

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-238253 DDID 2319 FDS: GA/GR – Group 7
Forms Design

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Stephanie Hugo, Harish Katragadda
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/2/2021	1.0	Initial revision	Stephanie Hugo

Table of Contents

1	Overview	6
1.1	Current Design.....	6
1.2	Requests.....	6
1.3	Overview of Recommendations.....	6
1.4	Assumptions.....	6
2	Recommendations.....	7
2.1	Add Online Notice Trigger for the General Relief – Approval – Facility NOA	7
2.1.1	Overview	7
2.1.2	Correspondence Information.....	7
2.1.3	Description of Change.....	7
2.2	Add Online Form trigger for the Generic Sanction Lift Letter	8
2.2.1	Overview	8
2.2.2	Correspondence Information.....	8
2.2.3	Description of Change.....	8
2.3	Add Online Form Trigger for the Interview Checklist	8
2.3.1	Overview	8
2.3.2	Correspondence Information.....	8
2.3.3	Description of Change.....	9
2.3.4	Miscellaneous Parameters.....	9
2.4	Add Online Form Trigger for the Redetermination Appointment Letter	9
2.4.1	Overview	9
2.4.2	Correspondence Information.....	9
2.4.3	Description of Change.....	9
2.4.4	Miscellaneous Parameters.....	10
2.5	Add Online Form Trigger for the Appointment Letter for Public Assistance	10
2.5.1	Overview	10
2.5.2	Correspondence Information.....	10
2.5.3	Description of Change.....	10
2.6	GA/GR Redetermination (RE) Packet Batch	11
2.6.1	Overview	11
2.6.2	Description of Changes.....	11
2.6.3	Programs Impacted	12

2.6.4	Execution Frequency	12
2.6.5	Key Scheduling Dependencies	12
2.6.6	Counties Impacted	12
2.6.7	Data Volume/Performance	12
2.7	Add Batch Form Trigger for the GR Authorization to Release Medical Information.....	12
2.7.1	Overview	12
2.7.2	Correspondence Information.....	12
2.7.3	Description of Change.....	13
2.8	Add Batch Form Trigger for the Redetermination Appointment Letter	13
2.8.1	Overview	13
2.8.2	Correspondence Information.....	13
2.8.3	Description of Change.....	14
2.8.4	Miscellaneous Parameters.....	14
2.9	GA/GR Periodic Reporting (PR) Correspondence Batch.....	15
2.9.1	Overview	15
2.9.2	Correspondence Information.....	15
2.9.3	Description of Change.....	15
2.9.4	Execution Frequency	16
2.9.5	Key Scheduling Dependencies	16
2.9.6	Counties Impacted	17
2.9.7	Data Volume/Performance	17
2.9.8	Failure Procedure/Operation Instructions	17
2.10	Online and Batch Trigger for the General Assistance Discontinuance – NEC Notice	17
2.10.1	Overview	17
2.10.2	Correspondence Information.....	17
2.10.3	Description of Change – Online Trigger	17
2.10.4	Description of Change – Batch Trigger	17
2.10.5	Execution Frequency	18
2.10.6	Key Scheduling Dependencies.....	18
2.10.7	Counties Impacted.....	18
2.10.8	Data Volume/Performance	18
2.10.9	Failure Procedure/Operational Instructions.....	18
2.11	Add Batch Form Trigger for the Self-Employment Sworn Statement	19

2.11.1	Overview	19
2.11.2	Correspondence Information.....	19
2.11.3	Description of Change.....	19
2.12	Add Batch Form Trigger for the Daily Tip Statement	20
2.12.1	Overview	20
2.12.2	Correspondence Information.....	20
2.12.3	Description of Change.....	20
2.13	Customer Reporting List Page Updates	21
2.13.1	Overview.....	21
2.13.2	Customer Reporting List Mockups	21
2.13.3	Description of Changes	22
2.13.4	Page Location	24
2.13.5	Security Updates	24
2.13.6	Page Mapping	24
2.13.7	Page Usage/Data Volume Impacts	24
2.14	Update Online Trigger to Send EDBC Information	24
2.14.1	Overview	24
2.14.2	Correspondence Information.....	24
2.14.3	Description of Change.....	26
3	Supporting Documents	26
4	Requirements.....	26
4.1	Migration Requirements	26

1 OVERVIEW

This SCR will implement the seventh group of Non-EDBC triggers and Manual-Only correspondences for the GA/GR Automated Solution Program.

