

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-210310

SAVE Verification Response File

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/15/2021	1.0	Initial Revision	Michael Barillas
3/1/2022	1.1	Adding Batch Requirements 3&4 under Section 2.1.2	Michael Barillas
03/16/2022	1.2	<p>Section 2.2 Save List</p> <ul style="list-style-type: none"> - Added new Section to update the Save List page <p>Section 2.3.3 Description of Changes</p> <ul style="list-style-type: none"> - Clarify that Case Name will reflect Case Name is the SAVE file - Updated the following in Save Detail page; <ul style="list-style-type: none"> - Admission of Class will display as Admission of Class Code – Description of Admission of Class - Provision of Law Code will display as Provision of Law – Description of Provision of Law - Most Recent EAD Provision of Law Code will display as Most Recent EAD Provision of Law Code – Description of Most Recent EAD Provision of Law Code - Renamed Grant Date as LPR Grant Date - Defined LPR as Legal Permanent Resident 	Vallari Bathala

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1 OVERVIEW

The Systematic Alien Verification for Entitlement (SAVE) Program is an intergovernmental information-sharing initiative designed to aid benefit providers in verifying an applicant's immigration status.

Currently, a portion of the SAVE immigration status verification information provided to Department of Health Care Services (DHCS) by U.S. Citizenship and Immigration Services (USCIS) and is sent to CalSAWS in a Medi-Cal Eligibility Data System (MEDS) generated SAVE Verification Response File.

A new SAVE Verification Response File has been developed to include data elements previously excluded by DHCS that will be sent to CalSAWS. CalSAWS will modify its SAVE Reader interface to process and record the new SAVE Verification Response File and update the SAVE Detail Page.

1.1 Current Design

DHCS has not been including all data elements that are provided to DHCS by USCIS.

1.2 Requests

Modify the SAVE Reader interface to process and record the new SAVE Verification Response File and update the SAVE Detail Page to add new fields to populate the new data received.

1.3 Overview of Recommendations

1. Modify the SAVE Reader interface to process and record the new SAVE Verification Response File.
2. Modify the SAVE Detail Page to add new fields/remove fields to match the new fields received.
3. Modify the SAVE List page to use the new First, Middle and Last Name fields in SAVE Detail page in the Applicant Name column.

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.
2. Existing SAVE Reader Interface Tasks and Journal Entries will function the same.
3. The SAVE Verification File's Record A will be followed by its corresponding Record B if Record A has sponsorship information.

2 RECOMMENDATION

2.1 Modify SAVE Inbound Interface

2.1.1 Overview

Currently, DHCS has not been including all data elements in the SAVE Verification Response File that are provided to DHCS by USCIS. A new SAVE Verification Response File has been developed to include data elements previously excluded from the SAVE Verification Response File.

CalSAWS will modify its SAVE Reader interface to process and record the new SAVE Verification Response File.

2.1.2 Description of Change

1. Modify SAVE Reader – PlxC504 to process and record the new SAVE Verification Response File.

Header

Field Name	Field Details	Position	Length
Record Type	Alphanumeric (Value 'HDR')	1	3
County Number		4	2
Creation Date	Numeric (YYYYMMDD)	6	8
Filler		14	637

Record A

Field Name	Type	Position	Length
Record Type	Alphanumeric (Value 'DTA')	1	3
SAVE Case Number	SAVE Unique number identifier	4	15
Alien Number		19	9
Date of Birth on Request	Numeric (YYYYMMDD)	28	8
Last Name on Request		36	40
First Name on Request		76	25
Middle Name on Request		101	25

Responsible County Code		126	2
Eligibility Worker Code		128	4
District Code		132	3
County Aid Code		135	2
Serial Number	CalSAWS Case Number	137	7
Family Budget Unit		144	1
Person Number		145	2
Case Name		147	18
Case Status		165	20
Last Name on Response		185	40
First Name on Response		225	25
Middle Name on Response		250	25
Date of Birth on Response	Numeric (YYYYMMDD)	275	8
Entry Date		283	8
Grant Date		291	8
Class of Admission Code		299	3
Provision of Law Code		302	4
Eligibility Statement Code		306	3
Eligibility Statement Text		309	64
Major Code		373	3
Major Statement Text		376	100
Minor Code		476	3
Minor Statement Text		479	100
Count of Sponsorships		579	2
Most Recent EAD Start Date		581	8

Most Recent EAD Expiration Date		589	8
Most Recent EAD Provision of Law Code		597	4
Creation Date YY		601	2
Creation Date DDD		603	3
Filler		606	45

Record B

Field Name		Position	Length
Record Type	Alphanumeric (Value 'DTB')	1	3
SAVE Case Number		4	15
Sponsor Last Name		19	40
Sponsor First Name		59	25
Sponsor Middle Name		84	25
Sponsor Address 1		109	60
Sponsor Address 2		169	60
Sponsor City		229	30
Sponsor State Province		259	2
Sponsor Zip Postal Code		261	9
Sponsor Country Code		270	5
Sponsor Country Name		275	100
Filler		375	276

Trailer

Field Name		Position	Length
Record Type	Alphanumeric (Value 'TRL')	1	3
County Number		4	2

Creation Date		6	8
Total Record A Count		14	8
Total Record B Count		22	8
Total Record Count		30	8
Filler		38	613

2. Modify the IEVS_SAVE table to store the new data fields.
 - a. Convert Record A 'Creation Date YY / Creation Date DDD' to the 'mm/dd/yyyy' format and store as Report Date.
3. Update 'New SAVE Applicant Received' Task (399_B6) and 'SAVE Response Additional Information Required Task' (399_C2) to reference the new SAVE fields.

2.1.3 Execution Frequency

No Change

2.1.4 Key Scheduling Dependencies

No Change

2.1.5 Counties Impacted

All Counties

2.1.6 Data Volume/Performance

N/A

2.1.7 Interface Partner

MEDS

2.1.8 Failure Procedure/Operational Instructions

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

2.2 SAVE List

2.2.1 Overview

Update Applicant Name column in SAVE List page to display the new First, Middle and Last Name added in the SAVE Detail page.

2.2.2 Description of Changes

1. Update the Applicant Name column in the SAVE List page to display name based on a hierarchy of Request Information, Response Information and Applicant Information in SAVE Detail page:
 - a. If First, Middle and Last Name is available in Request Information section, display the First, Middle and Last Name in Applicant Name column.
 - b. If the name is not available in Request Information but First, Middle and Last Name is available in Response Information section, display the First, Middle and Last Name in Applicant Name column.
 - c. For Historical records, if the name is not available in Request Information or Response Information, then display the First, Middle and Last name of the Applicant.
 - d. If none of the previous scenarios are true, then display 'No Name Given' in the Applicant Name column.

2.2.3 Page Location

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

2.2.4 Security Updates

N/A

2.2.5 Page Mapping

Update the page mapping for the changed field.

2.2.6 Page Usage/Data Volume Impacts

N/A

2.3 SAVE Detail

2.3.1 Overview

Add new fields to the SAVE Detail page to populate the data accordingly that is received in the SAVE Verification Response File.

2.3.2 SAVE Detail – Mockup

SAVE Detail

Edit Close

Applicant Information			
Case Number: LB49073	Person Number: 1	SAVE Case Number: 2022060124515ZS	County: Los Angeles
Case Name: Case Name	Case Status: CS COMPLETE	Date of Entry: 10/18/2018	Grant Date: 01/01/2022
Eligibility Worker Code: CI02	District Code: 003	Family Budget Unit: 1	A Number: 214923103
County Aid Code: M1	Responsible County Code: 19	Count of Sponsorship: 02	
Provision of Law Code: A03 - Refugee		Class of Admission Code:	
Major Code: 19	Major Statement Text: Conditional Resident		
Minor Code: 19	Minor Statement Text: Conditional Resident		
Eligibility Statement Code: 02	Eligibility Statement Text: CUBAN/HAITIAN ENTRANT-TEMPORARY EMPLOYMENT AUTHORIZED		
Most Recent EAD Start Date: 02/01/2022	Most Recent EAD Expiration Date: 10/10/2022		
Most Recent EAD Provision of Law Code: C06 - M-1 student seeking practical training after completing studies	Creation Date: 02/01/2022		

Request Information			
First Name: MYRLE	Middle Name:	Last Name: WIBERT	Date of Birth: 06/04/1985

Response Information			
First Name: MYRLE	Middle Name:	Last Name: WIBERT	Date of Birth: 06/04/1985

Sponsor Information			
Name	Address	Country Code	Country Name
RON POE BEN	55A MEDLITZ 55A RATTELSDORF, OH	E1	Germany

Abstract Information	
Run Date: * 03/01/2022	CalSAWS Process Date: * 03/16/2022

Sign-Off Section
Discrepancies: *
Comments:

Edit Close

Figure 2.2.2 – SAVE Detail Page

2.3.3 Description of Changes

1. Add following fields in the Applicant Information section of the SAVE Detail page as displayed in the figure 2.2.2.

Fields	Description
Case Name	Name of the Case from the SAVE file formatted as <First Name> <Last Name>.
Case Status	Status of the Case
Responsible County Code	Code of Responsible County
Eligibility Worker Code	Code of Eligibility Worker
District Code	Code of the District
County Aid Code	County Aid Code
SAVE Case Number	SAVE Case Number
Family Budget Unit	Family Budget Unit
Person Number	2-digit Alphanumeric Person Number
LPR Grant Date	The date when the individual was granted the Legal Permanent Resident (LPR) status formatted as mm/dd/yyyy.
Class of Admission Code	Class of Admission Code (COA) reflects the immigration law provision pursuant to which an alien is eligible for admission to the United States, either as an immigrant or non-immigrant. An Alien is any person who is not a citizen or national of the United States. Display as Class of Admission Code – Description of Class of Admission
Provision of Law Code	This code indicates the Provision of Law cited in the decision for authorization. Display as Provision of Law Code – Description of Provision of Law
Eligibility Statement Code	Unique Eligibility Statement Code
Eligibility Statement Text	Definition of the unique eligibility Statement Code
Major Code	Coded Value that indicates a specific Response from SAVE.
Major Statement Text	Definition of the Major Code
Minor Code	Minor Return Code

Minor Statement Text	Definition of the Minor Code
Count of Sponsorships	Number of Sponsors identified by SAVE.
Most Recent EAD Start Date	Most Recent Start Date of EAD formatted as mm/dd/yyyy.
Most Recent EAD Expiration Date	Most Recent Expiration Date of EAD formatted as mm/dd/yyyy.
Most Recent EAD Provision of Law Code	Most Recent Code of Provision of LAW. Display as Provision of Law Code – Description of Provision of Law
Creation Date	Creation Date formatted as mm/dd/yyyy.

2. Add the Request Information section in the SAVE Detail page with the columns given below as displayed in the figure 2.2.2.

Fields	Description
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Date of Birth	Date of birth formatted as mm/dd/yyyy

3. Add the Response Information Section in the SAVE Detail page with the columns given below as displayed in the figure 2.2.2.

Fields	Description
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Date of Birth	Date of birth formatted as mm/dd/yyyy

4. Add the Sponsor Information Section in the SAVE Detail page with the columns given below as displayed in the figure 2.2.2.

Fields	Description
Name	Name of the Sponsor formatted as <First Name> <Last Name>.
Address	Address of the Sponsor
Country Code	Country Code of the Sponsor
Country Name	Country Name of the Sponsor

5. Remove following fields from the Applicant Information section of the SAVE Detail page.
 - First Name
 - Middle Name
 - Last Name
 - Employment Eligibility Message
 - Employment Eligibility Message 2
 - SSN
 - Date of Birth
 - Country of Birth
6. Update LRS Process Date to be CalSAWS Process Date in the Abstract Information section of the SAVE Detail page.

Case Number field will be carrying the Serial Number.

When the Minor Statement Text, Major Statement Text and Eligibility Statement Text fields are blank in the SAVE file, the page will internally lookup the text

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Add Page Mappings for the new fields.

2.3.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.4	The LRS shall match LRS Data from external interfaces to an applicant s or participant s case record and update the LRS database when appropriate.	CalSAWS is updating its SAVE interface to receive and process additional SAVE data.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217944

ACL 20-113 / 20-120 - CW 60 MTC and WTW 24
MTC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell, Susanna Martinez, Jimmy Tu, Michael Barillas, Sridhar Mullapudi
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/01/2021	1.0	Initial Draft	Connor O'Donnell, Susanna Martinez, Jimmy Tu, Michael Barillas, Sridhar Mullapudi
1/10/2022	1.1	Design Clarification Section 2.3.6 #2 Remove WTW Page Mapping Section 2.32.2 #2 Additional CTCR for CT10527	Jimmy Tu
01/26/2022	1.2	Content Revision – Update wording of Section 2.5 and 2.7	Connor O'Donnell
2/2/2022	1.3	Design Clarification Section 2.31.2: DCR pending time limit extenders to denied.	Jimmy Tu
2/16/2022	1.4	Design Clarification: Section 6 Outreach	Jimmy Tu
2/22/2022	1.5	Content Revision – Update wording of Section 2.9 Section 2.29 - Removal of the WTW column in the Time Limit Report detail sheet	Connor O'Donnell, Susanna Martinez
2/24/2022	1.6	Section 2.31.2 #4 – Update Code Hierchy Table to End Date reasons (Removed CTCR in Section 2.32.2 #1 Section 2.4.3 #5 – Show past historical WTW 44 records.	Jimmy Tu
3/3/2022	1.7	Section 2.12: Updated overview and reason display logic Section 2.13.2: Removed unused non-compliance reason 2.14.2: Removed unused status reason	Jason Francis
3/15/2022	1.8	Section 2.31.2: Updated DCR to not set end date for extenders in "Pending" status.	Jimmy Tu

		Section 6.1 Lists: Added back "CW Used Months" column. Added Additional WTW/REP Office Name and Worker ID columns	
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1 OVERVIEW

SCR describes the changes needed to extend the CW 48 month time clock to 60 month time clock and repeal the WTW 24 month time clock effective 05/01/2022.

Extension of CW 48 month time clock to 60 month time clock

Adult CalWORKs participants shall be eligible to receive CalWORKs for a maximum of 60 cumulative and countable months. This 60-month CalWORKs time limit replaces the 48-month CalWORKs time limit that was implemented effective July 1, 2011.

The following months count towards the cumulation 60 months' time on aid

1. All months of CalWORKs aid received as a grant payment in California since January 1, 1998;
2. All months of CalWORKs aid received as a Special Needs payment
3. All months of CalWORKs aid received as a Zero Basic Grant (ZBG) payment
4. All months of CalWORKs aid received as an Immediate Need payment
5. All months of CalWORKs aid received as a Diversion payment
6. All months of CalWORKs aid received as Aid Paid Pending (APP)
7. All months of CalWORKs aid received as an overpayment that exceeded the CalWORKs time limit
8. All months of Temporary Assistance for Needy Families (TANF) assistance received from other states since January 1, 1998
9. All months of Tribal TANF assistance received since January 1, 1998

The following months do not count towards the cumulative 60 month time clocks

1. Months of TANF aid received in California or any other state between September 1, 1996, (when some states first implemented their TANF program) and December 31 1997.
2. Months in which the adult was exempt from the CalWORKs time limit for any of the reasons listed in the MPP Section 42-302.21.
3. Months in which a full-month CalWORKs aid overpayment was repaid.
4. Months in which a retroactive disability exemption was applied per ACL 15-08.
5. Months in which an Executive Order did not count aid received towards the time limit, including EO N-29-20, EO N-69-20 and EO N-75-20.
6. Months in which the adult was not aided due to a sanction that removed the adult from the assistance unit (AU).

The federal TANF 60-month time limit rules shall remain unchanged.

A mass informing notice Temp 3022 containing information regarding these changes shall be sent to all CalWORKs recipients at least 90 days prior to implementation. The informing notice shall be implemented under SCR CA- 227816.

Three new notices shall be added to advise recipients of their TOA between their 54th and 57th month and 30 other notices and forms will be updated to reflect the CalWORKs eligibility changes.

Repeal of WTW 24 month time clocks and CalWORKs federal standards and establish the CalWORKs hourly participation requirements.

The WTW 24-MTC provides 24 cumulative months of flexibility to help clients address barriers to and prepare for employment. While using the WTW 24-MTC, adults may

participate in any of the full array of CalWORKs activities, based on an assessment, without a core hourly requirement or activity time limits. During these 24 cumulative months, clients must meet WTW 24-MTC CalWORKs minimum standards depending on their household and assistance unit (AU) compositions. Clients who fail to meet CalWORKs federal standards after exhausting the WTW 24-MTC and any extensions must have their needs removed from the family grant calculation.

With the implementation of this SCR effective 05/01/2022 shall repeal both the WTW 24-MTC and CalWORKs federal standards and establishes the CalWORKs minimum standards as the sole set of CalWORKs hourly participation requirements throughout a client's time on aid, referred to henceforth as CalWORKs Hourly Participation Requirements.

1.1 Current Design

Adult CalWORKs participants shall be eligible to receive CalWORKs for a maximum of 48 cumulative and countable months

WTW participants are provided 24 cumulative months of flexibility on WTW program to help clients to and prepare for employment. While using the WTW 24-MTC, clients must meet CalWORKs minimum standards depending on their household and assistance unit (AU) compositions. Clients who fail to meet CalWORKs federal standards after exhausting the WTW 24-MTC and any extensions must have their needs removed from the family grant calculation.

1.2 Requests

1. Effective May 1, 2022, adults will be eligible to receive CalWORKs for a maximum of 60 cumulative and countable months. This 60-month CalWORKs time limit replaces the 48-month CalWORKs time limit that was implemented July 1, 2011
2. Effective May 01, 2022 repeals both the WTW 24-MTC and CalWORKs federal standards and establishes the CalWORKs minimum standards as the sole set of CalWORKs hourly participation requirements throughout a client's time on aid.

1.3 Overview of Recommendations

1. Update the column headers on the WTW Assistance Unit Summary page to accurately reflect the new terminology.
2. Update the Activity Agreement Detail page to have accurate column headers.
3. Update the Activity Agreement Detail page to reflect the updates to Plan Type and the removal of the WTW clock.
4. Update the ICT Person Detail page with the removal of the WTW Clock and the updates to the 'Months Remaining' on the CalWORKs clock.
5. Update the Family Stabilization Detail page with updated Denied/Ineligible Reasons

6. Update CalWORKs Time on Aid Limit from 48 to 60(CT-335 CT)
7. Update the WTW Assistance Unit Hours Requirement page
8. Create a DCR to end date the WTW or REP 24 MTC non-compliance records effective 04/30/2022
9. Update WTW status reasons for WTW or REP 24 MTC to be end dated effective 04/30/2022
10. Update WTW or REP type non-compliance with WTW 24 MTC reasons to be end dated effective 04/30/2022
11. Add new validation that stops the user from selecting the WTW or REP 24 MTC reason on the non-compliance page effective 5/1/2022
12. Create a DCR to update the WTW or REP program that is sanctioned with WTW 24 MTC reasons
13. Modify automated actions per the deactivation of the WTW Time Clock and the updates to the CalWORKs Time Clock.
14. Deactivate Participant Exceeded WTW Month Clock Task Batch Jobs
15. Modify Participant Exceeded CW Month Clock Tasks to push back the CW months.
16. Modify CW Timed Out Turning 60 Task Batch Job to check for CW count of 60 months.
17. Modify 48 Month Time Limit Flag Changed Task Batch Job's backend labels.
18. Modify Find CW 48 Month Sweep EDBC Sweep job to sweep for cases that reach 60 CW months.
19. Modify eICT writer/reader to no longer populate/process the WTW month time clock section.
20. Deactivate WDTIP Outbound WTW transaction (LD03).
21. Modify to Time Limit Summary page to update the CalWORKs 48 Months to 60 Months.
22. Modifications to Cash Aid Time Limit Month List page to update the CalWORKs 48 Months to 60 Months.
23. Update Cash Aid Time Limit Month Detail page to update the page validation that will prevent the user from approving a CalWORKs extension if there are months remaining on the 60-month time clock.
24. Modify the Time Limit Extension Request Detail page to update the page validation that will prevent the user from approving a CalWORKs extension if there are months remaining on the 60-month time clock.
25. Update the logic that determines CalWORKs 60-month Time Clock time limit months remaining to include approved extension requests for the month that eligibility is running for.
26. Update the Time Limit Extension Batch – If the individual's time limit extension is for a CW program, validate that they have exceeded their 60 month time clock for the upcoming month"
27. Update the Time Limit Daily & Monthly Batch to modify the limit for applying CW extensions from 48 months to 60 months.
28. Do a DCR to identify individuals who have CW Extenders on their 48 MTC and end date them effective 04/30/2022, allowing the clock to tick until it hits the 60th month
29. Update the Time Limit Summary page to deprecate the WTW 24 MTC effective 04/30/2022.

30. Modifications to Cash Aid Time Limit Month List page to remove the WTW 24 MTC.
31. Update Cash Aid Time Limits Month Detail page to remove the references for WTW 24 MTC.
32. Update the Time Limit Extension Request Detail page to end date the extender options which relates to WTW 24 MTC effective 4/30/2022.
33. Modifications to the Time Limit Extension Batch to not apply extensions for WTW 24 MTC anymore after the final policy is released.
34. Turn Off the Time Limit Meeting WPR Exemption Batch.
35. Turn off WTW Plan Sign Date Adjustment Batch.
36. Do a DCR to identify individuals who have WTW Extenders on their 24 MTC and end date them to 4/30/2022 so that there are no extenders going forward.
37. End Date Exempt and Good Cause Reasons in CT863 effective 4/30/2022.
38. Update the Time Limit Report batch sweep to limit to the appropriate number of months
39. Update the Time Limit Report layout to count CW months based on the updated number of months (Cosmetic primarily)
40. Update the Time Limit Report sweep job to remove WTW 24 MTC logic (or modify to run for retro periods)
41. Modify the Time Limit Report layout to remove 24 MTC references (or modify to run for retro periods)
42. Modify the Case Activity > WTW and REP Caseload Activity Report, the CalWORKS/RCA Adults 16 Years and Over Report and the CalWORKs/RCA Adults by Welfare-to-Work Category dashboard to either remove WTW 24 MTC references, or leave them with modifications to work for retro periods.

1.4 Assumptions

1. The activity participation hours calculation for the AU shall remain unchanged.
2. Changes to WTW program with the repeal of WTW 24 MTC shall also apply to REP program.
3. SCR CA-232366 shall attempt to add the timed out active participant back into the CW AU through a Batch EDBC run.
4. Tasks described in '2.16 Automated Actions' will be assigned based on existing logic.

2 RECOMMENDATIONS

2.1 Time Limit Summary Page

2.1.1 Overview

This page allows the user to add, edit, view, or remove Time Limit Information for all program applicants.

2.1.2 Time Limit Summary Page Mockup

Time Limit Summary

The mockup displays two sections: ABAWD and Cash-Aid. The ABAWD section has a 'Continue' button and a table with columns 'Name', 'Begin Month', and 'End Month'. The Cash-Aid section has a 'Remove' button and a table with columns 'Name', 'TANF Used Months', 'TANF Remaining Months', 'CalWORKs Used Months', and 'CalWORKs Remaining Months'.

ABAWD		
Name	Begin Month	End Month
No Data Found		

Cash-Aid

<input type="checkbox"/> Name	TANF Used Months	TANF Remaining Months	CalWORKs Used Months	CalWORKs Remaining Months
<input type="checkbox"/> [REDACTED]	16	44	7	53

Figure 2.1.1 – Time Limit Summary Mockup

2.1.3 Description of Changes

1. Modify to Time Limit Summary page to update the CalWORKs 48 Months to 60 Months.
2. Update the Time Limit Summary page to deprecate the WTW 24 MTC effective 05/01/2022.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Time Limits

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

1. Remove the following from page mapping:
 - a. "WTW Used Months"
 - b. "WTW Remaining Months"

2.1.7 Page Usage/Data Volume Impacts

None.

2.2 Cash Aid Time Limit Month List Page

2.2.1 Overview

This page allows the user to add, edit, view, or remove Cash Aid Time Limit Month information for a particular participant/beneficiary.

2.2.2 Cash Aid Time Limit Month List Mockup

Cash Aid Time Limit Month List

Close

Name: ██████████

Clocks	Months Used	Months Remaining
TANF	18	42
CalWORKs	3	57

Search Results Summary					Results 1 - 18 of 18
Month/Year	TANF	CalWORKs	County	Add Reason	
<input type="checkbox"/> 07/2021	Count	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/> 06/2021	Count	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/> 05/2021	Count	Exempt	Los Angeles	CalSAWS Month	Edit View History
<input type="checkbox"/> 04/2021	Count	Exempt	Los Angeles	CalSAWS Month	Edit View History

Figure 2.2.1 – Cash Aid Time Limit Month List Mockup

2.2.3 Description of Changes

1. Modifications to Cash Aid Time Limit Month List page to remove the WTW 24 MTC effective 5/1/2022.
 - a. These include the removal of WtW Plan Sign Date, Time Clock Start Date, Time Clock Start Reason, and County Fields.
2. Modifications to Cash Aid Time Limit Month List page to update the CalWORKs 48 Months to 60 Months.

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Time Limits

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

--	--	--

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.2.6 Page Mapping

1. Remove "WTW" from page mapping.

2.2.7 Page Usage/Data Volume Impacts

None.

2.3 Cash Aid Time Limit Month Detail Page

2.3.1 Overview

The Cash Aid Time Limit Month Detail page allows the user to add, view, edit, or remove Cash Aid Time Limit information for a specific month. Effective 5/1/2022, this page will be updated so that the WTW Clock will be removed along with the Reason codes listed below in section 2.3.3 will no longer be available to select in the system.

