <Dynamic Section> mentioned above will create a new line for each exempt month that exists.

NOTICE OF ACTION
Continued

COUNTY OF <COUNTY>

STATE OF CALIFORNIA
HEALTH AND WELFARE AGENCY
DEPARTMENT OF SOCIAL SERVICES

NOTICE DATE: <NOTICE_DATE>
CASE NAME: <CASE_NAME>
CASE NUMBER: <CASE_NUM>
WORKER NAME: <WORKER_NAME>
WORKER ID: <WORKER_ID>
TELEPHONE NUMBER: <PHONE_NUM>

Child Support Collection for CalWORKs 60-month Time Limit Exemption.

Child support collection is used to exempt months of aid. A month is exempt if the aid for that month is fully repaid by child support collected since 1998. All child support amounts since 1998 are added together so when the total child support amount can repay a month of aid, that month does not count toward the CalWORKs 60-month time limit.

The following information tells you how the child support was collected and applied to repay months on aid.

As of <NotificationDate>, the amount of child support collected is <AmountOfChildSupportCollected>.

On the last time limit notice, the remaining amount of child support that was not yet used was:
<RemainingChildSupport >

The total amount of child support applied to repay aid since your last notice is: = <AmountSinceLastTL>

The child support amount was applied to exempt the following <Number_of_Exempt_Months> months:

<Month_and_Year1> Amount of Aid Repaid by Child Support <Aid_Repaid_by_Child_Support> <Dynamic Section>

The remaining amount of child support is <RemainingChildSupport> and will be applied to months of aid that have not yet been repaid.

5. Attach CW 2184 form at the end of the Template

Attach the updated CW 2184 form at the end of the Template.

CALWORKS 60-MONTH TIME LIMIT



CalWORKs 60-MONTH TIME LIMIT ON AID

Beginning May 1, 2022, an aided adult (parent, stepparent, and/or caretaker relative) can only get 60 months (5 years) of cash aid from the California Work Opportunity and Responsibility to Kids (CalWORKs) program. This includes cash aid you got from California and other states' Federal Temporary Assistance for Needy Families (TANF) Programs.

The 60-month time limit does NOT apply to:

- Children
- Child Care
- Medi-Cal Benefits
- CalFresh Benefits
- Aid that you got from California or another state under the Aid to Families with Dependent Children (AFDC) Program before January 1, 1998.

FACTS YOU SHOULD KNOW ABOUT THE CalWORKs 60-MONTH TIME LIMIT

Time Limit Exemptions - "Clock Stoppers"

A month on cash aid does not count toward your CalWORKs 60-month time limit if at any time during that month you are:

- Disabled (*You must have medical proof of a disability that is expected to last at least 30 days.*)
- 60 years or older.
- Caring for an ill or incapacitated person living in your home, which impairs you from working or participating in welfare-to-work activities.
- Caring for a dependent child of the court or a child at risk of placement in foster care, which impairs you from working or participating in welfare-to-work activities.
- A victim of domestic abuse and the county waives the 60-month time limit.
- Living in Indian Country, as defined by federal law, or an Alaskan native village, in which at least 50 percent of the adults are unemployed.
- Granted an exemption from participation and the cash aid time limit based on caring for a child who is 0-23 months of age. (*This exemption is only available once.*)

More "Clock Stoppers" to the CalWORKs 60-Month Time Limit

A month does not count if:

- You did not get CalWORKs cash aid for yourself because your grant was less than \$10, you were sanctioned, or you were not eligible for any other reason.
- Your cash grant is fully repaid by child support collection.
- You are off cash aid, employed and only getting supportive services such as child care, transportation, or case management.

For more information regarding time limits, see back page.

Time Limit Exceptions -“Time Extenders”

You may be able to get more cash aid after 60 months if all aided parents, stepparents, and/or caretaker relatives in the home are in one of the following situations:

- Caring for an ill or incapacitated person living in your home, which impairs you from working or participating in welfare-to-work activities.
- 60 years or older.
- Caring for a dependent child of the court, or a child at risk of placement in foster care, which impairs you from working or participating in welfare-to-work activities.
- Evaluated by the county and are found to be unable to maintain work or take part in welfare-to-work activities. This exception only applies when the adult has a history of cooperating with welfare-to-work rules.
- Not in the assistance unit (AU) for any reason other than reaching the 60-month time limit.
- Disabled and receiving certain types of disability benefits and the disability impairs you from working or participating in welfare-to-work activities. The benefits that qualify for this are: State Disability Insurance, Worker’s Compensation Temporary Disability Insurance, In-Home Supportive Services, or State Supplementary Program benefits.
- If only one adult in the home meets an extender, you won’t be eligible for extended cash aid. All adults must meet one of these extenders, but each one can meet a different one.

CalWORKs 60-Month Time Limit Waiver for Extending Aid

If you are a victim of domestic abuse and the county determines that your condition or situation impairs your ability to work or to participate in welfare-to-work activities, the county may waive the 60-month time limit, and you can get more than 60 months of aid. All adults in the home do not need to meet an extender for an individual to receive a domestic violence waiver.

Request for Exemption or Extender

If you think you meet the rules for an exemption or extender, contact your worker. You may also contact your worker to find out how many months of aid you used.

Choosing to Leave Cash Aid

If your family is getting only a small amount of monthly cash aid, you may choose to go off aid so that the months will not count against your CalWORKs 60-month time limit. This will save you some months for cash aid in the future. You should contact your worker to find out if going off aid will be helpful to you.

Diversion

There are special time limit rules for diversion. Diversion is a lump sum payment you can get instead of getting monthly cash aid. The month that you get the diversion payment counts as one month toward the CalWORKs 60-month time limit, unless you reapply and get cash aid during the diversion period. In that case, you may choose to have all the months in the diversion period counted toward the 60-month time limit, or to repay the diversion payment by reducing your monthly cash grant.

RULES FOR OTHER STATES

Other states have different time limit rules. If you got TANF aid in another state -or if you plan to move to another state -you must contact that state to find out about its time limit requirements.

2.12.3 Form/NOA Variable Population**Add Fragment Variable Population**

This new Template will have 27 variables that are populated with values from EDBC.

See Supporting Document #10 for list of new Template variables and Population.

2.13 Add a New Time Limit NOA Message

2.13.1 Overview

Add a new Message to populate on Time Limit NOAs.

Known County NOA: NA 530

Program(s): CalWORKs

Action Type(s): Approval, Change, Discontinuance, Denial

Fragment Level: Program

Repeatable: No

Languages: English

2.13.2 Form/NOA Verbiage

Create a new Time Limit NOA message.

Description	Text
Static	<p>CONTACT YOUR WORKER RIGHT AWAY IF YOU DISAGREE WITH THE INFORMATION ON THIS NOTICE.</p> <ul style="list-style-type: none">• If you and the county worker cannot reach an agreement, you must ask for a hearing within 90 days from the date of this notice.• If you do not request a hearing, you may not get another chance to change the number of months shown on this notice for your 60-month time limit on aid. <p>Medi-Cal: This notice DOES NOT change or stop Medi-Cal Benefits. Keep using your plastic Benefits Identification Card(s). You will get another notice telling you about any changes to your health benefits.</p> <p>CalFresh: This notice DOES NOT stop or change your CalFresh benefits. You will get a separate notice telling you about any changes to your CalFresh benefits.</p> <p>Receiving Medi-Cal and/or CalFresh only DOES NOT count against your cash aid time limits.</p>

	Rules: These rules apply; you may review them at your welfare office: Assembly Bill 79 (Chapter 11, Statutes of 2020).
--	-------------------------------------------------------------------------------------------------------------------------------

*Formatting of this Message: Arial Font Size 10

2.13.3 Form/NOA Variable Population

N/A, this new Message Fragment does not require any variable population.

2.13.4 Form/NOA Generation Conditions

Generation conditions will be added as part of the reason fragment's recommendations.

Note: Please refer to the recommendations below for newly added reason fragments.

Ordering on the NOA: This will be the last fragment on the NOA.

2.14 Add a New Action Fragment

2.14.1 Overview

Add a new Message to populate on Time Limit NOAs.

Known County NOA: NA 530

Program(s): CalWORKs

Action Type(s): Approval

Fragment Level: Program

Repeatable: No

Languages: English

2.14.2 Form/NOA Verbiage

Create a new Time Limit NOA message.

Description	Text
Static	As of <EffectiveDate>, the county has approved cash aid and Medi-Cal for some members of your family. The first day of cash aid is <BenefitMonthBeginDate>. The first month's cash aid amount is <BenefitAmount>.

*Formatting of this Message: Arial Font Size 10

2.14.3 Form/NOA Variable Population

Variable Name	Population	Formatting
<EffectiveDate>	EDBC run date. Format: MM/DD/YYYY	Arial Font 10
<BenefitMonth BeginDate >	Begin date of the month for which the benefits are approved Format: MM/DD/YYYY	Arial Font 10
<BenefitAmount>	Approved cash aid amount Format: \$500.00	Arial Font 10

2.14.4 Form/NOA Generation Conditions

Generation conditions will be added as part of the reason fragment's recommendations.

Note: Please refer to the recommendations below for newly added reason fragments.

Ordering on the NOA: This will be the first fragment on the NOA.

2.15 Add new Time on Aid NOA (M40-107G)

2.15.1 Overview

Create a new Time on Aid NOA (M40-107G) to reflect the 60 MTC changes.

Known County NOA: M40-107G

NOA Template: New Template added in Rec 2.12

Program(s): CalWORKs

Action Type: Change/Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English

Note: Threshold will be added with SCR CA-233816

2.15.2 Form Verbiage

Add new Time On Aid Change Grant Reduction Change Fragment XDP

Add a new CalWORKs NOA Reason for Time On Aid change during grant reduction.

Description	Text
<Static_ Section>	<p>As of <EffectiveChangeDate1>, the County is changing your family's cash aid from <PriorMonthCashAidAmount> to <NewCashAidAmount>. We have removed <Person> from the grant. The new amount of cash aid is for the <Remaining AUMembers> remaining eligible members of your family. The new cash aid amount is figured on the next page.</p> <p>Here's why:</p> <p>As of < EffectiveChangeDate2>, <Person>, has used 60 months of CalWORKs cash aid. Adults cannot get CalWORKs cash aid after 60 months unless they meet an exception to the time limit. We have no record of you meeting an exception. If you disagree, ask for a hearing.</p> <p>You may be able to get aid for yourself after 60 months. The reasons are listed on form CW 2190A, sent out with this notice. Fill out and return the form to the County any time you think you qualify for an exception.</p> <p>You got CalWORKs aid: from <PeriodReceivedAid> = <PeriodTotal NumberMonths> months.</p>
<Dynamic Section1>	The list on this page includes months that are exempt due to child support collection. The last page(s) shows how child support was applied to exempt month(s).
<Dynamic_ Section2>	No child support was collected for children in your AU.

Add Dynamic Section to the Grant Reduction Change Fragment:

This new fragment will have a dynamically generated section (DYNAMIC SECTION 1,2). The trigger conditions for these dynamic sections are listed below.

2.15.3 Form/NOA Variable Population

1. Add Time On Aid Change Grant Reduction Fragment Variable Population

Variable Name	Population	Formatting
<EffectiveChange Date1>	Begin date of the month following the 60 th countable month. Format: MM/DD/YYYY	Arial Font 10

<PriorMonth CashAidAmount>	Prior Month Cash aid amount Format: \$600.00	Arial Font 10
<NewCash AidAmount>	Current Month Cash aid amount Format: \$500.00	Arial Font 10
<Person>	Populate with the Person's Name (First Name and Last Name)	Arial Font 10
<Remaining AUMembers>	The size of the AU after the person is being removed for reaching 60 TL months.	Arial Font 10
<EffectiveChange Date2>	End date of the 60 th countable month Format: MM/DD/YYYY	Arial Font 10
<Person>	Populate with the Person's Name (First Name and Last Name)	Arial Font 10
<PeriodReceivedAid>	<Time limit period begin month and year> to <Time limit period end month and year> Format: MM/YYYY to MM/YYYY Note: This section will be iterated based on the number of active time limit periods. For Example: If there are multiple time limit periods, the population will look like below From 01/2021 to 04/2021 =4 month(s) From 07/2021 to 08/2021 = 2 months	Arial Font 10
<PeriodTotal NumberMonths>	Populate the number of months within the time limit period. Note: Refer to the example mentioned in the <PeriodReceivedAid> population.	Arial Font 10

Variables Requiring Translations: N/A

2. Add regulations

This fragment has associated regulations. The following Regulations will be added when the Time on Aid Grant Reduction Fragment is generated on the NOA:

Regulations: 40-107(a)(4)(G), 42-302, 42-302.21, 42-712, 44-111, 44-113, 44-207.2, and ACL No. 20-113

3. Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Time on Aid Grant Reduction Reason Fragment.

NOA Reference on Document List Page: NOA - CW - **DS** - Aid:60Mnths

NOA Title: CALWORKS DISCONTINUANCE

NOA Footer: M40-107G

2.15.4 NOA Generation Conditions

1. Add Time on Aid Grant Reduction Reason Fragment Generation

This new Fragment will generate for a CalWORKs program when a Time Limit participant reaches his/her 60th countable month (i.e., this NOA will generate in the 60th countable month), the current benefit amount is less than the prior benefit amount and there is no time limit extender for the current month or the previous month.

The role reason for the participant will be 'CW Time Limit'

Action Fragment: This reason will not have an associated Action Fragment.

Message Fragment:

New message added as part of the recommendation 2.13

Regulations Fragment: REGULATIONS_SECTION (Fragment ID: 1308)

Budget Fragment: NA 1239 SAR

New NOA Template: Yes

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: CW 2190A

Ordering on the NOA: This fragment will be the first fragment to populate on the NOA followed by the message, regulations, NA 1239 SAR Budget, the months that did not count, Addendum (if applicable) and the CW 2184 form.

2. Dynamic Fragment Section Generation

Dynamic Section1 – Populate this section when there are month(s) that are exempt from the CW 60-month TL due to Child Support collection. i.e., Child Support Exempt months are not Zero.

Add Addendum 1 - Turn on Addendum 1 on the new Time Limit NOA Template when Dynamic Section1 generates and there was no previous Time Limit NOA for the person.

Add Addendum 2 - Turn on Addendum 2 on the new Time Limit NOA Template when Dynamic Section 1 generates on the NOA and a previous Time Limit NOA exists for the person.

Dynamic Section 2 – Populate this section when there are month(s) that are exempt from the CW 60-month TL and Child Support exemption do not apply. i.e., Child Support Exempt months are Zero

Note – No Addendum will be turned on if Dynamic Section 2 is being populated on the NOA.

3. Fragments being replaced by this new fragment

Following are the fragments that are getting replaced by this new fragment

Fragment ID	Fragment Name
6411	CW_CH_TL_GRANT_REDUCED_NO_EXEMPTS_NO_CS_A937
6412	CW_CH_TL_GRANT_REDUCED_EXEMPTS_NO_CS_A938
6413	CW_CH_TL_GRANT_REDUCED_EXEMPTS_CS_A939

2.16 Add to Time on Aid NOA (M40-107F)

2.16.1 Overview

Create a new Time on Aid NOA (M40-140F) to reflect the 60 MTC changes.

Known County NOA: Derived from M40-107F

NOA Template: New Template added in Rec 2.12

Program(s): CalWORKs

Action Type: No Change or Information Action

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English

Note: Threshold will be added with SCR CA-233816

2.16.2 Form Verbiage

Add new Time On Aid Beyond 60 Months Change Fragment XDP

Add a new CalWORKs NOA Reason for Time On Aid beyond 60 months.

Description	Text
<Static_ Section>	<p>On the date of the last time limit notice, <LastTlSentDate>, the County determined that you, <Person> used a total of <LifetimeMonthsLastNOA> months of your lifetime 60- month time limit of CalWORKs cash aid.</p> <p>As of <Date60MonthsUsed>, you, <Person> used your total 60 months of CalWORKs cash aid. However, you can continue to get cash aid because you have a condition that meets the requirement to be extended on aid.</p> <p>Your condition may be reviewed again to determine if you can continue to get aid.</p> <p>Here's why:</p> <p>Since your last time limit notice, you got CalWORKs:</p> <p>From <PeriodEligibleAfterTLNOA> = <PeriodTotalNumberMonths> month(s).</p> <p>Months that did not count = <ExemptionMonthsNotCounted> months.</p> <p>The additional months used: + <AdditionalCount></p> <p>The total number used is now {Total60Months} month(s).</p> <p>If you were exempt, the month(s) did not count toward the CalWORKs 60-month time limit. These months are listed on the next page.</p>
<Dynamic Section1>	The last page(s) shows how child support was applied to exempt month(s).
<Dynamic_ Section2>	No child support was collected for children in your Assisted Unit.

Add Dynamic Section to the Time Limit 60 month No Change Fragment:

This new fragment will have a dynamically generated section (DYNAMIC SECTION 1,2). The trigger conditions for these dynamic sections are listed below.