1.1 Current Design

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program.

1.2 Requests

A new GA/GR Automated 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 add additional Non-EDBC triggers through either online or batch.

1.3 Overview of Recommendations

1. Add Online Notice Trigger for the General Relief – Approval – Facility NOA
2. Add Online Form trigger for the Generic Sanction Lift Letter
3. Add Online Form Trigger for the Interview Checklist
4. Add Online Form Trigger for the Redetermination Appointment Letter
5. Add Online Form Trigger for the Appointment Letter for Public Assistance
6. GA/GR Redetermination (RE) Packet Batch
7. Add Batch Form Trigger for the GR Authorization to Release Medical Information
8. Add Batch Form Trigger for the Redetermination Appointment Letter
9. GA/GR Periodic Reporting (PR) Correspondence Batch
10. Online and Batch Trigger for the General Assistance Discontinuance – NEC Notice
11. Add Batch Form Trigger for the Self-Employment Sworn Statement
12. Add Batch Form Trigger for the Daily Tip Statement
13. Customer Reporting List Page Updates
14. Update Online Trigger to Send EDBC Information

1.4 Assumptions

1. All the changes in this SCR will not affect the Los Angeles GA, GA (Managed) and GA (Non-Managed) programs.
2. This SCR will only implement triggers based on the existing CalWIN GA/GR Correspondences. Verbiage and format was covered in SCR CA-215920.
3. All triggers are based on current existing triggers in CalWIN.
4. The triggers will only be available to cases from counties that are mentioned in the recommendation's respective "Correspondence Information" section.

5. The functionality of this SCR will be disabled until activated by the system date enabling the GA/GR Automated Solution implemented in CA-215687.
6. Miscellaneous Parameter implementation and functionality was implemented in SCR CA-215920 covering the technical details of the GA/GR Correspondence Functionality on the CalSAWS side.
7. This SCR follows the general Online Non-EDBC Correspondence Generation recommendation (rec. 2.1) from CA-215670.
8. There will be no Correspondence document Mailed out for GA/GR RE packet
9. There will be no automation of the GA/GR RE packet Customer Packet Record once after it is created, workers are expected to update the GA/GR RE packet status manually following their county business process.

2 RECOMMENDATIONS

2.1 Add Online Notice Trigger for the General Relief – Approval – Facility NOA

2.1.1 Overview

This notice is triggered when the Vendor is receiving the entire benefit amount on the EDBC.

2.1.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
X70005	Fresno	Notice of Action	Approval	General Relief - Approval - Facility	104-B (01/21)	12714

2.1.3 Description of Change

Trigger the correspondence for Fresno upon "Save and Continue" of an EDBC and the following conditions are met:

1. There is an EDBC for a GA/GR Automated Solution Program that is **"Active"**.
2. The GA/GR Automated Solution Program has been approved on the current EDBC.
3. The GA/GR Recipient was approved in a Type-6 Facility.
4. There is a Money Management section on the current GA/GR EDBC.
5. The Vendor is receiving the entire benefit amount.

2.2 Add Online Form trigger for the Generic Sanction Lift Letter

2.2.1 Overview

This form is triggered when a Sanction is no longer applicable or was created in error for a GA/GR recipient.

