

# CalsAWS

California Statewide Automated Welfare System

## **Design Document**

CA-48513

Update EDBC Logic to Auto-Test for 4M when  
Youth 18 years or Older Exits Foster Care

| CalSAWS | DOCUMENT APPROVAL HISTORY |  |
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|         | Prepared By               | Tisha Mutreja, Renee Gustafson   |
|         | Reviewed By               | Derek Goering, Prashant Goel, Akira Moriguchi, Geetha Ramalingam, William Baretsky, Priya Sridharan, Michael Wu, Naga Chinduluru |

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# 1 OVERVIEW

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This SCR is to streamline the Medi-Cal auto-test process by updating EDBC logic to auto-test for Former Foster Youth (FFY) aid code 4M when a youth 18 years or older exits from Foster Care (FC).

## 1.1 Current Design

Currently, when an individual is discontinued from FC for any of the following reasons, CalSAWS EDBC logic auto-tests the individual for Medi-Cal (MC) except if the discontinued FC individual is Pending or receiving Medi-Cal in a Medi-Cal program block, Other Program Assistance (OPA) or cash-based Medi-Cal.

| FC Disc Reasons that will MC Auto-Test |
|--|
| Age                                    |
| Child Eligible to Kin-GAP              |
| Child Not In Placement                 |
| Child Returns to Parent                |
| Court Requirement Not Met              |
| Didn't Recert License                  |
| Didn't Sign SOF                        |
| Doesn't Meet Program Req.              |
| Failed to Complete Determination       |
| Legal Guardian                         |
| No longer in Care                      |
| Non Fed Caretaker                      |
| Over Resources                         |
| Parent resides in Foster Home          |
| Petition Not Filed                     |
| Requested Disc. - Written              |
| Whereabouts Unknown                    |

The MC auto-test creates a new Medi-Cal Program block in the same case as the FC Program if there is not already an open MC Program block. The auto-tested MC individual will either be granted Continuous Eligibility for Children (CEC) with aid code 7J; otherwise, they will receive aid code 38. If another open MC program block is already on the FC case, the FC discontinued person is added to the existing MC program block as a pending person.

For Requested MC Type 'Former Foster Youth', Medi-Cal EDBC logic creates a budget named, "Former Foster Youth" with Member Role and aid code 4M when the FFY individual is the age of 18 until age 26 years. CalSAWS generates a Notice of Action for change/approval to aid code 4M.

CalSAWS Medi-Cal EDBC logic sets the RE Due Date for a MC program with only a FFY individual to the month in which the individual turns 26; if there are any other individuals on the MC program, the RE Due Date is set to the last day of the month of 'Begin Date + 11 months' where Begin Date is the first day of the EDBC Benefit Month.

**For Example:** If a Medi-Cal application on 02/05/2021 has only an FFY individual in the program block (FFY individual turns 26 on 08/28/2023), the System sets the RE Due Month to 08/2023.

If there is any other non-FFY individual in the same MC program block, the System sets the RE Due Month to 01/2022.

The Position Detail page displays information regarding a position. This includes information such as the location to which the position belongs, the number of cases and the type of programs to which the position can be assigned. This information specified for the position is then used during Worker Reassignment to determine whether the position can be assigned to a program.

Per existing logic, the newly assigned worker will receive the "New Assignment" indicator on the Workload Inventory page. An auto-journal "Assignment Worker Initiated" is created with details of previous worker and new worker.

Also, the New Worker Letter (CSF 163) generates to notify the recipient of a new worker contact.

The screenshot displays the 'Journal Detail' page. At the top, there is a header with a 'Help' icon. Below the header, a legend indicates that an asterisk (\*) denotes required fields. Navigation buttons '<<', 'Append', 'Suppress', and 'Print' are located in the top right corner. The main form area contains fields for 'Case Number' and 'Case Name'. Below these, a section titled 'Entry Information' contains the following details: 'Journal Category' is 'All', 'Journal Type' is 'Assignment', 'Initiated By' is 'User', and 'Method of Contact' is blank. The 'Short Description' is 'Assignment Worker Initiated'. The 'Long Description' states: 'Program(s) reassigned: FS, Previous Worker: 19DP344W04, New Worker: 19DP345F10, Initiated By: 19DP343E04'. At the bottom of the form, another set of navigation buttons '<<', 'Append', 'Suppress', and 'Print' is present. A timestamp '( 11/17/2021 9:55 AM, Steven Levinson, 19DP343E04, Intermediate Clerk )' is shown. A footer bar indicates 'This Type 1 page took 0.60 seconds to load.'

## 1.2 Requests

1. Streamline the process when youth 18 years or older exits Foster Care, by changing EDBC logic to auto-test for Former Foster Youth (4M) Medi-Cal to ensure uninterrupted Medi-Cal benefits. FFY MC applies to individuals in FC on their 18th birthday.
2. Add a new option on the Position Detail page to identify a position that can accept the Medi-Cal program created through an FFY auto-test on the new case.
3. Create a new auto-reassignment logic to reassign the Medi-Cal program created through an FFY auto-test on the new case per County Opt-in/Opt-out.

## 1.3 Overview of Recommendations

1. Update EDBC logic to auto-test for Former Foster Youth (4M) Medi-Cal when an individual, age 18 or above, is discontinued from the FC program.
  - a. Create a new case for the FFY Medi-Cal.
  - b. Generate the FFY Approval NOA from the new FFY case (and not from the FC case).
2. For FC cases that have a MC program on the case prior to the FFY auto-test, create a task for the worker(s) assigned to the other open programs in the FC case to inform that the FFY individual is discontinued and moved to the newly created MC case.
3. Create new reassignment logic to automatically reassign an active Medi-Cal program on the new FFY auto-test MC case to a new worker for Counties that opted in.
4. Add a new 'FFY Auto-Test' option to the Aid Codes – Medi-Cal section on the Position Detail page.

## 1.4 Assumptions

1. The original LA County Change Control Request (CCR) received and linked to the SCR CA-48513 included additional requests for updates to individuals in FFY MC and individuals discontinued from FC as stated above in the Request section. All the other requests in the CCR will be implemented with future SCR CA-220233 and will follow the regular prioritization process.
2. There are no changes to how EDBC sets the Medi-Cal RE Due Date. It will follow current functionality.
3. The auto-test logic will not be suppressed if the physical address is out of state. The System will follow existing functionality to auto-test a Medi-Cal program and then discontinue the MC individual for 'Calif. Residence'.
4. The Medi-Cal EDBC rules will not auto-test MC if the discontinued FC individual is Pending or receiving Medi-Cal in a Medi-Cal program block, Other Program Assistance (OPA) or cash-based Medi-Cal.
5. The auto-test logic will copy over the mailing/physical address from the discontinued Foster Care case to the newly created Medi-Cal case.
6. FC cases processed in Batch EDBC in 'All Programs' mode (or 'Partial Programs' with FC and MC) will follow the new FFY MC Auto-Test logic, if



- appropriate, and Batch EDBC will Accept and Save the FC program and the auto-tested MC program(s) using existing Batch EDBC logic.
7. Foster Care cases marked 'Confidential' will go through the new FFY auto-test process and the new MC case will NOT be marked 'Confidential'.
  8. If the FFY individual returns to FC, when they are discontinued from FC again, the FFY Auto-Test logic will create another new MC case and will not reopen any existing FFY case.
  9. Existing NOA generation/population logic will not be updated with this effort except for the Case ID.
  10. CA-220233 will update the FFY Packet to generate for all counties.
  11. The MC NOA will not be printed via the Preview NOA and will be printed locally only when the option to 'Print Locally' is available on Save and Continue on the new Case for Medi-Cal.
  12. Medi-Cal NOAs that are 'Rejected' via the Preview NOA will also be moved to the new Medi-Cal case.
  13. All existing online functionalities will remain unchanged, unless called out as part of the design document.
  14. The New Worker Letter (CSF 163) will be sent out for a change in worker when the Foster Care case is moved to the new MC case and the counties opt-in for worker reassignment for FFY Auto Test. Only one CSF 163 will be generated at the end of the day with the last worker assigned to the program.

## 2 RECOMMENDATIONS

### 2.1 Position Detail Page

#### 2.1.1 Overview

The Position Detail page displays information regarding a position. This includes information such as location to which the position belongs, the number of cases and the type of programs to which the position can be assigned. This SCR adds a new 'FFY Auto-Test' option to the Aid Codes – Medi-Cal section on the Position Detail page.