2.16.3 Form/NOA Variable Population

1. Add Time On Aid Time On Aid beyond 60 months Fragment Variable Population

Variable Name	Population	Formatting
<LastTlSentDate>	The date when the last Time Limit NOA was sent Format: MM/DD/YYYY	Arial Font 10

<Person>	Populate with the Person's Name (First Name and Last Name)	Arial Font 10
<LifetimeMonthsLastNOA>	Number of used Time Limit Months that was listed in the previous Time Limit NOA	Arial Font 10
<Date60MonthsUsed>	End date of the 60 th countable month Format: MM/DD/YYYY	Arial Font 10
<PeriodEligibleAfterTLNOA>	<Time limit period begin month and year after the last Time Limit NOA was sent> to <Time limit period end month and year> Note: This section will be iterated based on the number of active time limit periods. For Example: If there are multiple time limit periods, the population will look like below From 01/2021 to 04/2021 =4 month(s) From 07/2021 to 08/2021 = 2 months <Time limit period begin month and year> to <Time limit period end month and year> Format: MM/YYYY to MM/YYYY	Arial Font 10
<PeriodTotalNumberMonths>	Populate the number of months within the time limit period. Note: Refer to the example mentioned in the <PeriodReceivedAid> population.	Arial Font 10
<ExemptionMonthsNotCounted>	Populate the number of months that are either uncountable or exempt.	Arial Font 10
<AdditionalCount>	Countable Time Limit Months used since last Time Limit NOA was sent	Arial Font 10
<Total60Months>	Populate the total number of months counted (Will be 60 months)	Arial Font 10

Variables Requiring Translations: N/A

2. Add regulations

This fragment has associated regulations. The following Regulations will be added when the Time on Aid Beyond 60 months Fragment is generated on the NOA:

Regulations: 40-107(a)(4)(G), 42-302, 42-302.11, 42-302.21, 42-712 and ACL No. 20-113

3. Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Time on Aid Beyond 60 months Reason Fragment.

NOA Reference on Document List Page: NOA - CW - Aid:>60Mnths

NOA Title: CALWORKS INFORMATIONAL

NOA Footer: M40-107F

2.16.4 NOA Generation Conditions

1. Add Time on Aid beyond 60 months Reason Fragment Generation

Trigger for ongoing CalWORKs cases when a Time Limit participant reaches his/her 60 countable month(s) (i.e., this NOA will generate after the 60th countable month) and benefits continue to be granted due to a condition that meets the requirements for extended aid. i.e., extender months exist. (Code_DETL table CATGRY_ID = 863)

Action Fragment: This reason will not have an associated Action Fragment.

Message Fragment:

New message added as part of the recommendation 2.13

New NOA Template: Yes

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: No

This fragment will be the first fragment to populate on the NOA followed by the message, regulations, the months that did not count, addendum (if applicable) and the CW 2184 form.

2. Dynamic Fragment Section Generation

Dynamic Section1 – Populate this section when there are month(s) that are exempt from the CW 60-month TL due to Child Support collection. i.e., Child Support Exempt months are not Zero

Add Addendum 1 - Turn on Addendum 1 on the new Time Limit NOA Template when Dynamic Section1 generates and there was no previous Time Limit NOA for the person.

Add Addendum 2 - Turn on Addendum 2 on the new Time Limit NOA Template when Dynamic Section 1 generates on the NOA and a previous Time Limit NOA exists for the person.

Dynamic Section 2 – Populate this section when there are month(s) that are exempt from the CW 60-month TL and Child Support exemption do not apply. i.e., Child Support Exempt months are Zero

Note – No Addendum will be turned on if Dynamic Section 2 is being populated on the NOA.

3. Fragments being replaced by this new fragment

Following are the fragments that are getting replaced by this new fragment

Fragment ID	Fragment Name
6416	CW_IN_TL_EXTENDED_EXEMPTS_CS_A942
6414	CW_IN_TL_EXTENDED_NO_EXEMPTS_A940

2.17 Add new Time on Aid NOA (M40-107B)

2.17.1 Overview

Create a new Time on Aid NOA (M40-107B) to reflect the 60 MTC changes.

Known County NOA: M40-107B

NOA Template: New Template added in Rec 2.12

Program(s): CalWORKs

Action Type: Informational

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English

Note: Threshold will be added with SCR CA-233816

2.17.2 Form Verbiage

Add new Time On Aid at Application or Redetermination Fragment XDP

Add a new CalWORKs NOA Reason to inform about the time limit months during Intake or Redetermination.

Description	Text
<Static_ Section>	<p>On the date of the last time limit notice, <LastTlSentDate>, the County determined that you, <Person> used a total of <LifetimeMonthsLastNOA> months of your lifetime 60-month time limit of CalWORKs cash aid.</p> <p>Since <LastTlSentDate>, you used <AdditionalCount> more months.</p> <p>Here's why:</p> <p>Since your last time limit notice, you got CalWORKs:</p> <p>from <PeriodEligibleAfterTLNOA> = <PeriodTotalNumberMonths> month(s).</p> <p>Subtotal = <PeriodSubtotalMonths> month(s).</p> <p>Month(s) that did not count. - <ExemptionMonthsNotCounted> month(s).</p> <p>The additional months used: + <AdditionalCount></p> <p>The total number used is now = {TotalMonthsUsed} month(s).</p> <p>If you were exempt, the month(s) did not count toward the CalWORKs 60-month time limit. These months are listed on the next page.</p>
<Dynamic Section1>	<p>The list on the next page includes months that are exempt due to child support collection. The last page(s) shows how child support was applied to exempt month(s).</p> <p>You may also have months that are exempt because of child support collection. If you do, these months will be included in your next notice.</p>
<Dynamic_ Section2>	<p>No child support was collected for children in your AU.</p>

Add Dynamic Section to the Grant Reduction Change Fragment:

This new fragment will have a dynamically generated section (DYNAMIC SECTION 1,2). The trigger conditions for these dynamic sections are listed below.

2.17.3 Form/NOA Variable Population

1. Add Time On Aid at Application or Redetermination Fragment Variable Population

Variable Name	Population	Formatting
<LastTlSentDate>	The date when the last Time Limit NOA was sent Format: MM/DD/YYYY	Arial Font 10
<Person>	Populate with the Person's Name (First Name and Last Name)	Arial Font 10
<LifetimeMonths LastNOA>	Number of used Time Limit Months that was listed in the previous Time Limit NOA	Arial Font 10
<LastTlSentDate>	The date when the last Time Limit NOA was sent Format: MM/DD/YYYY	Arial Font 10
<AdditionalCount>	Countable Time Limit Months used since last Time Limit NOA was sent	Arial Font 10
<PeriodEligible AfterTLNOA>	<Time limit period begin month and year after the last Time Limit NOA was sent> to <Time limit period end month and year> Note: This section will be iterated based on the number of active time limit periods. For Example: If there are multiple time limit periods, the population will look like below From 01/2021 to 04/2021 =4 month(s) From 07/2021 to 08/2021 = 2 months <Time limit period begin month and year> to <Time limit period end month and year> Format: MM/YYYY to MM/YYYY	Arial Font 10
<PeriodTotal NumberMonths>	Populate the number of months within the time limit period. Note: Refer to the example mentioned in the <PeriodReceivedAid> population.	Arial Font 10
<PeriodSubtotal Months>	Populate the sum of all the <PeriodTotalNumberMonths>	Arial Font 10

<ExemptionMonths NotCounted>	Populate the number of months that are either uncountable or exempt.	Arial Font 10
<AdditionalCount>	Countable Time Limit Months used since last Time Limit NOA was sent	
<TotalMonthsUsed>	Populate the sum of previously used Time limit months and the additional Time limit NOA months i.e. <LifetimeMonths LastNOA> and <AdditionalCount>	Arial Font 10

Variables Requiring Translations: N/A

2. Add regulations

This fragment has associated regulations. The following Regulations will be added when the Time on Aid Grant Reduction Fragment is generated on the NOA:

Regulations: 40-107(a)(4), 42-302,42-302.21, 42-712 and All County Letter No. 20-113

3. Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Time on Aid Grant Reduction Reason Fragment.

NOA Reference on Document List Page: NOA - CW - Time on Aid at Application/ Redetermination

NOA Title: CALWORKS INFORMATIONAL

NOA Footer: M40-107B

2.17.4 NOA Generation Conditions

1. Add Time on Aid at Application or Redetermination Reason Fragment Generation

This new Fragment will generate for a CalWORKS program at Intake or at Redetermination (irrespective of the person's status) if a previous Time Limit NOA was sent to a participant and the person did not exhaust all of the 60 countable months. This fragment will generate although the person gets denied/discontinued.

Note: This NOA will not generate if there was no Time Limit NOA sent for this participant.

Action Fragment: This reason will not have an associated Action Fragment.

Message Fragment:

New message added as part of the recommendation 2.13

Regulations Fragment: REGULATIONS_SECTION (Fragment ID: 1308)

New NOA Template: Yes

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: No

Ordering on the NOA: This fragment will be the first fragment to populate on the NOA followed by the message, regulations, the months that did not count and the CW 2184 form.

2. **Dynamic Fragment Section Generation**

Dynamic Section1 – Populate this section when there are month(s) that are exempt from the CW 60-month TL due to Child Support collection. i.e., Child Support Exempt months are not Zero

Add Addendum 2 - Turn on Addendum 2 on the new Time Limit NOA Template when Dynamic Section1 generates on the NOA and a previous Time Limit NOA exists for the person.

Dynamic Section2 – Populate this section when there are month(s) that are exempt from the CW 60-month TL and Child Support exemption do not apply. i.e., Child Support Exempt months are Zero

Note – No Addendum will be turned on if Dynamic Section 2 is being populated on the NOA

3. **Fragments being replaced by this new fragment**

Following are the fragments that are getting replaced by this new fragment

Fragment ID	Fragment Name
6442	CW_IN_TL_REDETERM_EXEMPTS_AND_CS_A985
6441	CW_IN_TL_REDETERM_EXEMPTS_NO_CS_A984
6443	CW_IN_TL_REDETERM_NO_EXEMPTIONS_A986

2.18 Add new Time on Aid NOA(M40-107J)

2.18.1 Overview

Create a new Time on Aid NOA to reflect the 60 MTC changes.

Known County NOA: M40-107J

NOA Template: New Template added in Rec 2.12

Program(s): CalWORKs

Action Type: Partial Approval

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: CW 2184

Languages: English

Note: Threshold will be added with SCR CA-233816

2.18.2 Form Verbiage

Add new Time On Aid Partial Approval Fragment XDP

Add a new CalWORKs NOA Reason for Time On Aid during partial Approval.

Description	Text
<Static_ Section>	Aid has been denied for <Person>. Here's why: On the date of your last time limit notice, <LastTlSentDate> the county determined that you used the total 60 months of CalWORKs aid and can no longer get cash aid. Your cash amount is figured on the next page.

2.18.3 Form/NOA Variable Population

1. Add Time On Aid Partial Approval Fragment Variable Population

Variable Name	Population	Formatting
<Person>	Populate with the Person's Name (First Name and Last Name)	Arial Font 10
<LastTlSentDate>	The date when the last Time Limit NOA was sent Format: MM/DD/YYYY If the last Time Limit NOA sent date is not found, then populate 'N/A'	Arial Font 10

Variables Requiring Translations: N/A

2. Add regulations

This fragment has associated regulations. The following Regulations will be added when the Time on Aid Grant Reduction Fragment is generated on the NOA:

Regulations: 40-107(a)(4), 40-171, 40-173, 42-302, 42-302.21, 42-712, 82-833, and ACL No. 20-113

3. Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Time on Aid Grant Reduction Reason Fragment.

NOA Reference on Document List Page: NOA - CW - AP - Part. Appr

NOA Title: CALWORKS PARTIAL APPROVAL

NOA Footer: M40-107J

2.18.4 NOA Generation Conditions

1. Add Time on Aid Partial Approval Fragment Generation

This new Fragment will generate for a CalWORKs program during partial approval i.e., at least one person is approved on the case and at least one person is denied. The denied Time Limit participant used his/her 60 countable months, and the denied person does not qualify for any time limit extenders.

The role reason for denied the participant will be 'CW Time Limit'

Action Fragment: New Action Fragment added as part of the rec 2.14

Message Fragment:

New message added as part of the recommendation 2.13

Regulations Fragment: REGULATIONS_SECTION (Fragment ID: 1308)

Budget Fragment: NA 1239 SAR

New NOA Template: Yes

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: N/A

Ordering on the NOA: Action Fragment will be the first fragment to populate on the NOA followed by this reason, message, regulations, NA 1239 SAR Budget, and the CW 2184 form.

2. Fragments being replaced by this new fragment

Following are the fragments that are getting replaced by this new fragment

Fragment ID	Fragment Name
6420	CW_AP_TL_PA_NO_EXEMPTIONS_NO_CS_A946
6421	CW_AP_TL_PA_EXEMPTIONS_NO_CS_A947
6422	CW_AP_TL_PA_EXEMPTIONS_AND_CS_A948

2.19 Add new Time on Aid NOA (M40-107F2)

2.19.1 Overview

Create a new Time on Aid NOA (M40-107F2) to reflect the 60 MTC changes.

Known County NOA: M40-107F2

NOA Template: New Template added in Rec 2.12

Program(s): CalWORKs

Action Type: Change

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English

Note: Threshold will be added with SCR CA-233816

2.19.2 Form Verbiage

Add new Time On Aid Grant Reduction Change Fragment XDP

Add a new CalWORKs NOA Reason for Time On Aid change during grant reduction.

Description	Text
<Static_ Section>	You can no longer get cash aid because you, <Person>, no longer have a condition that lets you get cash aid after your 60-month limit. Contact your worker if you think you have a condition that meets the rule to continue to get cash aid. Your cash aid is figured on the next page.

2.19.3 Form/NOA Variable Population

1. Add Time On Aid Change Grant Reduction Fragment Variable Population

Variable Name	Population	Formatting
<Person>	Populate with the Person's Name (First Name and Last Name)	Arial Font 10

Variables Requiring Translations: N/A

2. Add regulations

This fragment has associated regulations. The following Regulations will be added when the Time on Aid Grant Reduction Fragment is generated on the NOA:

Regulations: 40-107(a)(4), 42-302, 42-302.11, 42-302.21, 42-712 and ACL No. 20-113

3. Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Time on Aid Grant Reduction Reason Fragment.

NOA Reference on Document List Page: NOA - CW - BC - Aid:60Mnths

NOA Title: CALWORKS CHANGE

NOA Footer: M40-107F2

2.19.4 NOA Generation Conditions

1. Add Time on Aid Grant Reduction Reason Fragment Generation

This new Fragment will generate for a CalWORKs program post 60th month time limit (i.e., countable time limit months > 60 months) when a Time Limit individual is no longer eligible for a CalWORKs time extender, the grant amount is reduced.

The role reason for the participant will be 'CW Time Limit'

Action Fragment: CW_CH_ACTION6 (Fragment ID: 4072)

Message Fragment:

New message added as part of the recommendation 2.13

Regulations Fragment: REGULATIONS_SECTION (Fragment ID: 1308)

Budget Fragment: NA 1239 SAR

New NOA Template: Yes

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: No

Ordering on the NOA: Action Fragment will be the first fragment to populate on the NOA followed by this reason, message, regulations, NA 1239 SAR Budget, the months that did not count and the CW 2184 form.

2. Fragments being replaced by this new fragment

Following are the fragments that are getting replaced by this new fragment

Fragment ID	Fragment Name
6427	CW_CH_TL_EXTENDER_END_EXEMPTS_NO_CS_A953

2.20 Add new Time on Aid NOA (M40-107F1)

2.20.1 Overview

Create a new Time on Aid NOA (M40-107F1) to reflect the 60 MTC changes.

Known County NOA: M40-107F1

NOA Template: New Template added in Rec 2.12

Program(s): CalWORKs

Action Type: Change

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English

Note: Threshold will be added with SCR CA-233816

2.20.2 Form Verbiage

Add new Time On Aid Change Extender Criteria Fragment XDP

Add a new CalWORKs NOA Reason for Time On Aid change during grant change when a recipient meets extended criteria.

Description	Text
<Static_ Section>	<p>You can now get cash aid because you, <Person>, have a condition that meets the rule to get cash aid after your 60-month limit.</p> <p>Your condition may be reviewed again to determine if you can continue to get aid.</p> <p>Your new cash aid amount is figured on the next page.</p>

2.20.3 Form/NOA Variable Population

1. Add Time On Aid Change Grant Reduction Fragment Variable Population

Variable Name	Population	Formatting
<Person>	Populate with the Person's Name (First Name and Last Name)	Arial Font 10

Variables Requiring Translations: N/A

2. Add regulations

This fragment has associated regulations. The following Regulations will be added when the Time on Aid Grant Reduction Fragment is generated on the NOA:

Regulations: 42-302, 42-302.11, 42-302.2, 42-302.21, 42-712 and ACL No. 20-113

3. Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Time on Aid Grant Reduction Reason Fragment.

NOA Reference on Document List Page: NOA - CW - BC - Aid:60Mnths

NOA Title: CALWORKS CHANGE

NOA Footer: M40-107F2

2.20.4 NOA Generation Conditions

1. Add Time on Aid Grant Reduction Reason Fragment Generation

This new Fragment will generate for CalWORKs program post 60th month time limit (i.e., countable time limit months > 60 months) when a Timed-out participant **i.e., person previously had the reason 'CW Time Limit'**, becomes eligible to receive aid as they meet an extender criterion for extended aid.

Action Fragment: CW_CH_ACTION6 (Fragment ID: 4072)

Message Fragment:

New message added as part of the recommendation 2.13

Regulations Fragment: REGULATIONS_SECTION (Fragment ID: 1308)

Budget Fragment: NA 1239 SAR

New NOA Template: Yes

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: No

Ordering on the NOA: Action Fragment will be the first fragment to populate on the NOA followed by this reason, message, regulations, NA 1239 SAR Budget, the months that did not count and the CW 2184 form.

2. Fragments being replaced by this new fragment

Following are the fragments that are getting replaced by this new fragment

Fragment ID	Fragment Name
6426	CW_CH_TL_48_EXTEND_TIME_OUT_PARTICIPANT_A977

2.21 Add to Time on Aid NOA (M40-107K)

2.21.1 Overview

Create a new Time on Aid NOA (M40-140K) to reflect the 60 MTC changes.