2.2.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
1C125A	Sacramento	Forms	N/A	Generic Sanction Lift Letter	CDS 282-A (05/03)	327717

2.2.3 Description of Change

Trigger the correspondence for Sacramento upon saving the Sanction Detail page and the following conditions are met:

1. The Person selected is a person on a GA/GR Automated Solution Program that is "**Pending**" or "**Active**".
2. The End Reason selected is either:
 - a. Sanction No Longer Applicable
 - b. Sanction Created in Error
3. The Sanction is current (current date is between the Begin Date and End Date).
4. One of the following is true:
 - a. A new Sanction Detail record was created.
 - b. An existing Sanction Detail record was updated and now matches the above conditions

2.3 Add Online Form Trigger for the Interview Checklist

2.3.1 Overview

This form is triggered when an Intake Appointment is created.

2.3.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
J00043	All	Forms	N/A	Interview Checklist	CSF 77 (01/08)	506956

2.3.3 Description of Change

Trigger the correspondence for All opted-in counties upon saving the Customer Appointment Detail page and the following conditions are met:

1. The Customer is an applicant of a GA/GR Automated Solution Program that is "**Pending**" or "**Active**".
2. The Appointment Category is "**GA/GR Intake Interview**".
3. Status is "**Scheduled**".
4. Status Reason is either:
 - a. Batch Initiated
 - b. Worker Initiated
 - c. Client Initiated
 - i. Only trigger the correspondence for the "Client Initiated" status reason if the Appointment Date is more than 5 days from the current date.
5. A New Appointment Record is created.

2.3.4 Miscellaneous Parameters

The below miscellaneous parameters will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
J00043	"AP"	Appointment ID	Ex. AP8923789

2.4 Add Online Form Trigger for the Redetermination Appointment Letter

2.4.1 Overview

This form is triggered when a Re-Evaluation Appointment is created or updated.

2.4.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
J00051	All	Forms	N/A	Redetermination Appointment Letter	CSC 35	607286

2.4.3 Description of Change

Trigger the correspondence for All opted-in counties upon saving the Customer Appointment Detail page and the following conditions are met:

1. The Customer is a recipient of a GA/GR Automated Solution Program that is "**Active**".

2. The Appointment Category is "**Re-evaluation GA/GR Interview**".
3. Status is "**Scheduled**".
4. A new Customer Appointment Record is created or an existing Customer Appointment record has been updated and now meets the above conditions.

2.4.4 Miscellaneous Parameters

The below miscellaneous parameters will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
J00051	"PG"	Program Code	Ex. PGGR

2.5 Add Online Form Trigger for the Appointment Letter for Public Assistance

2.5.1 Overview

This form is triggered when a client appointment is created or updated. This excludes the "Re-evaluation GA/GR Interview".

2.5.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
J00037	All	Forms	N/A	Appointment Letter for Public Assistance	CSF 6	506513
J00037	Alameda	Forms	N/A	Appointment Letter for Public Assistance	CSF 6 ALA (01/20)	611252

2.5.3 Description of Change

Trigger the correspondence for All opted-in counties upon saving the Customer Appointment Detail page and the following conditions are met:

1. The Customer is a applicant/recipient of a GA/GR Automated Solution Program that is "**Pending**" or "**Active**".
2. The Appointment Category is either:
 - a. General Appointment (for the following Appointment Types):
 - i. Fingerprinting
 - ii. GR Case Manager
 - iii. GR Hearing
 - iv. GR Medical
 - v. GA/GR Employment Services

- vi. Client Referral
- vii. GA/GR Verification
- b. GA/GR Intake Interview
- 3. Status is "**Scheduled**".
- 4. A new Customer Appointment Record is created or an existing Customer Appointment record has been updated.

2.6 GA/GR Redetermination (RE) Packet Batch

2.6.1 Overview

This section describes the Creation of GA/GR Redetermination (RE) packet for the GA/GR Automated Solution Program cases which has Redetermination due from the Batch.