#### 2.1.2 Position Detail Page Mockups

**Position Detail**

\* Indicates required fields

Save Save and Copy Cancel

### General Position Information

Worker ID:

Office Name: \*  
Select

Unit ID: \*  
Select

Assignment Type Code:  
Select

Auto Assign Indicator:  
Select

SSI Referrals:  
Select

Authorization Sampling Percentage:  
10

Case Load:  
Traditional

IHSS Referrals Auto Assignment: \*  
No

Section: \*  
Select

Position Status: \*  
Select

Worker Level:  
Select

Max Case Load:  
0

Max Intake Case Load:  
0

Current Case Load:  
0

Total Percentage of Cases Assigned:  
0%

Task Action Step Completion Required:  
Select

### Appointment Threshold

| Category | Type   | Daily Threshold |
|----------|--------|-----------------|
| Select   | Select | 0               |

Remove Add

### Program(s)

|  |  |  |
|--|--|--|
| <input type="checkbox"/> AAP             | <input type="checkbox"/> CAPI                | <input type="checkbox"/> CFET                              |
| <input type="checkbox"/> Cal-Learn       | <input type="checkbox"/> CalFresh            | <input type="checkbox"/> CalWORKs                          |
| <input type="checkbox"/> Child Care      | <input type="checkbox"/> Disaster CalFresh   | <input type="checkbox"/> Diversion                         |
| <input type="checkbox"/> Foster Care     | <input type="checkbox"/> GROW                | <input type="checkbox"/> General Assistance/General Relief |
| <input type="checkbox"/> Homeless - Perm | <input type="checkbox"/> Homeless - Temp     | <input type="checkbox"/> Immediate Need                    |
| <input type="checkbox"/> Kin-GAP         | <input checked="" type="checkbox"/> Medi-Cal | <input type="checkbox"/> Nutrition Benefit                 |
| <input type="checkbox"/> RCA             | <input type="checkbox"/> REP                 | <input type="checkbox"/> Welfare to Work                   |

### Aid Codes - Medi-Cal \*

|   |   |
|---|---|
| <input type="checkbox"/> ALL                            | <input type="checkbox"/> 250% Program                   |
| <input type="checkbox"/> All MAGI                       | <input type="checkbox"/> Craig vs Bonta                 |
| <input type="checkbox"/> Deemed Child                   | <input type="checkbox"/> FFY Auto-Test                  |
| <input type="checkbox"/> Foster Care, County Funded     | <input type="checkbox"/> IHSS Plus Waivers              |
| <input type="checkbox"/> LTC / Board and Care           | <input type="checkbox"/> MSP                            |
| <input type="checkbox"/> Minor Consent                  | <input type="checkbox"/> Non-MAGI, Aged Blind Disabled  |
| <input type="checkbox"/> Non-MAGI, Medi-Cal Transitions | <input type="checkbox"/> Special Treatment              |
| <input type="checkbox"/> Transitional, CEC Full         | <input type="checkbox"/> Transitional, Edwards vs Kizer |

Figure 2.1.2.1 – Position Detail page (Create mode)

Position Detail

\* Indicates required fields

Save

Save and Copy

Cancel

General Position Information

Worker ID:

19DP112C00

Office Name: \*

011 East Valley

Unit ID: \*

2C 00

Assignment Type Code:

Intake

Auto Assign Indicator:

No

SSI Referrals:

No

Authorization Sampling Percentage:

10

Case Load:

Traditional

IHSS Referrals Auto Assignment: \*

No

Section: \*

51

Select

Position Status: \*

Inactive

Worker Level:

Eligibility Worker

Max Case Load:

0

Max Intake Case Load:

Current Case Load:

0

Total Percentage of Cases Assigned:

0%

Task Action Step Completion Required:

Appointment Threshold

| Category | Type | Daily Threshold |
|----------|------|-----------------|
|          |      |                 |

Add

Remove

Program(s)

☐ AAP
 ☐ Cal-Learn
 ☐ Child Care
 ☐ Foster Care
 ☐ Homeless - Perm
 ☐ Kin-GAP
 ☐ RCA

☐ CAPI
 ☐ CalFresh
 ☐ Disaster CalFresh
 ☐ GROW
 ☐ Homeless - Temp
 ☒ Medi-Cal
 ☐ REP

☐ CFET
 ☐ CalWORKs
 ☐ Diversion
 ☐ General Assistance/General Relief
 ☐ Immediate Need
 ☐ Nutrition Benefit
 ☐ Welfare to Work

Aid Codes - Medi-Cal \*

☐ ALL
 ☐ All MAGI
 ☐ Deemed Child
 ☐ Foster Care, County Funded
 ☐ LTC / Board and Care
 ☐ Minor Consent
 ☐ Non-MAGI, Medi-Cal Transitions
 ☐ Transitional, CEC Full

☐ 250% Program
 ☐ Craig vs Bonta
 ☒ FFY Auto-Test
 ☐ IHSS Plus Walvers
 ☐ MSP
 ☐ Non-MAGI, Aged Blind Disabled
 ☐ Special Treatment
 ☐ Transitional, Edwards vs Kizer

Figure 2.1.2.2 – Position Detail page (Edit mode)

Position Detail

\* Indicates required fields

EditCopyClose

General Position Information

Worker ID:  
19DP112C00

Office Name: \*  
011 East Valley

Unit ID: \*  
2C 00

Assignment Type Code:  
Intake

Auto Assign Indicator:  
No

SSI Referrals:  
No

Authorization Sampling Percentage:  
10

Case Load:  
Traditional

IHSS Referrals Auto Assignment: \*  
No

Section: \*  
51

Position Status: \*  
Active

Worker Level:  
Eligibility Worker

Max Case Load:  
0

Max Intake Case Load:

Current Case Load:  
0

Total Percentage of Cases Assigned:  
0%

Task Action Step Completion Required:

Appointment Threshold

| Category      | Type | Daily Threshold |
|---------------|------|-----------------|
| No Data Found |      |                 |

Program(s)

|                 |                   |                                   |
|-----------------|-------------------|-----------------------------------|
| AAP             | CAPI              | CFET                              |
| Cal-Learn       | CalFresh          | CalWORKs                          |
| Child Care      | Disaster CalFresh | Diversión                         |
| Foster Care     | GROW              | General Assistance/General Relief |
| Homeless - Perm | Homeless - Temp   | Immediate Need                    |
| Kin-GAP         | ✓ Medi-Cal        | Nutrition Benefit                 |
| RCA             | REP               | Welfare to Work                   |

Aid Codes - Medi-Cal \*

|                                  |                                  |
|----------------------------------|----------------------------------|
| ✓ ALL                            | ✓ 250% Program                   |
| ✓ All MAGI                       | ✓ Craig vs Bonta                 |
| ✓ Deemed Child                   | ✓ FFY Auto-Test                  |
| ✓ Foster Care, County Funded     | ✓ IHSS Plus Waiver               |
| ✓ LTC / Board and Care           | ✓ MSP                            |
| ✓ Minor Consent                  | ✓ Non-MAGI, Aged Blind Disabled  |
| ✓ Non-MAGI, Medi-Cal Transitions | ✓ Special Treatment              |
| ✓ Transitional, CEC Full         | ✓ Transitional, Edwards vs Kizer |

Case Flow

Figure 2.1.2.3 – Position Detail page (View mode)

### 2.1.3 Description of Changes

1. Add a new option to the 'Aid Codes – Medi-Cal' section on the Position Detail page.
  - a. Add a new option named, "FFY Auto-Test" located to the right of "Deemed Child" option.
2. Update the following labels on the 'Aid Codes – Medi-Cal' section
  - a. "All Magi" to "All MAGI"
  - b. "Non Magi, Aged Blind Disabled" to "Non-MAGI, Aged Blind Disabled"
  - c. "Non Magi, Medi-Cal Transitions" to "Non-MAGI, Medi-Cal Transitions"

**Note:** The above cosmetic changes will also apply throughout CalSAWS that displays the same information.

### 2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Position**

### 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 Eligibility Rules Updates

### 2.2.1 Overview

Update EDBC logic to auto-test for Former Foster Youth (4M) Medi-Cal when an individual age 18 or above is discontinued from the FC program.

### 2.2.2 Description of Changes

1. Update Medi-Cal EDBC auto-test logic to identify if the discontinued FC individual aged 18 or older as of the discontinuance effective date will follow the new FFY auto-test logic.
  - a. Create FFY auto-test logic with below details:
    - i. Create a new MC program in the FC case with the discontinued FC individual.
      1. Assign the FC worker to the MC program
      2. Set the Requested MC Type to 'Former Foster Youth' for the FFY individual  
**Note:** The existing MC EDBC logic will grant the FFY individual the 4M aid code, 'Member' Role and a 'Former Foster Youth' budget.
      3. Set the FFY individual as the Primary Applicant
      4. Copy over the Cash Based program (FC Case) Application Source if exists,  
If the Application Source does not exist, set the default Application Source as 'Other'
      5. Set the Application Date for the MC program and program person to the system date (calendar date)
      6. Set the Beginning Date of Aid (BDA) to the first of the month of the FFY individual's discontinuance from FC.