2.3.2 Cash Aid Time Limit Month Detail Mockup

Cash Aid Time Limit Month Detail

* - Indicates required fields

Edit Close

Name: * [REDACTED]	Effective Month: * 05/2021	Add Reason: * CalSAWS Month
Aid Issued By: * Los Angeles	Send to WDTIP? * Yes	Case Number: * [REDACTED]
Program: * CalWORKs	Aid Code: 30 - CW-All Other Families (Fed)	

Exceptions			
Type	Reason	Clocks	Created By
Exempt	377 - Grant Amount \$10 or Less	CalWORKs	Batch, PB19E305

Clocks	Status
TANF	Count
CalWORKs	Exempt

Figure 2.3.1 – Cash Aid time Limit Month Detail Mockup

2.3.3 Description of Changes

1. Update Cash Aid Time Limit Month Detail page to update the page validation that will prevent the user from approving a CalWORKs extension if there are months remaining on the CW 60-month time clock.
2. Update Cash Aid Time Limit Month Detail page to remove the references for WTW 24 MTC effective 5/1/2022.
3. Update the Cash Aid Time Limit Month Detail page to end date the following reason codes, which will no longer display, effective 4/30/2022:
 - a. Sanction
 - i. 209 – Removed from Aid
 - b. Exempt
 - i. 319 – Meeting WPR
 - ii. 320 – Excused 2nd Parent from WTW Activities
 - iii. 321 – Participating in Appraisal, Assessment, or Development of a WTW Plan
 - iv. 322 – Participating in WTW Job Search
 - c. Good Cause
 - i. 402 – 18/24 Month Limit
 - ii. 404 – SIP
 - iii. 405 – Failure to Benefit from Assigned Activities
 - iv. 408 – Other Good Cause
 - d. Extender
 - i. 606-WTW-Likely to Obtain Employment
 - ii. 607-WTW-Labor Market Barriers

- iii. 608-WTW-Progress In Education
- iv. 609-WTW-Progress in Treatment
- v. 610-WTW-Diagnosed learning or Disability
- vi. 611-WTW-SSI Disability Benefits
- vii. 612-WTW-Two Parents Assistance Unit

2.3.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Time Limits

2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.3.6 Page Mapping

1. Remove WTW Status (Section: Clocks) from page mapping.

2.3.7 Page Usage/Data Volume Impacts

None.

2.4 Time Limit Extension Request Detail Page

2.4.1 Overview

This page allows the user to add, edit, view or remove Time Limit extension request information.

2.4.2 Time Limit Extension Request Detail Mockup

Time Limit Extension Request Detail

*- Indicates required fields

Save Save and Return Cancel

Name: *	Reason Code: *	Clocks:
- Select -	- Select -	
Request Source: *	600 - SDI, TDI, IHSS, or SSP Benefits	Status: *
- Select -	601 - CW - 60 Yrs and Older	Pending
Begin Month:	602 - CW - NPC Providing Care	
	603 - CW - Caring for Ill/Incap. HH Member	
	604 - CW - Unable to keep Job or Coop.	
	605 - CW - Domestic Abuse Good Cause	

Save Save and Return Cancel

Figure 2.4.1 – Reason Code Dropdown

Time Limit Extension Request Detail

*- Indicates required fields

Save Save and Return Cancel

Name: *	Reason Code: *	Clocks:
- Select -	- Select -	
Request Source: *	Request Date: *	Status: *
- Select -		Pending
CW 2190A	End Month:	
Client		
Worker		

Save Save and Return Cancel

Figure 2.4.2 – Request Source Dropdown

2.4.3 Description of Changes

1. Update the Time Limit Extension Request Detail page to end date 'WTW 44' from 'Request Source' field dropdown effective 4/30/2022.
2. Update the Time Limit Extension Request Detail page to end date the following WTW Time Limit Extension Reason Codes from the 'Reason Code' field dropdown effective 4/30/2022:
 - a. 606-WTW-Likely to Obtain Employment
 - b. 607-WTW-Labor Market Barriers
 - c. 608-WTW-Progress In Education

- d. 609-WTW-Progress in Treatment
 - e. 610-WTW-Diagnosed learning or Disability
 - f. 611-WTW-SSI Disability Benefits
 - g. 612-WTW-Two Parents Assistance Unit
3. Modify the Time Limit Extension Request Detail page to update the page validation that will prevent the user from approving a CalWORKs extension if there are months remaining on the 60-month time clock.
 4. Update the logic that determines CalWORKs 60-month Time Clock time limit months remaining to include approved extension requests for the month that eligibility is running for.

If the individual has an approved CalWORKs 60-Month Time Clock Extension Request where the Begin Month and End Month is between the EDBC Benefit Month, EDBC will evaluate the approved CalWORKs 60-Month Time Clock extension to not discontinue the person due to being timed-out on their CalWORKs 60-Month Time Clock.

5. Update the Time Limit Extension Request Detail page to display historical "WTW 44" records in view mode only after 4/30/2022. This Request Source will not be able available in create or edit mode after 4/30/2022.

2.4.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Time Limits

2.4.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.4.6 Page Mapping

None.

2.4.7 Page Usage/Data Volume Impacts

None.

2.5 WTW Assistance Unit Summary

2.5.1 Overview

The WTW Assistance Unit Summary page summarizes the hours, people, and activities tied to a given person on a WTW program. The changes to this page will replace the column header 'Minimum Hours' with the header 'Participation Hours'.

2.5.2 WTW Assistance Unit Summary Mockup

WTW Assistance Unit Summary

From:
 [View](#)

Required Hours For Month

Month	Participation Hours	Total Federal	Core Federal
06/2021	35	35	35

Assistance Unit Adults for Month

Name	CW Role	Work Reg. Type	Work Reg. Status	Empl. Program	Last Program Status	Last Program Status Reason
No Data Found						

Scheduled Customer Activities for Month

Name	Activity Type	Status	Schedule	Schedule	Participation	Federal	Core
		Begin Date	Start Date	End Date	Hours	Hours	Hours
No Data Found							

WTW Plans for Month

Form Type	Name	Plan Type	Create Date	Sign Date	Participation Hours	Core Hours
No Data Found						

Name: [Add Agreement](#)

Figure 2.5.1 – WTW Assistance Unit Summary Page

2.5.3 Description of Changes

1. Make the following adjustments to the 'Required Hours for Month' table effective 05/01/2022:
 - a. Rename the 'Total **Hours Minimum**' column to 'Participation Hours'.
2. Make the following adjustments to the 'Scheduled Customer Activities for Month' table effective 05/01/2022:
 - a. Rename the '**Total Minimum** Hours' column to 'Participation Hours'.
3. Make the following adjustments to the 'WTW Plans for Month' table effective 05/01/2022:

- a. Rename the 'Total Hours' column to 'Participation Hours'.
- b. Remove the 'WTW Clock' column header.

2.5.4 Page Location

- **Global: Empl. Services**
- **Local: Activities**
- **Task: WTW AU Summary**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

Update page mapping for updated fields

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 WTW Assistance Unit Hours Requirement

2.6.1 Overview

The WTW Assistance Unit Hours Requirement page will display the number of hours the WTW AU shall participate to meet CalWORKs Federal Standards or CalWORKs Minimum Standards. This page will also display the data elements used to determine the required hours for a month. Update the 'Total Minimum' column in the required hours section of the page to 'Participation Hours'

2.6.2 WTW Assistance Unit Hours Requirement

WTW Assistance Unit Hours Requirement

Close

Required Hours

Month: 06/2022	Determination Date: 06/30/2022	Aid Code: 35 - CW-Two Parent (Fed)
--------------------------	--	--

System Determination:

Participation Hours	Total Federal	Core Federal
35	35	30

Assistance Unit Adults

Person	CalWORKs Role	CalWORKs Role Reason	Pregnant
Parent, Mom 26F	MEM		No
Parent, Dad 28M	MEM		No

Work Registration:

Person	Type	Status	Status Reason	Volunteer	Excluded
Parent, Mom 26F	WTW	Mandatory			
Parent, Dad 28M	WTW	Mandatory			

Assistance Unit Children

Child	Date Of Birth	Age on First of Month
Parent, Child 7M	11/20/2020	7

Close

Figure 2.6.1 – WTW Assistance Unit Hours Requirement Page

2.6.3 Description of Changes

1. Update the following to the 'Required Hours' section:
 - a. Rename the 'Total Minimum' column to 'Participation Hours'.

Note: The logic to calculate the value of this column shall remain unchanged, the column will only be renamed to participation hours.

2.6.4 Page Location

- **Global: Empl. Services**
- **Local: Activities**
- **Task: WTW AU Summary**

2.6.5 Security Updates

None

2.6.6 Page Mapping

Update page mapping to rename 'Total Minimum' column to 'Participation Hours'

2.6.7 Page Usage/Data Volume Impacts

None.

2.7 Activity Agreement Detail

2.7.1 Overview

The Activity Agreement Detail page is used to store agreements for an activity plan for Welfare to Work. With the updates to the WTW program the Plan Type field and Total Hour fields will be updated to more properly reflect the way that they will function.

2.7.2 Activity Agreement Detail Mockup

Activity Agreement Detail

***- Indicates required fields**

Save **Save and Return** **Cancel**

Name: * Hollis, Horton 21M **Form Type: *** WTW2 **Signature Date:** **Program: *** Welfare to Work

Plan Type: * CalWORKs Federal

▼ Assistance Unit Summary

Required Hours: **Month: *** 06/2021 **View**

Month	Participation Hours	Total Federal	Core Federal
06/2021	35	35	35

Total Planned Hours in Current Activities for Month:

Participant	Participation Hours	Federal Hours	Core Hours
No Data Found			

Figure 2.7.1 – Activity Agreement Detail Mockup (Created before 05/01/2022)

Activity Agreement Detail

*- Indicates required fields

Save

Save and Return

Cancel

Name: *

Hollis, Horton 21M

Form Type: *

WTW2

Signature Date:

Program: *

Welfare to Work

Assistance Unit Summary

Required Hours:

Month: * 06/2021

View

Month	Participation Hours	Total Federal	Core Federal
06/2021	35	35	35

Total Planned Hours in Current Activities for Month:

Participant	Participation Hours	Federal Hours	Core Hours
No Data Found			

Figure 2.7.2 – Activity Agreement Detail Mockup (Created on or after 05/01/2022)

2.7.3 Description of Changes

1. Make the following adjustments to the Plan Type field when in Create or Edit mode effective 05/01/2022:
 - a. For Activity Agreements created before 05/01/2022 display the currently stored Plan Type field in plaintext.
 - b. For Activity Agreements created on or after 05/01/2022 do not display the Plan Type field.
2. Make the following adjustments to both the sub-tables in the 'Assistance Unit Summary' table effective 05/01/2022:
 - a. Rename the 'Total Hours Minimum' column to 'Participation Hours'.
 - b. Rename the 'Minimum Hours' column to 'Participation Hours'.
3. Remove the WTW Clock field effective 05/01/2022.
4. Update the validation for Activity Agreements that checks if a WTW/REP participant is in an 'Active' or 'Non-Compliant' program status to also allow for the participant to be in a 'Good Cause' program status.
 - a. Update the validation message "The selected customer does not have a WTW or REP program with the status of Active or Non-Compliant" to instead state "The selected customer does not have a WTW or REP program with the status of Active, Non-Compliant, or Good Cause"
5. Effective 05/01/2022 remove the validation logic that checks for the selection of the Plan Type field.

2.7.4 Page Location

- **Global: Empl. Services**
- **Local: Activities**
- **Task: Activity Agreements**

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

Update page mapping for updated fields.

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 ICT Person Detail

2.8.1 Overview

The ICT Person Detail page displays person-level details for a particular ICT. The changes to this page ensure that the WTW Time Clock is no longer shown and that the CalWORKs clock accurately represents that it will be changed from a 48 month clock to a 60 month clock.

2.8.2 ICT Person Detail Mockup

Time Limits							
ABAWD Clock Effective Date: 01/01/2020							
Clocks	Months Used	Months Remaining	Exemptions Count	Extenders Count	Exceptions Count	Current Status	End Date
TANE	0	60	0	0	0	Not Ticking	
CalWORKs	0	60	0	0	0	Not Ticking	

Figure 2.8.1 – ICT Person Detail Mockup

2.8.3 Description of Changes

1. In the Time Limits table change the value contained in 'Months Remaining' column for the CalWORKs clock from 48 to 60 effective 05/01/2022.
2. In the Time Limits table remove the row containing the WTW clock effective 05/01/2022.

2.8.4 Page Location

- **Global: Case Info**
- **Local: E-Tools**
- **Task: ICT Person Detail**

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 Family Stabilization Detail

2.9.1 Overview

The Family Stabilization Detail page will be updated to reflect the changes to the CalWORKS and WTW/REP programs. This will be done by updating the Denied/Ineligible reasons to show that the CalWORKS time clock has been changed from 48 months to 60 months, and the WTW time clock is being removed.

2.9.2 Family Stabilization Detail Mockup

Family Stabilization Detail

*- Indicates required fields

Save and Return

Cancel

Date Created:

Eligible: *

No

Eligibility Outcome: *

Denied

Denied/Ineligible Reason: *

Begin Date: *

05/01/2022

End Date:

Date Referred to FS:

FSP 3 Mailing Date:

Person(s) *

Name

Smith, Jane 21M

Barriers

Needs

Activities

Select -

Adult exceeded the 60-Month CW Time Limit

Adult is receiving SSI

Does not meet County's FS eligibility criteria

Drug and fleeing felons

Family Self-resolved

Family does not have CalWORKs recipient

Family does not meet additional county plan

Family entered another housing program

Family found help with another program

Family has other reason for exiting

Family housing has stabilized

Family is in receipt of judgement for eviction

Family is no longer eligible per county requirements

Family is not in an eligible residence situation

Family moved out of the county

Family no longer has Calv/ORKs recipient

Family was unreachable

Family whereabouts are unknown/unreachable

Family's fixed nighttime residence is a shelter

Family's fixed nighttime residence is not a regular sleeping accommodation

HSP funding is not available

Ineligible non-citizens

Lack of Family Stabilization Funding

Lack of Family Stabilization Services

No one required to participate in WTW

Non-needy caretaker relative

Other denials including withdrawals

Figure 2.9.1 – Family Stabilization Detail Mockup

2.9.3 Description of Changes

1. In Create and Edit mode, when the Eligible field is set to 'No' and the Eligibility Outcome field is set to 'Denied' or 'Ineligible' update the following Denied/Ineligible Reasons effective 05/01/2022:
 - a. Change 'Adult exceeded the 48-Month CW Time Limit' to 'Adult exceeded the 60-Month CW Time Limit'.
 - b. End-date the 'Adult exceeded the 48-Month CW Time Limit' reason effective 4/30/2022.
Note: This value will still appear in the dropdown if it is the value associated to the saved record.
 - c. Effective 05/01/2022 add the following reason:
 - i. 'Adult exceeded the 60-Month CW Time Limit'
2. In Create and Edit mode, when the Eligible field is set to 'No' and the Eligibility Outcome field is set to 'Denied' or 'Ineligible' remove the following Denied/Ineligible Reason effective 05/01/2022:
 - a. 'Adult exhausted the WTW 24-Month Time Clock'
Note: This value will still appear in the dropdown if it is the value associated to the saved record.

2.9.4 Page Location

- **Global: Empl. Services**
- **Local: Case Summary**
- **Task: Family Stabilization**

2.9.5 Security Updates

N/A

2.9.6 Page Mapping

N/A

2.9.7 Page Usage/Data Volume Impacts

N/A

2.10 Update EDBC Rules for CW 60 MTC

2.10.1 Overview

Update the EDBC rules effective 05/01/2022 to calculate the new CW time limit to be 60 months for a CW participant.

2.10.2 Description of Changes

1. Update the codes table (CT335_CT) to end date the existing time limit value of 48 month to 04/30/2022
2. Create a new codes table (CT335_CT) value effective 05/01/2022 with the CW time limit value of '60' months and the end date high dated (12/31/9999)

2.10.3 Programs Impacted

CalWORKs

2.10.4 Performance Impacts

None

2.11 Data Change to Update WTW Non-Compliance Records

2.11.1 Overview

WTW 24 MTC non-compliance reasons do not apply to the cash program with the repeal of the WTW 24 MTC effective 05/01/2022. Update the WTW 24 MTC non-compliance records for type 'WTW' or 'REP' to be end dated to 04/30/2022

2.11.2 Description of Changes

1. Create a DCR to update the non-compliance records with the following reasons that are active for 05/01/2022 to be end dated to 04/30/2022
 - a. Post WTW 24 MTC CW Fed Requirements Not Met (CT365_CM)
 - b. Failed to sign post 24 MTC Fed plan (CT365_W1)
 - c. Post WTW 24 MTC Failed to Sign Subsequent Fed Plan(CT365_W6)
 - d. Post WTW 24 MTC Fed Standards Not Met – Progress (CT365_W7)
 - e. Post WTW 24 MTC Fed Standards Not Met – Participation (CT365_W8)

2.11.3 Programs Impacted

CW

2.11.4 Performance Impacts

None

2.12 Update WTW Non-Compliance Status Reasons

2.12.1 Overview

WTW 24 MTC non-compliance reasons do not apply to the cash program with the repeal of the WTW 24 MTC effective 05/01/2022. Update the WTW 24 MTC non-compliance reasons for type 'WTW' or 'REP' to be end dated to 04/30/2022 so the reason will not be displayed on the page from 05/01/2022. Update the WTW 24 MTC non-compliance reasons for type 'WTW' or 'REP' to no longer appear when creating a new non-compliance as of 05/01/2022. These reasons will continue to appear when editing an existing record with one of these reasons.

2.12.2 Description of Changes

1. Update the codes table to end date the following status reasons to 04/30/2022

1. Add the following non-compliance reasons to a list of historical reasons that will no longer be available for new records and only display for edited existing records as of 05/01/2022:

- a. Post WTW 24 MTC CW Fed Requirements Not Met (CT365_CM)
- b. Failed to sign post 24 MTC Fed plan (CT365_W1)
- c. Post WTW 24 MTC Failed to Sign Subsequent Fed Plan(CT365_W6)
- d. Post WTW 24 MTC Fed Standards Not Met – Progress (CT365_W7)
- e. Post WTW 24 MTC Fed Standards Not Met – Participation (CT365_W8)

2.12.3 Programs Impacted

CalWORKs

2.12.4 Performance Impacts

None

2.13 Add Validation on the Eligibility Non-Compliance Detail Page

2.13.1 Overview

WTW 24 MTC non-compliance reasons do not apply to the cash program with the repeal of the WTW 24 MTC effective 05/01/2022. Update the Eligibility Non-Compliance Detail page to show a validation to stop the user from saving a WTW 24MTC reason non-compliance for cash program with begin date effective 05/01/2022 or after.

2.13.2 Description of Changes

1. The following validation messages will be displayed to the user on the Eligibility Non-Compliance Detail page when the user is trying to save a non-compliance record of type WTW with WTW 24 MTC Message:

The reason is not valid for the benefit month 05/01/2022 or later.

Condition:

When all the following conditions are met:

- a. The begin date for the non-compliance is on or after 05/01/2022
- b. The reason is one of the following reasons:
 - ~~i. Post WTW 24 MTC CW Fed Requirements Not Met (CT365_CM)~~
 - ii. Failed to sign post 24 MTC Fed plan (CT365_W1)
 - iii. Post WTW 24 MTC Failed to Sign Subsequent Fed Plan (CT365_W6)
 - iv. Post WTW 24 MTC Fed Standards Not Met – Progress (CT365_W7)
 - v. Post WTW 24 MTC Fed Standards Not Met – Participation (CT365_W8)

2.13.3 Programs Impacted

CalWORKs

2.13.4 Performance Impacts

None

2.14 Update WTW/REP Status Reasons

2.14.1 Overview

WTW 24 MTC status reason do not apply to the WTW/REP program with the repeal of the WTW 24 MTC effective 05/01/2022. Update the below

mentioned WTW 24 MTC status reasons to be end dated to 04/30/2022 so the reason will not be displayed on the page from 05/01/2022 for non-comp and sanction statuses.

2.14.2 Description of Changes

2. Update the codes table to end date the following status reasons to 04/30/2022
 - a. Post WTW 24 MTC Fed Standards Not Met – Participation (CT73_MTP)
 - b. Post WTW 24 MTC Fed Standards Not Met – Progress (CT73_MTR)
 - c. Failed to sign post 24 MTC Fed plan (CT73_MTF)
 - d. Post WTW 24 MTC Failed to Sign Subsequent Fed Plan (CT73_FSS)
 - e. ~~Post WTW 24 MTC CW Fed Requirements Not Met (CT73_74)~~

2.14.3 Programs Impacted

WTW, REP

2.14.4 Performance Impacts

None

2.15 Data Change to Update WTW/REP Program Status

2.15.1 Overview

WTW 24 MTC status reasons do not apply to the WTW/REP program with the repeal of the WTW 24 MTC effective 05/01/2022. Update the WTW program status for programs with the WTW 24 MTC status reason.

2.15.2 Description of Changes

1. Create a DCR to update the WTW/REP program with the status of sanction and following status reasons that are active for 05/01/2022 to be end dated to 04/30/2022
 - a. Post WTW 24 MTC Fed Standards Not Met – Participation (CT73_MTP)
 - b. Post WTW 24 MTC Fed Standards Not Met – Progress (CT73_MTR)
 - c. Failed to sign post 24 MTC Fed plan (CT73_MTF)
 - d. Post WTW 24 MTC Failed to Sign Subsequent Fed Plan(CT73_FSS)
 - e. Post WTW 24 MTC CW Fed Requirements Not Met (CT73_74)
2. Insert the following program status for the WTW/REP programs end dated above effective 05/01/2022

- a. If the person with the status reason listed above is currently active on CW program
 - i. Insert a new 'Pending' status effective 05/01/2022 for WTW/REP program with status reason 'Mandatory'.
- b. If the person with the status reason listed above is currently not 'Active' on CW program
 - i. Insert a new 'Deregistered' status effective 05/01/2022 for WTW/REP program with status reason 'Off aid – other reason'.

2.15.3 Programs Impacted

WTW/REP

2.15.4 Performance Impacts

None

2.16 Automated Actions

2.16.1 Overview

This section will describe the updates to Automated Actions per the deactivation of the WTW Time Clock and the updates to the CalWORKS Time Clock.

2.16.2 Description of Changes

1. Update the following Automated Actions to have a Status of 'Unavailable' for all counties:
 - a. WTW Recipient: Reached 18th Month
 - b. WTW Recipient: Reached 19th Month
 - c. WTW Recipient: Reached 20th Month
 - d. WTW Recipient: Reached 21st Month
 - e. WTW Recipient: Reached 22nd Month
 - f. WTW Recipient: Reached 23rd Month
 - g. WTW Recipient: Time Limit Reached

The 'Unavailable' status indicates that an Automated Action has become obsolete and is no longer triggered by automation. The Automated Action will remain available for historical references.

2. Modify the following Automated Actions:
 - a. CalWORKS Recipient Approaching CW Time Limit: 42 Months
Updated Values

Name: CalWORKs Recipient Approaching CW Time Limit: 54 Months

Scenario: An active CalWORKs recipient has reached their 54 month mark. The CalWORKs recipient is approaching the 60 month CalWORKs time limit.

Long Description: Person with CIN {CIN Number} reached the CW 54 month clock on {Date}

b. CalWORKs Recipient Approaching CW Time Limit: 46 Months

Updated Values

Name: CalWORKs Recipient Approaching CW Time Limit: 57 Months

Scenario: An active CalWORKs recipient has reached their 57 month mark. The CalWORKs recipient is approaching the 60 month CalWORKs time limit.

Long Description: Person with CIN {CIN Number} reached the CW 57 month clock on {Date}

c. CalWORKs Recipient: CalWORKs Time Limit Exceeded

Updated Values

Scenario: An active CalWORKs recipient has exceeded their CalWORKs time limit of 60 months. Review for appropriate action.

Long Description: Person with CIN {CIN Number} reached the CW 60 month clock on {Date}

d. CalWORKs Recipient: 48 Month Time Limit Flag Changed

Updated Values

Name: CalWORKs Recipient: 60 Month Time Limit Flag Changed

Long Description: Participant's 60-month time limit Flag was updated

2.17 Deactivate Participant Exceeded WTW Month Clock Task Batch Jobs

2.17.1 Overview

As a participant is approaching the 18th, 20th, and 24th month of WTW a task is created for the worker. As part of ACL 20-120 we will no longer keep track of the WTW time clock. Turn off the Participant Exceeded WTW Month Clock task batch jobs.

2.17.2 Description of Change

1. Create a BSCR to deactivate the following Automated Action batch processes:
 - a. WTW Recipient: Reached 18th Month(PB19A217)
 - b. WTW Recipient: Reached 19th Month(PB00A262)
 - c. WTW Recipient: Reached 20th Month(PB00A218)
 - d. WTW Recipient: Reached 21st Month(PB19A274)
 - e. WTW Recipient: Reached 22nd Month(PB00A201)
 - f. WTW Recipient: Reached 23rd Month(PB00A202)
 - g. WTW Recipient: Time Limit Reached(PB00A214)

2.17.3 Estimated Number of Records Impacted/Performance

N/A

2.18 Modify Participant Exceeded CW Month Clock Tasks

2.18.1 Overview

As a participant is approaching the 42nd, 46th, and 48th month of CW a task is created for the worker. As part of ACL 20-113 we will be pushing back the tasks to the 54th, 57th, and 60th months. Modify Participant Exceeded CW Month Clock Task batch jobs effective May 2022.

2.18.2 Description of Change

1. Modify the following Participant Exceeded CW Month Clock Task Batch Jobs effective May 2022.
 - a. Participant Exceeded CW 42 Month Clock Task Batch Job (PB19A206) driving query to generate a task when a person's CW clock exceeds 54 months.
 - b. Participant Exceeded CW 46 Month Clock Task Batch Job (PB19A205) driving query to generate a task when a person's CW clock is 57 or 58 months. (This batch job currently generates the task when a person's CW clock is 45 or 46 months).
 - c. Participant Exceeded CW 48 Month Clock Task Batch Job (PB19A204) driving query to generate a task when a person's CW clock exceeds 60 months.

2.18.3 Execution Frequency

1st of the Month

2.18.4 Key Scheduling Dependencies

No Change

2.18.5 Counties Impacted

Los Angeles County

2.18.6 Data Volume/Performance

N/A

2.18.7 Failure Procedure/Operational Instructions

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

2.19 Modify CW Timed Out Turning 60 Task Batch Job

2.19.1 Overview

Currently the CW Timed Out Turning 60 Task batch job creates a task for the worker to review a case for possible extenders when a person has at least a CW count of 48 month and is turning age 60 in the next month. Modify the task batch job's CW count check to 60 months.