2.6.2 Description of Changes

1. Create a new Batch Job for counties to create a GA/GR RE packet for the cases which meet the following conditions
 - a. Case has an active GA/GR Automated Solution Program on the case
 - b. RE due Month is 2nd month after the current month.
 - c. A GA/GR RE packet is not already created for the GA/GR Automated Solution Program for the RE due month.
 - d. GA/GR Redetermination is not complete for the Program for the RE due month.

Example Time line:

GA/GR Re Due Month: April 2022 (April 30,2022)

GA/GR RE packet Generation through Batch: February 15, 2022

2. Only Customer Reporting Record will be created for GA/GR RE packet, there will be no document mailed out to the Case person from CalSAWS application.
3. For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a GA/GR RE Packet.

Transaction values:

- a. Case ID: Case associated to GA/GR Automated Solution Counties Program
- b. Program ID: Program ID
- c. Person ID: Primary Applicant of Active GA/GR Automated

© 2019 CalSAWS. All Rights Reserved.

- Solution Program
- d. Type Code: TBD by build
- e. Sub Type Code: TBD by build
- f. Eff Date: Batch Date
- g. Created By: Batch
- h. Updated By: Batch

4. Create Journal Entry for GA/GR RE packet from Recommendation 2.11.

2.6.3 Programs Impacted

General Assistance/General Relief (GR)

2.6.4 Execution Frequency

Monthly – 15th day of the month.

2.6.5 Key Scheduling Dependencies

This job will run before forms balancers.

2.6.6 Counties Impacted

All CalWIN counties

2.6.7 Data Volume/Performance

TBD.

2.7 Add Batch Form Trigger for the GR Authorization to Release Medical Information

2.7.1 Overview

This form is an additional form triggered from the GA/GR Redetermination (RE) Packet Batch for Homeless cases.

2.7.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
L00003	Orange	Forms	N/A	GR Authorization to Release Medical Information	F063-26-112 (5/95)	502366

2.7.3 Description of Change

Trigger the correspondence for Orange county during the GA/GR RE Packet Batch where the following conditions are met:

1. The program is picked up in the GA/GR Redetermination (RE) Packet Batch (from recommendation 2.6).
2. At least one person on the GA/GR Solution Program is Homeless, meaning, as of the current date, the person's "**Living in the Home Status**" on the Household Status Detail page is either
 - a. "**Temporarily Out of the Home**"
 - b. "**Permanently Out of the Home**".
3. At least one person on the GA/GR Solution Program has an "**Active**" Medical Condition record.

For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a GR Authorization to Release Medical Information form during batch forms processing.

Transaction values:

- i. Case ID: Case associated to GA/GR Automated Solution Program
- j. Program ID: Program ID
- k. Person ID: Primary Applicant of Active GA/GR Automated EDBC/CC Counties Program
- l. Type Code: FR
- m. Sub Type Code: TBD by build
- n. Eff Date: Batch Date
- o. Created By: Batch
- p. Updated By: Batch

2.8 Add Batch Form Trigger for the Redetermination Appointment Letter

2.8.1 Overview

This form is an additional form triggered from the GA/GR Redetermination (RE) Packet Batch for cases where a Re-Evaluation appointment is required.

2.8.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
-------------	--------	----------	------------	---------------	--------	----------

L00001	All	Forms	N/A	Redetermination Appointment Letter	CSC 35	607286
--------	-----	-------	-----	------------------------------------	--------	--------

2.8.3 Description of Change

Trigger the correspondence for all opted-in counties during the GA/GR RE Packet Batch where the following conditions are met:

1. The program is picked up in the GA/GR Redetermination (RE) Packet Batch (from recommendation 2.6).
2. A person on the program has an existing appointment record.
3. The Appointment Category is "**Re-evaluation GA/GR Interview**".
4. Status is "**Scheduled**".
5. Status Reason is "**Batch Initiated**".

For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a Redetermination Appointment Letter form during batch forms processing.