Known County NOA: Derived from M40-107K

NOA Template: New Template added in Rec 2.12

Program(s): CalWORKs

Action Type: Change Action

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English

Note: Threshold will be added with SCR CA-233816

2.21.2 Form Verbiage

Add new Time On Aid 60 Months Grant Increase Fragment XDP

Add a new CalWORKs NOA Reason for Time On Aid 60 Months Grant Increase Reason XDP.

Description	Text
<Static_ Section>	On <EffectiveChangeDate>, the county determined that you, <Person> used your total 60 months of CalWORKs cash aid. You can now get cash aid because:
<Dynamic Section1>	The county has received child support that has repaid some months of aid.

<Dynamic_Section2>	You have paid back an overpayment that has repaid some months of aid.
<Static_Section>	You will get cash aid for <AdditionalCount> more months. The months that did not count toward the CalWORKs 60-month time limit are listed on the next page.

Add Dynamic Section to the Grant Reduction Change Fragment:

This new fragment will have a dynamically generated section (DYNAMIC SECTION 1,2). The trigger conditions for these dynamic sections are listed below.

2.21.3 Form/NOA Variable Population

1. Add Time On Aid Time On Aid beyond 60 months Fragment Variable Population

Variable Name	Population	Formatting
<EffectiveChange Date>	The begin date of the 60 th countable month Format: MM/DD/YYYY	Arial Font 10
<Person>	Populate with the Person's Name (First Name and Last Name)	Arial Font 10
<AdditionalCount>	The additional number of months for which the person could get time limit for.	Arial Font 10

Variables Requiring Translations: N/A

2. Add regulations

This fragment has associated regulations. The following Regulations will be added when the Time on Aid Beyond 60 months Fragment is generated on the NOA:

Regulations: 40-107(a)(4)(H), 42-302.1, 42-302.11, 42-302.2, 42-302.21 and All County Letter No. 20-113

3. Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Time on Aid Beyond 60 months Reason Fragment.

NOA Reference on Document List Page: NOA - CW - Aid:>60Mnths

NOA Title: CALWORKS CHANGE

NOA Footer: M40-107K

2.21.4 NOA Generation Conditions

1. Add Time on Aid Grant Reduction Reason Fragment Generation

Trigger for ongoing CalWORKs cases when a Time Limit participant timed out his/her 60 countable month(s) and is now eligible for additional months of aid. Refer to Dynamic Fragment Section Generation section for generation conditions.

Action Fragment: CW_CH_ACTION1 (Fragment ID: 4032)

Message Fragment:

New message added as part of the recommendation 2.13

New NOA Template: Yes

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: No

Ordering on the NOA:

Action Fragment will be the first fragment to populate on the NOA followed by this reason, message, regulations, NA 1239 SAR Budget, the months that did not count and the CW 2184 form.

2. Dynamic Fragment Section Generation

Dynamic Section1 – Populate this section when there are Child Support exempt months and the Person had the role reason of 'CW Time Limit' (CT73_AA) in the prior EDBC, there are no extenders in the current EDBC, and the person is active in the current EDBC.

Add Addendum 1 - Turn on Addendum 1 on the new Time Limit NOA Template when Dynamic Section1 generates and there was no previous Time Limit NOA for the person.

Add Addendum 2 - Turn on Addendum 2 on the new Time Limit NOA Template when Dynamic Section1 generates on the NOA and a previous Time Limit NOA exists for the person.

Dynamic Section2 – Populate this section when there are Overpayment exempt Months and the Person had the role reason of 'CW Time Limit' (CT73_AA) in the prior EDBC, there are no extenders in the current EDBC, and the person is active in the current EDBC.

Note: Time Limit Exception Type Code for overpayment repaid is CT842_07

Note – No Addendum will be turned on if Dynamic Section 2 is being populated on the NOA

3. **Fragments being replaced by this new fragment**

Following are the fragments that are getting replaced by this new fragment

Fragment ID	Fragment Name
-------------	---------------

6439	CW_CH_TL_CS_INCR_GRANT_TIME_ADJUST_A982
6440	CW_CH_TL_OVERPAY_INCR_GRANT_A983

2.22 Add to Time on Aid NOA (M40-107J1)

2.22.1 Overview

Create a new Time on Aid NOA (M40-140J1) to reflect the 60 MTC changes.

Known County NOA: Derived from M40-107J1

NOA Template: New Template added in Rec 2.12

Program(s): CalWORKs

Action Type: Approval

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English

Note: Threshold will be added with SCR CA-233816

2.22.2 Form Verbiage

Add new Time On Aid 60 Months Approval Fragment XDP

Add a new CalWORKs NOA Reason for Time On Aid 60 months Approval.

Description	Text
Reason 1	You have a condition that meets the rule to get cash aid after your 60-month limit. Your condition may be reviewed again to determine if you can continue to get aid.
Reason 2	The county has received child support that has repaid some of your months on aid.
Reason 3	You have paid back an overpayment that has repaid some of your months on aid.
Reason 4	The county has received child support that has repaid some of your months on aid. More information about your cash aid:

	The cash aid payment for your first month of aid is only for a part of a month. It is for the time from your first day of cash aid, shown above, through the end of the month. If nothing changes, next month's cash aid will be for a full month.
Reason 5	You have paid back an overpayment that has repaid some of your months on aid. More information about your cash aid: The cash aid payment for your first month of aid is only for a part of a month. It is for the time from your first day of cash aid, shown above, through the end of the month. If nothing changes, next month's cash aid will be for a full month.

2.22.3 Form/NOA Variable Population

1. Variable Population

These reason does not have any variable population associated to them.

2. Add regulations

This fragment has associated regulations. The following Regulations will be added when the Time on Aid Beyond 60 months Fragment is generated on the NOA:

Regulations: 40-171.2, 40-129, 42-302.1, 42-302.11-.12, 42-302.2-.21, 44-315, 44-317, 82-510.4, and ACL No. 20-113

3. Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Time on Aid 60 months Approval Reason Fragment.

NOA Reference on Document List Page: NOA - CW - Aid:>60Mnths

NOA Title: CALWORKS APPROVAL

NOA Footer: M40-107J1

2.22.4 NOA Generation Conditions

1. Add Time on Aid Grant Reduction Reason Fragment Generation

Trigger for CalWORKs cases during Approvals or restorations when a Time Limit participant is timed out for 60 countable month(s) but is approved for additional months for any exceptions. Refer to Reason Fragment Generation Conditions table below for generation conditions.

Reason	Generation Conditions
--------	-----------------------

Reason 1	Trigger on CalWORKs case when a timed-out applicant's case is approved because the participant has met a condition (also known as Extenders-for example "a person aged 60 or older) that meets the 60 th time limit aid rule.
Reason 2	Trigger on CalWORKs case where a timed-out applicant's case is approved for non-prorated months because the County has received Child Support payment that is enough to repay one or more months of aid.
Reason 3	Trigger for CalWORKs case where a timed-out applicant is approved for non-prorated months due to an overpayment that has repaid months on aid. Note: Time Limit Exception Type Code is CT842_07
Reason 4	Trigger on approve CalWORKs case for prorated months at Intake or restoration where 60 months timed out participant is now eligible due to the repayment of aided months by child support.
Reason 5	Trigger for CalWORKs cases where a timed-out applicant is approved for prorated months due to an overpayment that has repaid months on aid.

Reason Fragment Generation Conditions

Action Fragment: CW_AP_ACTION7(Fragment ID: 4076)

Message Fragment:

New message added as part of the recommendation 2.13

New NOA Template: Yes

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: No

Ordering on the NOA:

Action Fragment will be the first fragment to populate on the NOA followed by this reason, message, regulations, NA 1239 SAR Budget, and the CW 2184 form.

2. Fragments being replaced by this new fragment

Following are the fragments that are getting replaced by this new fragment

Fragment ID	Fragment Name
-------------	---------------

6433	CW_AP_TL_PARTICIPANT_MET_CONDITION_A987
6434	CW_AP_TL_CS_REPAID_A988
6435	CW_AP_TL_OVERPAY_REPAID_APPROVED_A989
6437	CW_AP_TL_REPAID_CS_PRORATE_APPROV_AFTER_48_A991
6438	CW_AP_TL_REPAID_OVERPAY_PRORATE_AP_AFTER_48_A992

2.23 Add new Time on Aid NOA (M40-107A)

2.23.1 Overview

Create a new Time on Aid NOA (M40-107A) to reflect the 60 MTC changes.

Known County NOA: M40-107A

NOA Template: New Template added in Rec 2.12

Program(s): CalWORKs

Action Type: Informational

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English

Note: Threshold will be added with SCR CA-233816

2.23.2 Form Verbiage

Add new Time On Aid Approval/Information Fragment XDP

Add a new CalWORKs NOA Reason for Time On Aid change during Intake or redetermination.

Description	Text
<Static_Section>	As of <EffectiveChangeDate1>, the County has determined that you, <Person> have used <LifetimeMonths> months of your lifetime 60-month time limit of CalWORKs cash aid. Here's why: You got CalWORKs:

	<p>from <PeriodReceivedAid> = <PeriodTotalNumberMonths> months.</p> <p>Subtotal = <PeriodSubtotalMonths> months.</p> <p>Month(s) that did not count. -</p> <p><ExemptionMonthsNotCounted> month(s).</p> <p>Total number of months used = {TotalMonthsUsed} month(s).</p> <p>If you were exempt, the month(s) did not count toward the CalWORKs 60-month time limit. These months are listed on the next page</p>
<Dynamic Section1>	<p>The list on the next page includes months that are exempt due to child support collection. The last page(s) shows how child support was applied to exempt month(s).</p> <p>You may also have months that are exempt because of child support collection. If you do, these months will be included in your next notice.</p>
<Dynamic_ Section2>	No child support was collected for children in your AU.

Add Dynamic Section to the Approval/Information Fragment:

This new fragment will have a dynamically generated section (DYNAMIC SECTION 1,2). The trigger conditions for these dynamic sections are listed below.

2.23.3 Form/NOA Variable Population

1. Add Time On Aid Change Grant Reduction Fragment Variable Population

Variable Name	Population	Formatting
<EffectiveChange Date1>	The date when the NOA is getting generated Format: MM/DD/YYYY	Arial Font 10
<Person>	Populate with the Person's Name (First Name and Last Name)	Arial Font 10
<LifetimeMonths>	Number of Time Limit Months used as of the NOA generation.	Arial Font 10
<Period ReceivedAid>	<Time limit period begin month and year> to <Time limit period end month and year> Format: MM/YYYY to MM/YYYY	Arial Font 10

	<p>Note: This section will be iterated based on the number of active time limit periods. For Example: If there are multiple time limit periods, the population will look like below From 01/2021 to 04/2021 = 4 month(s) From 07/2021 to 08/2021 = 2 months</p>	
<PeriodTotalNumberMonths>	Populate the number of months within the time limit period. Note: Refer to the example mentioned in the <PeriodReceivedAid> population.	Arial Font 10
<PeriodSubtotalMonths>	Populate the sum of all the <PeriodTotalNumberMonths>	Arial Font 10
<ExemptionMonthsNotCounted>	Populate the number of months that are either uncountable or exempt.	Arial Font 10
<TotalMonthsUsed>	Difference of <PeriodSubtotalMonths> and <ExemptionMonthsNotCounted>	Arial Font 10

Variables Requiring Translations: N/A

2. Add regulations

This fragment has associated regulations. The following Regulations will be added when the Time on Aid Grant Reduction Fragment is generated on the NOA:

Regulations: 40-107(a)(4), 42-302, 42-302.21, 42-712 and All County Letter No. 20-113

3. Add NOA Title and Footer Reference for new Reason

The following are the references that will be included for the new Time on Aid Information Reason Fragment.

NOA Reference on Document List Page: NOA - CW - BC - Aid:60Mnths

NOA Title: CALWORKS INFORMATIONAL

NOA Footer: M40-107A

2.23.4 NOA Generation Conditions

1. Add Time on Aid Informational Reason Fragment Generation

This new Fragment will generate for a CalWORKs program at Intake or at Redetermination (irrespective of the person's status) if a previous Time Limit NOA was not sent to a participant and the number of Time Limit

months used are between 1 month and 12 months. This fragment will generate although the person gets denied/discontinued.

Action Fragment: This reason will not have an associated Action Fragment.

Message Fragment:

New message added as part of the recommendation 2.13

Regulations Fragment: REGULATIONS_SECTION (Fragment ID: 1308)

Budget Fragment: N/A

New NOA Template: Yes

New Program Generation: No

New Action Type: No

Update to Fragment Level: No

New Forms/NOAs Generated with this NOA: N/A

Ordering on the NOA: This fragment will be the first fragment to populate on the NOA followed by the message, regulation, the months that did not count and the CW 2184 form.

2. Dynamic Fragment Section Generation

Dynamic Section1 – Populate this section when there are month(s) that are exempt from the CW 60-month TL due to Child Support collection. i.e., Child Support Exempt months are not Zero.

Add Addendum 1 - Turn on Addendum 1 on the new Time Limit NOA Template when Dynamic Section1 generates and there was no previous Time Limit NOA for the person.

Dynamic Section2 – Populate this section when there are month(s) that are exempt from the CW 60-month TL and Child Support exemption do not apply. i.e., Child Support Exempt months are Zero

Note – No Addendum will be turned on if Dynamic Section 2 is being populated on the NOA.

2.24 Update logic to store Time Limit NOA Details

2.24.1 Overview

The information of the Time Limit NOA sent date and the time limit months exhausted as of the Time Limit NOA sent date should be stored in the backend (database). This information will be used to populate some variables on the Time Limit Notices.

2.24.2 Description of Change

Update the logic which stores the Time Limit NOA sent date and the months exhausted as of the Time Limit NOA sent date in the backend(database).

Technical Details:

- Create a new record in the TIME_LIMIT table if there was no previous Time Limit NOA sent for the participant.
PERS_ID – Person's ID
LAST_NOTIF_DATE – The date NOA is being generated
MOS_LAST_COUNT_NUM – Number of Time Limit months exhausted as of NOA generation date.
- Update the record in the TIME_LIMIT table if there exists a record for the person already.
LAST_NOTIF_DATE – Update this column of the person ID with the latest Time Limit NOA generation date
MOS_LAST_COUNT_NUM – Update this column with the latest number of months exhausted as of the NOA generation date.

2.25 Update logic to not suppress generic Approval NOA

2.25.1 Overview

The current logic suppresses the generic approval NOA i.e., CW_AP_CW_APPROVED_A900 if the EDBC results in the generation of any other NOA.

2.25.2 Update to Generic Approval NOA logic

This effort is to update the generic approval NOA(CW_AP_CW_APPROVED_A900) suppression logic to generate the generic approval NOA along with any Time Limit NOA that gets generated as per the respective trigger conditions listed in this SCR.

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1.	Client Correspondence	CW 2166 Form	CW2166_EN.pdf

2.	Client Correspondence	CW 2184 Form	CW 2184.pdf
3.	Client Correspondence	CW 2186A Form	CW 2186A.pdf
4.	Client Correspondence	CW 2186B Form	CW 2186B.pdf
5.	Client Correspondence	CW 2187 Form	CW 2187.pfd
6.	Client Correspondence	CW 2190A Form	CW 2190A.pdf
7.	Client Correspondence	CW 2190B Form	CW 2190B.pdf
8.	Client Correspondence	FSP 2 Form	FSP 2.pdf
9.	Client Correspondence	WTW 5 Form	WTW 5.pdf
10.	Client Correspondence	Template Variable Population List	Template Variable Population List.xlsx
11.	Client Correspondence	Obsolete Fragments	Obsolete Fragments.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.1	<p>The LRS shall automatically generate the following correspondence online or in the batch process, as a result of individual and/or case action initiated by the LRS or by COUNTY-specified Users, except when exempt due to program requirements:</p> <ul style="list-style-type: none">a. Adverse notices (includes: decrease, collection, denial, or termination of benefits);b. Non-adverse notices (includes: approval, increase in benefits, no change, and rescission); andc. Non-approval notices (includes: cancellation, withdrawal, informational, and benefit issuance).	<p>Forms and NOAs which were updated as part of the associated ACLs are being added to the system as part of this SCR.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-230989

Re-platform Export Reports in CalSAWS from BI
Publisher to Custom Java

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Amy Gill, Sumeet Patil, Long Nguyen, Michael Wu, Naresh Barsagade, Kapil Santosh, Shilpa Suddavanda, Himanshu Jain, Ihsan Abdulsamed.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/03/2021	1.0	Initial	Kusnadi.E
01/27/2022	2.0	Content Revision 1. Updated Section 2.7.3 to shorten some of the Column Title in order to meet the 30 characters limit. 2. Supervisor Authorization Export - Mockup.xlsx Supporting document is updated as well to match the new Column Titles	Kusnadi.E

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1 OVERVIEW

Currently in CalSAWS there are multiple reports that are able to be exported to Excel to allow users the ability to easily view, organize and manipulate the data as needed. The export capability for the Eligibility Workload Inventory Export Report, Monthly Productivity List Export Report, General Ledger Report, and the Supervisor Authorization Report currently uses Oracle BI Publisher export processing. This SCR will update CalSAWS to use the new CalSAWS export processing to export the above reports to Excel.

1.1 Current Design

Currently in CalSAWS, the export capability for the Eligibility Workload Inventory Export Report, Monthly Productivity List Export Report, General Ledger Report, and the Supervisor Authorization Report uses Oracle BI Publisher export processing to allow these reports to be exported to Excel.

1.2 Requests

Update CalSAWS to use the new CalSAWS export processing to export the Eligibility Workload Inventory Export Report, Monthly Productivity List Export Report, General Ledger Report, and the Supervisor Authorization Report to Excel.