2.19.2 Description of Change

1. Modify the CW Timed Out Turning 60 Task Batch Job (PB00A129) to find persons who have a CW count of 60 months or greater and are also turning age 60 in the next month. Task Batch Job changes effective May 2022.

2.19.3 Execution Frequency

2nd of the Month

2.19.4 Key Scheduling Dependencies

N/A

2.19.5 Counties Impacted

All Counties

2.19.6 Data Volume/Performance

N/A

2.19.7 Failure Procedure/Operational Instructions

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

2.20 Modify 48 Month Time Limit Flag Changed Task Batch Job

2.20.1 Overview

Participant's 48-month time limit Flag Changed batch job creates tasks for WTW/REP workers when an ineligible adult becomes eligible post 48-months. The task informs the worker that the participant's 48-month time limit flag was updated. Modify the Task Batch job to accommodate the CW 60-month trigger.

2.20.2 Description of Change

1. Modify Batch Job's (PB00A215) 48 Month Time Limit Flag Changed query name to 'Month Time Clock Limit Flag'. Changes effective May 2022.

2.20.3 Execution Frequency

Daily

2.20.4 Key Scheduling Dependencies

N/A

2.20.5 Counties Impacted

All Counties

2.20.6 Data Volume/Performance

N/A

2.20.7 Failure Procedure/Operational Instructions

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

2.21 Modify Find CW 48 Month Sweep EDBC Sweep job

2.21.1 Overview

Currently CW cases that reach 48 months are swept by this batch job and become eligible for discontinuance. Modify the batch job to sweep for CW cases that reach 60 CW months.

2.21.2 Description of Change

1. Modify Find CW 48 Month Sweep (PB00E149) to trigger batch EDBC to process for CW cases that are over 60 CW months. Changes effective May 2022.

2.21.3 Execution Frequency

Monthly before 10 day

2.21.4 Key Scheduling Dependencies

N/A

2.21.5 Counties Impacted

All Counties

2.21.6 Data Volume/Performance

N/A

2.21.7 Failure Procedure/Operational Instructions

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

2.22 Modify eICT Interface Writer – Transfer case section

2.22.1 Overview

The eICT transfer case section builds transfer information for a case. The transfer case section populates a WTW Time Clock section which includes information relevant to WTW time clock months used, remaining, and exemption count. Modify the Transfer case section to no longer populate the WTW month time clock section.

2.22.2 Description of Change

1. Modify batch jobs POxxE100 and POxxE101
 - a. The following Transfer case sections WTW node values will no longer be populated effective May 2022.

Field Name	Field Description
WTWCode	Indicates whether on WTW or refused to WTW. See the WELFARE to WORK table for the codes and values.
Date	Plan WTW2 signed date or refused to sign date. (YYYYMMDD).
MonthsUsedCt	WTW Months Used Count
MonthsRemainCt	WTW Months Remaining
ExemptionsCt	Exemptions Count
ExtendersCt	Extenders Count
ExceptionsCt	Exceptions Count
RegistrationStatus	Active Registration Value M/V – if Mandatory send M with reason; if Active Volunteer send V with; if Mandatory exempt and Active Volunteer send Vand exemption reason;
CurrentClockStatusCode	TK=Ticking, NT=Non-Ticking
TimeclockEndDate	WTW Timeclock End Date
ReasonCode	Exemption/Extender Code. See EXEMPTION REASON CODE.
StartDate	Exemption Start Date
EndDate	Exemption End Date

2.22.3 Execution Frequency

Daily

2.22.4 Key Scheduling Dependencies

N/A

2.22.5 Counties Impacted

All Counties

2.22.6 Data Volume/Performance

N/A

2.22.7 Failure Procedure/Operational Instructions

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

2.23 Modify eICT Interface Reader

2.23.1 Overview

Currently, the eICT Reader batch will receive ICT data and image files from CALWIN on a daily basis including WTW timeclock information. Modify the eICT reader batch job to no longer record WTW timeclock information.

2.23.2 Description of Change

1. Modify Batch job PlxxE100 to no longer process the following WTW fields effective May 2022:

Field Name	Field Description
MonthsUsedCt	WTW Months Used Count
MonthsRemainCt	WTW Months Remaining
ExemptionsCt	Exemptions Count
ExtendersCt	Extenders Count
ExceptionsCt	Exceptions Count
RegistrationStatus	Active Registration Value M/V – if Mandatory send M with reason; if Active Volunteer send V with; if Mandatory exempt and Active Volunteer send Vand exemption reason;

CurrentClockStatusCode	TK=Ticking, NT=Non-Ticking
TimeclockEndDate	WTW Timeclock End Date
ReasonCode	Exemption/Extender Code. See EXEMPTION REASON CODE.
StartDate	Exemption Start Date
EndDate	Exemption End Date

2.23.3 Execution Frequency

Daily

2.23.4 Key Scheduling Dependencies

N/A

2.23.5 Counties Impacted

All Counties

2.23.6 Data Volume/Performance

N/A

2.23.7 Failure Procedure/Operational Instructions

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

2.24 Turn off WDTIP Outbound WTW Transaction

2.24.1 Overview

The WDTIP WTW transaction (LD03) is generated when a customer signs or refuses to sign the WTW plan. The WTW clock will start ticking the month following the WTW sign date. This transaction sends information relating to WTW timeclock.

2.24.2 Description of Change

1. Create a BSCR to deactivate batch jobs POxxE822 effective May 2022.

2.24.3 Execution Frequency

Daily

2.24.4 Key Scheduling Dependencies

N/A

2.24.5 Counties Impacted

All Counties

2.24.6 Data Volume/Performance

N/A

2.24.7 Failure Procedure/Operational Instructions

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

2.25 Time Limit Extension Batch

2.25.1 Overview

This batch job will find people with approved time limit extension request and apply extension for the time clock

2.25.2 Description of Change

1. Update the Time Limit Extension Batch – If the individual's time limit extension is for a CW program, validate that they have exceeded their 60 month time clock for the upcoming month.
2. Modifications to the Time Limit Extension Batch to not apply extensions for WTW 24 MTC anymore effective 4/30/2022.

2.25.3 Execution Frequency

No Change.

2.25.4 Key Scheduling Dependencies

No Change.

2.25.5 Counties Impacted

No Change.

2.25.6 Data Volume/Performance

No Change.

2.25.7 Failure Procedure/Operational Instructions

No Change.

2.26 Time Limit Meeting WPR Exemption Batch

2.26.1 Overview

This batch job finds people that are eligible for meeting CW Federal Standards Exemption and creates an exemption for the upcoming month.

2.26.2 Description of Change

1. Turn Off the Time Limit Meeting WPR Exemption Batch.
2. Create a BSCR to turn off Time Limit Meeting WPR Exemption Batch.

2.26.3 Execution Frequency

No Change.

2.26.4 Key Scheduling Dependencies

No Change.

2.26.5 Counties Impacted

No Change.

2.26.6 Data Volume/Performance

No Change.

2.26.7 Failure Procedure/Operational Instructions

No Change.

2.27 WTW Plan Sign Date Adjustment Batch

2.27.1 Overview

The WTW Plan Sign Date Adjustment batch adjusts the Exemption 321 for the time limit month if there has been an adjustment to the sign date of WTW plan during the day. Exemption 321, Participating in Appraisal, Assessment, or Development of a WTW Plan, is used only for WTW and is no longer needed (and is also being end dated from the list of Exemption Reasons on the Cash Aid Time Limit Month Detail page).

2.27.2 Description of Change

1. Turn off the WTW Plan Sign Date Adjustment Batch job.
2. Create a BSCR to turn off the WTW Plan Sign Date Adjustment Batch.

2.27.3 Execution Frequency

No Change.

2.27.4 Key Scheduling Dependencies

No Change.

2.27.5 Counties Impacted

No Change.

2.27.6 Data Volume/Performance

No Change.

2.27.7 Failure Procedure/Operational Instructions

No Change.

2.28 Time Limit Batch

2.28.1 Overview

The Time Limit Daily batch checks eligibility for individuals to receive aid and retroactively creates time limit records for these people retroactively. The Time Limit Monthly batch will find individuals with active time limit clocks and process next month changes for those clocks.

2.28.2 Description of Change

1. Update the Time Limit Daily & Monthly Batch to modify the limit for applying CW extensions from 48 months to 60 months.

2.28.3 Execution Frequency

No Change.

2.28.4 Key Scheduling Dependencies

No Change.

2.28.5 Counties Impacted

No Change.

2.28.6 Data Volume/Performance

No Change.

2.28.7 Failure Procedure/Operational Instructions

No Change.

2.29 Time Limit Report

2.29.1 Overview

The Time Limit Report provides information for the number of adults and children currently on a CalWORKs program, who are approaching

CalWORKs, TANF or Child Time Limits. The data used for this report is refreshed Monthly and, historical reports are not available.

Additionally, the Time Limit report is grouped with the other On Request reports that are being re-platformed to run in the Qlik environment. The updates noted here apply to the Qlik version of the Time Limit Report.

2.29.2 Time Limit Report Mockup

CalSAWS Summary											
Return to Selections		Data extracted daily as of: 04/01/2021			County: Los Angeles			User: UserID			
View Details											
Summary Table											
Region Group	Region Name	WTW Office	Worker ID	TANF Month 17	TANF Month 18	TANF Month 21	TANF Month 24	TANF Month 25	CW Month 41	CW Month 42	CW Month 48

Figure 2.29.2.1 – Time Limit Report Summary Sheet Mockup

CalSAWS Details										
Return to Selections		Data extracted daily as of: 04/01/2021			County: Los Angeles			User: UserID		
Return to Summary		Total Case Number								
Detail Table										
Region Group	Region	WTW Office	Worker ID	Case Number	Person Name	Status	Role	TANF	CW-Adult	WTW

Figure 2.29.2.2 – Time Limit Report Details Sheet with 'WTW' Column

CalSAWS Details									
Return to Selections		Data extracted daily as of: 02/02/2022			County: Los Angeles			User: UserID	
Return to Summary		Total Case Number							
Detail Table									
Region Group	Region	WTW Office	Worker ID	Case Number	Person Name	Status	Role	TANF	CW-Adult

Figure 2.29.2.3 – Time Limit Report Details Sheet without 'WTW' Column

2.29.3 Description of Change

1. For the Time Limit Report, only the Summary Sheet is affected update the Summary Sheet to remove all columns with reference to WTW. These include:

- WTW 17 Month
- WTW 18 Month
- WTW 21 Month
- WTW 24 Month
- WTW 25 Month +

2. On the Time Limit Report Detail sheet remove the 'WTW' column. This column is found to the right of the 'CW Adult' column.
3. On the Time Limit Report Summary sheet update the CW Month columns to reflect the change from a CW 48 Month Time Clock interval to a CW 60-Month Time Clock interval
 - a. Rename the 'CW 41 Month' column to 'CW 53 Month'
 - b. Rename the 'CW 42 Month' column to 'CW 54 Month'

- c. Rename the 'CW 46 Month' column to 'CW 58 Month'
 - d. Rename the 'CW 48 Month' column to 'CW 60 Month'
 - e. Rename the 'CW 49 Month +' column to 'CW 61 Month +'
4. Update the Time Limit Report sweep logic to account for the change from a CW 48-Month Time Clock interval to a CW 60-Month Time Clock interval

Design Note: Currently SCR CA-217944 has a Fix Version/s date of 22.03 which is dated beyond other in process SCRs affecting reports being modified for migration. This update will be applied to the then in production reports.

As such, current design mockups may not reflect final implementation.

2.29.4 Report Filters

Figure 2.29.4.1 – Report Filters Sheet

2.29.5 Report Location

- **Global:** Reports
- **Local:** On Request
- **Task:** Case Activity
- **Name:** Time Limit Report

2.29.6 Counties Impacted

All counties utilizing these reports will receive these updates.

2.30 CalWORKs/RCA Adults 16 Years and Over Report, WTW and REP Caseload Activity Report and CalWORKs/RCA Adults by Welfare-to-Work Category Dashboard

2.30.1 Overview

The CalWORKs/RCA Adults 16 Years and Over Report provides the CalWORKs/RCA and WTW/REP/Cal-Learn status of each participant age 16 and over. This report is available on the second business day of the month.

The WTW and REP Caseload Activity Report Provides detailed information of WTW and REP participants and corresponding activities. This report is available the second business day of the month.

The CalWORKs/RCA Adults by Welfare-to-Work Category dashboard captures all adults in an active CalWORKs or RCA program in a given report month.

This SCR, CA-217944, effects both reports with the removal of the WTW Months Used column seen in each report. This is the only column will be removed.

2.30.2 CalWORKs/RCA Adults 16 Years and Over Report, WTW and REP Caseload Activity Report and CalWORKs/RCA Adults by Welfare-to-Work Category Dashboard Mockup

Case Number	CalWORKs/RCA Status	CA District	Office	Worker Number	Participant Name	Participant Age	CIN	CalWORKs Used	WTW Months Used	Report Month	Report Month CaWORKs/RCA Grant Amount	Last Run Date

Figure 2.30.2.1 – CalWORKs/RCA Adults 16 Years and Over Report (original)
Screenshot focused on affected column for clarity

CalSAWS CalWORKs/RCA Adults by WTW Category

Type Description

EW Worker ID	Cash Aid Program	Aid Code	WTW/REP Program	WTW/REP Program Status	Participant Name	Person ID	DOB	Cash Aid Role	Cash Aid Role Status	Work Registration Status	CW Months Used	Time Expiration Date	WTW/REP Region
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Figure 2.30.2.6 – CalWORKs/RCA Adults by Welfare-to-Work Category dashboard - CalWORKs/RCA Adults by WTW Category sheet (updated)

2.30.3 Description of Change

1. Remove the *WTW Months Used* column from two reports:
 - i. CalWORKS/RCA Adults 16 Years and Over Report, column J.
 - ii. WTW and REP Caseload Activity Report, column AO.
2. Remove the *WTW Months Used* column from the CalWORKs/RCA Adults by Welfare-to-Work Category dashboard
 - i. The *WTW Months Used* column is located on the CalWORKs/RCA Adults by WTW Category sheet within the dashboard
3. Update CalSAWS Logo where needed.

No other logic changes are required at this time.

Design Note: Currently SCR CA-217944 has a Fix Version/s date of 22.03 which is dated beyond other in process SCRs affecting reports being modified for migration. This update will be applied to the then in production reports.

As such, current design mockups may not reflect final implementation.

2.30.4 Report Locations

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Case Activity
- **Name:** CalWORKS/RCA Adults 16 Years and Over Report

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Case Activity
- **Name:** WTW and REP Caseload Activity Report

- **Global:** Reports
- **Local:** Business Intelligence
- **Task:** Operations Reports
- **Name:** CalWORKs/RCA Adults by Welfare-to-Work Category

2.30.5 Counties Impacted

All counties utilizing these reports will receive these updates.

2.30.6 Security Updates

1. No Change

Security Right	Right Description	Right to Group Mapping

2.31 Data Change Request

2.31.1 Overview

This DCR will end date CW and WTW Extenders to comply with the new policy for CW 60 MTC and the removal of the WTW 24 MTC. A separate DCR will end date values in the Code Hierarchy table.

2.31.2 Description of Change

1. Identify individuals who have CW Extenders on their 48 MTC and extender status is not "Pending" and end date (effective 4/30/2022) them to allow the clock to tick until it hits the 60th month if they have not reached the CW 60 MTC limit.
2. Do a DCR to identify individuals who have WTW Extenders on their 24 MTC and extender status is not "Pending" and end date (effective 4/30/2022) them so that there are no WTW extenders going forward.
3. For individuals that have CW Extenders or WTW Extenders with an extender status in "Pending" insert a "Denied" status and status date (DCR Run Date):
 - a. Note: End Date will not be updated for records in "Pending" status.
4. For the above records mention in #3, the denied status that is being inserted needs to retain the original begin and end months of the previous pending status record. This would include potentially blank dates if the pending record was also blank.
5. Update Code Hierarchy table to end date the following values to 4/30/2022:

Parent Code ID	Parent Category ID	Child Short Decode Name	Child Code ID	Child Category ID
43028	842	209 – Removed from Aid	90124	863
43026	842	319 – Meeting WPR	57221	863
43026	842	320 – Excused 2 nd Parent from WTW Activities	57499	863
43026	842	321 – Participating in Appraisal, Assessment, or Development of a WTW Plan	57500	863
43026	842	322 – Participating in WTW Job Search	57742	863
43029	842	402 – 18/24 Month Limit	28900	863
43029	842	404 – SIP	16850	863
43029	842	405 – Failure to Benefit from Assigned Activities	28513	863
43029	842	408 – Other Good Cause	57222	863
43031	842	606-WTW-Likely to Obtain Employment	83017	863
43031	842	607-WTW-Labor Market Barriers	83018	863
43031	842	608-WTW-Progress In Education	83019	863
43031	842	609-WTW-Progress in Treatment	83020	863
43031	842	610-WTW-Diagnosed learning or Disability	83021	863
43031	842	611-WTW-SSI Disability Benefits	83022	863
43031	842	612-WTW-Two Parents Assistance Unit	83023	863

2.31.3 Estimated Number of Records Impacted/Performance

~148 for WTW Extenders.

~12,560 for CW Extenders.

2.32 Code Table Change Request

2.32.1 Overview

This CTCR will end date the good cause and exempt reasons in CT 863 to comply with the new policy for CW 60 MTC and the removal of the WTW 24 MTC. These are reasons the user will find on the Cash Aid Time Limit Month Detail page and the Time Limit Extension Request Detail page. **All the reasons listed below are only for WTW and are not used for other programs.**

2.32.2 Description of Change

1. Update CT 863 to end date the following reasons to 4/30/2022:

a. ~~209 – Removed From Aid~~

a. ~~319 – Meeting WPR~~

b. ~~320 – Excused 2nd Parent from WTW Activities~~

c. ~~321 – Participating in Appraisal, Assessment, or Development of a WTW Plan~~

d. ~~322 – Participating in WTW Job Search~~

e. ~~402 – 18/24 Month Limit~~

b. ~~404 – SIP~~

e. ~~405 – Failure to Benefit from Assigned Activities~~

f. ~~408 – Other Good Cause~~

g. ~~606 WTW Likely to Obtain Employment~~

h. ~~607 WTW Labor Market Barriers~~

i. ~~608 WTW Progress In Education~~

j. ~~609 WTW Progress in Treatment~~

k. ~~610 WTW Diagnosed learning or Disability~~

l. ~~611 WTW SSI Disability Benefits~~

m. ~~612 WTW Two Parents Assistance Unit~~

2. Update CT10527 to end date the following Time Limit Extension Request Source to 4/30/2022:

a. WT – WTW 44

2.32.3 Estimated Number of Records Impacted/Performance

17 Records.

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	Reports	Time Limit Report	https://devviz.calsaws.net/auth/hub/stream/0eaaac9f-c66b-4509-a54f-8ad886e7f54f Report Team - Design

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 OUTREACH

6.1 Lists

1. **List Name:** List of cases where the WTW non-compliance was updated through a DCR

List Criteria: Cases where a non-compliance was end dated effective 04/30/2022 with reason:

- a. Post WTW 24 MTC CW Fed Requirements Not Met (CT365_CM)
- b. Failed to sign post 24 MTC Fed plan (CT365_W1)
- c. Post WTW 24 MTC Failed to Sign Subsequent Fed Plan(CT365_W6)
- d. Post WTW 24 MTC Fed Standards Not Met – Progress (CT365_W7)
- e. Post WTW 24 MTC Fed Standards Not Met – Participation (CT365_W8)

NOTE: The standard list columns mentioned below shall be based on the information from CW program.

Additional Column(s): person name

2. **List Name:** List of cases where the sanctioned WTW program was updated through a DCR

List Criteria: Cases where the sanctioned WTW program was updated through recommendation 2.14

NOTE: The standard list columns mentioned below shall be based on the information from WTW/REP program.

Additional Column(s): person name

3. **List Name:** List of CW cases that have an active CW timed-out participant in the AU

List Criteria: list of CW Cases where all the following criteria is met:

- a. CW program is active for benefit month 05/2022
- b. Exists an active participant in the AU for benefit month 05/2022 with role reason 'CW Time Limit'

NOTE: The standard list columns mentioned below shall be based on the information from CW program.

Additional Column(s): WTW worker ID from the timed out individuals WTW program.

4. List of cases with CW Extenders end dated as of 4/30/2022.

List Name: List of CW cases that have had their CW Extenders End dated.

List Criteria: List of CW Cases where all the following criteria is met:

- a. This list will include the records updated by the DCR mentioned in Section 2.31.2 #1, #2, #3, and #4.
- b. Identify individuals who have CW Extenders on their 48 MTC and extender status is not "Pending" and end date (effective

4/30/2022) them to allow the clock to tick until it hits the 60th month if they have not reached the CW 60 MTC limit.

Additional Column(s): WtW/REP Program Status, Begin Date of WtW/REP Program Status, WtW Status Reason, Date, CW Used Months, CW Extender Code, CW Extender Reason, CW Extender Begin Date, CW Extender Expected End Date, CW Program Status, CW Aid Code, CW Person Status, CW Person Name, WTW/REP Office Name (most current or recent), WTW/REP Worker ID (most current or recent).

Standard Columns:

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

Frequency: One-time

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2022>CA-217944

7 APPENDIX

[Include any supplementary items that may not fit in the Description section. Examples could include flow charts, lengthy code tables, etc....]

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226839

External Party Access IVR

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Farhat Ulain
	Reviewed By	Matthew Lower, Jared Kuester

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/03/2021	1.0	Initial Revision	Farhat Ulain
02/21/2022	2.1	Content Revision-Online; Updated Recommendations for the online Pages	Farhat Ulain
02/21/2022	2.1	Content Revision-Correspondence; Updates to variable population logic in section 2.7.3.	Phong Xiong
03/11/2022	2.1	Content Revision – Correspondence; Updates to variable population logic in sections 2.7.3 and 2.8.3	Phong Xiong
03/18/2022	2.2	Content Revision 2 – Correspondence; Updates to sections 1.2 – 1.4, and 2.8.3. Added sections 2.9 – 2.11.	Phong Xiong
03/29/2022	2.2	Provided Design Clarification for the section 2.4.3.	Farhat Ulain
04/01/2022	2.3	Content Revision 2 – Removed section 2.6	Farhat Ulain

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1 OVERVIEW

The Interactive Voice Response (IVR) PIN is used to authenticate a person in the IVR system. IVR allows Organizations/Resources to interact with callers through a series of automated menus and enabling the customer to self-serve for faster resolution. Through IVR flow, the customer may choose to record their voices for future authentication. This voice authentication can be used instead of a password, or Personal Identification Number (PIN).

1.1 Current Design

In the CalSAWS, only the Case Person has access to Interactive Voice Response (IVR) and they can call in using their voice as a password or the Personal Identification Number (PIN). Therefore, IVR PIN is only being displayed in Contact Detail page with the case person's information.

This functionality does not currently exist in the IVR. External parties currently do not have a separate phone number to call to be connected to the correct county IVR.

1.2 Requests

Add 'IVR PIN' field and a 'Reset PIN' button next to it in Resource Detail page, Foster Care Resource Detail page, and Money Management Resource Detail page.

Add the new PIN Letter for External Party Access.

Create call flow in Amazon Connect platform for customer Service Center solution to allow authorized external parties (CBO's, other Providers, County Agencies) to call a specific phone number, authenticate with a PIN, and be transferred to the call's destination County agent.

Update the batch logic to pick up the CSF 181 for bundling and mailing.

1.3 Overview of Recommendations

1. Modify Resource Detail page, Foster Care Resource Detail page and Money Management Resource Detail page to add 'IVR PIN' field label and a 'Create PIN' or a 'Reset PIN' button underneath.
2. Add 'IVR PIN Access' field and a dropdown to the Approved for County Use List page.
3. Add the new CSF 181 – PIN Letter for External Party Access to CalSAWS.
 - a. A new form/hoa header will be implemented to be used for the CSF 181.
4. Configure External Party Access call flow in the AWS connect platform.
5. Updates to the following batch logic for organization only forms:
 - a. Print Central Batch
 - b. Balancer Batch
 - c. Rendering Batch

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.
2. The CSF 181 will not be implemented into the Template Repository.
3. CBO's that do not enter their PIN will show as "Unauthenticated" in the CCP Screen pop.
4. All counties will have one common phone number for External party to call into the IVR.
5. Each county will have separate queues for calls transferred from EPA.
6. EPA will only support English language.
7. EPA calls will be prioritized over regular IVR calls to the county, prioritization will be added at the contact flow level.
8. Since multiple forms can be generated in a single day for a single organization/resource, the worker will have to cancel any form with prior generated PINs if resetting the PIN more than once the same day.
9. The new header created in section 2.8 replicates the CalSAWS standard header but are mutually exclusive from one another. The logic in one header will not affect the other.
10. The toll-free number displayed on the CSF 181 will be hard-coded into the form.
11. The CSF 181 will follow the existing PIN mailing functionality. It will show the CSF 181 in the distributed documents page but the user cannot view the form from the distributed documents page.
12. The existing logic of the PB19P201 Print Central Batch will not be changed. The updates in section 2.9 are additional logic added to the existing logic and only specific for the CSF 181. All other forms that are triggered by this batch job are set for LA County and does not require the updates in section 2.9.2.
13. The changes to the balancer and rendering batch jobs are specific to the CSF 181. Other forms in these batches are not affected.

2 RECOMMENDATIONS

2.1 Resource Detail

2.1.1 Overview

Modify Resource Detail page to add 'IVR PIN' field and a 'Create PIN'/'Reset PIN' button underneath.

2.1.2 Resource Detail Page – Mockups

The mockup shows a 'Resource Detail' form with a blue header and a 'Save' and 'Cancel' button in the top right. A legend indicates that an asterisk (*) denotes required fields. The form is divided into two sections: 'Basic Information' and 'Resource Access'. The 'Basic Information' section contains fields for ID (940000011), Status (Active), Name (CENTER FOR COMMUNITY AND FAMILY SERVICES), Payee Name (CENTER FOR COMMUNITY AND FAMILY SERVICES), and eCAPS Vendor Number. An 'IVR PIN' field is present with a 'Create PIN' button. The 'Resource Access' section contains a table with columns 'Active Directory Id' and 'Name', showing 'No data found' and an 'Add' button.