Transaction values:

- a. Case ID: Case associated to GA/GR Automated Solution Program
- b. Program ID: Program ID
- c. Person ID: Primary Applicant of Active GA/GR Automated Solution Program
- d. Type Code: FR
- e. Sub Type Code: TBD by build
- f. Eff Date: Batch Date
- g. Created By: Batch
- h. Updated By: Batch

2.8.4 Miscellaneous Parameters

The below miscellaneous parameters will be triggered.

Reason Code	Miscellaneous Parameter Code	Miscellaneous Parameter Description	Format/Example
L00001	"PG"	Program Code	Ex. PGGR

2.9 GA/GR Periodic Reporting (PR) Correspondence Batch

2.9.1 Overview

This Section outlines the batch trigger for Periodic Reporting correspondences for the GA/GR Solution Programs that are due for their periodic reporting.

2.9.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
N00004	San Francisco	Forms	N/A	CAAP Monthly Earned Income & Asset Report	CAAP 1	502588
N00004	San Luis Obispo	Forms	N/A	Eligibility Report - General Assistance	DSS GA 213	502820
N00004	Solano	Forms	N/A	GA Income/Job Search Report	48-70-20 (REV 3/12)	609782
N00004	Yolo	Forms	N/A	GA Monthly Eligibility Report	YC58	504829
N00012	Placer	Forms	N/A	Monthly Eligibility Report	CW 7	500974
N00012	Santa Barbara	Forms	N/A	Monthly Eligibility Report	CW 7-GR	507384
N00012	Santa Cruz	Forms	N/A	Monthly Eligibility Report	CW 7	507378
N00012	San Diego	Forms	N/A	Monthly Eligibility Report	CW 7	507375
N00014	All	Forms	N/A	Quarterly Eligibility/Status Report	QR 7 (12/08)	506925
N00023	Contra Costa	Forms	N/A	GA Quarterly Status Report	GA-QR7	609255
N00032	Santa Clara	Forms	N/A	Semi Annual Eligibility/Status Report SCL	SAR 7 (12/14)-SCL	610897

2.9.3 Description of Change

Create a new Batch Job to create Periodic Reporting Correspondences along with Customer reporting records for the applicable counties under the following conditions:

1. As of the batch run date, the program has the following reporting type for the corresponding reason code/s:
 - a. Semi-Annual Reporting
 - i. N00032
 - b. Quarterly Reporting
 - i. N00023
 - ii. N00014
 - c. Monthly Reporting
 - i. N00012
 - ii. N00004
2. There exists an active GA/GR Automated Solution program for the batch run month.
3. GA/GR Automated Solution program on the case is due for reporting in the next month (submit month).
4. There is not already a Periodic Reporting Correspondence that exists for the GA/GR Automated Solution program for the Submit Month.
5. For each record returned in the driving query, a record will be inserted into the batch transaction table to generate the respective PR Correspondence.

Transaction values:

- a. Case ID: Case associated to GA/GR Automated Solution Program
- b. Program ID: Program ID
- c. Person ID: Primary Applicant of Active GA/GR Automated Solution Program
- d. Type Code: FR
- e. Sub Type Code: TBD by build
- f. Eff Date: Batch Date
- g. Created By: Batch
- h. Updated By: Batch

Technical Note: For all these correspondences, the clock icon will need to be displayed on the bottom right of each page.

2.9.4 Execution Frequency

Monthly – 6th Day from the end of the Month

2.9.5 Key Scheduling Dependencies

This job will run before forms balancers.

2.9.6 Counties Impacted

See county affected in the correspondence information section (2.9.2)

2.9.7 Data Volume/Performance

N/A

2.9.8 Failure Procedure/Operation Instructions

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

2.10 Online and Batch Trigger for the General Assistance Discontinuance – NEC Notice

2.10.1 Overview

This form will be triggered by batch/online prior to the Re-Evaluation Due Date of the GA/GR Automated Solution Program.