1.3 Overview of Recommendations

1. Update the following CalSAWS pages to call the new CalSAWS export processing.
 - a. Eligibility Workload Inventory
 - b. Monthly Productivity List
 - c. General Ledger List
 - d. Pending Authorizations
2. Update the look and feel for the template used when the following reports are exported to Excel.
 - a. Eligibility Workload Inventory Export Report
 - b. Monthly Productivity List Export Report
 - c. General Ledger Report
 - d. Supervisor Authorization Report
3. Update the architecture framework to configure a limit on the number of threads used for reports generation to avoid performance impact across the application.

1.4 Assumptions

1. All existing functionality will not be changed unless called out as part of this design.
2. The new CalSAWS export processing will be implemented as part of CA-223932.

- Only the look and feel of the template for the reports will be updated. No changes will be done to the existing parameters used to generate the reports.

2 RECOMMENDATIONS

Update CalSAWS to use the new CalSAWS export processing to export the Eligibility Workload Inventory Export Report, Monthly Productivity List Export Report, General Ledger Report, and the Supervisor Authorization Report to Excel.

2.1 Eligibility Workload Inventory

2.1.1 Overview

The Eligibility Workload Inventory Export Report is available from the Eligibility Workload Inventory page. The Eligibility Workload Inventory Export Report mirrors the information displayed on the Search Results Summary section. Currently, the export capability for the Eligibility Workload Inventory Export Report to Excel is by using the Oracle BI Publisher export processing. This SCR will update CalSAWS to use the new CalSAWS export processing instead to export the Eligibility Workload Inventory Export Report to Excel.

2.1.2 Eligibility Workload Inventory Mockup

Eligibility Workload Inventory

*- Indicates required fields

Worker ID: 19DP344W04 Select	Assignment Type: <input type="text" value="Primary"/>	Display Workload: * <input type="text" value="08/03/2021"/>
Status Effective Date: * <input type="text" value="08/03/2021"/>	Status: <input type="text" value="All"/>	

Results per Page: View

Search Results Summary
Results 1 - 100 of 3091

1 2 3 4 5 6 7 8 9 10 Next

Total Assignments	
Cases	1482
Programs	3091

2.1.3 Description of Changes

1. Update the Export icon on the Eligibility Workload Inventory page to invoke the new CalSAWS export processing.
 - a. Clicking on the Export icon will invoke the new CalSAWS export processing instead of the Oracle BI Publisher export processing to export the Eligibility Workload Inventory Export Report to Excel.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Workload Inventory**
- **Task: Workload Inventory**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Monthly Productivity List

2.2.1 Overview

The Monthly Productivity List Export Report is available from the Monthly Productivity List page. The Monthly Productivity List Export Report mirrors the information displayed on the Search Results Summary section. Currently, the export capability for the Monthly Productivity List Export Report to Excel is by using the Oracle BI Publisher export processing. This SCR will update CalSAWS to use the new CalSAWS export processing instead to export the Monthly Productivity List Export Report to Excel.

2.2.2 Monthly Productivity List Mockup

Monthly Productivity List

▼ Search

Worker ID: 19DP344W16 Select	Unit ID: 00 Select	Report Type: ▼
Report Status: All ▼	From: * 08/01/2020	To: * 08/31/2021

Results per Page: 100 ▼ [Search](#)

Search Results Summary							Results 1 - 6 of 6
Case Name	Case Number	Type	Submit Month	Status	Status Date	Program	

2.2.3 Description of Changes

1. Update the Export icon on the Monthly Productivity List page to invoke the new CalSAWS export processing.
 - a. Clicking on the Export icon will invoke the new CalSAWS export processing instead of the Oracle BI Publisher export processing to export the Monthly Productivity List Export Report to Excel.

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Workload Inventory**
- **Task: Monthly Productivity**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Pending Authorizations

2.3.1 Overview

The Supervisor Authorization Report is available from the Pending Authorizations page. The Supervisor Authorization Report mirrors the information displayed on the Search Results Summary section. Currently, the export capability for the Supervisor Authorization Report to Excel is by using the Oracle BI Publisher export processing. This SCR will update CalSAWS to use the new CalSAWS export processing instead to export the Supervisor Authorizations Report to Excel.

2.3.2 Pending Authorizations Mockup

The screenshot shows a web interface titled "Pending Authorizations". At the top left, there is a red asterisk icon followed by the text "*- Indicates required fields". On the top right, there is a blue "Search" button. Below this is a search filter area with several fields: "Case Number:" with a text input and a blue "Select" button; "Category:" with a dropdown menu; "Organization Level:" with a dropdown menu showing "Office"; "Organization Number:" with the value "V0" and a blue "Select" button; "Organization Name:" with the value "SAN GABRIEL VALLEY GROW"; "Unit:" with a dropdown menu showing "All"; and "Program:" with a dropdown menu. At the bottom right of the filter area, there is another blue "Search" button. Below the filter area is a dark blue header bar with the text "Search Results Summary" on the left and "Results 1 - 5 of 5" on the right. At the bottom right of this bar, there is a small red icon of a document with a play button.

2.3.3 Description of Changes

1. Update the Export icon on the Pending Authorization page to invoke the new CalSAWS export processing.
 - a. Clicking on the Export icon will invoke the new CalSAWS export processing instead of the Oracle BI Publisher export processing to export the Supervisor Authorization Report to Excel.

2.3.4 Page Location

- **Global: Case Info**
- **Local: Tasks**
- **Task: Approvals**

2.4 General Ledger List

2.4.1 Overview

The General Ledger Report is available from the General Ledger List page. The General Ledger Report provides a detailed ledger for each child receiving income. Currently, the export capability for the General Ledger Report to Excel is by using the Oracle BI Publisher export processing. This SCR will update CalSAWS to use the new CalSAWS export processing instead to export the General Ledger Report to Excel.

2.4.2 General Ledger List Mockup

General Ledger List

Name: Display From: To: [View](#)

Ledger Summary

Total Foster Care Paid:	0.00	Total Foster Care Offset:	0.00
Total Trust Balance:	0.00	Dedicated Balance:	0.00
SSI/SSA Trust Balance:	0.00		
Child Support Trust Balance:	0.00	Remaining Foster Care Balance:	0.00

Posted Date	Month	Type	Aid Code	Amount	Offset Amount	Trust Amount	Posting Status
No Data Found							

[View Journal](#) [General Ledger](#) [Add](#)

This [Type 1](#) page took 1.42 seconds to load.

2.4.3 Description of Changes

1. Update the General Ledger button on the General Ledger List page to invoke the new CalSAWS export processing.
 - a. Clicking on the General Ledger button will invoke the new CalSAWS export processing instead of the Oracle BI Publisher export processing to export the General Ledger Report to Excel.

2.4.4 Page Location

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

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Eligibility Workload Inventory Export Report

2.5.1 Overview

The Eligibility Workload Inventory Export Report is available from the Eligibility Workload Inventory page. The report provides a listing of employee workload information such as the case number, primary applicant, program, program status, application date, authorization date and the RE Date. This SCR will update the Excel Template that is used for the Eligibility Workload Inventory Export Report. This is to match the Excel Template that will be used for Export Report that is generated using the new CalSAWS export processing.

2.5.2 Eligibility Workload Inventory Export Report Mockup

General Information	
Report: Eligibility Workload Inventory Export	
County: Los Angeles	
Run Date: 08/05/2021 10:38 AM	
Worker ID: 19DP344W04	
Assignment Type: Primary	
Total Assigned Cases: 1501	
Total Assigned Programs: 3164	

Figure 2.5.1 – Eligibility Workload Inventory Export Report – General Information Sheet

Case Number	Primary Applicant	Program	Status	Application Date	Authorization Date	RE Due Date	Incomplete DERs	Carry Forward Status (CFS)
B000J16	JOHN, DOE	CF	Active	08/29/2019	02/06/2021	07/31/2021	Y	
B000I16	JOHN, DOE	CW	Active	08/29/2019	05/19/2021	07/31/2021	Y	
B000J16	JOHN, DOE	CW	Active	08/29/2019	05/19/2021	07/31/2021	Y	
B01L555	JOHN, ARMY	MC	Active	03/19/2015	05/05/2021	02/28/2022		
B01L555	JOHN, ARMY	MC	Active	01/21/2020	05/05/2021	12/31/2021		
B01WG8T	DOE, JANE	CF	Discontinued	12/06/2018	05/05/2021	11/30/2021	Y	
B01WG8T	DOE, JANE	MC	Active	01/01/2012	11/25/2020	08/31/2021	Y	
B01WG8T	DOE, JANE	CW	Active	12/06/2018	11/25/2020	11/30/2021	Y	

Figure 2.5.2 – Eligibility Workload Inventory Export Report – Exported Data Sheet

Note: The data included in the report mockup is not real data. It is only for visualization purposes.

2.5.3 Description of Change

1. The Excel template that is currently being used for the Eligibility Workload Inventory Export Report will be updated to match the new Excel Template that is used for reports that are exported to Excel using the new CalSAWS export processing. Reference the Supporting Documents section for example report templates which include the report layout and column placement.

Note: Parameters used to generate the report will remain unchanged, only the excel template that is to be used for the report is changing.

a. General Information Sheet

This sheet will contain general information including the parameters that were used to generate the Report. This sheet will include a single table with a single column titled "General Information" that will include the following rows:

- i. Report Name formatted as "Report: Eligibility Workload Inventory Export"
- ii. The county name formatted as "County: <County Name>". For example: "County: Los Angeles".
 1. This is the County that the user is logged into.
- iii. The date and time the report was generated formatted as "Run Date: <mm/dd/yyyy hh:mm AM/PM>". For example: "Run Date: 08/05/2021 10:38 AM".
- iv. The Worker ID formatted as "Worker ID: <Worker ID >". For Example: "Worker ID: 90LS00CF00".
 1. The worker number that is selected on the Eligibility Workload Inventory page when the report is generated.
- v. The Assignment Type formatted as "Assignment Type: <The assignment type of the selected worker>". For example: "Assignment Type: Primary".
 1. The assignment type that is selected on the Eligibility Workload Inventory page. Possible options are:
 - a. Primary – the report displays all the programs where the worker is assigned as primary.
 - b. Secondary – the report displays all the programs where the worker is assigned as secondary.
 - c. Both – the report displays all the programs where the worker is assigned as both, primary or secondary.
- vi. The Total Assigned Cases formatted as "Total Assigned Cases: <Total amount of case assigned to the Worker>". For example: "Total Assigned Cases: 1501".

- 1. The number of Cases assigned as displayed in the Total Assignments section of the Eligibility Workload Inventory page.
- vii. The Total Assigned Programs formatted as "Total Assigned Programs: <Total amount of programs assigned to the Worker>". For example, "Total Assigned Programs: 3164".
 - 1. The number of Programs assigned as displayed in the Total Assignments section of the Eligibility Workload Inventory page.

b. Exported Data Sheet

This sheet provides a listing of employee workload information such as the case number, primary applicant, program, program status, application date, authorization date, and RE due date. Export report will be sorted by Case Number in Ascending order.

Column Name	Description
Case Number	The Case Number of the Case
Primary Applicant	The Name of the Primary Applicant of the Program formatted as "Last Name", "First Name"
Program	This column will populate the program code that is associated to the case.
Status	This column will populate the status for the program.
Application Date	This column will populate the program application date formatted as mm/dd/yyyy.
Authorization Date	This column will populate the date the program was authorized for aid formatted as mm/dd/yyyy.
RE Due Date	This column will populate with the program redetermination due date formatted as mm/dd/yyyy.
Incomplete DERs	This column will populate with 'Y' when there is an Incomplete Determination of Eligibility Response (DER) associated to the program. This column is not labelled on the Eligibility Workload Inventory Page.

Column Name	Description
Carry Forward Status (CFS)	This column will display 'Y' if there was a DER within the current year in which the CFS flag was set to 'Y' and there were no subsequent DERs for the same benefit month where the CFS flag was set to 'N' for the same person. This will reset on January 1st of every year.

Note: Parameter used to generate the report will remain unchanged, only the excel template that is to be used for the report is changing.

2.5.4 Report Location

- **Global: Eligibility**
- **Local: Workload Inventory**
- **Task: Workload Inventory (click on the Export Icon that displays when there are Workload Inventory Report in the Search Results Summary).**

2.5.5 Counties Impacted

All CalSAWS counties are impacted.

2.5.6 Security Updates

N/A

2.5.7 Report Usage/Performance

N/A

2.6 Monthly Productivity List Export Report

2.6.1 Overview

The Monthly Productivity List Export Report is available from the Monthly Productivity List page. The report provides a listing of employee productivity information such as case name, case number, customer report type, submit month, customer report status and status date as well as the applicable program. This SCR will update the Excel Template that is used for the Monthly Productivity List Export Report. This is to match the Excel Template that will be used for Export Report that is generated using the new CalSAWS export processing.

2.6.2 Monthly Productivity List Export Report Mockup

General Information
Report: Monthly Productivity List Export
County: Los Angeles
Run Date: 08/05/2021 10:48 AM
Worker ID: 19DP344W16
Unit: 01
Total Reports: 1

Figure 2.6.1 – Monthly Productivity List Export Report – General Information Sheet

Case Number	Case Name	Type	Submit Month	Status	Status Date	Program
B0YBV33	Case Name	MG	05/01/2021	SE	03/11/2021	MC
B1B4V00	Case Name	S7	08/01/2020	CE	09/03/2020	CW
B1B4V00	Case Name	CWF	02/01/2021	CE	02/08/2021	CW
B1RYR99	Case Name	CWF	09/01/2020	CE	10/14/2020	CF
B1RYR99	Case Name	S7	03/01/2021	CE	04/02/2021	CF
B1VT000	Case Name	MG	04/01/2021	CE	05/30/2021	MC
B20L999	Case Name	CWF	10/01/2020	CE	11/18/2020	CF
B20L999	Case Name	CWF	10/01/2020	CE	11/18/2020	CF
B20L999	Case Name	S7	04/01/2021	SE	03/27/2021	CF
B20L999	Case Name	S7	04/01/2021	SE	03/27/2021	CF

Figure 2.6.2 – Monthly Productivity List Export Report – Exported Data Sheet

Note: The data included in the report mockup is not real data. It is only for visualization purposes.

2.6.3 Description of Change

1. The Excel template that is currently being used for the Monthly Productivity List Export Report will be updated to match the new Excel Template that is used for reports that are exported to Excel using the new CalSAWS export processing. Reference the Supporting Documents section for example report templates which include the report layout and column placement.

Note: Parameters used to generate the report will remain unchanged, only the excel template that is to be used for the report is changing.

a. General Information Sheet

This sheet will contain general information including the parameters that were used to generate the Report. This sheet will include a single table with a single column titled "General Information" that will include the following rows:

- i. Report Name formatted as "Report: Monthly Productivity List Export"
- ii. The county name formatted as "County: <County Name>". For example: "County: Los Angeles".
 1. This is the County that the user is logged into.

- iii. The date and time the report was generated formatted as "Run Date: <mm/dd/yyyy hh:mm AM/PM>". For example: "Run Date: 08/05/2021 10:38 AM".
- iv. The Worker ID formatted as "Worker ID: <Worker ID >". For Example: "Worker ID: 90LS00CF00".
 - 1. The worker number that is selected on the Monthly Productivity List page when the report is generated.
- v. The Unit formatted as "Unit: <Unit>". For example: "Unit: 01".
 - 1. The Unit that is selected on the Monthly Productivity List Page when the report is generated.
- vi. The Total Reports formatted as "Total Reports: <Total Reports>". For example: "Total Reports: 1".
 - 1. The Total count of reports that is pulled based on the Search Criteria that is defined from the Monthly Productivity List page.

b. Exported Data Sheet

This sheet provides a listing of employee productivity information such as case name, case number, customer report type, submit month, customer report status and status date as well as the applicable program. Export report will be sorted by Case Number in Ascending order.

Column Name	Description
Case Number	The Case Number of the Case
Case Name	The Case Name of the Case
Type	The type of the Customer Report
Submit Month	The Submit Month of the Customer Report formatted as mm/dd/yyyy
Status	This column will populate the status of the Customer Report
Status Date	This column will populate the current status date of the Customer Report formatted as mm/dd/yyyy
Program	The Program associated to the Customer Report

2.6.4 Report Location

- **Global: Eligibility**
- **Local: Workload Inventory**
- **Task: Monthly Productivity (click on the Export Icon that displays when there are Monthly Productivity List results in the Search Results Summary).**

2.6.5 Counties Impacted

All CalSAWS counties are impacted.

2.6.6 Security Updates

N/A

2.6.7 Report Usage/Performance

N/A

2.7 Supervisor Authorization Report

2.7.1 Overview

The Supervisor Authorization Report is available from the Pending Authorizations page. The report provides the different authorization types, actions taken, and performance metric of total days pending in queue, as well as detailed metrics of how many days in queue at each required authorization level. Not all authorization requests will require all three levels of approval. This SCR will update the Excel Template that is used for the Supervisor Authorization Report. This is to match the Excel Template that will be used for Export Report that is generated using the new CalSAWS export processing.