**For example:** If the FFY individual was discontinued on FC case effective 02/2021 and auto-tested to the new MC case on 01/07/2021, the Medi-Cal Application Date will be set as 01/07/2021, and BDA as 02/01/2021.

**NOTE:** This MC program block will be referred to as the "FFY MC program block" from here forward.

- ii. Create a separate MC program block with the FC MMO Infant Supplement Payment (ISP) child(ren), if any, with below details:
  1. Assign the FC worker to the MC program
  2. Set the Requested MC Type as 'Medi-Cal'
  3. Set the FFY individual as the primary applicant
  4. Copy over the Cash Based program (FC Case) Application Source if exists,  
If the Application Source does not exist, set the default Application Source as 'Other'
  5. Set the Application Date for the MC program and program person(s) to the system date (calendar date)
  6. Set the BDA to the first of the month of the FFY individual's discontinuance from FC
    - a. Update EDBC logic for FC MMO ISP child(ren) with a FFY parent, to create a budget as 'CEC' with Role as 'MEM' and aid code as '7J'

**NOTE:** This MC program block will be referred to as the "ISP MC program block" from here forward.

- b. Update 'Save and Continue EDBC' logic (including Supervisor Authorization) to move the auto tested FFY MC program, and ISP MC program if any, to a new MC case from the discontinued FC case as follows:
  - i. Create a new MC case with new case number:
    1. Copy the FFY individual, and ISP child(ren) if any, into the new MC case.
    2. Move the Active FFY MC program block, Active ISP MC program block if any, and assigned worker(s) from the discontinued FC case to the MC case.
    3. Reassign the Worker(s) based on County options:
      - a. For counties that opt out of the "FFY Auto-Test" worker reassignment, the MC program(s) will remain assigned to the existing FC worker.
      - b. For counties that opt in to the "FFY Auto-Test" worker reassignment, the MC program(s) on the new case will automatically be reassigned per recommendation 2.3.2.1.

**Technical Note:** Include the Aid Code – Medi-Cal "FFY Auto-Test" when calling the reassignment logic.

4. Do not copy the Foster Care program nor the Foster Care Resource/Payee (from the Child Placement) from the discontinued FC case to the MC case.
5. Create a new household record for each individual as "In the Home" and set Begin Date as system date (calendar date).
6. Do not copy the 'Confidential' designation from the FC case to the new MC case, if any.
7. Set the program assignment to "No" for the Life Cycle Indicator.
8. Set the "Assign To Medi-Cal Only" field on the Medi-Cal Program block to "No".

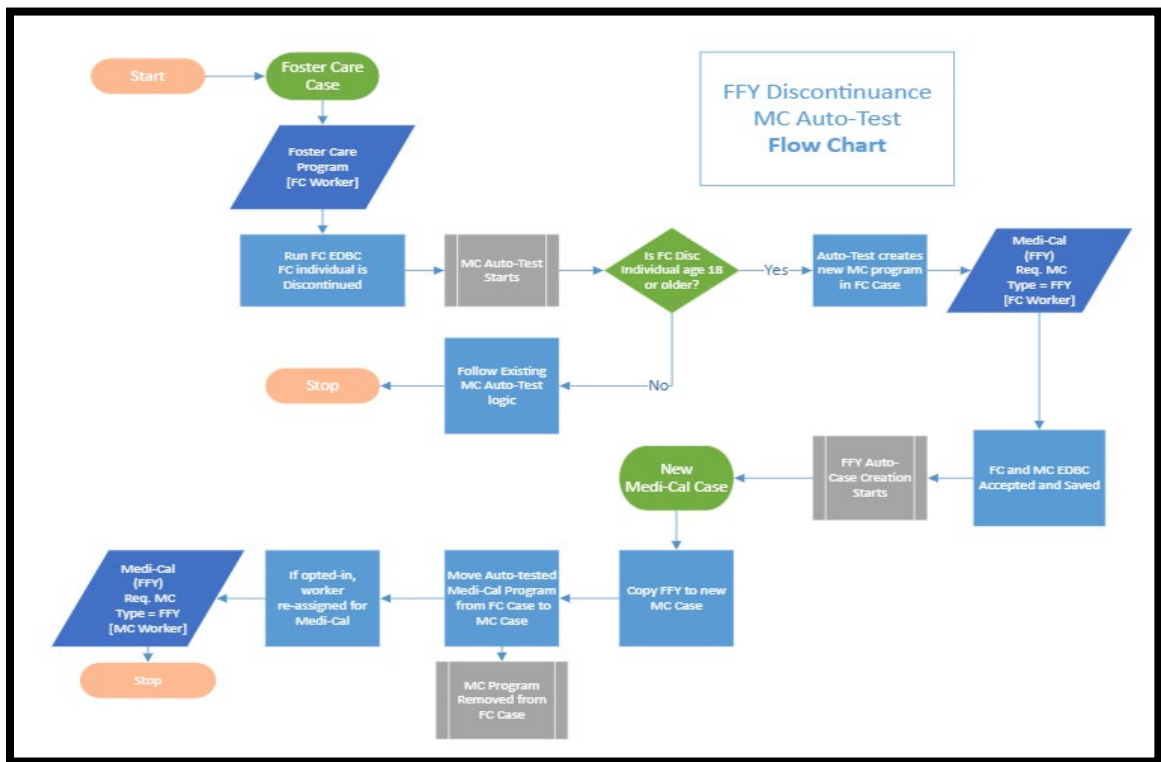


Figure 2.1 - Example Flow Chart for FFY Auto-Discontinuance



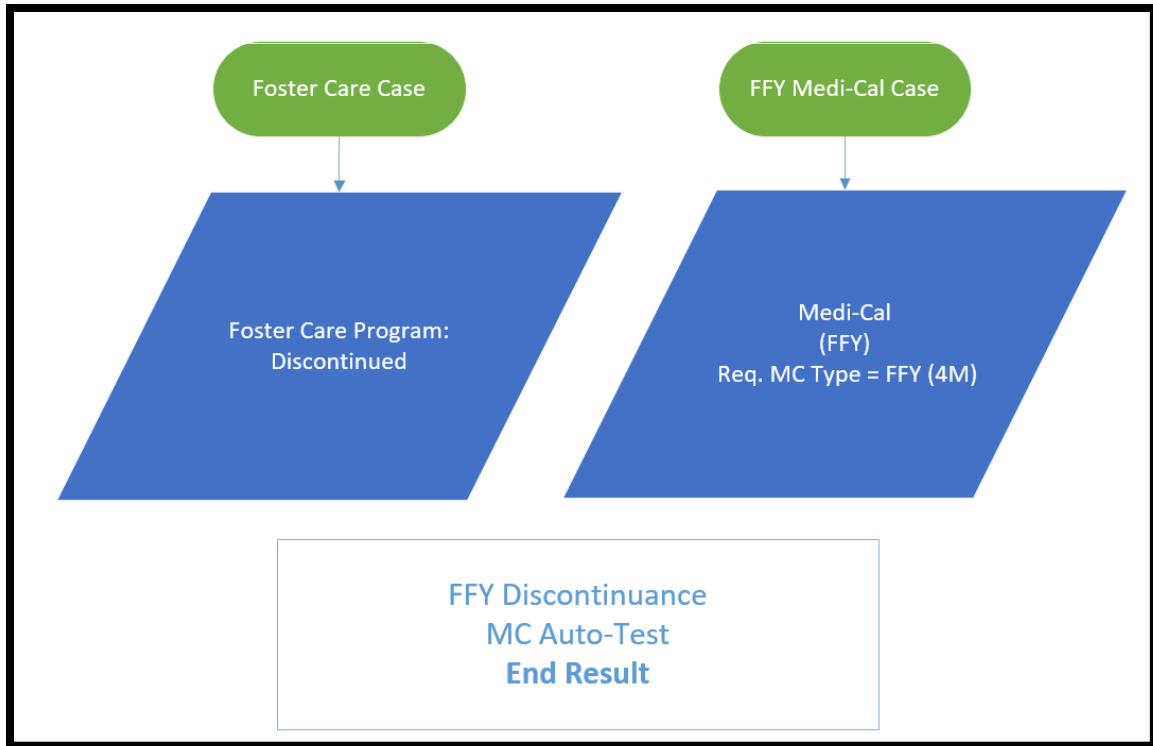


Figure 2.2 - End Result of FFY Auto-Discontinuance

**NOTE:** Additional flow charts are attached in Supporting Documents for reference.

2. Create a Journal entry in the new MC case created by the FFY auto-test logic.

The Journal Entry will be displayed as follows on Journal Detail page:

**Journal Category:** Activity

**Journal Type:** Eligibility

**Short Description:** MC Case created from FFY Discontinuance MC Auto-Test

**Long Description:** Case created by Medi-Cal FFY Auto-Test when an individual, age 18 or older, was discontinued from the Foster Care program

**Note:** There will be one journal entry per case.

3. Create a Journal entry for the existing FC case.

The Journal Entry will be displayed as follows on Journal Detail page:

**Journal Category:** Activity

**Journal Type:** Eligibility

**Short Description:** FC Discontinued and Auto-Test MC FFY created

**Long Description:** FFY program approved, and a new MC case created

**Note:** There will be one journal entry per case.

### 2.2.3 Programs Impacted

Medi-Cal, Foster Care

### 2.2.4 Performance Impacts

N/A

## 2.3 Worker Reassignment for FFY Auto-Tested Medi-Cal Program

### 2.3.1 Overview

Current Worker auto-reassignment logic reassigns a Worker to a program when the program status goes from 'Pending' to 'Active' for a Worker who can take that program type; this is defined through the Position Detail page. This SCR updates the existing Worker auto-reassignment logic to automatically reassign an already active MC program to a different Worker when the active MC program is created through the FFY Auto-Test; this includes the FFY MC program block, and ISP MC program block when the program(s) moves to a new MC case from the FFY Auto-Test.

### 2.3.2 Description of Changes

1. Update CalSAWS to automatically assign the active Medi-Cal program block on the new case (case was created through the "Save and Continue EDBC" logic – refer to Section 2.2.2.1.b) for counties that opted in.

**Note:** This re-assignment process will only be available for a Medi-Cal program that's created through the new flow outlined in Section 2.2.2.1.b

The new assignment indicator will be displayed on the workload inventory pages and an auto journal will be created when the Medi-Cal program is reassigned to a Medi-Cal worker.

**Step 1:** Find an Active position that is in the same office as the Foster Care worker, matches the language of the primary applicant, and the following requirements defined on the Position Detail page. If no position is found that can accept the same language as the primary applicant (if the language is not English) in the same office as the Foster Care worker, then proceed to Step 2.

- i. Position Status: Active

- ii. Assignment Type Code: "Continuing" or "Intake & Continuing"
- iii. The Program block have Medi-Cal selected
  - 1. Other programs can also be selected on the Program block on the Position Detail page.
- iv. Aid Codes – Medi-Cal: FFY Auto-Test
  - 1. Other aid codes can also be selected on the Aid Codes-Medi-Cal block on the Position Detail page.
- v. Auto Assign Indicator: Yes.
- vi. Staff is assigned to the Position.

**Step 2:** If no position is found that can speak the same primary language as the primary applicant (if it's other than English) in the same office location as the Foster Care worker, then look for any English-speaking active position in the office as the Foster Care worker and matches the above required criteria listed in Step 1.

If no position is found in the same office as the Foster Care worker that meets the criteria, then proceed to Step 3.

**Step 3:** If no position matches the required criteria (from Step 2) in the same office as Foster Care worker, then look for an active position in the same County that the case belongs to, matches the language of the primary applicant, and matches the following requirements. If no position is found that can accept the same language as the primary applicant (if the language is not English) in the same county as the Foster Care worker, then proceed to Step 4.

- i. Position Status: Active
- ii. Assignment Type Code: Continuing or Intake & Continuing
- iii. The Program block have Medi-Cal selected
  - 1. Other programs can also be selected on the Program block on the Position Detail page.
- iv. Aid Codes – Medi-Cal: FFY Auto-Test
  - 1. Other aid codes can also be selected on the Aid Codes-Medi-Cal block on the Position Detail page.
- v. Auto Assign Indicator: Yes.
- vi. Staff is assigned to the Position.

**Step 4:** If no position is found that can speak the same primary language as the primary applicant (if it's other than English) in the same county as the Foster Care worker, then look for any English-speaking active position in the county as the Foster Care worker and matches the above required criteria listed in Step 3.

If no position is found in the same county as the Foster Care worker that meets the criteria, then proceed to Step 5.

**Step 5:** If no position matches the required criteria (from Step 4) in the County that the case belongs to, then the Medi-Cal program will not be reassigned (there will be no change to the worker assignment for the Medi-Cal program and it will remain with the Foster Care worker).

Note: The reassignment logic will continue to use existing logic in determining the worker maximum case load.

### **2.3.3 Programs Impacted**

Medi-Cal

### **2.3.4 Performance Impacts**

N/A

## **2.4 Move the Medi-Cal NOA to the MC Case**

### **2.4.1 Overview**

The FFY Auto-Test MC EDBC(s) will move into a new case with this SCR. The NOA(s) generated from the Auto-Test MC EDBC(s) will also move to the new case with the MC program after which, the Medi-Cal NOA(s) from the FFY Auto-Test will not be visible in the Discontinued Foster Care case. The Case Number listed on the NOA will be updated when moved to the new MC program's case. This will be different than the original NOA that is seen in the Preview NOA when EDBC was originally run which will have the FC program Case Number.

See Supporting Document #2 for NOA Reasons that are expected to generate from the FFY Auto-Test MC EDBC.

### **2.4.2 Description of Change**

1. Add NOA logic at EDBC Save and Continue when generating a NOA from the FFY Auto-Test MC EDBC. If a newly created MC NOA (see list of NOAs from Supporting Document #2) has generated, check the associated EDBC's Case ID and if the Case ID differs from the Generated Document Case ID for the NOA:
  - a. Update the Case ID for the Generated Document to match the EDBC Case ID.
  - b. Update the Case Number NOA variable population in NOA\_SNIPPET\_VAR to match the new Medi-Cal Case Number (SERIAL\_NUM\_IDENTIF).

- c. Remove the previously created PDF of the NOA from the database (remove the ALF\_FMS\_NUM from Generate Documents). Note: This will allow the NOA to be generated with the new case variable population.

## 2.5 Update the FFY Aging Out Form to be viewable by all counties

### 2.5.1 Overview

The Former Foster Youth Aging Out Form (FFY MC Cover Letter) is currently available in Template Repository in CalSAWS but only visible to LA county. This recommendation will update the form to be viewable in Template Repository for all counties.

Note: This Form is also a part of the FFY RE Packet. This effort will make no updates to the version attached to the packet.

**State Form:** Upcoming Change to Your Medi-Cal Coverage per ACWDL 15-32

**Current Programs:** Medi-Cal

**Current Attached Form(s):** N/A

**Current Form Category:** Forms

**Current Template Repository Visibility:** LA County Only

**Existing Languages:** English

### 2.5.2 Description of Change

1. Update the FFY Aging Out Form (ID: 6027) to be visible to all counties in Template Repository (DOC\_TEMPL.TEMPL\_COUNTY\_CATGRY\_CODE = 'ALL').

See Supporting Documents #3 for existing CalSAWS FFY Aging Out Form.

## 2.6 Regression Test CSF 163 to validate generation for new Medi-Cal program

### 2.6.1 Overview

Currently the CSF 163 generates to notify the recipient of a new Worker contact.

**County Form:** Modified Former LA county form ADM 101-LA

**Current Programs:** All

**Current Attached Form(s):** N/A

**Current Form Category:** Forms

**Current Template Repository Visibility:** All County

**Existing Languages:** English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Lao, Korean, Russian, Tagalog, Vietnamese

## 2.6.2 Description of Change

Verify that a CSF 163 generates when the new Medi-Cal program and case is created, and a new Worker is assigned per Recommendation 2.3.

## 2.7 Automated Task Creation

### 2.7.1 Overview

For FC cases that have a MC program on the case prior to the FFY Auto-Test, create a task for the worker(s) assigned to the other open program in the FC case to inform that the FFY individual is discontinued and moved to the newly created MC program.

Invoke an Automated Action to create a Task notifying the worker assigned to the new MC program that resulted from the FFY Auto-Test.

### 2.7.2 Description of Change

The Automated Actions defined in this section will be available for the 58 Counties. The Status will initially be Inactive with a blank Task Type and Task Sub-Type. This is because each County can set a custom Task Type for each Automated Action. If a County decides to Activate one of these Automated Actions, the page validation will require that the County also select a Task Type to be used.