Resource Detail		
*- Indicates required fields		
Save Cancel		
Basic Information		
ID: 940000011	Status: * Active	IVR PIN: Create PIN
Name: * CENTER FOR COMMUNITY AND FAMILY SERVICES	Payee Name: * CENTER FOR COMMUNITY AND FAMILY SERVICES	
eCAPS Vendor Number:		
Resource Access		
Active Directory Id	Name	
No data found		
Add		

Figure 2.1.2-1 – Resource Detail Page-Create PIN

Resource Detail

* - Indicates required fields

Save Cancel

Basic Information

ID: 940000011 Status: * Active IVR PIN: Reset PIN

Name: * CENTER FOR COMMUNITY AND FAMILY SERVICES Payee Name: * CENTER FOR COMMUNITY AND FAMILY SERVICES IVR PIN Updated On: 04/17/2020 03:39:17 PM

eCAPS Vendor Number:

Resource Access

Active Directory Id	Name
No data found	

Add

Figure 2.1.2-2 – Resource Detail Page-Reset PIN

2.1.3 Description of Change

1. Add 'IVR PIN' field to Resource Detail page.
2. Add a 'Create PIN' button underneath the 'IVR PIN' field.
 - a. When a new Resource is added and the Resource Detail page doesn't have an IVR pin, a 'Create PIN' button will be displayed right underneath the 'IVR PIN' field.
 - i. Once the user clicks on the 'Create PIN' button, the 'Create PIN' button will be replaced with the text 'Pending'. After saving the record, an 8 digit unique PIN will be generated and assigned to the resource, and the 'Create PIN' button will be replaced with 'Reset PIN' button.
 - b. When the Resource Detail page has an IVR PIN generated, a 'Reset PIN' button will be displayed underneath the 'IVR PIN' field.
 - i. Clicking on the 'Reset PIN' button will reset the previously generated IVR PIN with a new set of 8 digit number once user clicks on SAVE button.
3. The 'IVR PIN' field and the 'Create PIN' button will be displayed in Create and Edit mode and the 'Reset PIN' button will be displayed only in Edit mode.
4. IVR PIN number will not be displayed in the Resource Detail page.
5. Add the 'IVR PIN Updated On' field in the Resource Detail page as displayed in the figure 2.1.2.-2.
 - a. This field will be displayed once the IVR PIN exists. This field will be displayed only in Edit mode.

- b. This field will display the date and time the IVR PIN was updated, formatted as <MM/DD/YYYY HH:MM:SS AM/PM>.

2.1.4 Page Location

- **Global:** Resource Databank
- **Local:** Resources
- **Task:** Resource Detail

2.1.5 Security

N/A

2.1.6 Page Mapping

Update page mapping for the new field.

2.1.7 Page Usage/Data Volume Impact

N/A

2.2 Foster Care Resource Detail

2.2.1 Overview

Modify Foster Care Resource Detail page to add 'IVR PIN' field and a 'Create PIN'/'Reset PIN' button underneath.

2.2.2 Foster Care Resource Detail Page – Mockups

The screenshot shows the 'Foster Care Resource Detail' page in the CalSAWS system. The page is for resource ID 2899353754. The 'Basic Information' section includes fields for ID, Vendor Type (Business), CWS/CMS Vendor Number (566398), and IVR PIN. The IVR PIN field is currently empty, and a 'Create PIN' button is visible to its right. Other fields include Resource Name (Extraordinary Families), Category (Foster Care), and eCAPS Vendor Number. A 'Save' button is located at the top right of the form area.

Figure 2.2.2-1 – Foster Care Resource Detail Page-Create PIN

This screenshot shows the same 'Foster Care Resource Detail' page, but now the IVR PIN field contains the value '04/17/2020 03:39:17 PM'. The 'Create PIN' button has been replaced by a 'Reset PIN' button. The 'Save' button remains at the top right. All other fields and the overall layout are identical to the previous screenshot.

Figure 2.2.2-2 – Foster Care Resource Detail Page-Reset PIN

2.2.3 Description of Change

1. Add 'IVR PIN' field to Foster Care Resource Detail page.
2. Add a 'Create PIN' button beneath the 'IVR PIN' field.
 - a. When a new Foster Care Resource is added and the Foster Care Resource Detail page doesn't have an IVR pin, a 'Create PIN' button will be displayed right underneath the 'IVR PIN' field.

- i. Once user clicks on 'Create PIN' button, the 'Create PIN' button will be replaced with the text 'Pending'. After saving the record, an 8 digit unique PIN will be generated and assigned to the resource, and the 'Create PIN' button will be replaced with 'Reset PIN' button.
 - b. When the Foster Care Resource Detail page has an IVR pin number generated, a 'Reset PIN' button will be displayed underneath the 'IVR PIN' field.
 - i. Clicking on 'Reset PIN' button will reset the previously generated IVR pin with a new set of 8 digit number once user clicks on SAVE button.
- 3. The 'IVR PIN' field and the 'Create PIN' button will be displayed in Create and Edit mode. The 'Reset PIN' button will be displayed only in Edit mode.
- 4. IVR PIN number will not be displayed in the Foster Care Resource Detail page.
- 5. Add the 'IVR PIN Updated On' field in the Foster Care Resource Detail page as displayed in the figure 2.2.2.-2.
 - a. This field will be displayed once the IVR PIN exists. This field will be displayed only in Edit mode.
 - b. This field will display the date and time the IVR PIN was updated, formatted as <MM/DD/YYYY HH:MM:SS AM/PM>.

2.2.4 Page Location

- **Global:** Resource Databank
- **Local:** Foster Care
- **Task:** Foster Care Resource Information

2.2.5 Security

N/A

2.2.6 Page Mapping

Update page mapping for the new field.

2.2.7 Page Usage/ Data Volume Impact

N/A

2.3 Money Management Resource Detail

2.3.1 Overview

Modify Money Management Resource Detail page to add 'IVR PIN' field and a 'Create PIN'/'Reset PIN' button underneath.

2.3.2 Money Management Resource Detail Page – Mockups

The screenshot shows the CalSAWS interface for the 'Money Management Resource Detail' page. The page title is 'Money Management Resource Detail'. A sidebar on the left contains a 'Money Management' menu with options: Money Management, Resource Search, Money Management Resource Information, Vendor Information, Approved for County Use, County Impact List, and Notification List. The main content area includes a header with 'Los Angeles STG1' and navigation tabs: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank (selected), Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. Below the header, there are 'Save' and 'Cancel' buttons. A note states '*- Indicates required fields'. The 'Basic Information' section contains the following fields: ID (2899324899), IVR PIN (with a 'Create PIN' button), Name (A & J Social Services, LLC), Payee Name (A & J Social Services, LLC), Category (Money Management), and Type (Other). The eCAPS Vendor Number field is also present.

Figure 2.3.2-1 – Money Management Resource Detail Page-Create PIN

The screenshot shows the CalSAWS interface for the 'Money Management Resource Detail' page, similar to the previous one but with a 'Reset PIN' button. The 'Basic Information' section now includes an 'IVR PIN Updated On:' field with the value '04/17/2020 03:39:17 PM'. The 'IVR PIN' field has a 'Reset PIN' button. All other fields and the sidebar remain the same as in the previous mockup.

Figure 2.3.2-2 – Money Management Resource Detail Page-Reset PIN

2.3.3 Description of Change

1. Add 'IVR PIN' field to Money Management Resource Detail page.
2. Add a 'Create PIN' button beneath the 'IVR PIN' field label.
 - a. When a new Money Management Resource is added and the Money Management Resource Detail page doesn't have an IVR pin, a 'Create PIN' button will be displayed right underneath the 'IVR PIN'.
 - i. Once the user clicks on 'Create PIN' button, the 'Create PIN' button will be replaced with the text 'Pending'. After Saving the record, an 8 digit unique PIN will be generated and assigned to the resource, and the 'Create PIN' button will be replaced with 'Reset PIN' button.
 - b. When the Money Management Resource Detail page has an IVR pin number generated, a 'Reset PIN' button will be displayed underneath the 'IVR PIN' field.
 - i. Clicking on 'Reset PIN' button will reset the previously generated IVR pin with a new set of 8 digit number once user clicks on SAVE button.
3. The 'IVR PIN' field and the 'Create PIN' button will be displayed in Create and Edit mode and the 'Reset PIN' button will be displayed only in Edit mode.
4. IVR PIN number will not be displayed in the Money Management Resource Detail page.
5. Add the 'IVR PIN Updated On' field in the Money Management Resource Detail page as displayed in the figure 2.3.2.-2.
 - a. This field will be displayed once the IVR PIN exists. This field will be displayed only in Edit mode.
 - b. This field will display the date and time the IVR PIN was updated, formatted as <MM/DD/YYYY HH:MM:SS AM/PM>.

2.3.4 Page Locations

- **Global:** Resource Databank
- **Local:** Money Management
- **Task:** Money Management Resource Information

2.3.5 Security Update

N/A

2.3.6 Page Mapping

Update page mapping for the new field.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Approved for County Use List

2.4.1 Overview

The Approved for County Use List page allows the User to add, edit and view a Resource's approval status. This page maintains a historical record of statuses for a Resource. This change will add the 'IVR PIN Access' field to the page to maintain IVR pin access for the resources.

2.4.2 Mockups

2.4.2.1 Approved for County Use List - Resources

The screenshot displays a web interface titled "Approved for County Use List". At the top right, there are "Save" and "Cancel" buttons. Below the title, a legend indicates that an asterisk (*) denotes required fields. A table lists resource approval details:

Approved	IVR PIN Access	Comments	Date	User
Yes	Yes		10/06/2021	587177

Below the table is a "Change Approval for Resource to" form. It includes:

- "Approved: *" dropdown menu with "Yes" selected.
- "IVR PIN Access: *" dropdown menu with "No" selected.
- "Date:" field with the value "02/17/2022".
- "Comments:" text area.
- "Save" and "Cancel" buttons at the bottom right.

Figure 2.4.2.1-1 – Approved for County Use List Page – Resources

2.4.2.2 Approved for County Use List – Foster Care

Approved for County Use List

*- Indicates required fields

Approved	IVR PIN Access	Suspended	Placement Verification Required	Comments	Date	User
Yes	Yes	No	Yes		02/17/2022	1054128
No			Yes		02/10/2022	1054128
Yes	No	No	Yes		02/10/2022	1054128

Change Approval for Resource to

Approved: *

 IVR PIN Access: *

 Date: 02/17/2022

Suspended: *

 Placement Verification Required: *

Comments:

Figure 2.4.2.2-1 – Approved for County Use List Page – Foster Care

2.4.3 Description of Change

1. Add 'IVR PIN Access' field and a dropdown to the Approved for County Use List Page.
 - a. The dropdown will have the following values:
 - Yes
 - No
 - b. It will be a dynamic field and will be displayed only if the user selects 'Yes' in the 'Approved' field.
 - c. It will be a required field.
 - d. This field will be defaulted to 'No'.
 - e. If a county ~~opts in and~~ selects 'Yes' in the 'IVR PIN Access' field, then the resource belongs to the county will have the access to the IVR PIN.
2. Add a column 'IVR PIN Access' to the top section of the page as displayed in the figure 2.4.2.1-1 and 2.4.2.2-1.
 - a. This column will save the value that is added to the 'IVR PIN

Access' dropdown previously, in the 'Change Approval for Resource to' section of the page

Note: If a county ~~opts out and~~ selects 'No' in the 'IVR PIN Access' field, then the resource belongs to the county will not have access to the IVR PIN.

All prior resources those are approved will have a default value 'No' in the 'IVR PIN Access' column.

Resources those are not approved, the 'IVR PIN Access' column will be blank for them.

2.4.4 Page Locations

- **Global:** Resource Databank
- **Local:** Resources
- **Task:** Approved for County Use

2.4.5 Security Update

N/A

2.4.6 Page Mappings

Update page mapping for the new field.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 External Party Access IVR

2.5.1 Overview

External Party calls a specific phone number, then enters a PIN to authenticate. Once authenticated the call is routed to the destination county agent for further assistance.

2.5.2 Description of Changes

Implement External party access IVR call flow in AWS connect. Add authentication PIN management in CalSAWS application.

When an external party calls the phone number, the caller is prompted to enter a PIN to authenticate. When the caller authenticates, the caller is

prompted to enter or say the county name or the two-digit county code of the case they are calling about. After the caller enters the county code, the call is then transferred to the destination county.

External party calls will also have a route to callers who are unable to authenticate in the IVR. The caller will still be prompted to enter or say the county name or the two-digit county code. After the caller enters the county code, the call is then transferred to the destination county.

The county must have dedicated queues to service External party calls. Routing profiles are created for such queues and agents are assigned to the routing profiles to service both authenticated and unauthenticated external party calls. County to configure separate routing profiles for External Party calls.

For Non-CSC counties, the IVR phone number will be played back to the external party.

2.6—IVR Authentication Sweep

2.6.1—Overview

2.6.2—Description of Change

~~Update IVR_LOGIN_AGGR table to include a reference to the CalSAWS table that stores the authorized representative.~~

~~Update batch job PB00V500 to include primary key id for the table that stores the authorized representative which IVR will consume.~~

2.6.3—Execution Frequency

2.6.4—Key Scheduling Dependencies

2.6.5—Counties Impacted

~~All Counties~~

2.6.6—Data Volume/Performance

2.6.7—Failure Procedure/Operational Instructions

~~Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file~~

from the directory and contacting the external partner if there is an account or password issue, etc...)

2.7 Adding New CSF 181 – New Case IVR PIN Letter for External Party Access Form Recommendation

2.7.1 Overview

The CSF 181 – New Case IVR PIN Letter for External Party Access form is used to inform the Resources (External Parties) of their PIN for the IVR system to call in and retrieve information.

State Form: N/A – Non-State Form

Programs: N/A – Non-Program Specific Form

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

Languages: English

2.7.2 Form Verbiage

Create Form XDP

A new XDP will be created for the CSF 181 – New Case IVR PIN Letter for External Party Access form.

Form Header: New header from section 2.7.

Form Title (Document List Page Displayed Name): New Case IVR PIN Letter for External Party Access

Form Number: CSF 181 (01/2022)

Include NA Back 9: No

Imaging Form Name: PIN Letter for External Party Access

Imaging Document Type: Interoffice Correspondence

Imaging Case/Person: N/A

Form Mockups/Examples: See supporting document #2

2.7.3 Form Variable Population

The new CSF 181 will require variable population logic for the header and body variables.

Form Header Variables:

Variable Name	Population	Formatting	Editable*/Field Type	Template Repository Population	Populates with Form Generation
Return Address	<p>Populates with the address of the sending office</p> <p><i>From ADDR table and using OFFICE_ID from OFFICE_ADDR table.</i></p> <p>Technical Note: OFFICE_ADDR table connects to ADDR table</p> <p>*Determined based on login user</p>	Arial Font Size 10	Yes/Text Field	No	Yes
County Of	<p>Populates with the county</p> <p><i>COUNTY_CODE from ADDR table.</i></p> <p>Technical Note: ADDR table connects to ORG table through ORG_ADDR table.</p> <p>*Determined based on login user</p>	Arial Font Size 10	Yes/Text Field	No	Yes
Date	Populates the current date	Arial Font Size 10	Yes/Date Field	No	Yes

Form Title	Populates with “ New Case IVR PIN Letter for External Party Access ”	Arial Font Size 10 – Bold	Yes/Text Field	No	Yes
Address	Mailing Address of the organization or resource (Displayed under “Address” in each page described in sections 2.1-2.3.)	Arial Font Size 10	Yes/Text Field	No	Yes

Form Body Variables:

Variable Name	Population	Formatting	Editable*/Field Type	Template Repository Population	Populates with Form Generation
Organization Name	Populates with the name of the organization or resource <i>BUSINESS_NAME</i> <i>from ORG table.</i>	Arial Font Size 10	Yes/Text Field	No	Yes
PIN Number 1	Populates with the 8-digit PIN generate when “Create PIN” or “Reset PIN” buttons are clicked. See sections 2.1 – 2.3. <i>PIN_NUM_IDENTIF</i> <i>from IVR_ORG table.</i>	Arial Font Size 10	Yes/Numeric Field	No	Yes

PIN Number 2	Populates with the 8-digit PIN generate when "Create PIN" or "Reset PIN" buttons are clicked. See sections 2.1 – 2.3. <i>PIN_NUM_IDENTIF from IVR_ORG table.</i>	Arial Font Size 10	Yes/Numeric Field	No	Yes
-----------------	---	-----------------------	----------------------	----	-----

Note: PIN Number 1 and PIN Number 2 are the same PINs.

2.7.4 Form Generation Conditions

1. Add Form Generation

The form will generate any time a user creates and saves a new PIN from any of the following pages:

- Resource Detail Page, or
- Foster Care Resource Detail Page, or
- Money Management Resource Detail Page

Sections 2.1 – 2.3 has added a "Create PIN" and "Reset PIN" buttons. The form will generate any time either of those buttons are clicked and saved by the user to create a new PIN or reset their PIN.

Once the new PIN has been created and saved, the form will display only on the Distributed Documents page and when the "Search By:" field is set to "Resource" (please see image below).

Distributed Documents Search

*- Indicates required fields

Search By:
Resource

Resource Name: Resource ID: From: *

Document Name: Document Number: Program

2. Add Form Control

The form will have the following barcode:

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Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

Note: Customers with electronic communications will still receive a paper copy of this correspondence in the mail so that they are also provided a return envelope.

3. Add Form Print Options and Mailing Requirements

The form will have the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
N	N	N	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): Resource or organization selected from one of the pages in sections 2.1-2.3.

Mailed From (Return): Sending Office

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: None

Enclosures: None

Electronic Signature: No

CW/CF Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): No

2.8 Adding New NOA Date Only Header Fragment Recommendation

2.8.1 Overview

The new header is created to be used when a form header only requires the date to be populated. The new header is used when a form is not tied to a specific case or program.

Languages: English

2.8.2 Header Verbiage

Create Header XDP

A new XDP will be created for the CSF 181 – PIN Letter for External Party Access form. The new header will replicate the CalSAWS Standard Header (HEADER_1), with the following fields removed:

- Case Name
- Case Number
- Worker Name
- Worker ID
- Worker Phone Number
- Customer ID

Example:

COUNTY OF _____
Date: _____

New Case IVR PIN Letter for
External Party Access

2.8.3 Header Variable Population

The new CSF 181 will require variable population logic for the body variables.

Variable Name	Population	Formatting*
Form Name	Populates with the form title	Arial Font Size 10 - Bolded
County Of	Populates with the county name	Arial Font Size 10
Customer Address	Populates with the address of the recipient Technical Note: Populates with Mailing Address (type_code = ML), if it does not, use the Physical Address (type_code = PH).	Arial Font Size 10

	<i>Type_Code is pulled from ORG_ADDR table.</i>	
Office Address	Populates with the address of the sending office	Arial Font Size 10
Date	Populates with the date the form was generated	Arial Font Size 10

*English only, Spanish and threshold will generate based on project standards for that language.

Variables Requiring Translations: N/A

2.9 Updates to PB19P201 Print Central Batch Logic

2.9.1 Overview

This batch logic is currently used for organization only forms that are intended for central print. This effort will add the CSF 181 – New Case IVR PIN Letter for External Party Access to the batch trigger. The batch is also currently only set for LA County.

2.9.2 Description of Changes

1. Add the CSF 181 to the batch trigger of the PB19P201 Print Central batch job to be sent out to all counties.

Technical Note: *County_Code* is pulled from *ADDR* table. If the *county_code* is not available in the *ADDR* table, the print job will fail for the form.

Technical Note 2: *Agency_Code* is null from *PRINT_FILE* table for Migration Counties. *AGENCY_CODE* = DP from *PRINT_FLE* only for LA County.

2. Update PB19P201 to PB00P201 to make it available for all counties.

2.10 Updates to PB00R3400 Balancer Batch Job Logic

2.10.1 Overview

The balancer assigns a number to the records in the *SYS_TRANSMACT* table.

2.10.2 Description of Changes

1. Update the balancer logic to account for forms with no *CASE_ID* that passes through the logic.

2.11 Updates to PB00R34XX Rendering Batch Job Logic

2.11.1 Overview

The rendering batch jobs picks up the forms with an assigned number from the balancer job.

2.11.2 Description of Changes

1. Update the rendering logic to process records without a *PGM_ID*.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	AWS External Party Access IVR Detailed Call flow.	Visio diagram represents External Party Access call flow, AWS EPA IVR Detailed Call Flow.pdf	
2	Forms	CSF 181 Mockup	CSF181_EN.pdf

4 PROJECT REQUIREMENTS

REQ #	REQUIREMENT TEXT	How Requirement Met
DDID 2216	The CONTRACTOR shall configure the customer Service Center solution to allow authorized external parties (CBO's, other Providers, County Agencies) to call a specific phone number, authenticate with a PIN, and be transferred to the call's destination County agent. This solution will only support English.	Section 2.4.2
DDID 2725	The Contractor shall configure the External Party Access solution to include unique PINs, assigned and managed by the County in the CalSAWS Application to be used by the external parties for identification and authentication purposes.	Section 2.6

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226844 | Enhanced Customer Control Panel

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Allen Garcia, Alex Haffalvi, Farhat Ulain, Amit Pandya
Reviewed By	Kevin Hooke	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/14/2021	0.1	Initial Draft	Allen Garcia
02/07/2022	2.0	Content Revision 1	Kevin Hooke
<u>03/16/22</u>	<u>3.0</u>	<u>Content Revision 2 – page mockups updated to reflected updates to UI look n feel</u>	<u>Kevin Hooke</u>

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1 OVERVIEW

1.1 Current Design

CalSAWS/C-IV Contact Center Agents currently use two applications, the Default Customer Control Panel (CCP) which is a web-based application with limited functionality, and the Custom CCP which is a desktop client application. Both applications allow Contact Center Agents to accept inbound voice calls, place outbound voice calls, and conduct web chats with customers.

1.2 Requests

1. Replace the current Default CCP and Custom CCP applications with a single web-based solution which enables agents to access the application from either a County Office or remote location.
2. Combine features of both applications, the Default CCP and Custom CCP, into one single application.
 - a. Including a new Dashboard page that will allow the user to view historical statistics for past voice calls and view the Message of the Day.
3. Add a 'Call Control Panel' link in the CalSAWS Application that opens the CCP application for the user.

1.3 Overview of Recommendations

1. Create Enhanced CCP with CalSAWS Identify Provider Integration for the CalSAWS Contact Center Solution
2. Add Enhanced CCP to CalSAWS Application Navigation
3. Customize Enhanced CCP
 - a. Dashboard
 - b. Caller Profile
 - c. Agent Profile
 - d. Supervisor View
 - e. Live Chat (Web Chat)
 - f. Queue Statistics/Team Performance
 - g. Useful Links
 - h. Administration page, **will be added in SCR CA-2266271**
4. Configure Call Panel in Enhanced CCP
5. Enable CalSAWS Screen Pop for Incoming Calls
6. Enable downloading of CCP Logs for Troubleshooting issues

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1.4 Assumptions

1. Agents will not be able to handle webchat calls if the county has not opted-into this feature.
 2. Agents/workers will not have access to Supervisor features in the Enhanced CCP. Only staff rolled on as a Supervisor will see these features.
 3. Quick Links will be defined at individual county sessions.
 4. The Enhanced CCP has a minimum required internet bandwidth of 2 Mbps to support Supervisor features such as screen recording and call monitoring. Other core features such as placing and receiving calls require less bandwidth. It is assumed Agents using the Enhanced CCP while working from home have the minimum required bandwidth available to support all features.
 5. The Enhanced CCP web application is only supported using the latest three versions of Google Chrome or Mozilla Firefox browsers.
- 5-6. [The Enhanced CCP will be deployed to San Bernardino County first. All future counties will be deployed with a separate SCR.](#)

2 RECOMMENDATIONS

2.1 Create Enhanced CCP with CalSAWS Identify Provider Integration

2.1.1 Overview

Enable the Enhanced CCP application to allow agents and supervisors in the CalSAWS Contact Center Solution to handle calls and view statistics. The Enhanced CCP will be integrated with the CalSAWS Identify Provider.

2.1.2 Description of Changes

Integrate the Enhanced CCP application with the CalSAWS Identity Provider to enable single-sign on (SSO). Create Enhanced CCP that is accessible from CalSAWS Application (See section 2.2) and designated URL.

2.1.2.1 Single Sign On

To access the Enhanced CCP application, the user must have one of the following roles assigned in the CalSAWS Application:

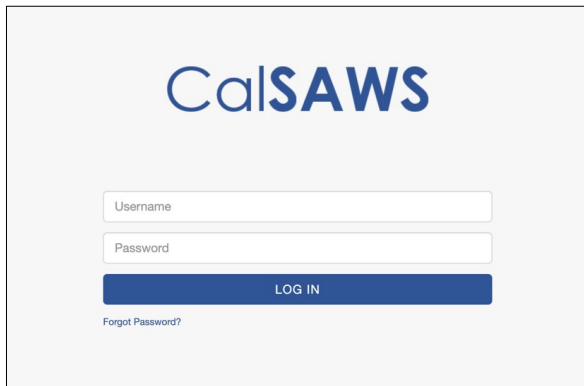
- CCP Agent

- CCP Supervisor

Users access the Enhanced CCP via the designated URL in their web browser or link in the CalSAWS Application (see section 2.2).

1. If the user has already logged on to the CalSAWS Application and their logon session is still active, they are redirected directly to the Enhanced CCP application and are not prompted to logon again.
2. If the user's logon session has expired or if the user is not currently logged on, they are redirected to the logon page which is provided by the CalSAWS Identity Provider. The user will enter in their CalSAWS credentials to continue. Login Screen Mockup.

2.1.2.1.1 Figure - Login Screen



If the user clicks the 'Logout' button at the top right of the Enhanced CCP, the user's current session is invalidated, and the user is redirected to the CalSAWS login page.

2.2 Add Enhanced CCP to CalSAWS Application Navigation

2.2.1 Overview

A 'Call Control Panel' link will be added in the CalSAWS Application to open the Enhanced CCP in a new window.