2.7.2 Supervisor Authorization Report Mockup

General Information
Report: Supervisor Authorization Report
County: Los Angeles
Run Date: 08/05/2021 10:53 AM
Organization Level: Office

Figure 2.7.1 – Supervisor Authorization Report – General Information Sheet

Region Group	Region	Office Name	Unit	Case Number	Case Name	Type
		SAN GABRIEL VALLEY GROW	1C	B21SU28	Case Name	PR - Bus Pass - \$110.00
		SAN GABRIEL VALLEY GROW	1C	B21SU28	Case Name	PR - Clothing/Shoes - \$50.0
		SAN GABRIEL VALLEY GROW	1C	L984404	Case Name	PR - Bus Pass - \$50.00
		SAN GABRIEL VALLEY GROW	1C	B177F09	Case Name	PR - Bus Pass - \$110.00
		SAN GABRIEL VALLEY GROW	1C	L984404	Case Name	PR - Clothing/Shoes - \$50.0

Figure 2.7.2 – Supervisor Authorization Report – Exported Data Sheet (refer to Supporting Document for the full report mockup)

Note: The data included in the report mockup is not real data. It is only for visualization purposes.

2.7.3 Description of Change

1. The Excel template that is currently being used for the Supervisor Authorization Report will be updated to match the new Excel Template that is used for reports that are exported to Excel using the new CalSAWS export processing. Reference the Supporting Documents section for example report templates which include the report layout and column placement.

Note: Parameters used to generate the report will remain unchanged, only the Excel template that is to be used for the report is changing.

a. General Information Sheet

This sheet will contain general information including the parameters that were used to generate the Report. This sheet will include a single table with a single column titled "General Information" that will include the following rows:

- i. Report Name formatted as "Report: Supervisor Authorization Report"
- ii. The county name formatted as "County: <County Name>". For example: "County: Los Angeles".
 1. This is the County that the user is logged into.
- iii. The date and time the report was generated formatted as "Run Date: <mm/dd/yyyy hh:mm AM/PM>". For example: "Run Date: 08/05/2021 10:38 AM".
- iv. The Organization Level formatted as "Organization Level: <The Organization Level selected>". For example: "Organization Level: Office".
 1. The Organization Level that is selected on the Pending Authorizations page. Possible options are:
 - a. Worker
 - b. Office
 - c. Bank

b. Exported Data Sheet

This sheet will contain the specific inventory of the different authorization types, actions taken, and performance metrics of total days pending in queue, as well as detailed metrics of how many days in queue at each required authorization level. Not all authorization requests will require all three levels of approval. Export report will be sorted by Case Number in Ascending order.

Column Name	Column Description
Region Group	Region group associated to the worker at the time of export. Region Group is assigned to worker primarily on WTW/REP program caseloads. Note: Value can be blank if the program is not a WTW/REP program.
Region	Region associated to the worker at the time of export. Note: Value can be blank if the program is not a WTW/REP program.
Office Name	Name of the office associated to the worker at the time of export.
Unit	The unit number associated to the worker at the time of export.
Case Number	The case number associated to the case.
Case Name	The case name associated to the case.
Type	The type code associated with the task. <ul style="list-style-type: none"> • Technical note: type code can be found in

Column Name	Column Description
	CODE_DETL.REFER_TABLE_1_DESCR where CATGRY_ID = '399'
Date	The date the task was assigned on. Format: MM/DD/YYYY
Program	Program associated to the task.
Program Status	Status of the program associated to the task.
ES	Indicator for whether the program requires Expedited Services.
Month(s)	Month(s) associated to the task.
Worker ID	ID of the worker associated to the task at the time of export.
Highest Level of Authorization Required by Task Highest Lvl Auth Req'd by Task	The highest level of authorization required for the task. Possible values are: <ul style="list-style-type: none"> • First • Second • Third
Total Days in Authorization Process Total Days in Auth Process	Displays the summation of days pending for a task across all approval levels.
First Level Authorization Status 1st Lvl Auth-Stat	Status of the transaction that is pending approval for requests that need first-level authorization depending on the Task Type. Technical note: Possible values are: <ul style="list-style-type: none"> • Approved • Pending • Rejected
First Level Authorization Status Date 1st Lvl Auth-Stat Date	Date of the status of the transaction for the first level of authorization.

Column Name	Column Description
First Level Authorization Days in Pending Status 1st Lvl Auth-Days in Pend Stat	<p>If First Level Authorization status is "Pending", display number of days from the date the worker created the approval task to the date of the export of the report.</p> <p>If First Level Authorization status is "Approved" or "Rejected", display number of days from the date the worker created the approval task to the date of first level approval or rejection.</p>
Second Level Authorization Status 2nd Lvl Auth-Stat	<p>Status of the transaction that is pending approval for pending requests that need second-level authorization (e.g., values can be Approved, Pending, Reject), depending on the Task Type.</p>
Second Level Authorization Status Date 2nd Lvl Auth-Stat Date	<p>Date of the status of the transaction for the second level of authorization.</p>
Second Level Authorization Days in Pending Status 2nd Lvl Auth-Days in Pend Stat	<p>If Second Level Authorization status is "Pending" display number of days from the date of first level approval to the date of the export of the report.</p> <p>If Second Level Authorization status is "Approved" or "Rejected", display number of days from the date of first level approval to the date of second level approval or rejection.</p> <p>If Second Level Authorization is not applicable to the task, leave blank.</p>
Third Level Authorization Status 3rd Lvl Auth-Stat	<p>Status of the transaction that is pending approval for pending requests that need third-level authorization (e.g., values can be Approved, Pending, Reject), depending on the Task Type.</p>
Third Level Authorization Status Date 3rd Lvl Auth-Stat Date	<p>Date of the status of the transaction for the third level of authorization.</p>

Column Name	Column Description
Third Level Authorization Days in Pending Status 3rd Lvl Auth-Days in Pend Stat	<p>If Third Level Authorization status is "Pending", display number of days from the date of second level approval to the date of the export of the report.</p> <p>If Third Level Authorization status is "Approved" or "Rejected", display number of days from the date of second level approval to the date of third level approval or rejection.</p> <p>If Third Level Authorization is not applicable to the task, leave blank.</p>

Note: For columns that appear on the Pending Authorizations page, their data will match what is exported from the page while the additional columns will be a detailed extension of that query.

2.7.4 Report Location

- **Global: Case Info**
- **Local: Task**
- **Task: Approval (click on the Export Icon that displays when there are Pending Authorizations in the Search Results Summary).**

2.7.5 Counties Impacted

All CalSAWS counties are impacted.

2.7.6 Security Updates

N/A

2.7.7 Report Usage/Performance

N/A

2.8 General Ledger Report

2.8.1 Overview

The General Ledger Report is available from the General Ledger List page. The report provides a detailed ledger report for all Foster Care and Kin-GAP payments made and all SSI, SSA and/or Child Support payments

received for each child. This SCR will update the Excel Template that is used for the General Ledger Report. This is to match the Excel Template that will be used for Export Report that is generated using the new CalSAWS export processing.

2.8.2 General Ledger Report Mockup

General Information
Report: General Ledger Report
County: Los Angeles
Run Date: 08/05/2021 10:58 AM
As of Date: 08/05/2021
Case No: B0KIN20
Child Name: JANE DOE
Child SSN: 123-45-6789

Figure 2.8.1 – General Ledger Report – General Information Sheet

Accrual Period	Transaction Date	Account Type	Transaction Type	Aid Type	Pay Code	Warrant Number	Debit/Credit	Foster Care Offset	Trust Amount	Total Foster Care Paid	Running Trust Balance
08/2020	09/15/2020	PAYMENTS	FC Payment	42	AA		(\$152.00)	\$0.00	\$0.00	(\$152.00)	\$0.00
09/2020	10/15/2020	PAYMENTS	FC Payment	42			(\$671.00)	\$0.00	\$0.00	(\$823.00)	\$0.00
10/2020	11/15/2020	PAYMENTS	FC Payment	42			(\$671.00)	\$0.00	\$0.00	(\$1,494.00)	\$0.00
11/2020	12/15/2020	PAYMENTS	FC Payment	42			(\$671.00)	\$0.00	\$0.00	(\$2,165.00)	\$0.00
12/2020	01/15/2021	PAYMENTS	FC Payment	42			(\$671.00)	\$0.00	\$0.00	(\$2,836.00)	\$0.00
01/2021	02/15/2021	PAYMENTS	FC Payment	42	XX		(\$671.00)	\$0.00	\$0.00	(\$3,507.00)	\$0.00
01/2021	02/18/2021	PAYMENTS	FC Payment Cancellation	42			\$671.00	\$0.00	\$0.00	(\$2,836.00)	\$0.00
02/2021	03/15/2021	PAYMENTS	FC Payment	42			(\$671.00)	\$0.00	\$0.00	(\$2,836.00)	\$0.00
03/2021	04/15/2021	PAYMENTS	FC Payment	42	BB		(\$688.00)	\$0.00	\$0.00	(\$3,524.00)	\$0.00
04/2021	05/15/2021	PAYMENTS	FC Payment	42			(\$688.00)	\$0.00	\$0.00	(\$4,212.00)	\$0.00
05/2021	06/15/2021	PAYMENTS	FC Payment	42			(\$688.00)	\$0.00	\$0.00	(\$4,900.00)	\$0.00
06/2021	07/15/2021	PAYMENTS	FC Payment	42	XX		(\$688.00)	\$0.00	\$0.00	(\$5,588.00)	\$0.00

Figure 2.8.2 – General Ledger Report – Exported Data Sheet

Note: The data included in the report mockup is not real data. It is only for visualization purposes.

2.8.3 Description of Change

1. The Excel template that is currently being used for the General Ledger Report will be updated to match the new Excel Template that is used for reports that are exported to Excel using the new CalSAWS export processing. Reference the Supporting Documents section for example report templates which include the report layout and column placement.

Note: Parameters used to generate the report will remain unchanged, only the Excel template that is to be used for the report is changing.

a. General Information Sheet

This sheet will contain general information including the parameters that were used to generate the Report. This sheet will include a single table with a single column titled "General Information" that will include the following rows:

- i. Report Name formatted as "Report: General Ledger Report"
- ii. The county name formatted as "County: <County Name>". For example: "County: Los Angeles".
 - 1. This is the County that the user is logged into.
- iii. The date and time the report was generated formatted as "Run Date: <mm/dd/yyyy hh:mm AM/PM>". For example: "Run Date: 08/05/2021 10:38 AM".
- iv. The As of Date formatted as "As of Date: <mm/dd/yyyy >". For Example: "As of Date: 08/05/2021".
 - 1. The As of Date is the date in which the data for the report is current.
- v. The Case Number formatted as "Case No: <Case Number>". For example: "Case No: B0KIN20"
 - 1. The Case Number is the Case Number of the Child that is selected on the General List page.
- vi. The Child Name formatted as "Child Name: <First Name, Last Name>". For example: "Child Name: JANE DOE".
 - 1. The Child Name is the Child Name that is selected on the General Ledger List page when the report is generated.
- vii. The Child SSN formatted as "Child SSN: <Social Security Number>". For example: "Child SSN: 123-45-6789".
 - 1. The social security number is for the Child that is selected on the General Ledger List page and will display the full SSN number instead of just the last four digits.

b. Exported Data Sheet

This sheet will contain a detailed ledger for each child receiving an income with the following columns:

Column Name	Description
Accrual Period	This column will populate the Accrual month and formatted as mm/yyyy
Transaction Date	This column will populate with the date of when the transaction posted to the General ledger and formatted as mm/dd/yyyy
Account Type	This column will populate with the account type for the general ledger. Possible Values: CSUP – When the general ledger transaction type is one of the following DEDICATED

Column Name	Description
	PAYMENTS SSI SSA INTEREST
Transaction Type	This column will populate with the transaction type from the Transaction Detail page
Aid Type	This column will populate with the aid code associated to the Foster Care payment
Pay Code	This column will populate with the pay code associated to the Foster Care payment.
Warrant Number	This column will populate the number issued for the warrant
Debit/Credit	This column will populate with the type of the transaction
Foster Care Offset	This column will populate with the amount of the Foster Care Offset
Trust Amount	This column will populate with the total amount that went into the Trust
Total Foster Care Paid	This column will populate with the total amount paid for the Foster Care
Running Trust Balance	This column will populate with the total amount in the trust account balance (adds up the trust account balances)

2.8.4 Report Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: General Ledger (click on General Ledger button)**

2.8.5 Counties Impacted

All CalSAWS counties are impacted.

2.8.6 Security Updates

N/A

2.8.7 Report Usage/Performance

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Eligibility Workload Inventory Export Report – Mockup	Eligibility Workload Inventory Export - Mockup.xlsx
2	Reports	Monthly Productivity Export Report – Mockup	Monthly Productivity List Export - Mockup.xlsx
3	Reports	Supervisor Authorization Export – Mockup	Supervisor Authorization Export - Mockup.xlsx
4	Reports	General Ledger Report – Mockup	General Ledger Report.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.4	The LRS shall produce several types of reports which support all levels of staff in managing their particular workloads, including management reports, State level reports, and ad hoc reports.	Reports will continue to be available for the workers by having it updated to go through the new CalSAWS export process so that it can be exported to Excel.
2.24.1.11	The LRS shall support all reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures, including statistical, operational, workload, and fiscal reports.	Reports will continue to be available for the workers by having it updated to go through the new CalSAWS export process so that it can be exported to Excel.

CalsAWS

California Statewide Automated Welfare System

Design Document

SCR CA-233488 DDID 2314 FDS: GA GR Rules Phase 2
Batch 5 - Income Rules and Corresponding NOA
Reasons

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Peterson Etienne, Justis Ketcham, Stephanie Hugo, Shreesha Venugopal Math
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/18/2021	1.0	Draft	Peterson Etienne, Justis Ketcham, Stephanie Hugo, Shreesha Venugopal Math
11/22/2021	1.1	Update based on QA log	Peterson Etienne, Justis Ketcham
12/21/2021	1.2	Section 2.1.2 Removed the statement that FRE needs to be in the home since this is not the current behavior for FRE in CalSAWS.	Peterson Etienne
01/03/2022	1.3	1. Added a note in Section 2.2.1.1 for clarification about the chart value displayed in 'Recurring Special Needs List' page for G/GR program. 2. Added Assumption for Aid In-Kind Recipient flags which are being set in future SCRs.	Rama Krishna Kuchibhotla
1/25/2022	2.0	Added a note stating that a spouse that did not apply for a GAGR Automated EDBC County/CC Solution but is on an active CalWORKs case will not be considered by the EDBC	Peterson Etienne

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1 OVERVIEW

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. [Special Need Eligibility Functionality](#)
 2. [GAGR Grant](#)
 3. [Financial Overall](#)

1.4 Assumptions

1. The existing Los Angeles County rules will remain unchanged.
2. This SCR CA-233488 is based on the WCDS approved documents.
3. The design of the rules is for each CalWIN county based on the Gainwell documents approved by the counties.
4. This SCR CA-223488 is part of phase 2 CalWIN rulesets for Financial.

5. The functionality of this SCR CA-233488 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 turned on at CalWIN go live.
6. Any logic related to San Francisco explicitly called out in relevant WCDS approved use cases will be included in this design. Any, San Francisco sub program logic independent of the rule will be added in SCR CA-215677 DDID 2374 scheduled for 22.01.
7. Alerts will be handled separately outside the Rules design in a separate SCR CA-220119.
8. 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.
9. All Data collection used in EDBC determination is effective for the benefit month.
10. All calculation for computed values will be detailed in the Visio diagram.
11. '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.
12. Logic that checks or creates Sanctions cannot be tested until SCR CA-227328 is implemented in 22.03.
13. Manual EDBC and negative action EDBC cannot be run with these changes.
14. Changes to the Financial Data Collection pages will be moved to SCR CA-232396.
15. 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.
16. Indigent burial and aid code 9B checks used in all designed/implemented functionalities cannot be tested until Indigent burial completed implementation.
17. Earned income county specific logic cannot be tested until 22.03 is implemented for the following counties: San Francisco, Contra Costa, San Diego, Sacramento.
18. Indigent burial related logic cannot be tested until 22.03 release. It will be defaulted to false in 22.01.
19. 'Aid In-kind recipient', used in Aid in-kind functionality is set in time clock functionality which can't be tested until 22.05 release.

2 RECOMMENDATIONS

2.1 FRE Non-Applicant

2.1.1 Overview

When an individual that is on the case but did not apply for GA/GR or the individual that applied for GA/GR is closed during the configuration or the non-financial evaluation, if the individual is a 'Responsible Relative' or 'Spouse' or 'parent' and is in the home then they will be considered as a non-applicant with the role of 'Financially Responsible Excluded' (FRE).

2.1.2 Description of Changes

Financially Responsible Relative

When an individual that is on the case but did not apply for GA/GR if the individual is a 'Responsible Relative'.

1. The non-applicant will have a role of 'Financially Responsible Excluded' (FRE) and a Role reason of 'Financially Responsible Relative'.
2. The non-applicant will be active on the program for budgeting.
3. The non-applicant's role and role reason cannot be overridden unless it is to another non-applicant FRE role reason for GA/GR.
4. The non-applicant will not be granted benefit through EDBC unless they apply.

Spouse

When an individual that applied for GA/GR and is closed during the configuration or the non-financial evaluation, if the individual is a 'spouse' and is in the home.

1. The non-applicant will have a role of 'Financially Responsible Excluded' (FRE) and a Role reason of 'Spouse'.
2. The non-applicant will be active on the program for budgeting.
3. The non-applicant's role and role reason cannot be overridden unless it is to another non-applicant FRE role reason for GA/GR.
4. The non-applicant will not be granted benefit through EDBC unless they reapply.

Please Note:

When a spouse that is on the case but did not apply for GA/GR and is currently in an active CalWORKs program. Then the spouse will not be considered in the EDBC determination result for the GA/GR Automated Solution program.

Deemed Parent (applied)

When an individual that applied for GA/GR and is closed during the configuration or the non-financial evaluation, if the individual is a 'parent' and is in the home.