1. Create a "Medi-Cal Program: Exists on Discontinued Foster Care Case" Automated Action that will have the following attributes on the Automated Action Detail page:
  - a. Action Information
    - i. Name: Medi-Cal Program: Exists on Discontinued Foster Care Case
    - ii. Type: Create Task
    - iii. Status: Inactive
    - iv. Program(s): MC
    - v. Run Date: Daily or Real Time

- vi. Source: Batch/Online
  - vii. Scenario: Scenario: A Foster Care program was Discontinued with an open Medi-Cal program existing on the case.
- b. Task Information
- i. Task Type: BLANK
  - ii. Task Sub-Type: BLANK
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 10 business days
  - v. Initial Assignment: Default Assignment
  - vi. Default Assignment: Current Medi-Cal Program Worker
  - vii. Long Description: The FC individual was discontinued and auto-tested to FFY on a separate Medi-Cal case. Review the Medi-Cal individual(s) on this case to determine if they should also move to the new Medi-Cal case.
- c. Update the EDBC Save and Continue to invoke the above Automated Action when the FC discontinuance resulted in a new MC case from the FFY Auto-Test as described in Recommendation 2.2.2.1.b and there remains an open MC program on the FC case.
2. Create a "Former Foster Youth Auto-Test: Medi-Cal Worker Assigned" Automated Action that will have the following attributes on the Automated Action Detail page:
- a. Action Information
- i. Name: Former Foster Youth Auto-Test: Medi-Cal Worker Assigned
  - ii. Type: Create Task
  - iii. Status: Inactive
  - iv. Program(s): MC
  - v. Run Date: Daily or Real Time
  - vi. Source: Batch/Online
  - vii. Scenario: A Former Foster Youth has auto-tested into a Medi-Cal program which has been assigned to a worker.
- b. Task Information
- i. Task Type: BLANK
  - ii. Task Sub-Type: BLANK
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 10 business days
  - v. Initial Assignment: Default Assignment
  - vi. Default Assignment: Current Program Worker
  - vii. Long Description: A Medi-Cal program that resulted from a Former Foster Youth auto-test has been assigned.

- c. Update the EDBC Save and Continue to invoke the above Automated Action when the FC discontinuance resulted in a new MC program from the FFY Auto-Test as described in Recommendation 2.2.2.1.b. The resulting Task will be associated to the new Medi-Cal program.

## 2.8 Automated Regression Test

### 2.8.1 Overview

Create a new script to verify the new final result when accepting and saving a Foster Care EDBC that discontinues an individual who is 18 or older to verify the movement of the Medi-Cal program to a separate case.

### 2.8.2 Description of Change





Create a new script to verify the new final result when accepting and saving a Foster Care EDBC that discontinues an individual who is 18 or older:

1. No Medi-Cal program is present on the Foster Care case
2. No Medi-Cal EDBC results are visible on the Foster Care case
3. The auto-tested Medi-Cal program is present on a new second case:
  - a. Requested Medi-Cal Type is "Former Foster Youth" for each applicant
  - b. Program status is "Active"
  - c. Person status is "Active" for each applicant
4. The auto-tested Medi-Cal EDBC result is visible on this second case:
  - a. Status is "Active"
  - b. Aid Code is "4M" for each applicant
5. The Medi-Cal program on the new second case is assigned to the same worker as the Foster Care program on the original case.  
**Note:** This result will only be verified for counties that opt out of the "FFY Auto-Test" worker reassignment.
6. A Journal entry is present on the new second case with the following details:
  - a. **Journal Category:** Activity
  - b. **Journal Type:** Eligibility
  - c. **Short Description:** MC Case created from FFY Discontinuance MC Auto-Test
  - d. **Long Description:** Case created by Medi-Cal FFY Auto-Test when an individual, age 18 or older, was discontinued from the Foster Care program
7. A Journal entry is present on the Foster Care case with the following details:



- a. **Journal Category:** Activity
- b. **Journal Type:** Eligibility
- c. **Short Description:** FC Discontinued and Auto-Test MC FFY created
- d. **Long Description:** FFY program approved, and a new MC case created

### 3 SUPPORTING DOCUMENTS

| Number | Functional Area   | Description   | Attachment   |
|--------|-------------------|---|--|
| 1      | Eligibility Rules | Flow charts explaining the MC auto-test process from recommendation 2.2.2 | <br>FFY Auto Test.pdf             |
| 2      | NOA               | Expected NOAs to generate from the auto-test MC EDBC                      | <br>CA-48513 - Impacted NOAs.xlsx |
| 3      | Form              | Former Foster Youth Aging Out Form  | <br>FFYAGINGOUT.pdf               |
| 4      | CCR Request       | Original Request from LA County   | <br>CCR Request.docx              |



California Statewide Automated Welfare System

## **Design Document**

CA-209311

Add threshold language MC 355 forms

| CalSAWS | DOCUMENT APPROVAL HISTORY |              |
|---------|---------------------------|--------------|
|         | Prepared By               | Nagesha S    |
|         | Reviewed By               | Madhan Kumar |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR    |
|------------|---------------------|----------------------|-----------|
| 04/29/2022 | 1.0                 | Initial Draft        | Nagesha S |
|            |                     |                      |           |
|            |                     |                      |           |
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# 1 OVERVIEW

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This effort will add threshold language MC 355 forms.

## 1.1 Current Design

MC 355 initial and reminder forms are available in English and Spanish.

## 1.2 Requests

Add Threshold languages to the CalSAWS for the MC 355 Initial and Reminder forms and system generated.

Languages include:

Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

## 1.3 Overview of Recommendations

1. Add MC 355 initial and reminder forms in all Threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold languages will remain the same as the print options for MC 355 English and Spanish.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. MC 355 is not available from Template Repository.
4. All fields (blank or prepopulated) will be editable.
5. Supporting Documents section references attachments found on Jira website.

# 2 RECOMMENDATIONS

---

## 2.1 MC 355 initial Form

### 2.1.1 Overview

This section will cover the requirements for adding the MC 355 initial in available threshold languages. This form will generate from MC 355 detail page and through Batch. The MC 355 is not available from Template Repository.

**State Form:** MC 355

**Current Programs:** Medi-Cal

**Current Forms Category:** Forms

**Current Template Repository Visibility:** N/A

**Existing Languages:** English, Spanish

### 2.1.2 Form Verbiage

#### **Create MC 355 XDP's for Threshold Languages**

Create MC 355 XDPs for the following threshold languages with the CalSAWS standard fonts.

**Threshold Languages:** Armenian, Arabic, Cambodian, Chinese\*, Farsi, Tagalog/Filipino, Hmong Korean, Lao, Russian, Vietnamese

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** NO

### 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish forms for existing population logic.

### 2.1.4 Form Generation Conditions

#### **MC 355 Detail Page**

From the MC 355 Detail page, all necessary inputs will be available from the case context (Case Number, Customer Name, Language, and Program). When the Generate MC 355 button is pressed, the form will generate without the Document Parameters page popping up.

#### **Update Form generation batch job**

Update MC 355 form Batch job (PB00R1986) to generate the MC 355 in newly added threshold languages.

Tech Note: Update CT942\_ MI

#### **Form Print/Mailing Options**

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

**Print Options:**

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

**Mailing Options:**

| Mailing Options        | Option for MC 355  |
|------------------------|--|
| Mail-To (Recipient)    | Medi-Cal Participant   |
| Mailed From (Return)   | Medi-Cal Regional Office Name and Address/ Medi-Cal District Office Name and Address |
| Mail-back-to Address   | Medi-Cal Regional Office Name and Address/ Medi-Cal District Office Name and Address |
| Outgoing Envelope Type | Standard   |
| Return Envelope Type   | Prepaid  |
| Special Paper Stock    | N/A  |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| Y                | Y           | Y               |

**Additional Options:**

| Requirement                 | Option for MC 355 |
|-----------------------------|-------------------|
| Post to Self-Service Portal | Y                 |

**2.2 MC 355 Reminder Form****2.2.1 Overview**

Reminder for request for verifications from the Customer to assist in determining Medi-Cal eligibility. This form is generated with the MC 355 Detail page. If a reminder has not been sent by the worker after 15 calendar days and there are still pending verifications, the reminder notice will be generated and sent by batch. The MC 355 Reminder is not available from Template Repository.



**State Form:** MC 355 REMINDER  
**Current Programs:** Medi-Cal  
**Current Forms Category:** Forms  
**Current Template Repository Visibility:** N/A  
**Existing Languages:** English, Spanish

### 2.2.2 Form Verbiage

#### **Create MC 355 XDP's for Threshold Languages**

Create MC 355 REMINDERXDPs for the following threshold languages with the CalSAWS standard fonts.

**Threshold Languages:** Armenian, Arabic, Cambodian, Chinese\*, Farsi, Tagalog/Filipino, Hmong Korean, Lao, Russian, Vietnamese

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #2

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** NO

### 2.2.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish forms for existing population logic.

### 2.2.4 Form Generation Conditions

#### **MC 355 Detail Page**

The Reminder Notice status will be set to Pending the Generate Reminder button is clicked.

#### **Update Form generation batch job**

Update MC 355 form Batch job (PB00R1987) to generate the MC 355 REMINDER in newly added threshold languages.