2.2.2 Description of Change

1. Add a 'Call Control Panel' link under Admin Tool – Global navigation, and Office Admin – Local navigation.

2. The 'Call Control Panel' link will be displayed directly under the Call Log link in the Task Navigation Menu.
3. Upon clicking on 'Call Control Panel' link, Call Control Panel pop up window will be displayed.
4. Call Control Panel window (New Window) will be displayed for the user who has CCP Agent and or CCP Supervisor security right(s). CCP Agent and CCP Supervisor are existing security rights.

Technical Note: Call Control Panel pop up window configured:

- Height = Screen Height
- Width = Screen Width
- Scrollable = Yes
- Sizeable = Yes

2.2.2.1 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Call Control Panel

2.2.2.1.1 Figure - Task Navigation

2.2.2.2 Security Updates

N/A

2.3 Customize Enhanced CCP

2.3.1 Overview

The Enhanced CCP is a web-based application that enables contact center agents and supervisors to complete the core functions in a contact center, including handling incoming calls, setting agents/user status, initiating outbound calls and transferring calls.

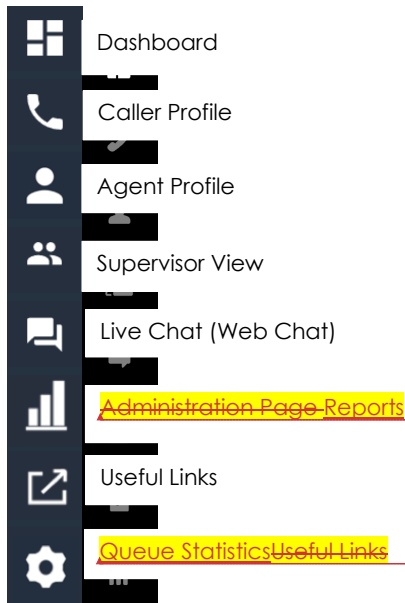
2.3.2 Description of Changes

Customize the base Enhanced CCP to enable the following pages/menu items.

1. **Dashboard** – Allows the user to view historical statistics for past voice calls and view the Message of the Day.

2. **Caller Profile** – Displays information about the current caller to assist the Agent when working with the current customer.
3. **Agent Profile** – Displays current statistics for the Agent. The page also allows the Agent to compare their Statistics over time.
4. **Supervisor View** – Allows a Supervisor user to view and manage Agents.
5. **Live Chat (Web Chat)** – Allows the Agent to interact with a customer using text chat.
6. **Queue Statistics** – Displays Statistics for the currently defined queues.
7. **Useful Links** – Provides county specific links for agents to access.

2.3.2.1 Figure - Enhanced CCP Navigation Menu



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Note: Admin page will be added in SCR CA-226627

2.3.2.2 Create Dashboard page

Add a page to the Enhanced CCP application that displays **Real-time and Historical call statistics metrics** for a selected queue and Message of the Day functionality.

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The Message of the Day feature allows Supervisors to send a message to their Agents and for Agents to view the **most recent** messages from their supervisors.

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1. User clicks on 'Dashboard' menu item in the main navigation bar, **Real-time and Historical metrics for the selected queues are** displayed.
2. At the top left of the Dashboard page the 'Message of the Day' panel is displayed. The panel includes who the message is from (**"Message sent by"**) and the time and date the message was sent.
3. In the **'Message SenderCompose Message'** field at the top right, the user enters text into the field **labelled 'Add a Message'** then clicks the 'Send' button, to send the message of the day to the Agents. Note: Only users with CCP Supervisor role will have access to **'Message SenderCompose Message' .fieldpanel**. **Below the 'Add a Message' text entry input field, 'Characters Left: 200' is displayed and is updated as the user types a message to indicate how many characters are remaining. The user can send a message with upto 200 characters.**
4. **Real Time Metrics and Historical Voice StatisticsMetrics for voice and chat** are displayed below the Message of the Day.
5. **Below theTo the right of the .Historical StatisticsMetrics text label, the user can choose a date range a start and end date and data type to display a graph of the to display the selected metrics ever timefor a selected date range.** See highlighted section in Figure 2.3.2.2.2.

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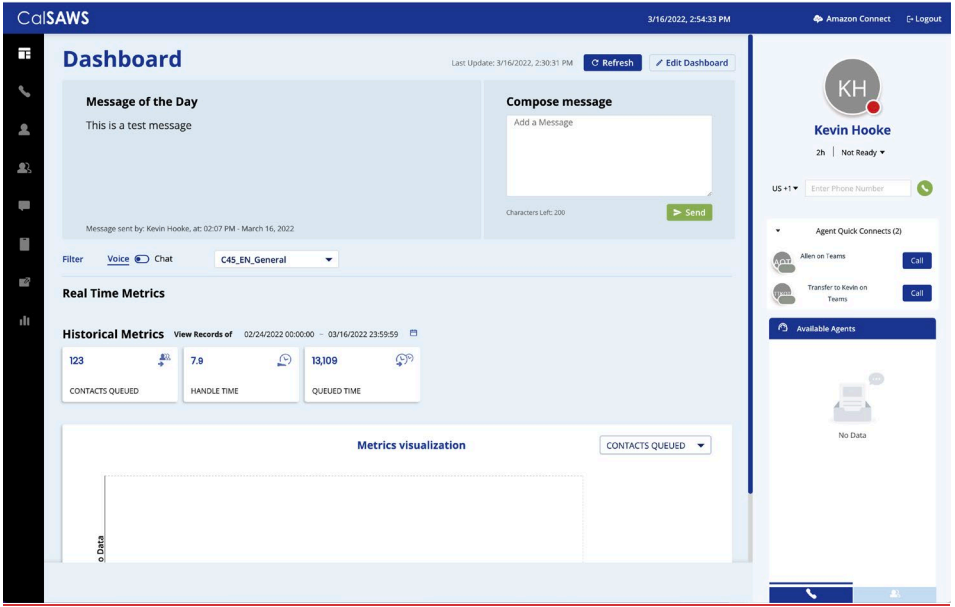
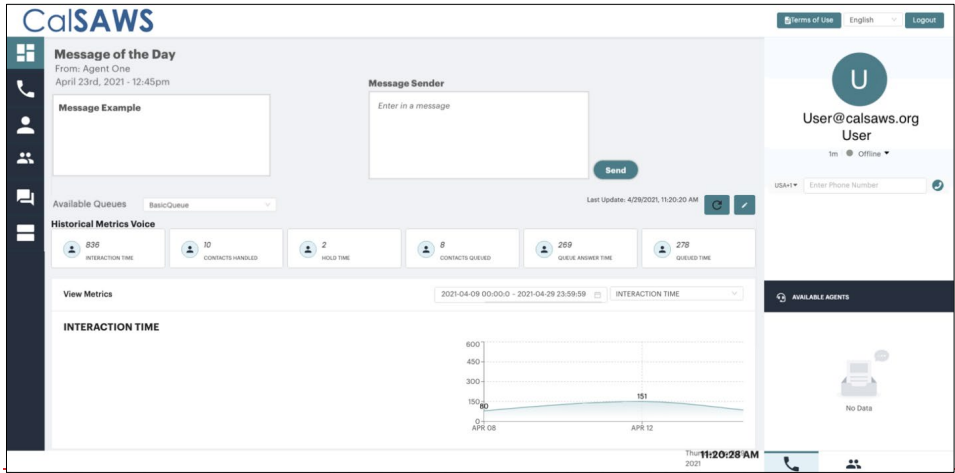
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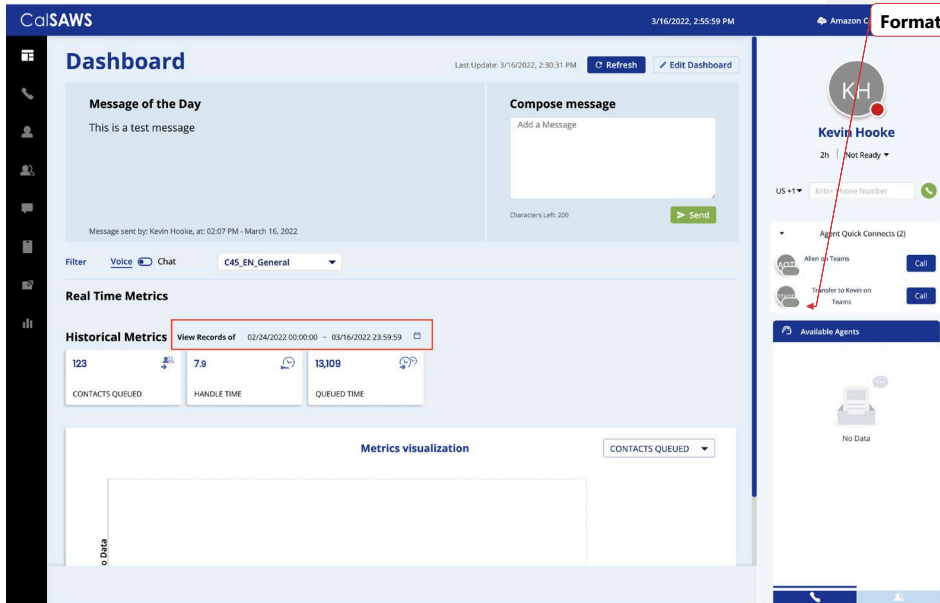
2.3.2.2.1 Figure – Dashboard page

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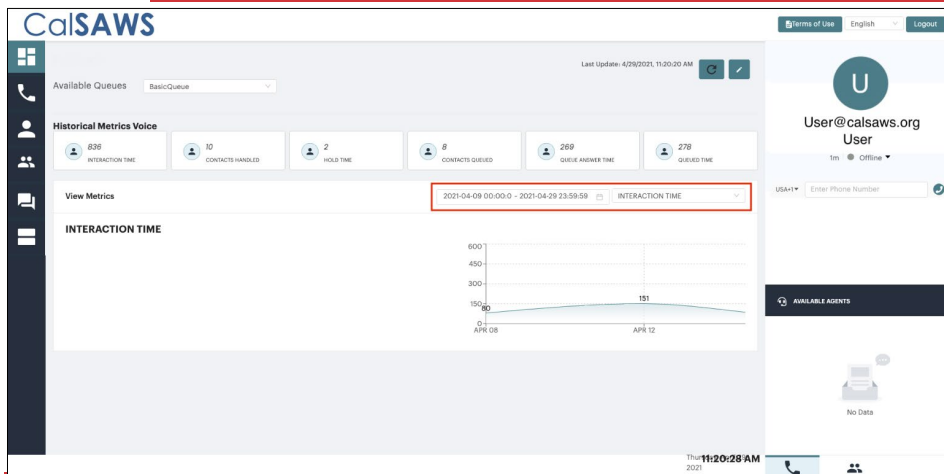


2.3.2.2.2 Figure – Dashboard page Date Range

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2.3.2.2.3



2.3.2.3 Create Caller Profile page

Add a page to the Enhanced CCP that displays caller information and buttons for the user to select and perform an action.

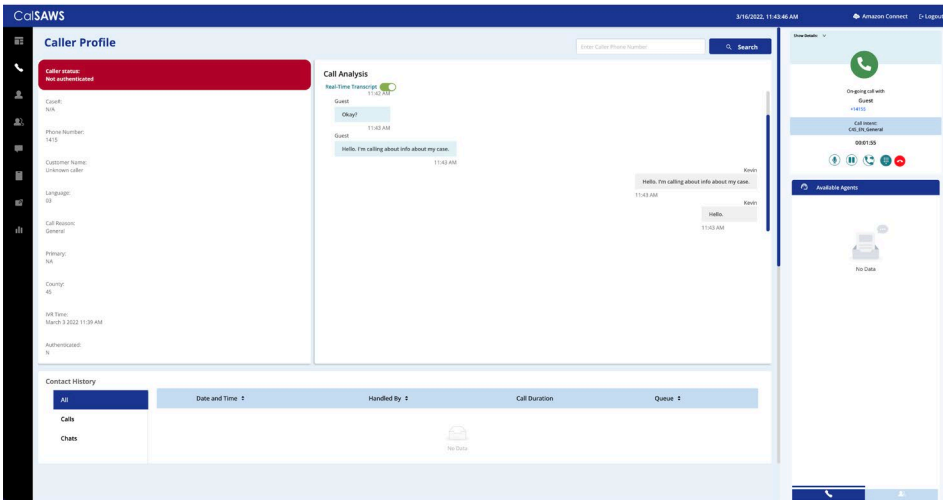
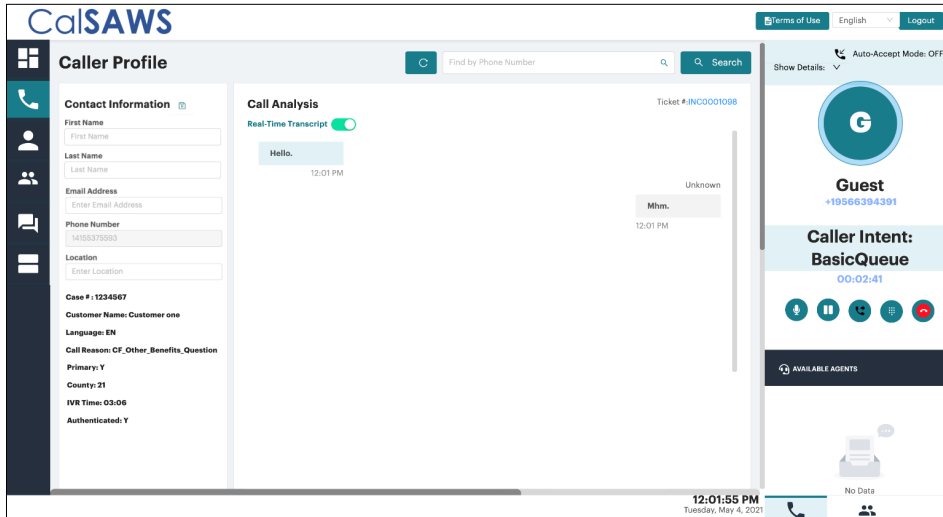
1. User clicks on 'Caller Profile' menu item in main navigation bar or accepts an inbound call, the Caller Profile page is displayed. The left of the page displays the caller's contact information.
2. In the center of the Caller Profile Page, a Real-Time Transcript of the voice call is displayed which the user can turn off or on. The transcript is automatically updated during the call and displays a text record of both the caller and the Agent.
3. If the user accepts an incoming call, the In-Progress Call Banner ~~Page panel~~ is displayed on the ~~right~~~~left~~. The name of the caller and their phone number is displayed.
4. **In the Call Control Panel on the right**, ~~B~~below the phone number the name of the current queue and call duration is displayed.
5. ~~At the bottom of the page~~**Below the call duration**, buttons are displayed to allow the Agent to perform an action on the current call.

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2.3.2.3.1 Figure - Caller Profile page - Call In-Progress

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2.3.2.4 Create Agent Profile page

Add a page to the Enhanced CCP application to display the Agent's information, Call History and statistics.

1. User clicks on the 'Agent Profile' menu item in the navigation bar, the Agent Profile page is displayed.

2. Users information is displayed at the top of the page including name and email address.
3. Users call statistics are displayed under the users information showing the Number of Call Answered, Total Calls Handled, Total Missed Calls, Total Call Duration, and Average Call Duration.

4. Users can click 'Today', 'Weekly', and 'Monthly' select a start date and end date to view of their call statistics between a selected date range.

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5. On the Below statistics, users can see their 'Comparison of Agent Statistics' by selecting a time and date range to compare their call statistics over time.

6.5. Call Contact History tab, information about previous calls and web-chats handled and missed and e-mails displayed with up to three years of log history.

2.3.2.4.1 Figure – Agent Profile page – Call History

CalSAWS Terms of Use English Logout

Agent One
User@calsaws.org

Date and Time	Phone Number	Caller Name	Call Duration	Queue
Sat, May 1, 2021, 01:05:59 PM	1555555555	Guest	56 seconds	BasicQueue
Sat, May 1, 2021, 01:01:39 PM	1555555555	Guest	135 seconds	BasicQueue

11:21:39 AM 2021

User@calsaws.org
User
In Offline
Enter Phone Number

AVAILABLE AGENTS
No Data

CalSAWS 3/16/2022, 10:53:53 AM Amazon Connect Logout

Agent Profile Download CCP Logs

Kevin Hooke
Not Ready

Call History Chat History Missed Contact History Video History Profile Contact History

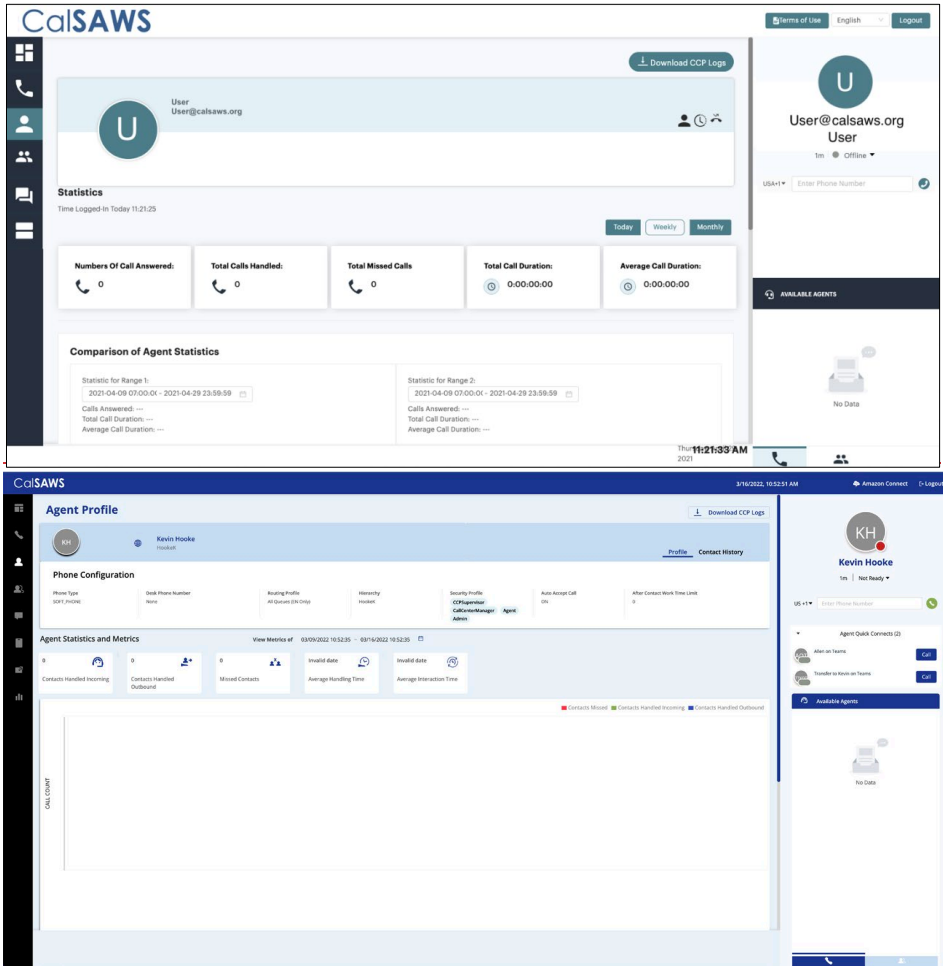
Date and Time	Phone Number	Contact ID	Queue
Wed, March 2, 2022, 01:53:54 PM	1415	48545434-4b29-4853-9426-b056e1601ac7	CHS_EN_General
Tue, February 15, 2022, 02:16:09 PM	1415	683075d5-768c-46f1-8878-67a8f116e17e	CHS_EN_General
Tue, February 15, 2022, 03:08:04 PM	1415	00428841-6a45-4730-9c37-5a6a758d89d0	CHS_EN_General
Tue, February 15, 2022, 03:03:12 PM	1415	798c1878-8f65-4d46-bae2-18ca758d89d5	CHS_EN_General
Tue, February 15, 2022, 02:59:47 PM	1415	01492460-38ac-46a0-b3a6-ca053847544c	CHS_EN_General
Tue, February 15, 2022, 10:08:26 AM	1415	a0867830-8ba2-42ba-af18-e1f91d800249	CHS_EN_General
Tue, February 15, 2022, 09:56:58 AM	1415	300166f4-a665-444f-9a3f-356f0327b2ce	CHS_EN_General
Tue, February 15, 2022, 09:53:16 AM	1415	f585d713-366c-4865-9181-818d479e1e4b	CHS_EN_General
Tue, February 15, 2022, 09:40:40 AM	1415	64115839-a0c5-4855-818f-c0a699a4893c	CHS_EN_General
Mon, February 14, 2022, 05:02:35 PM	1415	a08a4010-f0c6-46e1-5d7d-1228035f886	CHS_EN_General

10 / page

Kevin Hooke
2m Not Ready
Enter Phone Number
Agent Quick Connect (2)
Add on Teams Call
Transfer to Work on Teams Call
Available Agents
No Data

2.3.2.4.2 Figure – Agent Profile page – Agent Statistics

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2.3.2.5 Create Supervisor View page

The Supervisor View page allows a Supervisor user to view and manage agents and view missed calls. The page allows the Supervisor to change the Routing Profile, turn on/off the 'auto answer' feature, and change the phone type for each Agent.

This menu item is only available to users with the CCP Supervisor role assigned.

Add a page to the Enhanced CCP application for supervisors to view ~~and manage~~ agents in a selected team. **Team Performance tab**. Team viewed is selected using the 'select team' drop down.

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A filter is displayed in the Agent list panel, 'Include logged out agents' to **include display logged out agents in the display**.

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1. User clicks on the 'Supervisor View' menu item in the navigation bar, the Supervisor View page is then displayed.
2. Tabs are available to view and manage agents/teams.

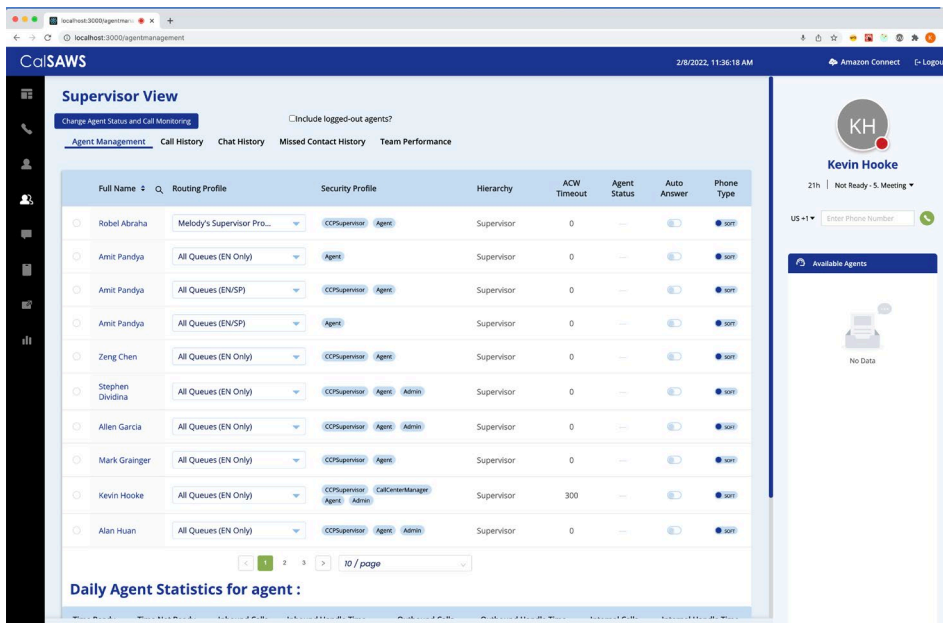
- **Agent Management tab** for a list of agent information.
- **Call History for a list of calls handed by the current agent**
- **Chat History for a list of web-chats handled by the current agent**
- **Missed Call Contact History** tab for list of missed calls
- Team Performance Tab for view of team statistics

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At the bottom of the Agent Management page, users click on the left, right or numbered toggle button to move between pages.

To monitor in-progress calls and change the status of an Agent, the Supervisor presses the 'Change Agent Status and Call Monitoring' button showed in Figure 2.3.2.5.1. When pressed, this button opens a new browser tab and navigates to the AWS Connect console 'Real Time Metrics' page.

2.3.2.5.1 Figure - Supervisor View page



2.3.2.5.2 Supervisor View page – Real-time Metrics

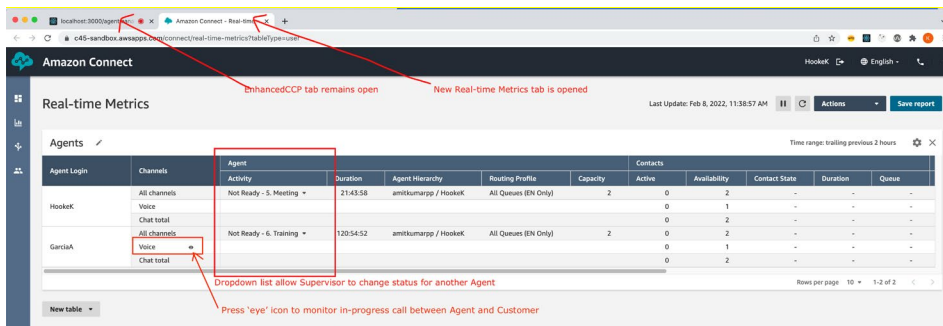


Figure 2.3.2.5.2 shows the Real-time Metrics page open in a new tab after pressing the 'Change Agent Status and Call Monitoring' button on the Supervisor View page. While open, the Supervisor can change between the EnhancedCCP application and the Real-time Metrics page using the open tabs in their browser.

The Supervisor can change the status of any currently logged on Agent by using the 'Activity' dropdown list and selecting an available status.

When an Agent is in an in-progress call an 'eye' icon is displayed beside the Agent name. Clicking this icon allows the Supervisor to monitor a call in progress. There is no notification to the Agent or the Customer if a Supervisor starts or ends monitoring.