1. The non-applicant will have a role of 'Financially Responsible Excluded' (FRE) and a Role reason of 'Deemed Parent'.
2. The non-applicant's role and role reason cannot be overridden unless it is to another non-applicant FRE role reason for GA/GR.
3. The non-applicant's closure reason will be saved.
4. Set the Application Closure Event Reason to match the person's Role Reason as set above. This will allow the person to remain active in the program for budgeting but will deny/discontinue their application. They will need to reapply/rescind to be aided again.

Financially Responsible Relative (applied)

When an individual that applied for GA/GR is closed during the configuration or the non-financial evaluation, if the individual is a 'Responsible Relative'.

1. The non-applicant will have a role of 'Financially Responsible Excluded' (FRE) and a Role reason of 'Financially Responsible Relative'.
2. The non-applicant's role and role reason cannot be overridden unless it is to another non-applicant FRE role reason for GA/GR.
3. The non-applicant's closure reason will be saved.
4. Set the Application Closure Event Reason to match the person's Role Reason as set above. This will allow the person to remain active in the program for budgeting but will deny/discontinue their application. They will need to reapply/rescind to be aided again.

2.2 Logic Overview

2.2.1 Overview - Special Need Eligibility

The Recurring Special Needs can be added and processed in CalSAWS for GAGR program as follows:

1. Add Recurring Special Needs record:
 - Place the cursor over Eligibility on the Global navigation bar.
 - Select Customer Information from the Local navigator.
 - Click the Financial link on the Task navigation bar.

- Click the Special Needs link on the Task navigation bar.
- Click on Add button to navigate to Detail screen and to add a record.

2.2.1.1 Recurring Special Needs List

The screenshot displays the 'Recurring Special Needs List' page. The left sidebar contains a navigation menu with categories like 'Customer Information', 'Non Financial', 'Financial', 'Special Needs', 'GR', and 'ABAWD'. The 'Special Needs' category is selected. The main content area features a title 'Recurring Special Needs List' and a table with the following columns: Person, Need, Value, Begin Date, and End Date. The table currently displays 'No Data Found'. There are several interactive elements: a 'View' button, an 'Add' button (highlighted in yellow), a 'Remove' button, and a 'Complete' checkbox. A status bar at the bottom indicates 'This Type_1 page took 1.14 seconds to load.'

2.2.1.1 – Recurring Special Needs List page

2. Add Recurring Special Needs Detail record:
 - Select program person name
 - Select Need type
 - Enter need description (optional).

- Select Monthly Amount Type.
 - i. When 'Actual' is selected then Monthly Amount needs to be entered.
 - ii. When 'Chart' is selected then monthly amount need not to be entered and will be selected from reference table.

Note: Since the Need types displayed in 'Need' drop down list in 'Recurring Special Needs Detail' page are common for all programs, when 'Chart' is selected for 'Monthly Amount Type' in 'Recurring Special Needs Detail' page then the 'Value' displayed in 'Recurring Special Needs List' page is 'Chart Rate' column value from 'Special Need Type Code' reference table (CT200) which represents the values for base programs like CalWORKs/CalFresh. However, the actual chart value for the need type is different for GA/GR program which is different from the displayed value in the list page. The actual chart value applicable for GA/GR program will be used in the EDBC calculations and will be displayed only in the EDBC results.

2.2.1.2 Recurring Special Needs Detail

Recurring Special Needs Detail

* - Indicates required fields

Save and Add Another
Save and Return
Cancel

Change Reason

New Change Reason: * **New Reported Date: ***

Intake 08/01/2021

Name: *

First Name, Last Name

Retrieve Information

Need: *

GR - Distilled Water

Description:

Monthly Amount Type: *

Actual

Monthly Amount: *

100

Begin Date: *

08/01/2021

End Date: *

Verified: *

Verified View

Save and Add Another
Save and Return
Cancel

Recurring Special Needs Detail

*- Indicates required fields

Images
Save and Return
Cancel

Change Reason

New Change Reason: * <input type="text" value="Intake"/>	New Reported Date: * <input type="text" value="08/01/2021"/>
Change Reason: Intake	Reported Date: 08/01/2021

View

Name: *		
<input type="text" value="First Name, Last Name"/>		
Need: *		
<input type="text" value="GR - Distilled Water"/>		
Description:		
<input type="text"/>		
Monthly Amount Type:	Begin Date: *	End Date:
<input type="text" value="Chart"/>	<input type="text" value="08/01/2021"/>	<input type="text"/>
Verified: *		
<input type="text" value="Verified"/>		

View

Images
Save and Return
Cancel

2.2.1.2 – Showing the Recurring Special Needs Detail Page

3. When EDBC ran for GAGR program, the assistance unit special needs are calculated and will be shown as a separate line item in EDBC summary page as shown below:

2.2.1.3 Eligibility Summary Page with Special Needs Line item

General Assistance/General Relief Budget		Regular
Unearned Income	\$	50.00
Earned Income	+	70.00
In-Kind Income	+	20.00
Total Net Income	=	140.00
Assistance Unit Size		1
Potential Grant	\$	221.00
Assistance Unit Special Needs	+	100.00
Total Net Income	-	140.00
Aid Payment	=	181.00

2.2.1.3 – Showing the Special Needs Line Item in EDBC summary page

- When clicked on the hyperlink for Assistance Unit Special Needs amount the following child page will be displayed which shows the details of all the special needs considered for the current EDBC run. There can be more than one special need amount for the benefit month and all the records will be displayed here and the total will be displayed in EDBC Summary page.

2.2.1.4 EDBC Person Line-Item Detail

EDBC Person Line Item Detail - AU Special Needs				
				Close
Name	Type	Description		Amount
First Name, Last Name	GR - Distilled Water	(09/01/2021) \$100.00	\$	100.00
			Total	\$ 100.00
				Close

2.2.1.4 – EDBC Person Line-Item Detail

The worker can also create a non-recurring need. The worker will follow below steps to create the Needs record in CalSAWS:

1. From Eligibility:

- i. Place the cursor over Eligibility on the Global navigation bar.
- ii. Select Customer Information from the Local navigator.
- iii. Click the Needs link on the Task navigation bar to access the Needs List page.
- iv. Click 'Add Need' button.

2. From Employment Services

- i. Place the cursor over Employment Services on the Global navigation bar.
- ii. Select Supportive Services from the Local navigator.
- iii. Click the Needs link on the Task navigation bar to access the Needs List page.
- iv. Click the Add Need button.

2.2.1.5 Needs List

The screenshot displays the 'Needs List' page. At the top, a navigation bar includes 'Los Angeles AT1', 'Case Info', 'Eligibility' (highlighted), 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The left sidebar contains 'Customer Information' and a 'Person Search' menu with items like 'Non Financial', 'Financial', 'GR', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', 'Run EDBC', 'Manual EDBC', 'Needs' (highlighted), 'Cal-Learn', 'Service Arrangements', 'ABAWD', and 'EDBC Results'. The main content area has a 'Needs List' title and search filters: 'Display by Name' (set to 'All'), 'From' and 'To' date pickers, 'Category' and 'Type' dropdowns, and a 'View' button. Below the filters is a 'Search Results Summary' section showing 'Results 1 - 4 of 4'. A table with columns 'Type', 'Name', 'Category', 'Begin Date', 'End Date', and 'Status' is visible. A 'Remove' button is on the left, and two 'Add Need' buttons are highlighted in yellow on the right. A status message at the bottom reads 'This Type_1 page took 0.31 seconds to load.'

2.2.1.5 Adding a Need on the Needs List page.

3 To Add a New Need:

- i. Go to the Need Detail page.
- ii. Enter the appropriate information in Need Detail page.
- iii. Select 'Service Arrangement' for Save and Add New and then click 'Go' button to add new service arrangement record.

2.2.1.6 Needs Detail

Need Detail

*- Indicates required fields

Save And Return Cancel

Name: *
First Name, Last Name

Category: * GR Non-Recurring Special Need **Type: *** Return to Residence

Begin Date: * 09/06/2021

Description: Bus Ticket

Status: * Indicated **Status Reason: *** Documented

Save & Add New: Service Arrangement Go

Save And Return Cancel

This Type_1 page took 1.26 seconds to load.

2.2.1.6 Entering the information on the Need Detail page.

2.2.1.7 Service Arrangement Detail

Service Arrangement Detail

[Save and Return](#) [Cancel](#)

Need ✳

Type	Name	Category	Begin Date
<input checked="" type="radio"/> Return to Residence	Last Name, First Name 31M	GR Non-Recurring Special Need	09/06/2021

Activities

Type	Status	Begin Date	End Date
------	--------	------------	----------

[Select](#)

Arrangement Details

Arrangement Period: *
 From: To:

Program Type: * **Aid Code: ***
 General Assistance/General - Select -

Relief Voucher: *
 No

Payee: *
 - Select -

Employed: *
 - Select -

Additional Payee:

Service Type Description **Total**

--	--

Status History

Status	Status Reason	Status Date
		09/09/2021

Comments:

Save and Return
Cancel

2.2.1.7 The screen for the Service Arrangement Detail.

2.3 Program Configuration Override

2.3.1 Overview

From the EDBC summary page before saving the EDBC, worker has the option to override program configuration by clicking the 'Override Program Configuration' button and navigate to the 'Program Configuration Override List' page and the 'Program Configuration Override Detail' page. Both pages will function as per current CalSAWS framework for GA/GR.

2.3.1.1 Program Configuration Override List

The 'Program Configuration Override List' page will work per existing CalSAWS framework, GA/GR EDBC summary will be modified to use this page.

2.3.1.2 Program Configuration Override Detail

The 'Program Configuration Override Detail' page will work per existing CalSAWS framework, GA/GR EDBC summary will be modified to use this page.

2.4 View All Program Status Reasons

2.4.1 Overview

Currently in CalSAWS, when more than one program status reason is set for GA program during the current EDBC run for any benefit month then the status reason with lowest priority will be used and set as program status reason to fail the GA program. However, all other status reasons will be retained for view purpose.

These status reasons can be viewed from EDBC summary page using 'View All' button placed along with 'Program Status Reason' line item.

This functionality will be extended to GA/GR Automated EDBC/CC solution program and all program status reason set in the current EDBC run can be accessed using 'View All' button on EDBC Summary page.

2.4.2 EDBC Summary page with View All button:

The following screens shows how to find 'View All' button and how to see all program status reasons set during the current EDBC run from EDBC summary page.

2.4.2.1 EDBC Summary Page 'View All' button

General Assistance/General Relief EDBC Summary

*- Indicates required fields Close

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2021		10/26/2021	Accepted - Saved	Worker Name

EDBC Information

Reporting Type Reason:
Type: Regular
Recalculation: No

Program Configuration

System Determination
EDBC Source: Online EDBC Rules
Aid Code:
Program Status: Discontinued
Program Status Reason: Has More Than One Vehicle View All

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Participant Name	04/08/1973	MEM		Discontinued	Has More Than One Vehicle

▶ **Reporting Configuration**

Figure 2.4.2.1 – EDBC summary page with 'View All' button

2.4.2.2 Program Status Reasons page:

Program Status Reasons

Close

Status Reasons

Has More Than One Vehicle
 Income Exceeds Grant Amount

Close

Figure 2.4.2.2 – Program Status Reasons detail page showing all status reasons set in the current EDBC run

2.5 Financial

2.5.1 Special Need Eligibility Functionality

2.5.1.1 County Admin Detail - Special Need Eligibility

2.5.1.1.1 Overview

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

2.5.1.1.2 Description of Changes

- The Admin detail page for Special Need Eligibility 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
Special Needs Applicable.	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	Y	Y	Y	Y

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX400C001	Special Needs Applicable.	Special Needs Applicable.

2.5.1.2 EDBC Changes

2.5.1.2.1 Overview

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

2.5.1.2.2 Description of Change

Special Need Eligibility Rules Flow Diagram:

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

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

Field (CalWIN)	Field (CalSAWS)	Location Details
Type: Case Special Need Payment/Request Details	Need	Recurring Special Needs Detail
Amount Authorized: Case Special Need Payment/Request Details	Monthly Amount	Recurring Special Needs Detail
Requested Date: Case Special Need Payment/Request Details	Begin Date	Recurring Special Needs Detail

Please refer the [Rules Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram.

2.5.1.3 Project Requirements

DDID 2314	DDID Description	How DDID Requirement Met	Rule Flow diagram
	[Business Rule: {Special Needs Applicable} CalSAWS must determine special needs eligibility for GA/GR.]	The rule 'Special Needs Applicable.' will meet this requirement.	The following rule is stated in the business flow diagram and admin matrix

2.5.2 GAGR Grant Additional Functionality

2.5.2.1 Rules

The GAGR Grant Additional Functionality introduces two rules previously unused in SCR CA-224578.

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo	
Allow 12 bus tickets per person per month.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y
Applicant.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
San Mateo Couples.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX321C008	Allow 12 bus tickets per person per month.	Allow 12 bus tickets per person per month.
EDX321C009	Applicant	Applicant.

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
Pro-rate homeless and housed benefits.	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N

Earned income – Orange Only.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income - Placer Only.	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Sacramento Only.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – San Diego Only.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Rate for homeless in shelter.	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Income test on adjusted amount.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Room Board situation.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Mental health facility.	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N
Chass Shelter options.	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Housing and Basic Needs Test – Alameda.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Earned income – Ventura Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N
Earned income – Tulare Only.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
SSN-Santa Clara. This applies to Santa Clara.																			

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX305C003	Pro-rate CAAP homeless and housed benefits	Pro-rate homeless and housed benefits.
EDX309C004	Earned income method 4 - Orange Only	Earned income – Orange Only.
EDX309C005	Earned income method 5 - Placer Only	Earned income - Placer Only.
EDX309C006	Earned income method 6 - Sacramento Only	Earned income – Sacramento Only.
EDX309C007	Earned income method 7 - San Diego Only	Earned income – San Diego Only.
EDX314C004	Rate for homeless in shelter	Rate for homeless in shelter.
EDX320C006	Income test on adjusted amount	Income test on adjusted amount.

EDX314C003	Room Board situation.	Room Board situation.
EDX314C010	Mental health facility.	Mental health facility.
EDX314C007	Chass Shelter options.	Chass Shelter options.
EDX323C016	Housing and Basic Needs Test – Alameda.	Housing and Basic Needs Test – Alameda.
EDX309C017	Earned income method 17 - Ventura Only	Earned income – Ventura Only.
EDX309C016	Earned income method 16 - Tulare Only	Earned income – Tulare Only.
EDX116C003	SSN-SantaClara	SSN-Santa Clara.

The following CalWIN rules has been removed for this functionality.

CalWIN Number	CalWIN Description	Reason
EDX321C011	Grant less than 10\$.	Not using this rule as the values calculated when this rule is active is not used.
EDX321C014	Grant less than 1\$.	Not using this rule as the values calculated when this rule is active is not used.
EDX321C015	Grant less than 20\$.	Not using this rule as the values calculated when this rule is active is not used.
EDX321C024	SF GA Couples.	Not using this rule as the values calculated when

		this rule is active is not used.
EDX321C026	Suspend case in month of zero budget grant and pass in future month if no ZBG exists.	Not using this rule as the values calculated when this rule is active is not used.
EDX321C028	Suspend case in month of zero budget grant and pass case for 3 total months from month of zero budget grant.	Not using this rule as the values calculated when this rule is active is not used.
EDX321C030	Contra Costa Couples.	Not using this rule as the values calculated when this rule is active is not used.
EDX321C031	Tulare Couples.	Not using this rule as the values calculated when this rule is active is not used.
EDX321C032	Solano Couples.	Not using this rule as the values calculated when this rule is active is not used.
EDX321C033	San Mateo Couples.	Not using this rule as the values calculated when this rule is active is not used.
EDX321C036	Aid at half 2-person rate for Unemployable Spouse of Individual who has a Emp Svc Non-Cooperative Sanction.	Not using this rule as the values calculated when this rule is active is not used.

Program/Person status reason logic update

1. Existing (SCR-224578) program/person status reason CT73 'Grant Amt is Less Than Zero Grant Level' has added logic in the "Minimum Grant" flow. Please refer to the Visio Diagram.

Category	Short Description
73	Grant Amt is Less Than Zero Grant Level

2.5.2.2 GAGR Grant Additional logic

For GA/GR Automated EDBC/CC Counties Solution program, when the program has more than one individual with different aid begin dates or different aid end dates then EDBC will create corresponding budgets with applicable dates to prorate the benefit amount in the benefit month. The benefit amount will be prorated according to the prorated days applicable for each budget. Final Aid payment will be calculated by adding all pro-rated benefit amounts applicable for the benefit month.

2.5.2.2.1 EDBC Summary Page with more than one budget

The EDBC summary page with more than one budget in a benefit month is as shown below:

General Assistance/General Relief Budget		Prorated	Prorated
Unearned Income	\$	<u>50.00</u>	\$ <u>50.00</u>
Earned Income	+	<u>30.00</u>	+ <u>30.00</u>
In-Kind Income	+	<u>20.00</u>	+ <u>20.00</u>
Total Net Income	=	100.00	= 100.00
Assistance Unit Size		<u>1</u>	<u>2</u>
Potential Grant	\$	221.00	\$ 375.00
Assistance Unit Special Needs	+	<u>0.00</u>	+ <u>0.00</u>
Total Net Income	-	100.00	- 100.00
Medical Deduction	-	0.00	- 0.00
Aid Payment	=	121.00	= 275.00

Aid Payment		Prorated	Prorated
Full Month Aid Payment	\$	121.00	\$ 275.00
Dates to Prorate		10-20	21-31
Prorated Benefit Amount	\$	42.94	\$ 97.58
Final Aid Payment			\$ 140.52
Overridden Aid Payment			\$
			Override Payment
Potential Benefit			= 140.52
Previous Potential Benefit			- <u>0.00</u>
Overpayment Adjustment Amount			- <u>0.00</u>
Authorized Amount			= 140.52

Delivery Method: *	Immediacy Indicator: *	Issuance Method:
Mail <input type="button" value="v"/>	Routine <input type="button" value="v"/>	

2.5.2.1.1 EDBC Summary page with 2 budget

Few scenarios where more than one budget is created are shown below and the corresponding EDBC summary page details are shown in attached excel Multiple Budgets - Scenarios.xlsx in [Supporting Documents section](#).