Tech Note: Update CT942\_ M5

#### **Form Print/Mailing Options**

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

**Print Options:**

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

**Mailing Options:**

| Mailing Options        | Option for MC 355 Reminder   |
|------------------------|--|
| Mail-To (Recipient)    | Medi-Cal Participant   |
| Mailed From (Return)   | Medi-Cal Regional Office Name and Address/ Medi-Cal District Office Name and Address |
| Mail-back-to Address   | Medi-Cal Regional Office Name and Address/ Medi-Cal District Office Name and Address |
| Outgoing Envelope Type | Standard   |
| Return Envelope Type   | Prepaid  |
| Special Paper Stock    | N/A  |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| Y                | Y           | Y               |

**Additional Options:**

| Requirement                 | Option for MC 355 Reminder |
|-----------------------------|----------------------------|
| Post to Self-Service Portal | Y                          |

### 3 SUPPORTING DOCUMENTS

| Number | Functional Area       | Description                   | Attachment   |
|--------|-----------------------|-------------------------------|--|
| 1      | Client Correspondence | MC 355 Initial forms Mockups  | MC355_Arabic.pdf<br>MC355_Armenian.pdf<br>MC355_Cambodian.pdf<br>MC355_Chinese.pdf<br>MC355_Farsi.pdf<br>MC355_Hmong.pdf<br>MC355_Korean.pdf<br>MC355_Lao.pdf<br>MC355_Russian.pdf<br>MC355_Tagalog.pdf<br>MC355_Vietnamese.pdf  |
| 2      | Client Correspondence | MC 355 Reminder forms Mockups | MC355_Reminder_Arabic.pdf<br>MC355_Reminder_Armenian.pdf<br>MC355_Reminder_Cambodian.pdf<br>MC355_Reminder_Chinese.pdf<br>MC355_Reminder_Farsi.pdf<br>MC355_Reminder_Hmong.pdf<br>MC355_Reminder_Korean.pdf<br>MC355_Reminder_Lao.pdf<br>MC355_Reminder_Russian.pdf<br>MC355_Reminder_Tagalog.pdf<br>MC355_Reminder_Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | MC 355 Initial and MC 355 Reminder forms are being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-211971

Add Form FC 3 NM-DETERMINATION OF FEDERAL  
AFDC-FC ELIGIBILITY FOR NMD to Template  
Repository

| CalSAWS | DOCUMENT APPROVAL HISTORY |                 |
|---------|---------------------------|-----------------|
|         | Prepared By               | Ayman Hussein   |
|         | Reviewed By               | Tiffany Huckaby |

| DATE      | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR        |
|-----------|---------------------|----------------------|---------------|
| 5/25/2022 | 0.1                 | Initial Draft        | Ayman Hussein |
|           |                     |                      |               |
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# 1 OVERVIEW

---

This SCR will add form FC 3 NM (10/19) Determination Of Federal AFDC-FC Eligibility For NMD to CalSAWS template repository.

## 1.1 Current Design

Form FC 3 NM (10/19) does not exist in CalSAWS.

## 1.2 Requests

Add form FC 3 NM (10/19) - Determination Of Federal AFDC-FC Eligibility For NMD in CalSAWS template repository.

## 1.3 Overview of Recommendations

Add form FC 3 NM (10/19) - Determination Of Federal AFDC-FC Eligibility For NMD in CalSAWS template repository.

## 1.4 Assumptions

1. When generated in the context of a case, the body fields will be editable for all counties, as per CalSAWS standards.
2. The form's header consists of the CalSAWS standard header (Header\_3-1). This effort will not change the form's header.
3. The form is available in English only. This effort will not be introducing any additional threshold languages for the FC 3 NM form.
4. This SCR CA-211971 will only cover adding the FC 3 NM (10/19) Form to Template Repository. A new SCR CA-XXXXXX will be created for adding the FC 3 NM (10/19) Form generation to the "Non-Minor Dependent Re-Entry Authority Detail" page in CalSAWS.
5. The FC 3 form was updated to the latest state version (10/19) as part of SCR CA- 236029 and moved to production in release 22.04.26.



## 2 RECOMMENDATIONS

---

### 2.1 Add form FC 3 NM (10/19) - Determination Of Federal AFDC-FC Eligibility For NMD

#### 2.1.1 Overview

This SCR will add form FC 3 NM (10/19) - Determination Of Federal AFDC-FC Eligibility For NMD in CalSAWS.

**State Form:** FC 3 NM (10/19)

**Programs:** FC

**Attached Forms:** None

**Forms Category:** Forms

**Template Repository Visibility:** All Counties

**Languages:** English

#### 2.1.2 Form/NOA Verbiage

##### Create Form XDP

This form is one impression, one page form.

**Form Header:** Existing CalSAWS Header (Header\_3-1)

**Form Title (Document List Page Displayed Name):** Determination Of Federal AFDC-FC Eligibility For NMD

**Form Number:** FC 3 NM (10/19)

**Include NA Back 9:** No

**Imaging Form Name:** Determination Of Federal AFDC-FC For NMD

**Imaging Document Type:** Foster Care (FC)

**Imaging Case/Person:** Case

**Form Mockups/Examples:** See Supporting Documents #1 for the new FC 3 NM Form mockup.

#### 2.1.3 Form/NOA Variable Population

Create the following variables on the FC 3 NM (10/19) form when generated from Template Repository.

| Variable Name         | Population  | Formatting         | Editable*      | Template Repository |
|-----------------------|---|--------------------|----------------|---------------------|
| < NMDS_NAME>          | This will not be pre-populated and will be a worker fillable field on the form. | Arial Font Size 10 | Y, Text Field. | No                  |
| <ReENTRY_DATE>        | This will not be pre-populated and will be a worker fillable field on the form. | MM/DD/YYYY         | Y, Date Field. | No                  |
| < ReENTRY_COURT_DATE> | This will not be pre-populated and will be a worker fillable field on the form. | MM/DD/YYYY         | Y, Date Field. | No                  |
| <NMD_INC_PROP>        | Editable Text Box to be filled in by the worker. No population.                 | Arial Font Size 7  | Y, Text Field. | No                  |
| <AFDC_NMD_IN_ELIG_Y>  | This will not be pre-populated and will be a worker fillable field on the form. | Arial Font Size 7  | Y, Text Field. | No                  |
| <AFDC_NMD_IN_ELIG_N>  | This will not be pre-populated and will be a worker fillable field on the form. | Arial Font Size 7  | Y, Text Field. | No                  |

**Note:** Variables listed in the above table will not be pre-populated and will be a worker fillable field on the form.

#### 2.1.4 Form/NOA Generation Conditions

There will be no updates to the Form Generation, Form Control, nor Print/Mailing Options. The form will be a 'Print Locally' only document.

### 1. Add Form to Template Repository

The FC 3 NM (10/19) Form will be added to Template Repository. The form will not have any pre-population.

**Required Document Parameters:** Case Number, Customer Name, Language, Program

### 2. Add Form Control

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

### 3. Add Form Print Options and Mailing Requirements

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

#### **Mailing Requirements:**

Mail-To (Recipient): N/A

Mailed From (Return): N/A

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Mail

Return Envelope Type: N/A

#### **Additional Requirements:**

Special Paper Stock: N/A

Enclosures: No

Electronic Signature: No

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

Check to Sign: No

Post to Self Service Portal (SSP): Yes

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description              | Attachment           |
|--------|-----------------|--------------------------|----------------------|
| 1      | Form            | FC 3 NM (English) mockup | FC3 NM_EN_Mockup.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | <p>With SCR CA-211971, form FC 3 NM (10/19) - Determination Of Federal AFDC-FC Eligibility For NMD will be added in CalSAWS template repository.</p> |



California Statewide Automated Welfare System

## **Design Document**

CA-216498

Add Threshold Languages to

DFA 377.7F

| CalSAWS | DOCUMENT APPROVAL HISTORY |                        |
|---------|---------------------------|------------------------|
|         | Prepared By               | Thanushree Veereshappa |
|         | Reviewed By               | Ravi Kumar Gupta       |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR                    |
|------------|---------------------|----------------------|---------------------------|
| 05/31/2022 | 1.0                 | Initial Draft        | Thanushree<br>Veereshappa |
|            |                     |                      |                           |
|            |                     |                      |                           |
|            |                     |                      |                           |
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# 1 OVERVIEW

---

This effort will add the DFA 377.7F in all available threshold languages.

## 1.1 Current Design

The system only has English & Spanish of the DFA 377.7F.

## 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the DFA 377.7F (06/18) form Template Repository and system generated.