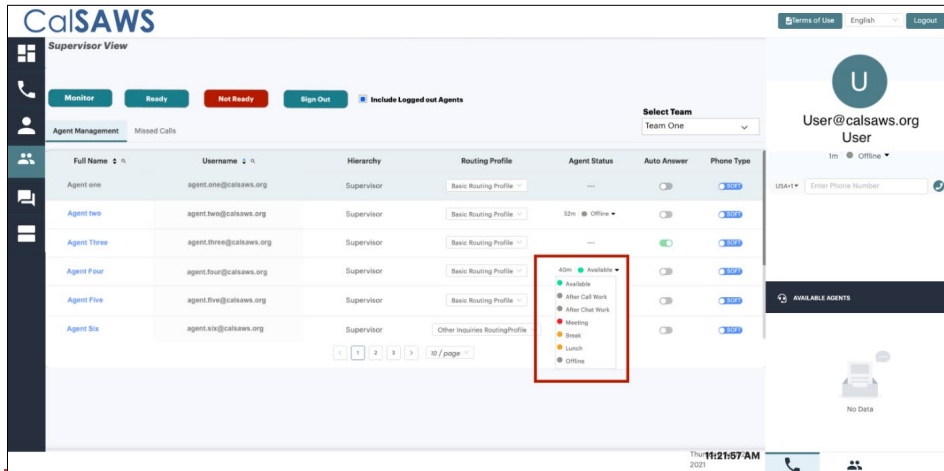
2.3.2.5.3 Agent Management

Under the Agent Management tab in the Supervisor View menu item the following features are available:

1. View Agent Information
2. Update Agent Routing Profile
3. ~~Change Agent Status~~
- 4.3. Turn Auto Answer On/Off for Agent
5. ~~Change Phone Type~~
- 6.4. ~~Call In Progress Monitoring~~
7. ~~Sign Agent Out~~
5. Daily Agent Statistics
8. ~~Change Agent Status and Supervisor call monitoring are available via the Real Time Metrics page shown in figure 2.3.2.5.2.~~

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2.3.2.5.3.1 ~~Figure Supervisor View Change Agent Status~~



2.3.2.5.3.2 ~~Figure Supervisor View Call Monitoring~~

Supervisor View

Case #: 1234567
 Customer Name: Customer one
 Language: EN
 Call Reason: CF_Other_Benefits_Question

Primary: Y
 County: 21
 IVR Time: 03:06
 Authenticated: Y

End Monitoring Ready Not Ready Sign Out Include Logged out Agents

Full Name	Username	Hierarchy	Routing Profile	Agent Status	Auto Answer	Phone Type
Agent One	Agent.one@calaws.org	Supervisor	Basic Routing Profile	---	Off	SOA
Agent Two	Agent.two@calaws.org	Supervisor	Basic Routing Profile	---	Off	SOA
Agent Three	Agent.three@calaws.org	Supervisor	Basic Routing Profile	---	Off	SOA
Agent Four	Agent.four@calaws.org	Supervisor	Basic Routing Profile	---	Off	SOA
Agent Five	Agent.five@calaws.org	Supervisor	Basic Routing Profile	---	On	SOA

Caller Intent: BasicQueue
00:02:10

AVAILABLE AGENTS
No Data

3:44:55 PM
Monday, May 3, 2021

Note: Current caller information is displayed during monitoring

Formatted: Normal

2.3.2.5.3.32.3.2.5.3.1 Figure - Supervisor View – Daily Agent Statistics

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CalSAWS Terms of Use English Logout

End Monitoring Ready Not Ready Sign Out Include Logged out Agents

Agent Management Missed Calls Select Team: Team One

Full Name	Username	Hierarchy	Routing Profile	Agent Status	Auto Answer	Phone Type
Agent One	Agent.one@callsaws.org	Supervisor	Basic Routing Profile	---	Off	SOFT
Agent Two	Agent.two@callsaws.org	Supervisor	Basic Routing Profile	---	Off	SOFT
Agent Three	Agent.three@callsaws.org	Supervisor	Basic Routing Profile	---	Off	SOFT
Agent Four	Agent.four@callsaws.org	Supervisor	Basic Routing Profile	---	Off	SOFT
Agent Five	Agent.five@callsaws.org	Supervisor	Basic Routing Profile	---	On	SOFT

Time Ready: 01:23:04 | Time Not Ready: 00:03:04 | Inbound Calls: 7 | Inbound Handle Time: 00:23:04 | Outbound Calls: 7 | Outbound Handle Time: 00:23:04 | Internal Calls: 7 | Internal Handle Time: 00:23:04

Update
Date Last Refreshed: 7:10-00AM

3:44:55 PM
Monday, May 3, 2021

Auto-Accept Mode: OFF
Show Details: v

Guest
Caller Intent: **BasicQueue**
00:02:10

AVAILABLE AGENTS
No Data

CalSAWS 3/16/2022, 4:09:49 PM Amazon Connect Logout

Salameda

Agent	Queue	Role	Supervisor	Calls	Handle Time	Auto Answer	Phone Type
Keval Patel	All Queues (EN Only)	CCPSupervisor	Agent Admin	Supervisor	0	Off	SOFT
Kevin Hooke	All Queues (EN Only)	CCPSupervisor	CalCenterManager	Supervisor	180	Off	SOFT
Mark Grainger	All Queues (EN Only)	CCPSupervisor	Agent	Supervisor	0	Off	SOFT
Michael Wright	All Queues (EN/SP)	CCPSupervisor	Agent	Supervisor	0	Off	SOFT
Michael Wright	All Queues (EN/SP)	CCPSupervisor	Agent	Supervisor	0	Off	SOFT
Pallavi Tumula	Supervisor (EN/SP)	CCPSupervisor	Agent	Supervisor	0	Off	SOFT
Pallavi Tumula	All Queues (EN/SP)	Agent	Supervisor	Supervisor	0	Off	SOFT
pramod r	All Queues (EN Only)	Agent	Supervisor	Supervisor	0	Off	SOFT
Pramod R	All Queues (EN Only)	Agent	Supervisor	Supervisor	0	Off	SOFT

Daily Agent Statistics for agent : HookeK

Time Ready	Time Not Ready	Inbound Calls	Inbound Handle Time	Outbound Calls	Outbound Handle Time	Internal Calls	Internal Handle Time
0:46:00	0:11:50	6	0:09:32	1	0:02:17	0	0:00:00

Kevin Hooke
44m | Ready

Agent Quick Connects (2)
 - Allen on Teams [Call]
 - Transfer to Kevin on Teams [Call]

AVAILABLE AGENTS
No Data

2.3.2.6 Missed Calls

The **Missed Calls** **Missed Contact History** tab on the Supervisor View page shows inbound calls that were not answered by any Agent. These are inbound calls from a customer where they abandoned the call without talking with an Agent.

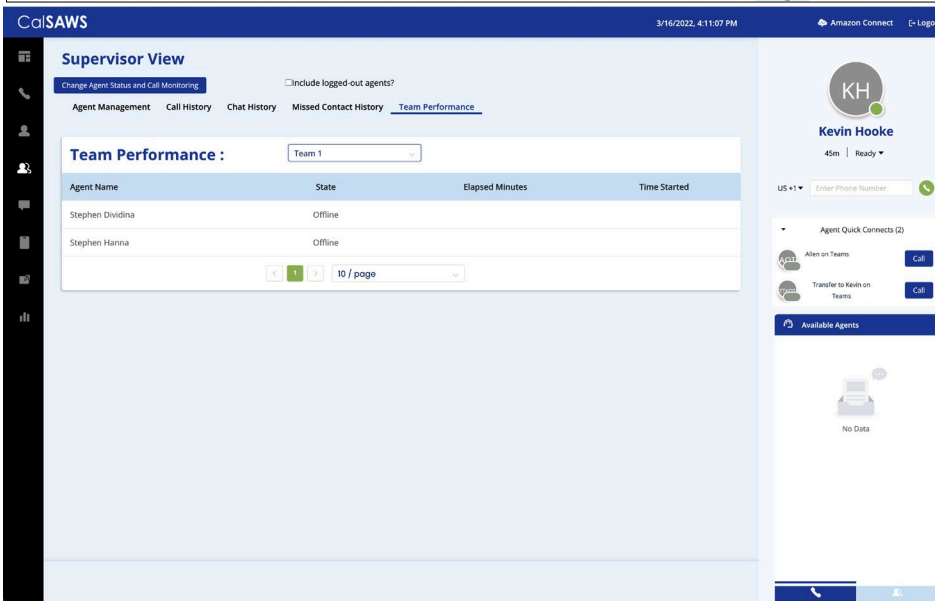
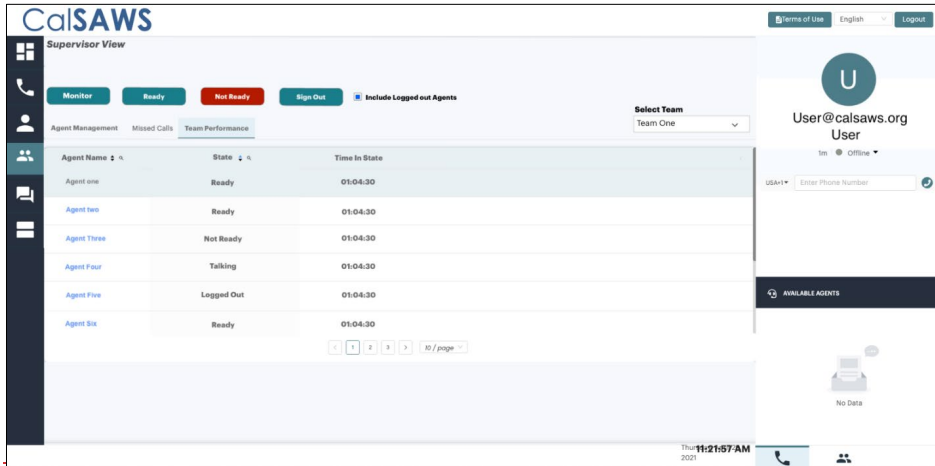
2.3.2.7 Team Performance

Under the Team performance tab displays a list of currently configured teams on the left and a list of agents in the selected team in the panel on the right including agents name, current state and time in state.

If there are more Agents in the selected team that can be displayed on the page, pagination links are displayed at the bottom of the Agent list panel. Clicking the 'Next' link displays the next page of Agents, clicking the 'Previous' link displays the previous page.

2.3.2.7.1 **Figure - Supervisor View – Team Statistics** **Performance**

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2.3.2.8 Create Live Chat (Web Chat) page

This feature allows the Agent to interact with a customer using text chat if the county has opted into this functionality.

Agents receive an incoming Web Chat request as an incoming call which they can either accept or reject using the call control panel.

Web Chat will be implemented in SCR CA-227063.

2.3.2.9 Create Queue Statistics page

The Queue Statistics page shows Statistics for the currently defined queues. This is a view only, real-time display of current queue statistics.

Add a page to the Enhanced CCP application that displays queue statistics for the currently defined queues for the Supervisor's County.

1. If the user clicks on the Queue Statistics menu item in the main navigation menu, the Queue Statistics page is displayed.
2. The Queue Statistics page shows a list of all queues currently defined for the current County.
3. Each of the statistics columns can be sorted in ascending or descending order by clicking on the column heading. The current sort order if enabled is indicated by an 'up arrow' for ascending order, or 'down arrow' for descending order.
4. If there are more queues for the current County that can be displayed on the page, page navigation links are enabled at the bottom of the page:
 - a. If the user presses 'Next' the next page of queues are displayed
 - b. If the user presses 'Previous' the previous page of queues are displayed

2.3.2.9.1 Figure - Queue Statistics

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CalSAWS

Queue Statistics

Queue Name	Calls	Max Time	Ready	Not Ready	Active			Wrap Up	
					In	Out	Other	Ready (Pending)	Not Ready (Pending)
CO4_EN_CallFresh	34	02:01:21	4	1	1	1	1	1	1
CO4_EN_Chat	32	02:01:21	3	2	0	0	0	0	0
CO4_EN_CW_WW	42	02:01:21	7	1	1	1	1	1	1
CO4_EN_General	08	02:01:21	13	0	0	0	0	0	0
CO4_EN_CallFresh	07	02:01:21	2	1	0	0	0	0	0
CO4_EN_Chat	45	02:01:21	4	0	1	1	1	1	1
CO4_EN_CW_WW	12	02:01:21	2	3	0	0	0	0	0
CO4_EN_General	28	02:01:21	1	1	0	0	0	0	0

Thursday, 3/16/2022 11:21:57 AM

User@calsaws.org
User
1m Offline

AVAILABLE AGENTS

No Data

CalSAWS

3/16/2022, 4:12:49 PM

Queue Statistics

Queue Name	Calls	Max Time	Ready	Not Ready	In	Out	Active	Ready (Pending)	Not Ready (Pending)
BasicQueue	0	0:00:00	0	0	0	0	0	0	0
C45_Chat_General	0	0:00:00	1	0	0	0	0	0	0
C45_EN_CallFresh	0	0:00:00	1	0	0	0	0	0	0
C45_EN_CallWORKS	0	0:00:00	1	0	0	0	0	0	0
C45_EN_MediCal	0	0:00:00	1	0	0	0	0	0	0
C45_EN_Supervisor	0	0:00:00	0	0	0	0	0	0	0
C45_SP_CallFresh	0	0:00:00	0	0	0	0	0	0	0
C45_SP_General	0	0:00:00	0	0	0	0	0	0	0
C45_SP_MediCal	0	0:00:00	0	0	0	0	0	0	0
C45_SP_Supervisor	0	0:00:00	0	0	0	0	0	0	0

1 / page

Kevin Hooke
47m Ready

Agent Quick Connects (2)

Allen on Teams Call

Transfer to Kevin on Teams Call

AVAILABLE AGENTS

No Data

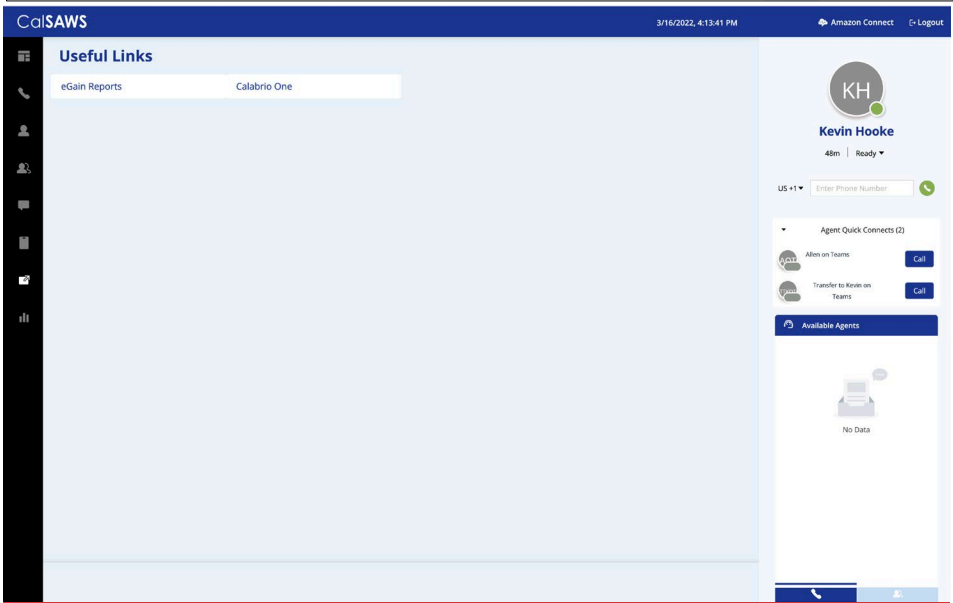
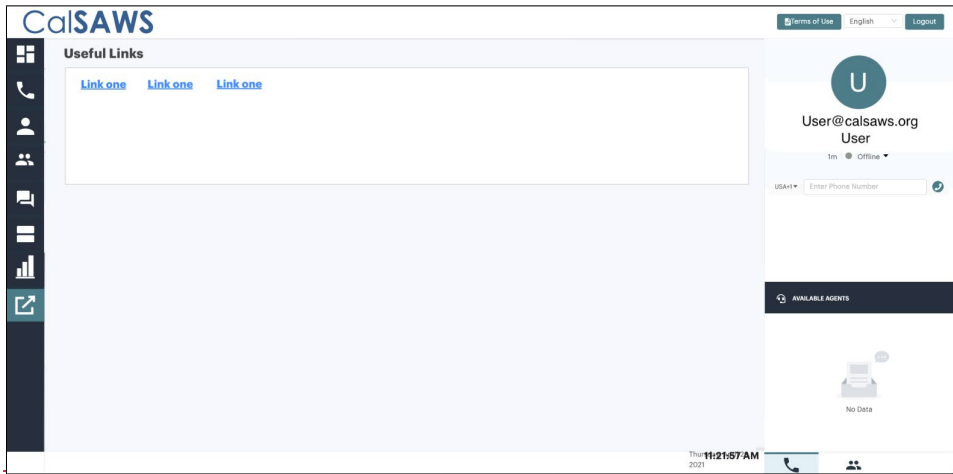
2.3.2.10 Create Useful Links page

Clickable links that are displayed for each county in accordance with the county's needs.

Note: These links will be defined by the county in the individual county sessions. This is limited to 10 links.

2.3.2.10.1 Figure - Useful Links

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2.4 Configure Call Panel

2.4.1 Overview

On the right side of the Enhanced CCP is the Call Panel. This section of the CCP is used to accept calls and chats, place outgoing calls, update users status, transfer calls and access quick connects.

2.4.2 Description of Change

Configure the Call Panel in the Enhanced CCP to allow the following:

1. Call in Progress Banner
2. Initiate Outbound Call
3. Transfer Calls/Quick Connects
4. Add Transfer Note

2.4.2.1 In-Progress Call BannerControl Panel

The In-Progress **Call BannerControl Panel** displays information about the current call and provides buttons for the user to perform actions during the call. Both agent and supervisor have this feature. Actions include:

- Mute
- Hold/Pause
- Transfer
- Keypad
- End Call

While the Agent is not in a call, the **Call BannerControl Panel** shows a timer that counts in minutes, indicating the time spent in that status. The timer resets to zero when the Agent's status changes. This is shown in Figure 2.4.2.1.1.

If an Agent is in After Call Work status, the **Call BannerControl Panel** shows a timer along with the currently configured After Call Work Limit for this Agent. When the time spent in After Call Work reaches the configured limit, they are automatically moved back to Ready/Available status. This is shown in Figure 2.4.2.1.2.

2.4.2.1.1 Figure – Call BannerControl Panel (not in call)

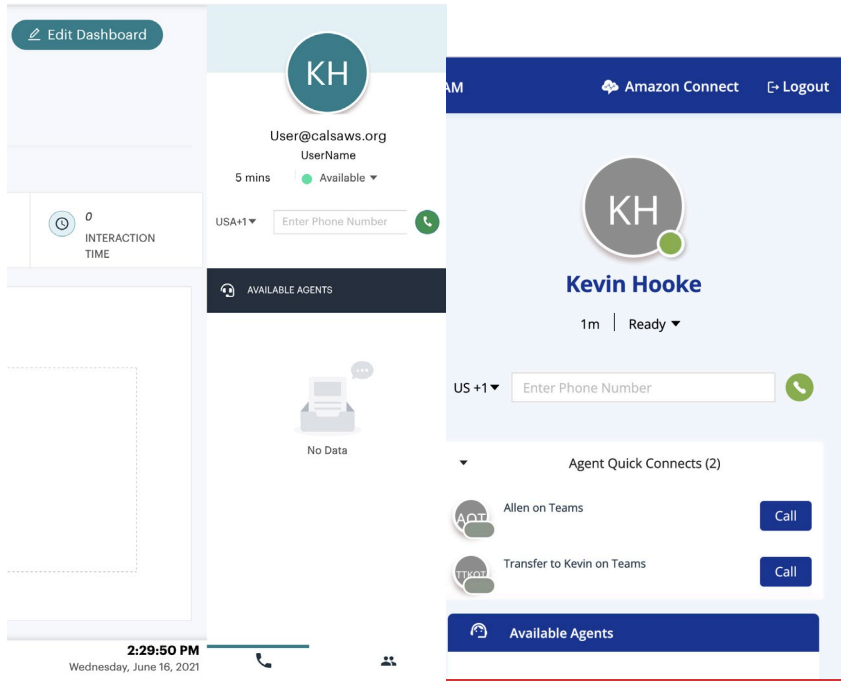
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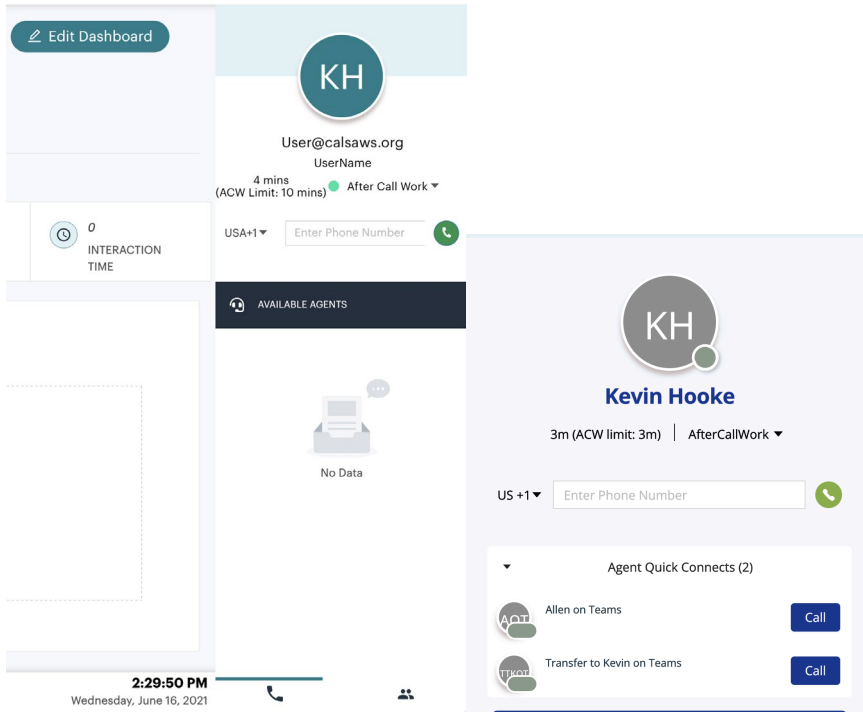
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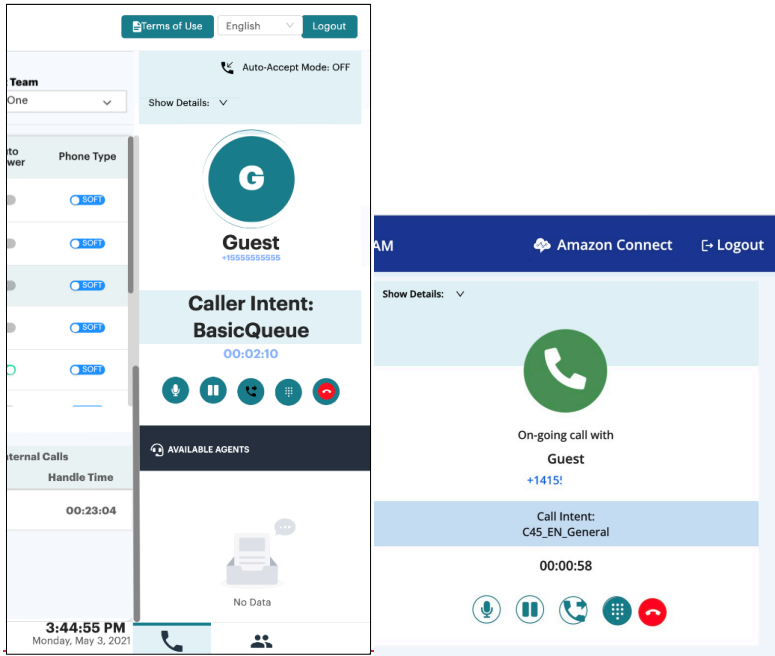
2.4.2.1.2 Figure – Call Banner Control Panel (in After Call Work status)

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2.4.2.1.3 Figure - In-Progress Call Control Panel Banner

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2.4.2.2 Initiate Outbound Call

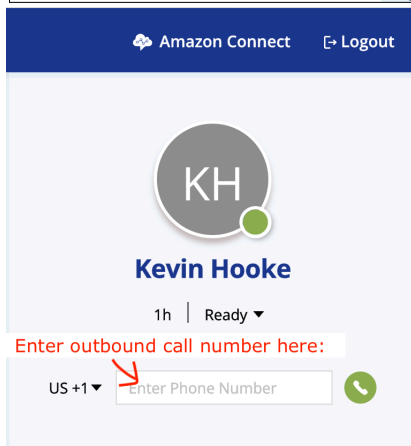
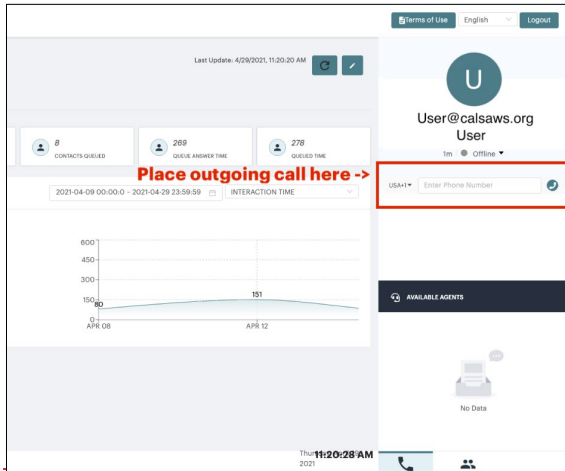
This feature allows users to initiate outbound calls by entering a phone number, then clicking the call button.

Add a panel to the Enhanced CCP application that allows users to place outgoing calls.

1. On the right hand side of the Enhanced CCP, users enter a phone number into the 'Enter Phone Number' field under the users current status.
2. The users click the call button to the right of the 'Enter Phone Number' field to initiate the outgoing call.
3. The Enhanced CCP application supports 10 digit dialing.

2.4.2.2.1 Figure - Outbound Call

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2.4.2.3 Transfer Call and Quick Connects

This feature allows user to transfer calls to a selected queue or external phone number. Configuration of the quick connects is available on the Administration page to be included in a separate SCR (CA-226672 Admin Page).