2.10.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
XL0001	Yolo	Notice of Action	Discontinuance	General Assistance Discontinuance - NEC Notice	070-3	12254

2.10.3 Description of Change – Online Trigger

Trigger the correspondence for Yolo county upon editing and saving the GA/GR Automated Solution Detail page and the following conditions are met:

1. The GA/GR Automated Solution Program is “**Active**”
2. The RE Due Date has been updated.
3. The GA/GR recipient had an Unemployable status in the previous EDBC and is now Employable in the latest EDBC.

2.10.4 Description of Change – Batch Trigger

1. Create a new batch job to send the General Assistance Discontinuance - NEC Notice form for Yolo county when the following conditions are true:

- a. Case has an active GA/GR Automated Solution Program on the case
 - b. The program's RE due month is the month after the batch run month.
 - c. A GA/GR RE packet was created for the GA/GR Automated Solution Program for the RE due month.
 - d. GA/GR Redetermination is not complete for the Program for the RE due month.
2. For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a General Assistance Discontinuance - NEC Notice during batch forms processing.

Transaction values:

- a. Case ID: Case associated to GA/GR Automated EDBC/CC Counties Program
- b. Program ID: Program ID
- c. Person ID: Primary Applicant of Active GA/GR Automated EDBC/CC Counties Program
- d. Type Code: FR
- e. Sub Type Code: TBD by build
- f. Eff Date: Batch Date
- g. Created By: Batch
- h. Updated By: Batch

2.10.5 Execution Frequency

Monthly – 15th day of the month.

2.10.6 Key Scheduling Dependencies

This job will run before forms balancers.

2.10.7 Counties Impacted

This job will run for Yolo county.

2.10.8 Data Volume/Performance

N/A

2.10.9 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.11 Add Batch Form Trigger for the Self-Employment Sworn Statement

2.11.1 Overview

This form is an additional form triggered from the GA/GR Periodic Reporting (PR) Correspondence Batch for cases where there is a person on the GA/GR Automated Solution program that has Self-Employment Income.

2.11.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
N00001	All	Forms	N/A	Self-Employment Sworn Statement	CSF 35	506506

2.11.3 Description of Change

Trigger the correspondence for all opted-in counties during the GA/GR PR Batch where the following conditions are met:

1. The program is picked up in the GA/GR Periodic Reporting (PR) Batch (see recommendation 2.9).
2. A person on the program has an existing and current Income Detail record.
3. The Income Category is "**Earnings**".
4. The Income Type is "**Self-Employment**".
5. The Income Amount for Cash/CalFresh is greater than 0.
6. The person with this income as of the current date, has a "**Living in the Home Status**" of "**In the Home**".

For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a Self-Employment Sworn Statement form during batch forms processing.

Transaction values:

- a. Case ID: Case associated to GA/GR Automated Solution Program
- b. Program ID: Program ID
- c. Person ID: Primary Applicant of Active GA/GR Automated Solution Program
- d. Type Code: FR
- e. Sub Type Code: TBD by build
- f. Eff Date: Batch Date

© 2019 CalSAWS. All Rights Reserved.

- g. Created By: Batch
- h. Updated By: Batch

2.12 Add Batch Form Trigger for the Daily Tip Statement

2.12.1 Overview

This form is an additional form triggered from the GA/GR Periodic Reporting (PR) Correspondence Batch for cases where there is a person on the GA/GR Automated Solution program that has Income from Tips.

2.12.2 Correspondence Information

Reason Code	County	Category	NOA Action	Document Name	Number	Template
N00003	All	Forms	N/A	Daily Tip Statement	CSF 34	506504

2.12.3 Description of Change

Trigger the correspondence for all opted-in counties during the GA/GR PR Batch where the following conditions are met:

1. The program is picked up in the GA/GR Periodic Reporting (PR) Batch (see recommendation 2.9).
2. A person on the program has an existing and current Income Detail record.
3. The Income Category is "**Earnings**".
4. The Income Type is "**Tips**".
5. The Income Amount for Cash/CalFresh is greater than 0.
6. The person with this income as of the current date, has a "**Living in the Home Status**" of "**In the Home**".