Languages include:

Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.3 Overview of Recommendations

1. Add the DFA 377.7F form in available threshold languages.  
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add Threshold Languages to DFA 377.7F Form

### 2.1.1 Overview

This section will cover the requirements for adding the DFA 377.7F forms in available threshold languages.

**State Form:** DFA 377.7F

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** Notice of CalFresh Overissuance Notice Intentional Program Violation(IPV).

**Imaging Form Name:** CF OI notice IPV

**Imaging Document Type:** Overpayment/Overissuance (OP/OI)

## 2.1.2 Form Verbiage

### Create DFA 377.7F XDP's for Threshold Languages

**Threshold Languages:** Arabic, Armenian, Cambodian, Chinese\*, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Vietnamese and Russian.

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** YES

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

## 2.1.4 Form Generation Conditions

The CalSAWS will generate the DFA 377.7F Form from Template Repository.

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for DFA 377.7F Form                          |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for DFA 377.7F Form |
|-----------------------------|----------------------------|
| Post to Self-Service Portal | Y                          |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                          | Attachment  |
|--------|-----------------|--------------------------------------|---|
| 1      | Correspondence  | DFA 377.7F<br>Threshold<br>Languages | DFA377.7F_Arabic.pdf<br>DFA377.7F_Armenian.pdf<br>DFA377.7F_Cambodian.pdf<br>DFA377.7F_Chinese.pdf<br>DFA377.7F_Farsi.pdf<br>DFA377.7F_Hmong.pdf<br>DFA377.7F_Korean.pdf<br>DFA377.7F_Lao.pdf<br>DFA377.7F_Russian.pdf<br>DFA377.7F_Tagalog.pdf<br>DFA377.7F_Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | <p>DFA 377.7F is being added in all available threshold languages.</p> |



California Statewide Automated Welfare System

## **Design Document**

CA-235894

Remove 'LTC MC RE Packet Recipient' Field  
from Online Pages

| CalSAWS | DOCUMENT APPROVAL HISTORY |               |
|---------|---------------------------|---------------|
|         | Prepared By               | Farhat Ulain  |
|         | Reviewed By               | Matthew Lower |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR       |
|------------|---------------------|----------------------|--------------|
| 02/02/2022 | 1.0                 | Initial Draft        | Farhat Ulain |
|            |                     |                      |              |
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# 1 OVERVIEW

---

The 'LTC MC RE Packet Recipient' field is available in the 'Authorized Representative Program Detail' page and in the 'Administrative Role Detail' page. Currently, in CalSAWS, user can specify if the authorized representative may/may not receive the LTC MC RE Packet that gets generated for the Medi-Cal program. Due to the phasing out of LTC MC RE Packet, this field is longer required to be on these pages.

## 1.1 Current Design

In the 'Authorized Representative Program Detail' page and the 'Administrative Role Detail' page, the 'LTC MC RE Packet Recipient' field displays if the user specifies the additional recipient for the correspondence in the Medi-Cal program.

## 1.2 Requests

Remove the 'LTC MC RE Packet Recipient' field from the 'Authorized Representative Program Detail' page and the 'Administrative Role Detail' page.

## 1.3 Overview of Recommendations

1. Update the 'Authorized Representative Program Detail' page and the 'Administrative Role Detail' page to remove the 'LTC MC RE Packet Recipient'.

## 1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.

## 2 RECOMMENDATIONS

### 2.1 Authorized Representative Program Detail

#### 2.1.1 Overview

The 'Authorized Representative Program Detail' page allows the user to specify the representative who is authorized to receive the case information for the case person. Additionally, user can also specify if the authorized representative may/may not receive the LTC MC RE Packet. Due to the phasing out of LTC MC RE Packet, this field is no longer required to be in this page. This SCR will be removing the 'LTC MC RE Packet Recipient' field from the page.

#### 2.1.2 Authorized Representative Program Detail - Mockup

**Authorized Representative Program Detail**

\* - Indicates required fields

**Name:**  
fsdfds, zdvds

**Program:**  
Medi-Cal

**Additional Correspondence Recipient: \***  
Yes

**Authority: \***  
Limited

**Begin Date: \***  
[Date Picker]

**End Date:**  
[Date Picker]

**Additional Information:**  
[Text Area]

Save and Return Cancel

Figure 2.1.2.1 – Authorized Representative Program Detail Page

#### 2.1.3 Description of Change

1. Remove the 'LTC MC RE Packet Recipient' field from the 'Authorized Representative Program Detail' page.

- Remove the following validation message that gets displayed in the page, if the 'LTC MC RE Packet Recipient' field remains blank.

"LTC MC RE Packet Recipient – Field is required. Please enter a value."

b. Remove the following validation message that gets displayed in the page when an additional correspondence recipient is already set from the Administrative Role Detail page.

"LTC MC RE Packet Recipient – An Additional Correspondence Recipient is already set to be the recipient of this form during the time period selected."

#### 2.1.4 Page Location

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

#### 2.1.5 Security Updates

N/A

#### 2.1.6 Page Mapping

Update page mappings for the 'Authorized Representative Program Detail' page.

#### 2.1.7 Page Usage/Data Volume Impacts

N/A

### 2.2 Administrative Role Detail Page

#### 2.2.1 Overview

The Administrative Role Detail page allows the user to access the program information for an associated case and program participant/beneficiary. Additionally, user can set the admin for the case correspondence from this page who may/may not receive the LTC MC RE Packet. Due to the phasing out of LTC MC RE Packet, this field is no longer required to be in this page. This SCR will be removing the 'LTC MC RE Packet Recipient' field from the page.

## 2.2.2 Administrative Role Detail – Mockup

### Administrative Role Detail

\*- Indicates required fields

Save and Return

Cancel

Administrative Role: \*

Additional Correspondence Recipient ▼

Name: \*

ABERDEEN, CORTEZ 1F ▼

I.D. Number:

Resource:

Select

Begin Month: \*

02/2022

End Month:

Save and Return

Cancel

Figure 2.2.2-1 – Administrative Role Detail Page

## 2.2.3 Description of Change

1. Remove the 'LTC MC RE Packet Recipient' field from the 'Administrative Role Detail' page.
  - a. Remove the following validation message that gets displayed in the page, if the 'LTC MC RE Packet Recipient' field remains blank.  
"LTC MC RE Packet Recipient – Field is required. Please enter a value."
  - b. Remove the following validation message that gets displayed in the page when an authorized representative is already set to be the recipient from the Authorized Representative Detail page.  
"LTC MC RE Packet Recipient – An Authorized Representative is already set to be the recipient of this form during the time period selected."

## 2.2.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Administrative Role Detail

## 2.2.5 Security Updates

N/A

### 2.2.6 Page Mapping

Update page mapping for the 'Authorized Representative Program Detail' page.

### 2.2.7 Page Usage/Data Volume Impacts

N/A

## 3 SUPPORTING DOCUMENTS

---

N/A

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

| REQ #   | REQUIREMENT TEXT  | How Requirement Met  |
|---------|---|--|
| 2.1.1.5 | The CalSAWS shall provide field-level and cross-field validation upon completion of data entry by User and immediately display appropriate corrective instructions for the related field. | 'LTC MC RE Packet Recipient' field will be removed from the 'Authorized Representative Program Detail' and the 'Administrative Role Detail' pages, along with the validation messages. |



California Statewide Automated Welfare System

## **Design Document**

CA-237811

Add Threshold Languages to NA 1268 Form

| CalSAWS | DOCUMENT APPROVAL HISTORY |               |
|---------|---------------------------|---------------|
|         | Prepared By               | Preetam Basti |
|         | Reviewed By               | Ravi Gupta    |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR        |
|------------|---------------------|----------------------|---------------|
| 05/31/2022 | 1.0                 | Initial Draft        | Preetam Basti |
|            |                     |                      |               |
|            |                     |                      |               |
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## 1 OVERVIEW

---

This effort will add the NA 1268 in all available threshold languages.

### 1.1 Current Design

The system only has English & Spanish of the NA 1268(4/13).

### 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the NA 1268 (04/13) form Template Repository and system generated.

Languages include:

Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

### 1.3 Overview of Recommendations

1. Add the NA 1268 form in available threshold languages.  
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

### 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add Threshold Languages to NA 1268 Form

#### 2.1.1 Overview

This section will cover the requirements for adding the NA 1268 forms in available threshold languages.

**State Form:** NA 1268

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** Informing notice sent by the sending county to notify Customers that their case is being transferred to a new county.

**Imaging Form Name:** CF Informing Notice of Sending ICT

**Imaging Document Type:** Inter-County Transfer (ICT)

## 2.1.2 Form Verbiage

### Create NA 1268 XDP's for Threshold Languages

**Threshold Languages:** Arabic, Armenian, Cambodian, Chinese\*, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** Yes

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

## 2.1.4 Form Generation Conditions

The CalSAWS will generate the NA 1268 Form from Template Repository.