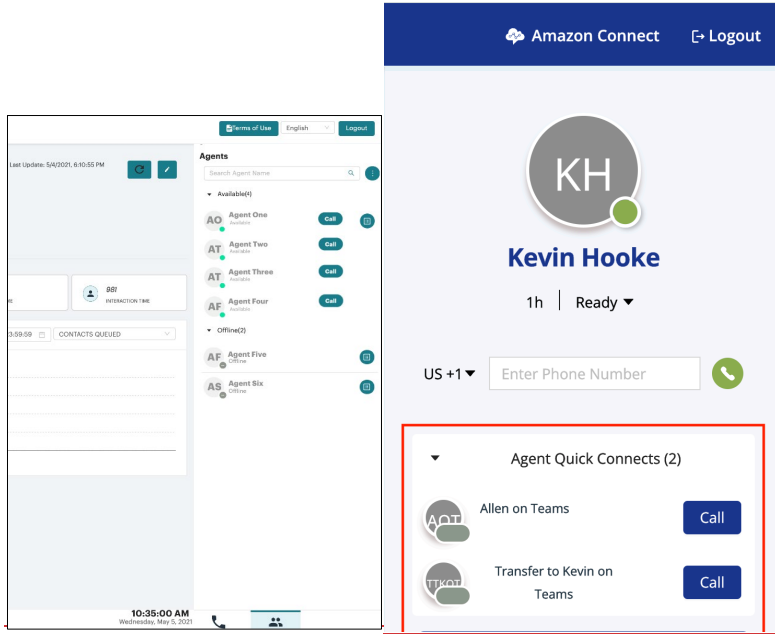
Configure Enhanced CCP to allow users to select queues to transfer current call(s) to.

1. The Quick Connects panel is displayed if the user clicks the 'Quick Connects' icon in the bottom right now of the page.
2. The panel displays a list of configured Agents and Queues that are available for the Agent to all.

3. The Agent can place a call to another Agent or Queue by pressing the 'Call' button.

2.4.2.3.1 Figure - Quick Connects

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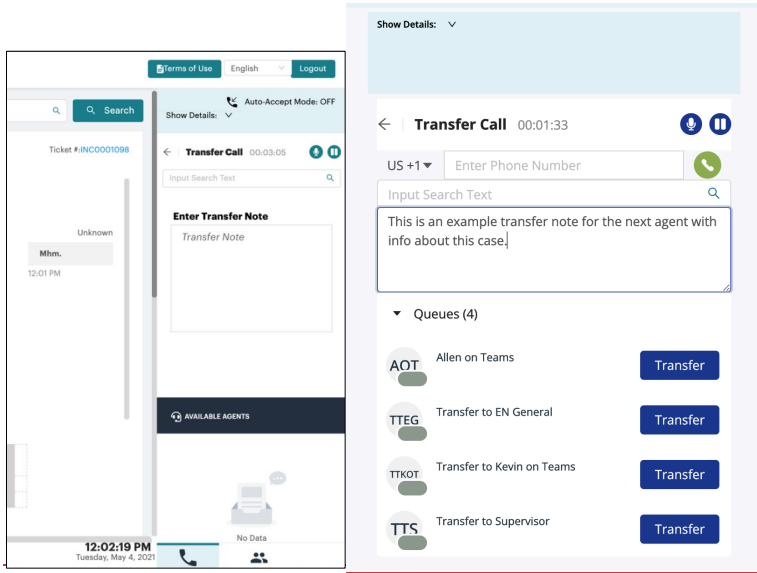
2.4.2.4 Enable Transfer Note for Transferred Calls

The Transfer Note feature allows user to send a message to the agent or supervisor when they transfer a call to a different queue within the Call Center Solution.

Add an input text field to the Enhanced CCP application Call Transfer page to allow user to input text to be displayed for the next Agent or Supervisor.

2.4.2.4.1 Figure - Transfer Note for Transferred Calls

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2.5 Enable CalSAWS Screen Pop

2.5.1 Overview

This functionality enables the CalSAWS system to accept Screen Pop parameters from the Enhanced CCP Application.

2.5.2 Description of Change

Enable the Enhanced CCP to pop the CalSAWS Application when an incoming call is received. The screen pop is dependent on the type of caller:

- Authenticated Caller: Case Summary page for authenticated case and Call Log Detail page with auto-populated case information (case number, name, and language)
- Non Authenticated Caller: Person Search page and Call Log Detail page
- Regional Call Center/Quick Sort Transfer Caller: Call Log Detail page with auto-populated Covered California information (Caller's County, Tracker/Tracer ID, and language)

When an agent accepts an incoming call, the Enhanced CCP application displays call details from the Amazon Connect IVR.

This feature is related to SCR CA-215560 to add auto-population logic for the screen pop.

2.6 Enable Downloading CCP Logs for Troubleshooting

2.6.1 Overview

The Download Logs button allows agents to download their CCP application session logs to share with the contact center support to troubleshoot issues in the CCP. This feature is available to both Agents and Supervisors.

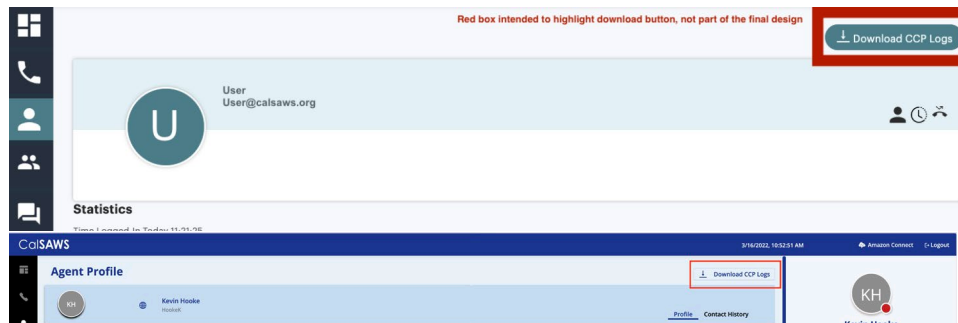
2.6.2 Description of Changes

Add a button to allow the user to download their CCP application session logs to help with technical application problems.

1. User clicks on the 'Agent Profile' menu item in the navigation bar, then clicks on the 'Download CCP Logs' button at the top of the page, a text file is downloaded to the user's computer.
2. The file contains technical information about the user's session after they logged into the CCP including error messages, browser information, and Enhanced CCP settings.

Note: Users will be instructed where to send/upload logs in the event of a CCP issue based on their existing support process.

2.6.2.1 Figure - Download CCP Logs button



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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
None			

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2700	The CONTRACTOR shall configure the Customer Service Center solution to include a Message of the Day functionality which allows County designated staff to send global messages to all staff's CCP.		Section 2.3.2.2

5 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227824

WTW 2 Revision

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Daniel Rosales
	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/01/2021	0.1	Initial Draft	Daniel Rosales
2/17/2022	0.2	Design updated to include turning off Spanish generation as it's not yet available on CDSS website.	Daniel Rosales

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1 OVERVIEW

This effort will update the WTW 2 to the newest State version (5/21).

1.1 Current Design

The WTW 2 (12/12) exists in the CalSAWS Template Repository in English and Spanish. It's also generated online from the Activity Agreement Detail page when the Form type is "WTW 2" and the generate form button is selected. The Generate form button will not display if the agreement is signed.

1.2 Requests

Update the Welfare-to-Work (WTW 2) form from Template Repository to the newest State version (5/21) in English.

1.3 Overview of Recommendations

1. Update the Template Repository WTW 2 to the newest State version in English and make all fields editable. Increase font size of Subscripts on page 2 to font size 8. Prior character limit for the Comment Section was 255 characters which did not utilize all space available. The new Comment Section is amended to 3 lines. Each line should have its character limit to use all space available. Turn off Spanish generation for the form as it is not yet available on the CDSS website.

1.4 Assumptions

1. WTW 2 in Spanish will be updated in a separate SCR ([CA-237436](#)) as it is not yet available on the CDSS website.
2. This effort will not be updating variable population or adding/altering generation conditions.
3. The WTW 2 form currently has print locally and save and print locally functionality. This effort will not be updating print functionality.

Commented [TH1]: What are the current print options for WTW 2? Does it generate with a coversheet to mail Centrally or is this a Print Local only Form? We should list the current print options in the assumptions. And IF we do include Print Central with coverletter please make sure to include this in the recommendation that we will continue to use the coverletter.

Commented [DR2R1]: Assumption added.

2 RECOMMENDATIONS

2.1 Update Form WTW 2 – Welfare-to-Work Activity Assignment

2.1.1 Overview

Update the WTW 2 in English and make all fields editable. Prior character limit for the Comment Section was 255 characters which did not utilize all space available. The new Comment Section is amended to 3 lines. Each line should have its character limit to use all space available. Turn off Spanish generation for the form.

State Form: Welfare-To-Work Plan Activity Assignment (5/21)

Current Programs: Welfare-to-Work

Current Attached Forms: None

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

2.1.2 Form/NOA Verbiage

Update WTW 2 XDP

Update the WTW 2 for English and make all fields editable. Increase font size of Subscripts on page 2 to font size 8. Increase character limit in Comment Section to utilize all space available.

Updated Languages: English

Include NA Back 9: No

Form Mockups/Examples: See Supporting Documents #1

Commented [TH3]: make sure to reference your attached file in Supporting Documents #1.

Description	Formatting*
Page 2 Subscripts for Text Box/Fields	Arial Font Size 8

2.1.3 Form/NOA Variable Population

N/A – This effort is not updating variable population. It currently should only populate standard header fields and Activity Info for the Customer.

2.1.4 Form/NOA Generation Conditions

Turn off Spanish generation for the WTW 2 form.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	WTW 2 (English) Form	WTW2.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>ACL 20-129 is requiring an update to CF 1239 to its most recent revision (12/20).</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-229939

One-time Batches to Transition Older Adults (50 or older) from Restricted to Full Scope Medi-Cal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tisha Mutreja
	Reviewed By	Renee Gustafson, Derek Goering, Prashant Goel, Chad Quan, Suneetha Minnekanti, Sireesha Kommajosyula, Noel Acosta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/12/2021	0.1	Original Draft	Tisha Mutreja
07/28/2021	0.2	Updated design per published policy ACWDL 21-13	Tisha Mutreja
08/19/2021	0.4	Updated document to state "Older Adult Expansion" instead of "Health4All – Older Californians" post updated policy from DHCS	Tisha Mutreja
9/24/2021	0.5	Content Revision: Updated Section 2.1.4 Key Scheduling Dependencies	Tisha Mutreja
3/16/2022	0.6	Content Revision 2: <ul style="list-style-type: none"> Updated sections 1.2, 1.3 and 2.1.2.3 to display correct format of Month/Year and Short Description in the Journal Entry for Journal reason. List #3: Older Adult Expansion remains in restricted scope in Section #4 was updated to remove column "Reason" or any reference related to that column in the description of the list. 	Tisha Mutreja

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1 OVERVIEW

This SCR will automate the transition of individuals aged 50 years or older, currently in restricted scope Medi-Cal to full scope MAGI Medi-Cal with a one-time batch process.

1.1 Current Design

In Release 22.02, CalHEERS and CalSAWS were updated to grant full scope Medi-Cal for individuals 50 years of age or older, regardless of satisfactory citizenship or immigration status if they meet all other eligibility criteria for the benefit month starting May 2022 with CA-228957 and CalHEERS Change Request CH-159158. This population is referred to as "Older Adult Expansion".

CalSAWS has individuals age 50 or older, still receiving restricted scope Medi-Cal who should be transitioned to full scope Medi-Cal.

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

Journal Category: Eligibility

Journal Type: Batch EDBC

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

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

There is no Batch EDBC Sweep Code for Older Adult Expansion one-time transition batch processing, so CalSAWS will automatically create the journal entry with a missing reason in the Long Description.

1.2 Requests

1. Automate the transition of individuals aged 50 years or older, currently receiving restricted scope Medi-Cal to full scope Medi-Cal based on the transition Aid Code Crosswalk provided by DHCS.
2. Add a Batch EDBC Sweep Code so the auto-journal Long Description will display the reason: "Older Adult Expansion".
3. Provide one-time County lists for County Eligibility Workers to follow-up on any individuals who remain in restricted scope Medi-Cal or are discontinued from Medi-Cal after the one-time transition batch processing is complete.

1.3 Overview of Recommendations

1. Initiate a one-time process to send Eligibility Determination Requests (EDRs) to CalHEERS and run Batch EDBC for identified individuals 50 years of age or older who are receiving restricted scope Medi-Cal to transition to full scope Medi-Cal.

2. Add a Batch EDBC Sweep Code to display the Journal Long Description reason: "Older Adult Expansion ~~one-time transition batch~~".
3. Generate one-time County lists to aid the counties to complete the transition of Older Adult Expansion to full scope Medi-Cal after Batch EDBC completes.

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 One-Time Batch

2.1.1 Overview

Initiate a one-time process to send EDRs to CalHEERS and run Batch EDBC for identified individuals 50 years of age or older, who are receiving restricted scope Medi-Cal to be transitioned to full scope Medi-Cal. Create a Journal entry for the cases processed successfully in the one-time process.

2.1.2 Description of Changes

1. Batch MAGI

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

i. The Medi-Cal program contains an individual that meets all the following conditions:

I. The individual's 50th birthday is on or before 05/31/2022.

II. The individual is currently receiving any of the following aid codes during the May 2022 benefit month:

a. A restricted scope adult MAGI Medi-Cal aid code

i. Parent/Caretaker Relative: M4

ii. Pregnant Individual: M0, M8

iii. Adults 19-64 Years Old: M2, L7

or

b. A restricted scope Non-MAGI Medi-Cal aid code

- Exclude CMSP aid codes

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

- iii. The CEW has not already processed MAGI and a corresponding Medi-Cal EDBC for May 2022 benefit month since the start date of the Older Adult Expansion rules update in CA-228957.
 - iv. The Medi-Cal EDBC effective May 2022 is not an overridden, read-only, or manual EDBC.
- b. Send an EDR for the benefit month of May 2022 based on the Medi-Cal program assigned to the most recent EDR. If there is no prior EDR, then assign the Medi-Cal program for the EDR based on the Medi-Cal program assigned to the most recent DER.

2. Batch EDBC

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

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

B. Non-MAGI Medi-Cal

- a. Identify Non-MAGI Medi-Cal cases that meet all the following conditions for one-time Batch EDBC processing:
- i. The program does not contain a MAGI Medi-Cal beneficiary.
 - ii. The program contains an individual where all the following are true:
 - 1. The individual's 50th birthday is on or before 05/31/2022.

- 2. The individual is currently receiving a restricted scope Non-MAGI Medi-Cal aid code during the May 2022 benefit month.
 - Exclude CMSP aid codes
- iii. Medi-Cal EDBC has not been processed for May 2022 benefit month since the start date of the Older Adult Expansion rules update in CA-228957.
- iv. The Medi-Cal EDBC effective May 2022 is not an overridden, read-only, or Manual EDBC.
- b. Run Batch EDBC for May 2022 benefit month only for the Medi-Cal program in Targeted Program mode with Type Code 'BE' (Batch Eligibility). Include the new Batch EDBC Sweep Code added in Recommendation 2.1.2.3.

3. Journal Entry

- a. Add Batch EDBC Sweep Code (CT_942) for Older Adult Expansion one-time transition batch to the code table.

Code Table	Description
New/Update	New
Category Id	942
Short Description	Older Adult Expansion
Long Description	Older Adult Expansion one-time transition batch

This will allow CalSAWS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.1.2.2.

Journal Category: Eligibility
Journal Type: Batch EDBC

Short Description: Batch EDBC ran for 05/2022 May 2022.

Long Description: Batch EDBC ran for 05/2022 May 2022.

Batch EDBC processed for the Medi-Cal program for the following reason: Older Adult Expansion ~~one-time transition batch~~.

2.1.3 Execution Frequency

This is a one-time batch.

2.1.4 Key Scheduling Dependencies

- Friday 04/08/2022
Batch operations team will run the Data Change Request (DCR) for Batch MAGI before regularly scheduled batch. Then Friday's regularly scheduled batch will send the EDRs during Batch MAGI.
- Saturday 04/09/2022
Batch operations will run the DCR for Batch EDBC before regularly scheduled batch processing. Then Saturday's regularly scheduled batch will process the cases through Batch EDBC before the nightly batch is run.


2.1.5 Counties Impacted

All counties

2.1.6 Data Volume/Performance

Approximately 190K individuals will be processed with this change. At least one Notice of Action is expected for each of the cases processed in Batch EDBC.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	ACWDL 21-13	 21-13.pdf

4 OUTREACH

Generate one-time County lists to aid the counties to complete the transition of Older Adult Expansion to full scope Medi-Cal after Batch EDBC completes.

The lists will display the below columns:

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

List will be posted at following locations:

CalACES Web Portal>System Changes>SCR and SIR Lists>2022>CA-229939

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

Generate a list of cases where the Medi-Cal program was discontinued due to the one-time Batch EDBC processing for Older Adult Expansion transition to full scope.

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

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

Generate a list of cases where an individual was discontinued from the Medi-Cal program due to the one-time Batch EDBC processing for Older Adult Expansion transition to full scope.

Additional Columns:

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

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

3. **List Name:** Older Adult Expansion remains in restricted scope

Generate a list of cases where an individual age 50 or older remains in restricted Medi-Cal after the one-time Batch EDBC processing for Older Adult Expansion completes. Include a column for the reason they did not transition.

Additional Columns:

- CIN
- Aid Code
- DOB
- Reason*

***Known reasons:**

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

County Action: These individuals should be transitioned to full scope Medi-Cal but remain in restricted scope.

5 REQUIREMENTS

5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.2	The LRS shall determine an applicant's/participant's eligibility for a program or programs.	CalSAWS will automate the transition of individuals aged 50 years or older, currently in restricted scope MAGI Medi-Cal to full scope MAGI Medi-Cal with a one-time batch process.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-230792

YBN to BenefitsCal LA County Text Notification

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Michael Barillas
	Reviewed By	Logan Pratt; Eric Perkins; Shilpa Suddavanda; Edgars Reinholds;

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/15/2021	1.0	Initial Draft	Michael Barillas
3/18/2022	2.0	Content Revision 1 – Updated BenefitsCal Date References	Michael Barillas

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1 OVERVIEW

Due to migration efforts, BenefitsCal will be replacing Your Benefits Now (YBN) on **April 24, 2022**. Current LA County CalSAWS applicants and YBN customers will need to be notified of this conversion. CalSAWS will Send a text message to current LA County CalSAWS applicants and YBN customers whose phone number is opted in to receive text messages to inform them that BenefitsCal will be replacing YBN.

1.1 Current Design

Due to migration efforts, BenefitsCal will be replacing YBN on **April 24, 2022**. Current LA County CalSAWS applicants and YBN customers will need to be notified of this conversion.

1.2 Requests

Send a text message to current LA County CalSAWS applicants and YBN customers whose phone number is opted in to receive text messages to inform them that BenefitsCal will be replacing YBN.

1.3 Overview of Recommendations

1. Create and schedule a one-time batch job so that LA County CalSAWS applicants and YBN customers who are opted into text messages receive a one-time message before **April 24**.

1.4 Assumptions

1. Text messages will only be sent in English and Spanish, using English characters. Not all phones may support Spanish or other language characters and using them may result in texts with illegible characters.
2. Text message will only be sent to primary applicants.

2 RECOMMENDATIONS

2.1 Create One-Time Text Message Batch LA County YBN Migrating to BenefitsCal

2.1.1 Overview

Schedule a one-time batch job on 4/13/2022 to send a one-time message to LA County CalSAWS applicants and YBN customers who are opted into text messages.

2.1.2 Description of Change

1. Text Message Verbiage:
 - a. Message Name: LA County YBN Migrating to BenefitsCal
 - b. Message Verbiage:
 - i. If a person's preferred written language is Spanish:
 1. "El 04/24/22 se lanza BenefitsCal: un nuevo sitio web para administrar sus beneficios. YourBenefitsNow (YBN) no estará disponible. Visite info.BenefitsCal.com."
 - ii. Otherwise use English Verbiage:
 1. "On 04/24/22 BenefitsCal is going live - a new website to manage your benefits. YourBenefitsNow (YBN) will not be available. Please visit info.BenefitsCal.com."
 - c. Target Population:
 - i. Persons on Active/Pending Program
 - ii. Has a YBN Account
 - iii. Is Opted-In to received Text Messages
 - iv. Is not within a Domestic Abuse Case
 - d. Run Dates: One-Time Run
 - e. Programs: All Programs
 - f. Applicable Counties: LA County Only
 - g. Character County English: 127
 - h. Character County Spanish: 149
 - i. Automated Action Scenario: N/A
 - j. Contact History Reason: YBN Migrating to BenefitsCal – LA County Only

2.1.3 Execution Frequency

On Demand

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

LA County

2.1.6 Data Volume/Performance

N/A

2.1.7 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.12	The LRS shall alert COUNTY-specified Users of all automated actions taken by the LRS as a result of LRS Data received through an interface.	CalSAWS is notifying customers of a change of system, from YBN to BenefitsCal.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-232660: Cal-OAR 19 Update WTW Program
Criteria

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna and Chris Carandang
	Reviewed By	Gingko Luna, Lien Phan, Joel Acevedo, Balakumar Murthy, Karthikeyan Krishnamoorthy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/18/2022	1.0	Initial Version	Chris Carandang, Jennifer Muna
2/1/2022	2.0	Added note for Partner Integration Testing. Removed duplicate data elements in section 2.1.2	Chris Carandang
2/15/2022	3.0	<ul style="list-style-type: none"> Added clarification to ATT_HRS when populating Employment hours Added Assumption #2 	Chris Carandang, Jennifer Muna
3/22/22	4.0	Content Revision to <ul style="list-style-type: none"> Adding additional REQ_CAPP criteria Update ATT_HRS logic when determining Employment hours Restructured items i & ii for section(s) 2.1.2.1, 2.3.2.2, and 2.5.2.1 Cosmetic updates (i.e. underlining terms, replacing 'and' to 'or') 	Jennifer Muna

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1 OVERVIEW

This SCR outlines the necessary modifications to the Cal-OAR interface when transmitting data elements to California Department of Social Services (CDSS).

1.1 Current Design

The Cal-OAR 19, 19A, 19B, 19C, 19E files have data elements referencing the Welfare to Work (WTW) program status. These data elements display the response options of '01'- WTW Active or '02'- Sanction, when the individual is active on WTW program, otherwise, it displays '99' or '999', for Non-applicable. CDSS receives data for several fields as '99' or '999' where there is a different value than what is viewable in the interface. For example, the front-end shows 40 participation hours per month and the data file shows values of '99' or '999' for WTW program statuses of '1a'- Good Cause and '1b'- Non-Compliance. CalSAWS is currently transmitting data for recipients with an active WTW program. CDSS requests to receive the values for all the data elements in the Cal-OAR 19x files, regardless of the WTW program status.

Currently the data value for Attendance Hours (ATT_HRS) are derived from the Actual Hours Information section on the Employment Hours Detail page. The Actual Hours Information section displays documented employment hours for each day/week. CalSAWS will update its logic to derive the values for Attendance Hours from the 'Total Monthly Hours' field.

1.2 Requests

Per CRPC 2284, CDSS has identified several Cal-OAR data elements that will need to be updated as they are only reporting data for recipients with an active WTW program. CalSAWS must transmit the values for the specific data elements in the Cal-OAR 19x files for individuals in all WTW program statuses.

1.3 Overview of Recommendations

1. Update the following data elements to transmit to CDSS regardless of WTW program status:
 - a. Ancillary Services Need Indicated (ANC_IND)
 - b. Ancillary Services Received (ANC_REC)
 - c. Attendance Hours (ATT_HRS)
 - d. Child Care Need Indicated (CH_NEED)
 - e. Stage One Child Care Received (CH_REC)
 - f. Completed OCAT/Appraisal within 30 days after Aid is Granted (COM_ADAY)
 - g. Completed OCAT/Appraisal (COM_OAPP)
 - h. Eligible for Child Care (ECC)
 - i. Participated in First Activity (PAR_ACT)
 - j. Granted Aid and Required to Complete OCAT/Appraisal (REQ_CAPP)
 - k. Scheduled for Next Activity (SCH_NACT)

- l. Scheduled to Participate in First Activity (SCH_PACT)
 - m. Attended Orientation (WTW_ATT)
 - n. Scheduled to Attend Orientation (WTW_SATT)
 - o. Received at Least One Transportation Service (WTW_V_TR)
 - p. Granted Aid in Previous Quarter (WTW_V_A)
2. Update the reporting criteria of the following data elements to look for WTW program status '01-Active', '1a – Good Cause', '1b – Non-Compliance', '3a – Exempt Volunteer':
- a. WTW Eligible Home Visiting Participants Who Finished Participation and any Exemptions (WTW_HV_E)
 - b. WTW Eligible Former HVI Participants with Verified Participation in WTW (WTW_HV_W).
3. Update the logic in Cal-OAR 19B to derive the Employment hours from the 'Total Monthly Hours' field in Employment Hours Detail page that will be displayed in the Attendance Hours (ATT_HRS) data element. If there is no Verified Employment Hours for the reporting month, capture the Projected Employment Hours **by looking back up to 5 months** for Actual Verified Hours to be used for the report month.

1.4 Assumptions

- 1. All recipients who have a WTW program in any status within the measurement period will be reported for the aforementioned data elements.
- 2. Attendance Hours (ATT_HRS) variable populates actual hours for any Activity, including actual or projected hours for an Employment activity. No changes to the logic for Attendance Hours when populating actual hours for any Activity, excluding Employment activity.

2 RECOMMENDATIONS

2.1 Update the criteria of Cal-OAR 19 data elements

2.1.1 Overview

This section outlines the necessary modifications to the criteria of the data elements of Cal-OAR 19 sweep job (PB00C112) to report data in all WTW/REP program status.

2.1.2 Description of Change

1. Update the following data element requirements in Cal-OAR 19 data file to report data for individuals in all WTW/REP program statuses.
Note: All existing Cal-OAR 19 reporting criteria will not be changed except for the ones mentioned.

- i. Additional Reporting criteria will be updated for the data elements listed below:

1. The individual has a WTW/REP program in the measurement month.

- ii. Additional Response options will be updated for the data elements listed below:

1. 01 = No - A response of 01 is reported when the individual has a WTW/REP program but does not meet all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status but does not meet all the requirements in the reporting criteria, the batch job will send a '01' in the Cal-OAR 19 data file.

2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status and meets all the requirements in the reporting criteria, the batch job will send a '02' in the Cal-OAR 19 data file.

3. 99 = Not Applicable - A response of 99 is reported when the individual does not have a WTW/REP program in the measurement month.