Note: Amounts in the excel file are shown for sample purpose only. Amounts may or may not be rounded based on the applicable admin rules for each county.

Scenario 1:

Program has two persons with the following aid begin dates:

Person 1 – Intake – Begin Date of Aid - 10/10/2021

Person 2 – Intake – Begin Date of Aid - 10/21/2021

Budget 1 – Budget Begin Date and Budget End Date: 10 – 20, AU Size - 1

Budget 2 – Budget Begin Date and Budget End Date: 21 – 31, AU Size - 2

Scenario 2:

Program has two persons with the following aid end dates:

Person 1 – Active Ongoing – End Date of Aid - 10/10/2021

Person 2 – Active Ongoing – End Date of Aid - 10/20/2021

Budget 1 – Budget Begin Date and Budget End Date: 1 – 10, AU Size - 2

Budget 2 – Budget Begin Date and Budget End Date: 11 – 20, AU Size - 1

Scenario 3:

Program has two persons with the following aid begin dates:

Person 1 – Active Ongoing – Begin Date of Aid - 10/01/2021

Person 2 – intake – Begin Date of Aid - 10/11/2021

Budget 1 – Budget Begin Date and Budget End Date: 1 – 10, AU Size - 1

Budget 2 – Budget Begin Date and Budget End Date: 11 – 31, AU Size - 2

Scenario 4:

Program has two persons with the following aid begin and end dates:

Person 1 – Active Ongoing – Begin Date of Aid - 10/01/2021

Person 2 - Active Ongoing - Aid Beg Date - 10/01/2021, Aid End Date - 10/20/2021

Budget 1 – Budget Begin Date and Budget End Date: 1 – 20, AU Size - 2

Budget 2 – Budget Begin Date and Budget End Date: 21 – 31, AU Size – 1

2.5.3 Additional Status reasons from Other Functionality

Unearned income Functionality

1. The new program status reason CT73 'Gross Income > Grant' will be set as a failure reason when all the following conditions
 - a. The rules 'Income deductions.' and 'Earned income – Sacramento Only.' are active.
 - b. The individual is 'Aid-in-Kind (AIK) recipient'. (This is determined if the primary aid code of the individual is '98').
 - c. The individual has unearned income for this benefit month.
 - d. The unearned income type is: UIB Unemployment.

Category	Short Description
73	Gross Income > Grant

2. The new person status reason CT73 'Aid Ended' will be set as a failure status reason when all the following conditions
 - a. The Last Date of Aid is a valid date.
 - b. The benefit month begin date is after the 'Last Date of Aid'.

Category	Short Description
73	Aid Ended

Aid Inkind functionality

1. The new program status reason CT73 'Job Quit Resides in AIK' will be set as a failure reason when all the following conditions are met:
 - a. GAGR granted and GAGR Indigent Burial Granted is not true
 - b. the following is not true:
 - the rule 'Return to residence applicable' is active and individual's County of Residence on Residency Detail is not the current county, and the individual has a 'return to residence' record.
 - c. 'Indigent Burial Applicable' is not active
 - d. 'Aid in kind applicable' is active
 - e. individual is homeless
 - f. individual meets presumptive eligibility
 - g. individual is eligible for group living situation
 - h. the rule 'Previously applied AIK.' is active
 - i. Program is ongoing
 - j. individual has an employment record effective for the benefit month with a termination reason of 'quit'

Category	Short Description
73	Job Quit Resides in AIK

2.5.4 Approval NOA

2.5.4.1 County Admin Detail – Approval NOA

Leverage Rule

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

Rule Name	Alameda	Contra Costa	Fresno	Orange	Placer	Sacramento	San Diego	San Francisco	San Luis Obispo	San Mateo	Santa Barbara	Santa Clara	Santa Cruz	Solano	Sonoma	Tulare	Ventura	Yolo
Earned income – Sacramento Only.	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N
Room Board & Shelter applicable.	Y	Y	N	N	N	N	N	N	N	Y	Y	Y	Y	N	N	N	N	Y
Meeting shelter conditions.	N	N	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N
Room Board situation.	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N
Earned income – Santa Cruz and Santa Clara Only.	N	N	N	N	N	N	N	N	N	N	N	Y	Y	N	N	N	N	N
Earned income – San Luis Obispo Only.	N	N	N	N	N	N	N	N	Y	N	N	N	N	N	N	N	N	N

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

CalWIN Number	CalWIN Rule	CalSAWS Rule
EDX309C006	Earned income – Sacramento Only.	Earned income – Sacramento Only.
EDX314C001	Room Board & Shelter applicable.	Room Board & Shelter applicable.

EDX314C002	Meeting shelter conditions.	Meeting shelter conditions.
EDX314C003	Room Board situation.	Room Board situation.
EDX309C013	Earned income – Santa Cruz and Santa Clara Only.	Earned income – Santa Cruz and Santa Clara Only.
EDX309C009	Earned income – San Luis Obispo Only.	Earned income – San Luis Obispo Only.

2.5.4.2 EDBC Changes

2.5.4.2.1 Overview

This section will provide the Eligibility Rules flow for Housing Program Person Eligibility that can be filtered for each CalWIN County.

2.5.4.2.2 Description of Change

Approval NOA 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
Aid to Pay Day	Last Date of Aid	Application Detail page

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 'Indv App is Approved' will be set to for the form E10062 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 program mode is intake.
 - b. The GAGR program is approved for the benefit month.
 - c. The program aid code is not '9B' ('Indigent Burial').

- d. The program application type is not 'Restoration' (Application Type is not 'Restoration' in Application Detail page).

Category	Short Description
73	Indv App is Approved

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 'Pgm Approved and SSI/SSP is Pending/Applied' will be set as a non display status reason when all the following conditions are met:
 - a. The program mode is intake.
 - b. The GAGR program is approved for the benefit month.
 - c. The program aid code is not '9B' ('Indigent Burial').
 - d. All the following in I or II:
 - I. All the following:
 - i. Individual has SSIAP record effective for the benefit month.
 - ii. Individual status code = 'Approved' OR 'Approved Other' OR 'Approved Self' (Status / Decision in SSIAP Detail page).
 - II. All the following:
 - i. Individual has an entry in Other Program Assistance Detail page valid for the benefit month.
 - ii. Type of Assistance = 'SSI/SSP' (Type of Assistance in Other Program Assistance Detail page).
 - iii. Disposition = 'Active' (Disposition in Other Program Assistance Detail page).

Category	Short Description
73	Pgm Approved and SSI/SSP is Pending/Applied

2. The new program status reason CT73 'Restoration Application is Approved' will be set as a non display status reason when all the following conditions are met:
 - a. The program mode is intake.
 - b. The GAGR program is approved for the benefit month.
 - c. The program aid code is not '9B' ('Indigent Burial').

- d. The program application type = 'Restoration' (Application Type = 'Restoration' in Application Detail page).

Category	Short Description
73	Restoration Application is Approved

- 3. The new program status reason CT73 'Approval of Last Date of Aid' will be set as a non display status reason when all the following conditions are met:
 - a. The program mode is intake.
 - b. The GAGR program is approved for the benefit month.
 - c. The program aid code is not '9B' ('Indigent Burial').
 - d. The program application type is not 'Restoration' (Application Type is not 'Restoration' in Application Detail page).
 - e. The rule 'Earned Income – Sacramento Only.' Is active.
 - f. Last Date of Aid is in current benefit month.

Category	Short Description
73	Approval of Last Date of Aid

- 4. The new program status reason CT73 'Board and Care App is Approved' will be set as a non display status reason when all the following conditions are met:
 - a. The program mode is intake.
 - b. The GAGR program is approved for the benefit month.
 - c. The program aid code is not '9B' ('Indigent Burial').
 - d. The program application type is not 'Restoration' (Application Type is not 'Restoration' in Application Detail page).
 - e. All the following in I or II:
 - I. Both rules are active:
 - i. 'Room Board & Shelter applicable.'
 - ii. 'Meeting shelter conditions.'
 - II. The rule 'Room Board situation.' is active.
 - f. 'Indv Eligible for Room and Board' is true (determined in Room, Board, shelter use case).

Category	Short Description
----------	-------------------

73	Board and Care App is Approved
----	--------------------------------

5. The new program status reason CT73 'Approved and in Drug Alcohol Treatment Facility' will be set as a non display status reason when all the following conditions are met:
- a. The program mode is intake.
 - b. The GAGR program is approved for the benefit month.
 - c. The program aid code is not '9B' ('Indigent Burial').
 - d. The program application type is not 'Restoration' (Application Type is not 'Restoration' in Application Detail page).
 - e. The person has an entry in Living Arrangements Detail page applicable for the benefit month.
 - f. Facility Sub-Type in Living Arrangement Detail page is one of the following:
 - 'Alternative General Assistance Program Drug & Alcohol'.
 - 'Drug and Alcohol Rehab Public Funding'.
 - 'Drug and Alcohol Treatment Private Funding'.
 - g. One of the following rules is active:
 - 'Earned income – Santa Cruz and Santa Clara Only.'
 - 'Earned income – San Luis Obispo Only.'

Category	Short Description
73	Approved and in Drug Alcohol Treatment Facility

6. The new program status reason CT73 'Approved for First Two Trimesters of Pregnancy' will be set as a non display status reason when all the following conditions are met:
- a. The program mode is intake.
 - b. The GAGR program did not fail for the benefit month.
 - c. The program aid code is not '9B' ('Indigent Burial').
 - d. The program application type is not 'Restoration' (Application Type is not 'Restoration' in Application Detail page).
 - e. Any individual in the program is 'Pregnant'.

Category	Short Description
73	Approved for First Two Trimesters of Pregnancy

2.5.4.3 Correspondence

2.5.4.3.1 Overview

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

The reason codes listed in the rule recommendations are formatted as <CalWIN Reason Code> - <CalSAWS EDBC 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.

2.5.4.3.2 Description of Change

1. **Reason Code: E10062 - Indv App is Approved**

a. Trigger Condition

- i. This form generates for the applicable counties when the program was 'Pending' and is now 'Active' on the current EDBC with the reason 'Indv App is Approved'.

b. Program Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Santa Clara	N/A	General Assistance Repayment Responsibility	SC 588 (01/03)	502978

2. **Reason Code: XAF010 - Approved for First Two Trimesters of Pregnancy**

a. Trigger Condition

- i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Active' on the current EDBC with the reason 'Approved for First Two Trimesters of Pregnancy'.

b. Program Level Reason

c. County-specific information:

County	Action	Document Description	Number	Template
Contra Costa	Approval	Approval of General Assistance - Pregnancy	101 3	12591

3. **Reason Code: XAF340 - Restoration Application is Approved**

a. Trigger Condition

- i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Active' on the current EDBC with the reason 'Restoration Application is Approved'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Placer	Approval	Generic GA/GR Approval - Placer	CalSAWS 1-Placer	11633
Sonoma	Approval	Generic GA/GR Approval - Sonoma	CalSAWS 1-Sonoma	12537

4. Reason Code: XAF409 - Pgm Approved and SSI/SSP is Pending/Applied.

- a. Trigger Condition
 - i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Active' on the current EDBC with the reason 'Pgm Approved and SSI/SSP is Pending/Applied'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Fresno	Approval	Generic GA/GR Approval - Fresno	CalSAWS 1-Fresno	11549
Placer	Approval	Generic GA/GR Approval - Placer	CalSAWS 1-Placer	11633
Santa Clara	Approval	Generic GA/GR Approval - Santa Clara	CalSAWS 1-Santa Clara	12034
Santa Clara	Approval	Approval of interim assistance	GA 200	12628
Santa Cruz	Approval	Generic GA/GR Approval - Santa Cruz	CalSAWS 1-Santa Cruz	607311
San Diego	Approval	Generic GA/GR Approval - San Diego	CalSAWS 1-San Diego	12721
San Francisco	Approval	Generic GA/GR Approval - San Francisco	CalSAWS 1-San Francisco	12667
San Luis Obispo	Approval	Generic GA/GR Approval - San Luis Obispo	CalSAWS 1-San Luis Obispo	11929
Solano	Approval	Generic GA/GR Approval - Solano	CalSAWS 1-Solano	12129
Sonoma	Approval	Generic GA/GR Approval - Sonoma	CalSAWS 1-Sonoma	12537
Tulare	Approval	Generic GA/GR Approval - Tulare	CalSAWS 1-Tulare	12198
Yolo	Approval	Generic GA/GR Approval - Yolo	CalSAWS 1-Yolo	12219

5. Reason Code: XAF630 - Approved and in Drug Alcohol Treatment Facility

- a. Trigger Condition
 - i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Active' on the current EDBC with the reason 'Approved and in Drug Alcohol Treatment Facility'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
San Luis Obispo	Approval	Generic GA/GR Approval - San Luis Obispo	CalSAWS 1-San Luis Obispo	11929

6. Reason Code: XAN428 - Approval of Last Date of Aid.

- a. Trigger Condition
 - i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Active' on the current EDBC with the reason 'Approval of Last Date of Aid'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Sacramento	Approval	Approval of Aid to Payday Benefit Notice	SC 610G	608821

7. Reason Code: XAN656 - Board and Care App is Approved

- a. Trigger Condition
 - i. This notice generates for the applicable counties when the program was 'Pending' and is now 'Active' on the current EDBC with the reason 'Shelter Cost not Allowed for Property Manager or Agent'.
- b. Program Level Reason
- c. County-specific information:

County	Action	Document Description	Number	Template
Santa Clara	Approval	GA Board and Care Approved	GA 909	12068

2.5.5 Financial overall flow

An updated financial overall flow including financial functionalities designed in phase 2 batch 4 and 5 is added to the Visio document. Please refer the [Rules](#)

[Flow Diagram](#) in the Appendix section on how to open and navigate the Visio diagram.

2.5.6 Now Testable Features

The following is a list of assumptions that was added in phase 2 of features that could not be tested and can now be tested.

1. Financial other person functionality cannot be tested in 21.11 release due to the outputs from this functionality are used in SCR CA-229096.
2. Drug and Alcohol use case is not implemented. So, the 'Zero Grant Flag' cannot be evaluated, and the status reason 'Individual in Approved Drug and Alcohol Trtmnt Fclty Pay Zero Grant' cannot be tested.
3. Status reason for Lumpsum POI cannot be tested until phase 3.
4. The following status reason and any functionality related it or the condition 'The individual is applying for GA/GR program and is applying (with parent or Caretaker relative)')' cannot be tested until phase 2 batch 5 SCR CA-233488.
 - XAS768 - Parent/Caretaker not applying,
 - XAN519 - Person is Single.

Note: Please see Visio document of CA-233488 for updated condition of the status reasons.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	GAGR Grant Additional Functionality	Multiple Budget scenario for EDBC summary page.	 Multiple Budgets-Scenarios.xls

4 REQUIREMENT

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2314	<p>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:</p> <ol style="list-style-type: none"> 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 	<p>Eligibility:</p> <p>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</p> <p>Create new</p> <ul style="list-style-type: none"> • 21 Difficult rules • 24 Medium rules • 13 Easy rules <p>Modify existing</p> <ul style="list-style-type: none"> • 14 Difficult rules • 23 Medium rules • 15 Easy rules <p>Batch/Interfaces</p> <p>Up to 20 new Batch sweeps will be created in CalSAWS to handle the MU triggers that is currently existing for CalWIN GR program</p> <p>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.</p>	<p>The following subsequent Rules migrated in this SCR will met these requirements.</p>

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

5 MIGRATION IMPACTS

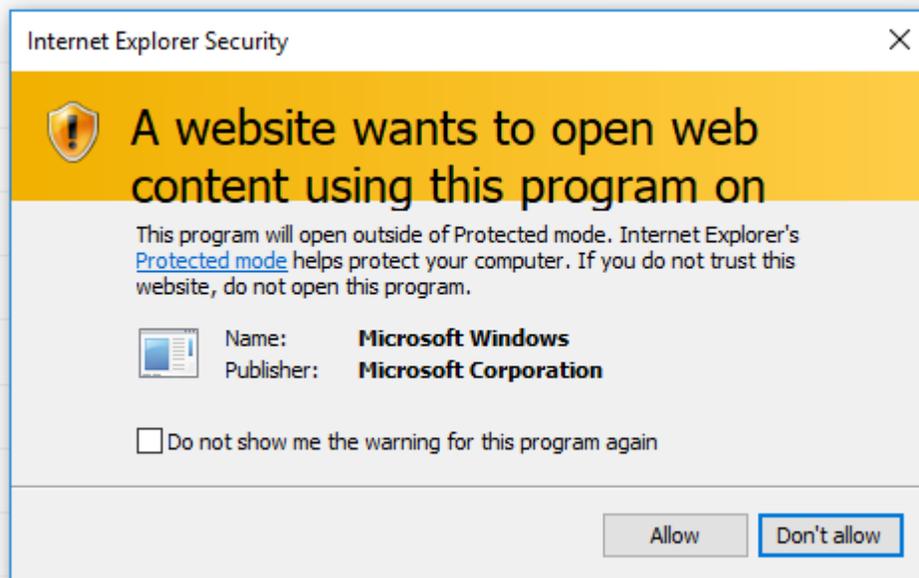
General Assistance/General Relief functionality will be implemented as a new program for the 57 counties excluding Los Angeles County. Los Angeles GA/GR functionality will not be modified.