For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a Daily Tip Statement form during batch forms processing.

Transaction values:

- a. Case ID: Case associated to GA/GR Automated Solution Program
- b. Program ID: Program ID
- c. Person ID: Primary Applicant of Active GA/GR Automated Solution Program
- d. Type Code: FR
- e. Sub Type Code: TBD by build
- f. Eff Date: Batch Date

- g. Created By: Batch
- h. Updated By: Batch

2.13 Customer Reporting List Page Updates

2.13.1 Overview

The GA/GR Customer Reporting List page will provide the user a list of Customer Reporting Reforms available for the county and enter the submit month for the form.

2.13.2 Customer Reporting List Mockups

Figure 2.4.2.1 GA/GR Customer Reporting List Page

Case Name: MOne Test
Case Number: N400544

Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Sacramento GAGR3 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Reporting

Case Number: Go

Person Search

Customer Reporting

Customer Reporting List

Search Results Summary Results 1 - 1 of 1

Display Type: GA/GR RE Packet Display Name: All From: To: View

Type	Name	Submit Month	Program	Status	Status Date
GA/GR RE Packet	ATHERTON, JOI 38F	01/2022	GR	Generated	01/17/2022

RE Month: * Generate GA/GR RE Packet

This Type 1 page took 0.33 seconds to load.

Figure 2.4.2.2 Customer Reporting List Page-After Packet Generation

2.13.3 Description of Changes

1. RE Month - Month for which GA/GR RE Packet is being created.
2. Display the 'RE Month' and the 'Generate GA/GR RE Packet' button when the user selects 'GA/GR RE Packet' in the Display Type drop down and Clicks 'View' button and there is GA/GR Automated Solution Program on the Case.
3. Generate GA/GR RE Packet button will create a GA/GR RE Packet for the RE Month selected and display the GA/GR RE Packet created in the Customer Reporting List page.
4. Create Customer Reporting Detail records for a GA/GR Automated Solution Program.
5. Create a new Customer Reporting type 'GA/GR RE Packet' and added to the Customer Reporting List page.
6. The following statuses will show in the "Status" section for the new forms on the view page when the form has been designated as such.
 - a. Generated
 - b. Sent
 - c. Received
 - d. Incomplete
 - e. Reviewed – Ready to run EDBC
 - f. Not Applicable
 - g. Complete – EDBC Accepted
7. The following statuses will have the respective Status options in the "Status" dropdown for the new forms on the edit page.
 - a. Generated

- i. Sent
 - ii. Received
 - iii. Not applicable
 - b. Sent
 - i. Received
 - ii. Not applicable
 - c. Received
 - i. Reviewed – Ready to run EDBC
 - ii. Incomplete
 - iii. Not applicable
 - d. Incomplete
 - i. Reviewed – Ready to run EDBC
 - ii. Not applicable
 - e. Not Applicable
 - f. Complete – EDBC Accepted
8. The following status options will have the respective status detail options in the "Status Detail" dropdown for the new forms on the edit page.
- a. Received
 - i. No Change
 - ii. Action Required
 - b. Incomplete
 - i. Pending Incomplete
9. Generate GA/GR RE Packet button and RE Due month will be accessible for the users with following existing Security Right
- a. CustomerReportingDetailEdit
10. Add the following Validation Message when 'GA/GR RE Packet' for RE Month' is already generated and Customer Reporting Record doesn't have a 'Not Applicable' or 'Error' status
- a. GA/GR RE Packet has been already created for the RE month.
11. Standard Mandatory required Fields Message will be displayed for RE Month.
- a. Field is required. Please enter a value.
12. Create a Journal Entry for the GA/GR RE Packet to be created.
- a. Short Description: GA/GR RE Packet
 - i. Journal Category: All
 - ii. Journal Type: Document
 - iii. Initiated By:
 - a. User – if completed by a worker
 - b. System – if completed through batch
 - iv. Long Description: {worker}
 - a. {worker} is the worker that created the GA/GR RE Packet. Format: Worker ID and the Worker Name (Example: 36ES18CH0S Jane Doe)
 - v. Uses a Classic Template

2.13.4 Page Location

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer Reporting**

2.13.5 Security Updates

There are no updates to the security settings.