For Example: A person who is active in CW program and does not have a WTW/REP program, the batch job will send a '99' in the Cal-OAR 19 data file.

- a. Ancillary Services Need Indicated (ANC_IND): This variable identifies individuals who did or did not indicate a need for ancillary services.
- b. Ancillary Services Received (ANC_REC): This variable identifies individuals who did or did not receive ancillary services in the measurement period.
- c. Scheduled to Attend Orientation (WTW_SATT)
This variable identifies individuals who were or were not scheduled to attend orientation within the measurement month.
- d. Attended Orientation (WTW_ATT)
This variable identifies individuals who did or did not complete orientation within the measurement month.

Note: Cal-OAR changes will require Partner Integration Testing.

2.1.3 Execution Frequency

No Changes. This file runs monthly.

2.1.4 Key Scheduling Dependencies

N/A.

2.1.5 Counties Impacted

All CalSAWS counties.

2.1.6 Data Volume/Performance

Approximately 500,000 records are generated in the monthly Cal-OAR 19 data file.

2.1.7 Interface Partner

California Department of Social Services (CDSS).

2.1.8 Failure Procedure/Operational Instructions

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

2.2 Update the criteria of Cal-OAR 19A data elements

2.2.1 Overview

This section outlines the necessary modifications to the criteria of the data elements of Cal-OAR 19A sweep job (PB00C102) to report data in all WTW/REP program status.

2.2.2 Description of Change

1. Update the following fields in Cal-OAR 19A data file to report data for individuals in all WTW/REP program statuses. Note: All existing Cal-OAR 19A reporting criteria will not be changed except for the following that is mentioned.

- a. Completed OCAT/Appraisal within 30 days after Aid is Granted (COM_ADAY)

This variable identifies individuals who did or did not complete an OCAT/Appraisal within 30 days after aid is granted.

- i. Additional reporting criteria:
 1. The individual has a WTW/REP program in the measurement month.
- ii. Response options:
 1. 01 = No - A response of 01 is reported when the individual has a WTW/REP program and **did not** complete 'Appraisal' **and or** 'Orientation/Appraisal' activity within 30 days.

For Example: A person who is active in CW program and has a WTW/REP program in any status and **did not** complete 'Appraisal' **and or** 'Orientation/Appraisal' activity within 30 days, the batch job will send a '01' in the Cal-OAR 19A data file.

2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program and completed 'Appraisal' or 'Orientation/Appraisal' activity within 30 days.

For Example: A person who is active in CW program and has a WTW/REP program in any status completed 'Appraisal' or 'Orientation/Appraisal' activity within 30 days, the batch job will send a '02' in the Cal-OAR 19A data file.

3. 99 = Not Applicable - A response of 99 is reported when the variable 35 (REQ_CAPP) = '01' or '99' for that individual.

For Example: A person who is active in CW program and variable 35 (REQ_CAPP) = '01' or '99', the batch job will send a '99' in the Cal-OAR 19A data file.

b. Completed OCAT/Appraisal (COM_OAPP)

This variable identifies individuals who did or did not complete an OCAT/Appraisal in the measurement month.

- i. Additional reporting criteria:
 1. The individual has a WTW/REP program in the measurement month.
- ii. Response options:
 1. 01 = No - A response of 01 is reported when the individual has a WTW/REP program but **does not** meet all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status but **does not** meet all the requirements in the reporting criteria, the batch job will send a '01' in the Cal-OAR 19A data file.

2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status and meets all the requirements in the reporting criteria, the batch job will send a '02' in the Cal-OAR 19A data file.

3. 99 = Not Applicable - A response of 99 is reported when the individual **does not** have a WTW/REP program in the measurement month.

For Example: A person who is active in CW program and **does not** have a WTW/REP program, the batch job will send a '99' in the Cal-OAR 19A data file.

c. Granted Aid and Required to Complete OCAT/Appraisal (REQ_CAPP)

This variable identifies individuals who were or were not granted aid in the measurement month who are required to complete an OCAT/appraisal.

- i. Update Criteria to include individuals who have been 'Approved' for CalWORKs program for the first time after denial.
- ii. Additional Reporting criteria:
 1. The individual has a WTW/REP program in the measurement month.
- iii. Response options:
 1. 01 = No - A response of 01 is reported when the individual has a CW approval date, a WTW/REP program and **have** no 'Appraisal' **and or** 'Orientation/Appraisal' activity.

For Example: A person who is active in CW program and has a WTW/REP program in any status and has a CW approval date and **has** no 'Appraisal' **and or** 'Orientation/Appraisal' activity, the batch job will send a '01' in the Cal-OAR 19A data file.

2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status and has 'Appraisal' **and or** 'Orientation/Appraisal' activity, the batch job will send a '02' in the Cal-OAR 19A data file.

3. 99 = Not Applicable - A response of 99 is reported when the individual **does not** have a WTW/REP program in the measurement month.

For Example: A person who is active in CW program and **does not** have a WTW/REP program,

the batch job will send a '99' in the Cal-OAR 19A data file.

d. Scheduled for Next Activity (SCH_NACT)

This variable identifies individuals who were or were not scheduled for their next activity within 30 days of OCAT/Appraisal completion.

- i. Additional reporting criteria:
 - 1. The individual has a WTW/REP program in the measurement month.
- ii. Response options:
 - 1. 01 = No - A response of 01 is reported when the individual has a WTW/REP program but **does not** meet all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status but **does not** meet all the requirements in the reporting criteria, the batch job will send a '01' in the Cal-OAR 19A data file.

- 2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status and meets all the requirements in the reporting criteria, the batch job will send a '02' in the Cal-OAR 19A data file.

- 3. 99 = Not Applicable - A response of 99 is reported when the individual **does not** have a WTW/REP program in the measurement month.

For Example: A person who is active in CW program and **does not** have a WTW/REP program, the batch job will send a '99' in the Cal-OAR 19A data file.

Note: Cal-OAR changes will require Partner Integration Testing.

2.2.3 Execution Frequency

No Changes. This file runs monthly.

2.2.4 Key Scheduling Dependencies

N/A.

2.2.5 Counties Impacted

All CalSAWS counties.

2.2.6 Data Volume/Performance

Approximately 500,000 records are generated in the monthly Cal-OAR 19A data file.

2.2.7 Interface Partner

California Department of Social Services (CDSS).

2.2.8 Failure Procedure/Operational Instructions

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

2.3 Update the criteria of Cal-OAR 19B data elements

2.3.1 Overview

This section outlines the necessary modifications to the criteria of the data elements of Cal-OAR 19B sweep job (PB00C104) to report data in all WTW/REP program status.

2.3.2 Description of Change

1. Update the following fields in Cal-OAR 19B data file to report data for individuals in all WTW/REP program statuses. Note: All existing Cal-OAR 19B reporting criteria will not be changed except for the following that is mentioned.

- a. Attendance Hours (ATT_HRS)

The variable reports an individual's total monthly hours of attendance in any activity, including actual or projected Employment hours. This variable utilizes actual, verified attendance hours and excused hours for any activity and not including scheduled hours. For Employment hours, the variable utilizes the Total Monthly Hours of employment within the measurement period.

- i. Update the Attendance Hours logic to populate the Employment actual total monthly hours from the 'Total Monthly Hours' field (EMP_MONTH_ACTUAL table) on the Employment Hours Detail page. *Navigation: Eligibility > Customer Activities > Activity Type: Employment > Progress > Employment Detail page.* This table contains the Total actual hours of employment for the month.

If there **are is** no Total Monthly Hours for 'Employment' activity for the reporting month, then capture the **latest Employment Hours** actual hours from the **WPRD_PERS_ACTIV_DETL table** **by looking back up to 5 months for Actual Hours** to be used for the report month.

For example:

Report Month: January 2022

If there are no actual **total** employment hours for January 2022, **look 5 months back** **December 2021 to August 2021** and pull the total monthly employment hours from the latest month where employment hours were reported. **If the employment hours were reported on August, September, October, the System will only report the hours in October.** then capture the actual

hours from the WPRD report for report month of January 2022.

Each employment will have the same process. If there are multiple employments reported, then the hours from the reported employment will be captured and summed up. Example for multiple employment:

Employment A reported 100 total monthly employment hours for January 2022.

Employment B had no actual total employment hours for January 2022. Batch will then look at the actual hours, which are projected hours in the WPRD report for January 2022 report month. previous months for employment hours dating as far as 5 months. The results determined that there were 80 projected hours in October, 60 hours in September and 40 hours in August.

Employment C had no verified actual total employment hours for January 2022. Batch will then look at the actual hours, which are projected hours in the WPRD report for January 2022 report month. previous months for employment hours dating as far as 5 months. Results show that there were 80 projected hours in December, 60 in November.

Total Monthly Employment Hours will be calculated by adding the Emp. A hours for January 2022 (100 hours) and the latest Projected Employment Hours for Emp. B for January 2022 in October (80 hours) and the latest Projected Emp. Hours for Emp. C for January 2022 in December (80 hours). The total will display the totaled employment hours of all 3 employments as 260 hours in the data file for January 2022.

	Jan. 2022	Dec. 2021	Nov. 2021	Oct. 2021	Sept. 2021	Aug. 2021
EMP-A	100 hrs.	n/a	n/a	n/a	n/a	n/a
EMP-B	n/a	n/a	n/a	80 hrs.	60 hrs.	40 hrs.
EMP-C	n/a	80 hrs.	60 hrs.	40 hrs.	n/a	n/a

Note: The Projected hours for Employment is not displayed on the online application.

- ii. Additional reporting criteria:
 - 1. The individual has a WTW/REP program in the measurement month.
- iii. Response options:
 - 1. XXX = Numeric value (whole number, 0 or greater)
 - A sum of hours is reported when the individual has a WTW/REP program and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status, the batch job will send the total number of Attendance Hours in the Cal-OAR 19B data file.

- 2. 999 = Not Applicable – A response of 999 is reported when the individual does not have a WTW/REP program in the measurement month.

For Example: A person who is active in CW program and **does not** have a WTW/REP program, the batch job will send '999' in the Cal-OAR 19B data file.

- b. Scheduled to Participate in First Activity (SCH_PACT)
This variable identifies individuals who were or were not scheduled to participate in their first WTW or FS plan activity in the measurement month.

- i. Additional reporting criteria:
 - 1. The individual has a WTW/REP program in the measurement month.
- ii. Response options:
 - 1. 01 = No - A response of 01 is reported when the individual has a WTW/**REP** program with activity agreement and/or no activity start date within the measurement month.

For Example: A person who is active in CW program and has a WTW/REP program with activity agreement and/or no activity start date within the measurement month, the batch job will send a '01' in the Cal-OAR 19B data file.

2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program with activity agreement, and the earliest start date is within the measurement month.

For Example: A person who is active in CW program and has a WTW/REP program with activity agreement and the earliest start date is within the measurement month, the batch job will send a '02' in the Cal-OAR 19B data file.

3. 99 = Not Applicable - A response of 99 is reported when the individual does not have a WTW/REP program in the measurement month.

For Example: A person who is active in CW program and does not have a WTW/REP program, the batch job will send a '99' in the Cal-OAR 19B data file

c. Participated in First Activity (PAR_ACT)

This variable identifies individuals who did or did not participate (with actual, verified attendance hours) in their first WTW or FS plan activity in the measurement month.

i. Additional reporting criteria:

The individual has a WTW/REP program in the measurement month.

ii. Response options:

1. 01 = No - A response of 01 is reported when the individual has a WTW/REP program and does not meet the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status but does not meet all the requirements in the reporting criteria, the batch job will send a '01' in the Cal-OAR 19B data file.

2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status and meets all the requirements in the

reporting criteria, the batch job will send a '02' in the Cal-OAR 19B data file.

3. 99 = Not Applicable - A response of 99 is reported when the individual does not have a WTW/REP program in the measurement month.

For Example: A person who is active in CW program and does not have a WTW/REP program, the batch job will send a '99' in the Cal-OAR 19B data file.

2. Update the following data elements in Cal-OAR 19B data file to report data for individuals in WTW/REP program status of 'Active', 'Good Cause', 'Non-compliance', or 'Exempt Volunteer':

- i. Additional reporting criteria:

1. WTW/REP program status = Active, Good Cause, Non-Compliance, or Exempt Volunteer.

- ii. Response options:

1. 01 = No - A response of 01 is reported when the individual's WTW/REP program status is not Active, Good Cause, Non-Compliance, or Exempt Volunteer.

For Example: A person who is active in CW program and the WTW/REP program status is not Active, Good Cause, Non-Compliance, or Exempt Volunteer, the batch job will send a '01' in the Cal-OAR 19B data file.

2. 02 = Yes - A response of 02 is reported when the individual's WTW/REP program status is Active, Good Cause, Non-Compliance, or Exempt Volunteer and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program is Active, Good Cause, Non-Compliance, or Exempt Volunteer and meets all the requirements in the reporting criteria, the batch job will send a '02' in the Cal-OAR 19B data file.

3. 99 = Not Applicable - A response of 99 is reported when the individual does not have a WTW/REP program in the measurement month.

For Example: A person who is active in CW program and does not have a WTW/REP program, the batch job will send a '99' in the Cal-OAR 19B data file.

- b. WTW Eligible Home Visiting Participants Who Finished Participation and any Exemptions (WTW_HV_E)
This variable reports WTW individuals who did or did not complete their HVI participation and any exemptions within the measurement period.
- c. WTW Eligible Former HVI Participants with Verified Participation in WTW (WTW_HV_W)
This variable identifies home visiting participants who did or did not transition to participation (actual, verified attendance hours) in an approved WTW activity within three months of completing HVI participation and any exemptions.

Note: Cal-OAR changes will require Partner Integration Testing.

2.3.3 Execution Frequency

No Changes. This file runs monthly.

2.3.4 Key Scheduling Dependencies

N/A.

2.3.5 Counties Impacted

All CalSAWS counties.

2.3.6 Data Volume/Performance

Approximately 500,000 records are generated in the monthly Cal-OAR 19B data file.

2.3.7 Interface Partner

California Department of Social Services (CDSS).

2.3.8 Failure Procedure/Operational Instructions

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

2.4 Update the criteria of Cal-OAR 19C data elements

2.4.1 Overview

This section outlines the necessary modifications to the criteria of the data elements of Cal-OAR 19C sweep job (PB00C106) to report data in all WTW/REP program status.

2.4.2 Description of Change

1. Update the following fields in Cal-OAR 19C data file to report data for individuals in all WTW/REP program statuses. Note: All existing Cal-OAR 19C reporting criteria will not be changed except for the following that is mentioned.

a. Received at Least One Transportation Service (WTW_V_TR)

This variable identifies individuals who did or did not receive at least one transportation service within one quarter of aid being granted.

i. Additional reporting criteria:

1. The individual has a WTW/REP program in the measurement period.

ii. Response options:

1. 01 = No - A response of 01 is reported when the individual has a WTW/REP program in the measurement period and granted aid on previous quarter (WTW_V_A=02) but **does not** meet the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status and granted aid on previous quarter but **does not** meet all the requirements in the reporting criteria, the batch job will send a '01' in the Cal-OAR 19C data file.

2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program in the measurement period and granted aid on previous quarter (WTW_V_A=02) and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status and granted aid on previous quarter and

meets all the requirements in the reporting criteria, the batch job will send a '02' in the Cal-OAR 19C data file.

3. 99 = Not Applicable - A response of 99 is reported when the individual **does not** have a WTW/REP program in the measurement period.

For Example: A person who is active in CW program and does not have a WTW/REP program, the batch job will send a '99' in the Cal-OAR 19C data file.

b. **Granted Aid in Previous Quarter (WTW_V_A)**

This variable identifies individuals who were or were not granted aid in the previous quarter.

i. Additional Reporting criteria:

1. The individual has a WTW/REP program in the measurement period.

ii. Response options:

1. 01 = No - A response of 01 is reported when **individual does not have a WTW/REP program in the measurement period, or # does not** meet all the requirements in the reporting criteria.

For Example: A person who is active in CW program and does not have a WTW/REP program or does not meet all the requirements in the reporting criteria, the batch job will send a '01' in the Cal-OAR 19C data file.

2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status and meets all the requirements in the reporting criteria, the batch job will send a '02' in the Cal-OAR 19C data file.

Note: Cal-OAR changes will require Partner Integration Testing.

2.4.3 Execution Frequency

No Changes. This file runs quarterly.

2.4.4 Key Scheduling Dependencies

N/A.

2.4.5 Counties Impacted

All CalSAWS counties.

2.4.6 Data Volume/Performance

Approximately 500,000 records are generated in the quarterly Cal-OAR 19C data file.

2.4.7 Interface Partner

California Department of Social Services (CDSS).

2.4.8 Failure Procedure/Operational Instructions

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

2.5 Update the criteria of Cal-OAR 19E data elements

2.5.1 Overview

This section outlines the necessary modifications to the criteria of the data elements of Cal-OAR 19E sweep job (PB00C110) to report data in all WTW/REP program status.

2.5.2 Description of Change

1. Update the following fields in Cal-OAR 19E data file to report data for individuals in all WTW/REP program statuses. Note: All existing Cal-OAR 19E reporting criteria will not be changed except for the following that is mentioned.

i. Additional reporting criteria for the data elements listed below:

1. The individual has a WTW/REP program in the measurement period.

ii. Response options for the data elements listed below:

1. 01 = No - A response of 01 is reported when the individual has a WTW/REP program but does not meet the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status but does not meet all the requirements in the reporting criteria, the batch job will send a '01' in the Cal-OAR 19E data file.

2. 02 = Yes - A response of 02 is reported when the individual has a WTW/REP program and meets all the requirements in the reporting criteria.

For Example: A person who is active in CW program and has a WTW/REP program in any status and meets all the requirements in the reporting criteria, the batch job will send a '02' in the Cal-OAR 19E data file.

3. 99 = Not Applicable - A response of 99 is reported when the individual does not have a WTW/REP program in the measurement period.

For Example: A person who is active in CW program and does not have a WTW/REP program, the batch job will send a '99' in the Cal-OAR 19E data file.

- a. Child Care Need Indicated (CH_NEED)
This variable identifies individuals who did or did not indicate they have a need for childcare.
- b. Stage One Child Care Received (CH_REC)
This variable identifies individuals who did or did not receive subsidized childcare services.
- c. Eligible for Child Care (ECC)
This variable identifies individuals who were or were not eligible for childcare.

Note: Cal-OAR changes will require Partner Integration Testing.

2.5.3 Execution Frequency

No Changes. This file runs Semi-Annually.

2.5.4 Key Scheduling Dependencies

N/A.

2.5.5 Counties Impacted

All CalSAWS counties.

2.5.6 Data Volume/Performance

Approximately 600,000 records are generated in the semi-annual Cal-OAR 19E data file.

2.5.7 Interface Partner

California Department of Social Services (CDSS).

2.5.8 Failure Procedure/Operational Instructions

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

CalSAWS

California Statewide Automated Welfare System

Proof of Concept

CA-237360

Shark Tank Innovation:

Proactive Communications - Reimagining
Service to Transform the Customer
Experience/Journey

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Richard Martin
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/17/2021	1.0	Draft	Richard Martin
3/23/2022	2.0	Content revision for POC extension through 4/30/2022	Amy Gill

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1 OVERVIEW

1.1 Current Design

This System Change Request ("SCR") describes the one-time Services that Accenture performed to design, develop, test, and implement a proactive two-way communication campaign as a proof of concept ("POC") for San Francisco County ("County"). The purpose of the POC is to highlight how artificial intelligence (AI) and interactive two-way SMS messaging can be leveraged to increase client engagement during the CalFresh recertification process.

1.2 Requests

Grant approval for Accenture and San Francisco County to run the Proactive Communications POC.

1.3 Overview of Recommendations

1. Design, develop and implement a proactive two-way communication campaign for Active San Francisco CalFresh customers that must recertify between 1/14/2022 and 2/28/2022; and
 - a. Have provided consent to messaging in CalWIN.
 - b. Are English speakers.
 - c. Are not homeless, elderly, or disabled.

1.4 Assumptions

1. The POC shall be delivered between November 18, 2021 and **March 31, 2022 April 30, 2022**.
2. POC Services are delivered at no charge to the County.
3. This POC includes a one-time Accenture investment of more than 2,700 staff hours to support the POC.
4. The AI and interactive communications technology deployed under the POC utilize the ContactEngine, Inc. technology platform. Accenture and ContactEngine, Inc. executed an Order that describes services that ContactEngine, Inc. will provide from December 1, 2021 through **March 31, 2022 April 30, 2022**. The Order includes an additional one-time Accenture investment to pay for software licensing fees from December 1, 2021 through March 31, 2022.
5. ContactEngine, Inc. signed Schedule 10 (Required Subcontract Provisions) to Exhibit X, and provided a certificate of insurance that meets or exceeds the Consortium's requirements.
6. All Accenture and ContactEngine, Inc. staff that support the POC were officially rolled on to CalSAWS Project.
7. The design, development, testing and implementation of conversational intents may be performed by Accenture's Global Delivery Network ("GDN").
8. The POC will be executed in English only.

9. The POC target audience includes Active San Francisco County CalFresh customers that must recertify between 1/14/2022 and 2/28/2022; and
 - a. Have provided consent to messaging in CalWIN.
 - b. Are English speakers.
 - c. Are not homeless, elderly, or disabled.
10. Accenture will conduct regular meetings with the County team via Microsoft Teams to manage POC activities.
11. The County will identify and provide the appropriate County staff to support POC activities and provide required data throughout the term of the POC.
12. The County will approve all customer facing content prior to release of conversational intents.
13. Accenture will have access to Personally Identifiable Information (PII) and it will be processed following provisions of Exhibit X, Accenture client data protection and Project policies. GDN resources will not have access to PII.

2 RECOMMENDATIONS

2.1 Proactive Communications POC

2.1.1 Overview

This SCR describes the one-time Services that Accenture performed to design, develop, test, and implement a proactive two-way communication campaign as a POC for San Francisco County. The purpose of the POC is to highlight how AI and interactive two-way SMS messaging can be leveraged to increase client engagement during the CalFresh recertification process.

2.1.2 Scope

The one-time services that will be delivered during the POC include:

1. The design, development, test, and implementation of conversational intents for each key date on the customer journey through the CalFresh annual recertification timeline.
2. Data design and data requirement identification, including:
 - a. Identification of available CalWIN customer data elements.
 - b. Design and implementation of a secure file transfer protocol (SFTP) site.
 - c. The County will extract customer data daily and place in the SFTP site.
 - d. Daily ingestion of the customer data into the ContactEngine, Inc. AI and communications platform. This information is leveraged to facilitate the two-way communications with the County customers.
3. Reporting: Design, development and distribution of reports that describe customer engagement metrics associated with the POC.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237566

Update rescind functionality to prevent adjusting a program's conversion date

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/20/21	1.0	Initial Draft	Connor O'Donnell

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1 OVERVIEW

1.1 Current Design

When a worker rescinds a program, the conversion date of the program will change to the beginning of the rescind period if it was set to after the beginning of the rescind period.

1.2 Requests

Prevent the adjustment of the program's conversion date when a program is rescinded.

1.3 Overview of Recommendations

1. Update the logic for the Rescind Detail, Application Detail, **New/Reapplication Detail, Previous Case List**, and Medi-Cal Person Detail pages so that the conversion date is no longer altered upon updating the dates on the page.

1.4 Assumptions

1. N/A

2 RECOMMENDATIONS

2.1 Rescind Detail

2.1.1 Overview

The Rescind Detail page currently updates the conversion date when a program is rescinded to a date prior to the stored conversion date. This is undesired behavior, so the page logic will be updated to keep the conversion date from changing upon the occurrence of a rescind.

2.1.2 Rescind Detail Mockup

N/A

2.1.3 Description of Changes

1. Update the logic of the Rescind Detail page so that when a program is rescinded from a Denied or Discontinued status, the program's Conversion Date is not altered.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Rescind Detail**

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 Application Detail

2.2.1 Overview

The Application Detail page currently updates the conversion date when the application date or beginning date of aid is updated to a date prior to the stored conversion date. This is undesired behavior, so the page logic will be updated to keep the conversion date from changing upon the occurrence of a changed date.

2.2.2 Application Detail Mockup

N/A

2.2.3 Description of Changes

1. Update the logic of the Application Detail page so that when the Application Date or Beginning Date of Aid is altered, the program's Conversion Date is not altered.

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Application Detail**

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 New/Reapplication Detail

2.3.1 Overview

The New/Reapplication Detail page currently updates the conversion date when reapplication is filed to a date prior to the stored conversion date. This is undesired behavior, so the page logic will be updated to

keep the conversion date from changing upon the occurrence of a changed date.

2.3.2 New/Reapplication Detail Mockup

N/A

2.3.3 Description of Changes

1. Update the logic of the New/Reapplication page so that when a reapplication occurs that the conversion date for any program on the case is not set prior to May 31st, 2010:
 - a. If the conversion date would be set prior to 05/31/2010, change the conversion date to 05/31/2010.
 - b. If the conversion date would be set 05/31/2010 or after, do not alter the conversion date.

2.3.4 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: New/Reapplication Detail**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Previous Case List

2.4.1 Overview

The Previous Case List page is used to when linking applications to existing cases. This update will prevent the conversion date of programs on linked cases from being set prior to the date CalSAWS went live.

2.4.2 Previous Case List Mockup

N/A

2.4.3 Description of Changes

2. Update the logic of the Previous Case List page so that when a new case is created for the purposes of linking an application that the conversion date for any program on the linked case is not set prior to May 31st, 2010:
 - a. If the conversion date would be set prior to 05/31/2010, change the conversion date to 05/31/2010.
 - b. If the conversion date would be set 05/31/2010 or after, do not alter the conversion date.

2.4.4 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Previous Case List**

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 Medi-Cal Person Detail

2.5.1 Overview

The Medi-Cal Detail page currently updates the conversion date when a Retro month is added to a date prior to the stored conversion date. This is undesired behavior, so the page logic will be updated to keep the conversion date from changing upon the occurrence of a retro month.

2.5.2 Medi-Cal Person Detail Mockup

N/A

2.5.3 Description of Changes

1. Update the logic of the Medi-Cal Person Detail page so that when a Retro Month is updated, the program's Conversion Date is not altered.

2.5.4 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Medi-Cal Person Detail**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met