6 APPENDIX

6.1 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



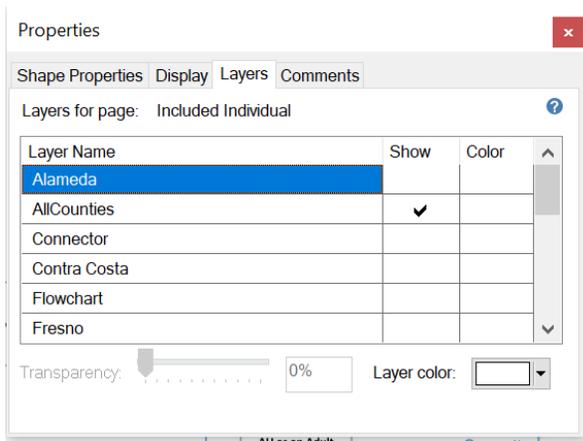
7. Click Allow Blocked Content.
8. Once the Visio opens in Internet Explorer, select the tab at the bottom and navigate using the buttons highlighted below for the appropriate rules (in this case Included Individual)



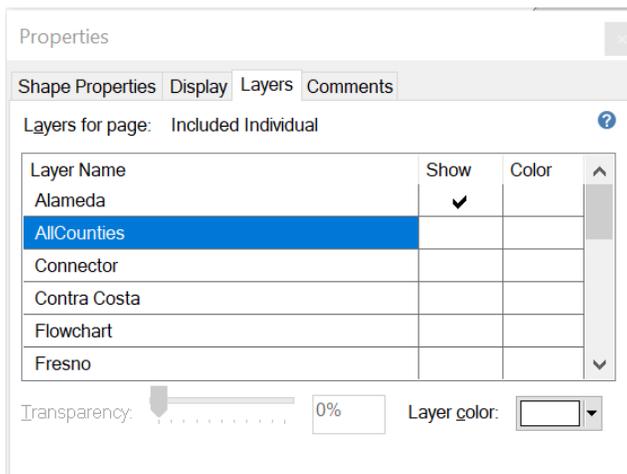
9. Click the layer icon circled in red color below



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



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.

6.2 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 CalWIN 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
E10062		Indv App is Approved	N				Y	Approval NOA
XAF010		Approved for First Two Trimesters of Pregnancy	N				Y	Approval NOA
XAF340		Restoration Application is Approved	N				Y	Approval NOA
XAF409		Pgm Approved and SSI/SSP is Pending/Applied	N				Y	Approval NOA
XAF630		Approved and in Drug Alcohol Treatment Facility	N				Y	Approval NOA
XAN428		Approval of Last Date of Aid	N				Y	Approval NOA
XAN656		Board and Care App is Approved	N				Y	Approval NOA

6.3 CalWIN RT table search reference (used by developers)

This table has how CalWIN currently search for county defined values used in EDBC. Developers will use this information to get the required values in CalSAWS.

Use Case	CalSAWs Table	Description (summary of what we are doing in this table)	Example	Category ID
Special Need Eligibility	Special Need expense	<p>The table 'GAGR Special Need expense' is used to retrieve the grant amount for a CalWIN County.</p> <p>The county code (CT 18) and the Need type (CT 200) will be used to retrieve the GA Amount.</p>	<p>Example: Get Contra Costa (07) defined 'maximum cremation cost amount' / 'GR budget net grant amount' for the need type: 'Indigent cremation' (IC).</p> <p>Search: Grant Amount</p> <p>From: Code Detail Table</p> <p>Where: Need Type: IC County: 07</p> <p>Result: Grant Amount = 825</p> <p>Contra Costa (07) 'maximum cremation cost amount' / 'GR budget net grant amount' for the need type: 'Indigent cremation' (IC) is 825.</p>	10662

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-236997

Retro Month EDBC on Converted Cases

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Paul Galloway
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2021-11-24	.01	Initial Draft	Paul Galloway
2021-12-10	.02	Updates following Build & Test review	Paul Galloway
2021-01-19	1.01	Design clarification to EDBC logic in sections 2.1.3 & 2.2.3 to say CONV_DATE is "in calendar year 2021". Prevents the new security right from applying to CalWIN data once it is converted into CalSAWS.	Paul Galloway
2021-01-20	1.02	Delete recommendation 2.2 and any other references to the Negative Action Detail page so the SCR is now only updating the Run EDBC page.	Paul Galloway

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1 OVERVIEW

When C-IV counties migrated to CalSAWS, the Run EDBC page had restrictions on running EDBC for benefit months prior to migration on converted programs. After migration, a workload impact was detected when workers who process multiple retro months of EDBC were forced to do Manual EDBC's which are more time-consuming. Allowing some workers to run EDBC for additional pre-migration months can help relieve this impact.

1.1 Current Design

Page validation on the Run EDBC and Negative Action Detail pages prevents workers from running EDBC on a program converted from C-IV for a benefit month prior to:

- 6/2021 if the program is CalWORKs(CW), CalFresh(CF), Kin-GAP(KG), Medi-Cal(MC), or Nutrition Benefit(NB),
- 10/2021 if the program is Foster Care(FC), Adoption Assistance Program (AAP), Disaster CalFresh, Cash Assistance Program for Immigrants (CAPI), Refugee Cash Assistance (RCA), Diversion, General Assistance/General Relief (GA/GR), Homeless Assistance (HA) Permanent and Temporary, and Immediate Need (IN).

The validation logic on the pages uses the Conversion Date field on the Program Table (PGM.CONV_DATE) which is not visible to users online. That field was populated during conversion and was set to 5/31/2021 for programs in the first bullet above, and 9/30/2021 for those in the second bullet.

If a user selects an earlier Begin Month (on Run EDBC) or Benefit Month (on Negative Action Detail) on a converted C-IV program, the program(s) do not display, and the user sees this message instead:

"<List of Program(s)>: EDBC cannot be run for this program(s) prior to <MM/YYYY>. Please use Manual EDBC for months prior to <MM/YYYY>."

1.2 Requests

IEVS workers typically process EDBC for retro months. Processing multiple months of Manual EDBCs creates a workload impact. C-IV migration counties have requested the ability to run regular EDBC for some programs beginning with the 1/2021 benefit month.

1.3 Overview of Recommendations

1. Add a new security right that allows a worker with that right to run EDBC for retro months prior to the Conversion Date (PGM.CONV_DATE) set during C-IV conversion.
2. Update validation on the Run EDBC page for CW, CF, and NB programs converted from C-IV to allow workers with the new security right to select a Begin Month prior to the PGM.CONV_DATE but no earlier than 1/1/2021. This will

- override the current restriction on running prior to the PGM.CONV_DATE. All other validations on the page will remain unchanged.
3. Add a warning message on the Run EDBC page when a worker selects a Begin Month prior to the PGM.CONV_DATE for a converted CW, CF, or NB program and clicks Run EDBC. The message is to remind the worker that they may receive unexpected results running EDBC prior to the PGM.CONV_DATE and it may require them to do a Manual EDBC. The warning message will not prevent a worker with the security right from running EDBC.
 4. Update validation on the Negative Action Detail page for CW, CF, and NB programs converted from C-IV to allow workers with the new security right to select a Benefit Month prior to the PGM.CONV_DATE but no earlier than 1/1/2021. This will override the current restriction on running prior to the PGM.CONV_DATE. All other validations on the page will remain unchanged.
 5. Add a warning message on the Negative Action Detail page that will display when a worker with the new security right selects a Begin Month before the PGM.CONV_DATE and there is a converted CW, CF, or NB program on the case. The warning message will not prevent a worker with the security right from running EDBC.
 6. Issue a CIT prior to implementing this change to notify counties that there is no formal assurance of EDBC functionality for converted CW, CF, and NB programs for benefit months prior to 06/2021. As such, there may be limited support of related issues or errors escalated through the helpdesk process.

1.4 Assumptions

1. The restriction on running EDBC for retro months only applies to programs that existed in C-IV and were converted to CalSAWS. Converted programs are identified by a PGM.CONV_DATE that is not MIN_DATE (i.e., 1/1/1000). New programs created in CalSAWS (even if they are on a case that was converted from C-IV) have the PGM.CONV_DATE set to MIN_DATE, so there is no restriction on how far back EDBC can run on them other than existing restrictions based on Application Date, original County Go-Live date, etc.
2. The message that displays when workers select a Begin/Benefit Month earlier than the CONV_DATE was set by CA-228383 "Update Run EDBC Validation Message for Conversion Months." If a worker with the new security right selects a Begin/Benefit Month prior to 1/2021 on a converted CW/CF/NB program, the message will display using the value in the PGM.CONV_DATE field. This means it will still say "EDBC cannot be run for this program(s) prior to **6/2021**..." even though workers with the new security right can run for months prior to that date. No change is being made to the message in this SCR.

2 RECOMMENDATIONS

2.1 Eligibility: Run EDBC Page

2.1.1 Overview

The list of programs available to select for EDBC is updated when the Begin Month dropdown is changed on the Run EDBC page. Currently, programs will not display on the Run EDBC Page if the Begin Month selected is earlier than the Conversion Date (PGM.CONV_DATE). When workers select a Begin Month prior to that date, they see a message indicating that they can only do Manual EDBC for the converted programs for those months.

This SCR adds a new security right so certain workers can select a Begin Month as far back as 1/2021 on the Run EDBC page for CW, CF, and NB programs converted from C-IV.

2.1.2 Run EDBC Mockup

The screenshot shows the 'Run EDBC' page in a web application. The top navigation bar includes 'Case Info', 'Eligibility' (selected), 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. Below the navigation, the page title is 'Run EDBC'. A legend indicates that an asterisk (*) denotes required fields. There are two buttons: 'Change Reason' and 'Cancel'. The 'Benefit Processing Range' section shows 'Begin Month: *' set to '05/2021' and 'End Month: *' set to '01/2022'. Below this is a table with columns: Program, Status, Timely Notice Exception, Reason, and Run Reason. A message is displayed below the table: 'CalFresh, CalWORKs, Nutrition Benefit: EDBC cannot be run for this program(s) prior to 06/2021. Please use Manual EDBC for months prior to 06/2021.'

Figure 2.1.2.1 – Current Functionality: Begin Month before 6/2021 on converted CW/CF/NB programs displays this message. Will not change for workers who don't receive new security right.

Case Info **Eligibility** Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Run EDBC

* - Indicates required fields

Change Reason Run EDBC Cancel

Benefit Processing Range:

Begin Month: * 05/2021 **End Month: *** 07/2021

<input type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	CalFresh	Active	No		
<input checked="" type="checkbox"/>	Nutrition Benefit	Active	No		
<input checked="" type="checkbox"/>	CalWORKs	Active	No		

Figure 2.1.2.2 – New Functionality: Begin Month from 1/2021 to 5/2021 on converted C-IV programs for workers with new security right. CW/CF/NB programs display with checkbox (if the program is available for the month).

Case Info **Eligibility** Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Run EDBC

* - Indicates required fields

Change Reason Run EDBC Cancel

Benefit Processing Range:

Begin Month: * 05/2021 **End Month: *** 07/2021

<input type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	CalFresh	Active	No		
<input checked="" type="checkbox"/>	Nutrition Benefit	Active	No		
<input checked="" type="checkbox"/>	CalWORKs	Active	No		

Running EDBC for benefits months between 1/2021 and 5/2021 on a converted program may produce unexpected results. A manual EDBC may be necessary.

Selected End Month is not in the Come-Up(Future) Month.

Figure 2.1.2.3 – New Functionality: Begin Month from 1/2021 to 5/2021 on converted C-IV programs displays new warning message after worker clicks Run EDBC button.

Figure 2.1.2.4 – Current/New Functionality: Begin Month before 1/2021 on converted CW/CF/NB programs displays existing message to all workers regardless of new security right.

Message will show “6/2021” even if a worker has new security right and can run 1/2021 – 5/2021. (See [1.4-Assumptions # 2.](#))

2.1.3 Description of Changes

1. Update Run EDBC Begin Month dropdown processing to check if the worker has the new RunCnvrtdRetroEDBC security right when determining which programs to display in the program list.
2. If the new security right is found, display the programs and checkboxes, and do not display the message “EDBC cannot be run for this program(s) prior to <MM/YYYY>...” if:
 - a. The Begin Month is before the PGM.CONV_DATE but no earlier than 1/2021; and,
 - b. The program is CW, CF, or NB and was converted from C-IV (identified by a CONV_DATE that is **in calendar year 2021**).

Note: this does not change any other validations that determine if a program can display on the page such as application date, status, etc.

3. Add a new warning message to the Run EDBC page:

Running EDBC for benefits months between 1/2021 and 5/2021 on a converted program may produce unexpected results. A manual EDBC may be necessary.
4. Display the new warning message when the Run EDBC button is clicked, and the following are all true:
 - a. The worker has the new security right.
 - b. The Begin Month is before the PGM.CONV_DATE.
 - c. The selection includes a CW, CF, or NB program converted from C-IV (identified by a CONV_DATE that is **in calendar year 2021**).

Note: The new message is a warning (like the existing “Selected End Month is not in the Come-Up(Future) Month”, “The following verification(s) have not been received: ”, etc.). It will not prevent a worker from continuing onward with running EDBC by clicking the “Run EDBC” button again (or clicking “Run EDBC w/o Verifications” if it displays).

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Run EDBC

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
RunCnvrtdRetroEDBC	Run EDBC and Negative Action pages allow selection of a Begin Month on programs converted from C-IV that are otherwise not allowed.	Run Converted Retro EDBC

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Run Converted Retro EDBC	Run EDBC and Negative Action pages allow selection of a Begin Month on programs converted from C-IV that are otherwise not allowed.	See Security Matrix

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Eligibility: Negative Action Detail Page

2.2.1 Overview

The list of programs available to select on the Negative Action Detail page is updated when the Benefit Month dropdown is changed. Currently, programs will not display if the Benefit Month selected is earlier than the Conversion Date (PGM.CONV_DATE). When workers select a Benefit Month prior to that date, they see a message indicating that they can only do Manual EDBC for the converted programs for those months.

This SCR adds a new security right so certain workers can select a Benefit Month as far back as 1/2021 on the Negative Action Detail page for CW, CF, and NB programs converted from C-IV.

2.2.2 Negative Action Detail Mockup

The screenshot shows a web interface with a navigation bar at the top containing tabs: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled "Negative Action Detail" and includes a legend: "* - Indicates required fields". Below this is a "Benefit Month: *" dropdown menu with "05/2021" selected. A message below the dropdown reads: "CalFresh, CalWORKs: EDBC cannot be run for this program(s) prior to 06/2021. Please use Manual EDBC for months prior to 06/2021."

Figure 2.2.2.1 – Current Functionality: Begin Month Before 6/2021 on converted CW/CF/NB programs displays this message. Will not change for workers who don't receive new security right.

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Negative Action Detail

*- Indicates required fields Run EDBC

Running EDBC for benefits months between 1/2021 and 5/2021 on a converted program may produce unexpected results. A manual EDBC may be necessary.

Benefit Month: *
05/2021

CalWORKS	Run EDBC for this program	SSN	Date of Birth
<input type="checkbox"/> Person			
<input type="checkbox"/> PERSON, TWO 6M		222-33-4444	05/05/2015
<input type="checkbox"/> PERSON, ONE 26F		111-22-3333	05/05/1995

Negative Action Reason:
▼

Figure 2.2.2.2 – New Functionality: Begin Month from 1/2021 to 5/2021 on converted C-IV programs for workers with new security right. CW/CF/NB programs display (if available for the month) along with the new warning message.

2.2.3 Description of Changes

1. Update Negative Action Detail Benefit Month dropdown processing to check if worker has new RunCnvrtdRetroEDBC security right when determining which programs to display.
2. If the new security right is found, display the programs, and do not display the message "EDBC cannot be run for this program(s) prior to <MM/YYYY>..." if:
 - a. The Benefit Month is before the PGM.CONV_DATE but no earlier than 1/2021; and,
 - d. The program is CW, CF, or NB and was converted from C-IV (identified by a CONV_DATE that is in calendar year 2021).

Note: this does not change any other validations that determine if a program can display on the page such as application date, status, etc.

3. Add a new warning message to the Negative Action Detail page:

Running EDBC for benefits months between 1/2021 and 5/2021 on a converted program may produce unexpected results. A manual EDBC may be necessary.

4. Display the new warning message when the Benefit Month dropdown is changed, and the following are all true:
 - a. The Benefit Month is before the PGM.CONV_DATE.
 - b. The programs displayed include a CW, CF, or NB converted from C-IV (identified by a CONV_DATE that is in calendar year 2021).

Note: the new message is a warning and will not prevent the worker from continuing onward when they click the "Run EDBC" button.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** N/A
- **Task:** Negative Action

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right-to-Group Mapping
RunCnvrtdRetroEDBC	Run EDBC and Negative Action pages allow selection of a Begin Month on programs converted from C-IV that are otherwise not allowed.	Run Converted Retro-EDBC

4. Security Groups

Security Group	Group Description	Group-to-Role Mapping
Run Converted Retro-EDBC	Run EDBC and Negative Action pages allow selection of a Begin Month on programs converted from C-IV that are otherwise not allowed.	See Security Matrix

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	CA-236997 Retro Month EDBC on Converted Cases Security Matrix.xls

4 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

5 OUTREACH

A CIT will be issued by the consortium prior to implementing this change to notify counties that there is no formal assurance of EDBC functionality for benefit months prior to 06/2021 for converted C-IV cases. As such, there may be limited support of related issues or errors escalated through the helpdesk process.