2.13.6 Page Mapping

No New Page Mappings

2.13.7 Page Usage/Data Volume Impacts

This is a link to open Customer Reporting List Page and will not be frequented in a Normal Workflow.

2.14 Update Online Trigger to Send EDBC Information

2.14.1 Overview

Upon implementation of Recovery Account Reason correspondences (recommendation 2.4) in SCR CA-235436 in release 22.03 there were correspondences found to be requiring current prior EDBC information (prior, meaning, the EDBC that was authorized and saved before the most recent EDBC). Currently in CalSAWS, online correspondence triggers do not have the functionality to derive the prior EDBC.

2.14.2 Correspondence Information

The below correspondences have already been created in CA-235436, 22.03. This list is purely for reference and re-testing purposes.

Reason Code	County	Category	NOA Action	Document Name	Number	Template
X3C023	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	
X3C023	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C024	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592

X3C026	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C026	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C027	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C042	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C043	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C044	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C044	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C050	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C051	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C052	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C064	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	
X3C064	Placer	Notice of Action	Change	GA Overpayment is Created	774-1	608592
X3C064	Placer	Notice of Action	Change	Overpayment Adjustment General Relief	774-1	608592
X3C084	Santa Barbara	Notice of Action	Change	GR Chng - Overpayment Adjustment	K-3	
X3C084	Santa Barbara	Notice of Action	Change	GR Chng - Overpayment Adjustment	K-3	12700
X3C086	Santa Barbara	Notice of Action	Change	GR Chng - Overpayment Adjustment	K-3	12700
X3C086	Santa Barbara	Notice of Action	Change	GR Chng - Overpayment Adjustment	K-3	12700
X3C088	Santa Barbara	Notice of Action	Change	GR Chng - Overpayment Adjustment	K-3	12700
X3C091	Santa Barbara	Notice of Action	Change	GR Chng - Overpayment Adjustment	K-3	12700
X3C093	Santa Barbara	Notice of Action	Change	GR Chng - Overpayment Adjustment	K-3	12700
XAN944	Sonoma	Notice of Action	Denial	GA Denial - 48 Months Cash Aid	145-2 (09/98)	12539

2.14.3 Description of Change

Update the online trigger for the listed correspondences in 2.14.2 to identify the most recent EDBC and derive the prior EDBC of the GA/GR Automated Solution program. These EDBC information will then be included the data sent to the Correspondence Service for variable population.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2319	<p>The CONTRACTOR shall update the CalSAWS Software with current available automated CalWIN county specific NOA's and Forms associated to their GA/GR program.</p> <p>The CONTRACTOR shall update the CalSAWS software to trigger an interface to a "Correspondence Service" to generate the automated CalWIN County specific Forms/NOAs generate county specific NOAs and Forms based upon each county's eligibility rules.</p>	<p>Correspondence:</p> <p>1. There are a total of 180 non EDBC triggered forms of which</p> <ul style="list-style-type: none"> • 53 forms will be manually generated from template repository. • 93 forms will be triggered from CalSAWS and generated through DXC service. • 34 forms will use current CalSAWS triggers and the corresponding version available. <p>2. All GA/GR specific and combo program State forms will be triggered/generated through CalSAWS except if any form is customized by county already in</p>	<p>This requirement is met based on the "NOAs listed in Appendix A" supplemented by the functionality described in this design document.</p>

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

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		Entire case data including office related information will be sent to DXC service for each form/NOA trigger.	

*Note: DXC is now referred to as Gainwell