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for NA 1268 Form                             |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for NA 1268 Form |
|-----------------------------|-------------------------|
| Post to Self-Service Portal | Y                       |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                 | Attachment   |
|--------|-----------------|-----------------------------|--|
| 1      | Correspondence  | NA 1268 Threshold Languages | NA1268_Arabic.pdf<br>NA1268_Armenian.pdf<br>NA1268_Cambodian.pdf<br>NA1268_Chinese.pdf<br>NA1268_Farsi.pdf<br>NA1268_Hmong.pdf<br>NA1268_Korean.pdf<br>NA1268_Lao.pdf<br>NA1268_Russian.pdf<br>NA1268_Tagalog.pdf<br>NA1268_Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | NA 1268 is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239009

Add Threshold Languages to CF 377.2C Form

| CalSAWS | DOCUMENT APPROVAL HISTORY |                  |
|---------|---------------------------|------------------|
|         | Prepared By               | Vamsi Davuluri   |
|         | Reviewed By               | Narendar Sabbani |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR         |
|------------|---------------------|----------------------|----------------|
| 27/05/2022 | 1.0                 | Initial Draft        | Vamsi Davuluri |
|            |                     |                      |                |
|            |                     |                      |                |
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## 1 OVERVIEW

---

This effort will add the CF377.2C in all available threshold languages.

### 1.1 Current Design

The system only has English of the CF 377.2C.

### 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the CF 377.2C (12/20) form Template Repository and system generated.

Languages include:

Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese.

### 1.3 Overview of Recommendations

1. Add the CF377.2C form in available threshold languages.  
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese.

### 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print option for English form.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN form.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add Threshold Languages to CF 377.2C Form

#### 2.1.1 Overview

This section will cover the requirements for adding the CF 377.2C forms in available threshold languages.

**State Form:** CF 377.2C

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English

**Template Description:** User initiated from repository when the household lost ESAP after CF 377.2B was sent. This notice should be sent in the month prior to the end of the 36-month ESAP certification period.

**Imaging Form Name:** CF Expiration w/Only Elderly/Disabled

**Imaging Document Type:** CalFresh (CF)

## 2.1.2 Form Verbiage

### Create CF 377.2C XDP's for Threshold Languages

**Threshold Languages:** Arabic, Armenian, Cambodian, Chinese\*, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Spanish and Vietnamese.

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** YES

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English Form for existing population logic.

## 2.1.4 Form Generation Conditions

Form CF 377.2C (PB00R1996) will be triggered for a CalFresh Case that has current RE duration of 36 months and the household is determined to be ineligible for ESAP. (ESAP indicator is 'No') and RE is due the following month and CF 377.2D has already been sent during the current RE period.

### Update Dynamic Form generation batch jobs

Update Dynamic Form generation batch jobs (PB00R6501- PB00R6800) to generate the CF 377.2C in newly added threshold languages.

Tech Note: Update CT942\_2C

### **Form Print/Mailing Options**

Threshold forms will have the same Form Print/Mailing Options as their corresponding English form.

#### **Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

#### **Mailing Options:**

| Mailing Options        | Option for CF 377.2C Form                           |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | N/A   |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

#### **Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

#### **Additional Options:**

| Requirement                 | Option for CF 377.2C Form |
|-----------------------------|---------------------------|
| Post to Self-Service Portal | Y                         |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                         | Attachment   |
|--------|-----------------|-------------------------------------|--|
| 1      | Correspondence  | CF 377.2C<br>Threshold<br>Languages | CF 377_2C _Arabic.pdf<br>CF 377_2C _Armenian.pdf<br>CF 377_2C _Cambodian.pdf<br>CF 377_2C _Chinese.pdf<br>CF 377_2C _Farsi.pdf<br>CF 377_2C _Hmong.pdf<br>CF 377_2C _Korean.pdf<br>CF 377_2C _Lao.pdf<br>CF 377_2C _Russian.pdf<br>CF 377_2C _Spanish.pdf<br>CF 377_2C _Tagalog.pdf<br>CF 377_2C _Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CF 377.2C is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239011

Add Threshold Languages to CF 377.2D Form

| CalSAWS | DOCUMENT APPROVAL HISTORY |                   |
|---------|---------------------------|-------------------|
|         | Prepared By               | Singaram Manickam |
|         | Reviewed By               | P Madhan Kumar    |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR               |
|------------|---------------------|----------------------|----------------------|
| 05/25/2022 | 1.0                 | Initial Draft        | Singaram<br>Manickam |
|            |                     |                      |                      |
|            |                     |                      |                      |
|            |                     |                      |                      |
|            |                     |                      |                      |

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| 2.1.4 | Form Generation Conditions .....           | 5 |
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| 4.1   | Project Requirements.....                  | 8 |



# 1 OVERVIEW

---

This effort will add the CF 377.2D in all available threshold languages.

## 1.1 Current Design

The system only has English, Spanish, Chinese and Russian of the CF 377.2D.

## 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the CF 377.2D (3/18) form Template Repository and system generated.

Languages include:

Arabic, Armenian, Cambodian, Farsi, Hmong, Korean, Lao, Tagalog and Vietnamese.

## 1.3 Overview of Recommendations

1. Add the CF 377.2D form in available threshold languages.  
Languages: Arabic, Armenian, Cambodian, Farsi, Hmong, Korean, Lao, Tagalog and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add Threshold Languages to CF 377.2D

### 2.1.1 Overview

This section will cover the requirements for adding the CF 377.2D forms in available threshold languages.

**State Form:** CF 377.2D

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish, Chinese and Russian

**Template Description:** User initiated from repository at any time during the 36-month ESAP certification period when the household fails to meet ESAP eligibility requirements.

**Imaging Form Name:** CF Status Change Only Elderly/Disabled

**Imaging Document Type:** CalFresh (CF)

## 2.1.2 Form Verbiage

### Create CF 377.2D XDP's for Threshold Languages

**Threshold Languages:** Arabic, Armenian, Cambodian, Farsi, Hmong, Korean, Lao, Tagalog and Vietnamese.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** Yes

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

## 2.1.4 Form Generation Conditions

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for CF 377.2D Form                           |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for CF 377.2D Form |
|-----------------------------|---------------------------|
| Post to Self-Service Portal | Y                         |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                         | Attachment  |
|--------|-----------------|-------------------------------------|---|
| 1      | Correspondence  | CF 377.2D<br>Threshold<br>Languages | CF_377_2D_Arabic.pdf<br>CF_377_2D_Armenian.pdf<br>CF_377_2D_Cambodian.pdf<br>CF_377_2D_Farsi.pdf<br>CF_377_2D_Hmong.pdf<br>CF_377_2D_Korean.pdf<br>CF_377_2D_Lao.pdf<br>CF_377_2D_Tagalog.pdf<br>CF_377_2D_Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CF 377.2D is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239012

Add Threshold Languages to CF 377.7B

| CalSAWS | DOCUMENT APPROVAL HISTORY |            |
|---------|---------------------------|------------|
|         | Prepared By               | Vishesh J  |
|         | Reviewed By               | Ravi Gupta |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR    |
|------------|---------------------|----------------------|-----------|
| 05/25/2022 | 1.0                 | Initial Draft        | Vishesh J |
|            |                     |                      |           |
|            |                     |                      |           |
|            |                     |                      |           |
|            |                     |                      |           |

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| 4     | Requirements                                    | 8 |
| 4.1   | Project Requirements.....                       | 8 |



## 1 OVERVIEW

---

This effort will add the CF 377.7B in all available threshold languages.

### 1.1 Current Design

The system has only English and Spanish for CF 377.7B.

### 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the CF 377.7B form Template Repository and system generated.

Languages include:

Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese

### 1.3 Overview of Recommendations

1. Add the CF 377.7B (4/2018) form in available threshold languages.  
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

### 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add Threshold Languages to CF 377.7B Form

#### 2.1.1 Overview

This section will cover the requirements for adding the CF 377.7B forms in available threshold languages.

**State Form:** CF 377.7B

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** NOA

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** This notice of action is sent out when a CalFresh overissuance occurs due to a household mistake.

**Imaging Form Name:** CF OI for Client Error

**Imaging Document Type:** Notification/NOA

## 2.1.2 Form Verbiage

### Create CF 377.7B XDP's for Threshold Languages

**Threshold Languages:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** Yes

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

## 2.1.4 Form Generation Conditions

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for CF 377.7B Form                           |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for CF 377.7B Form |
|-----------------------------|---------------------------|
| Post to Self-Service Portal | Y                         |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                         | Attachment  |
|--------|-----------------|-------------------------------------|---|
| 1      | Correspondence  | CF 377.7B<br>Threshold<br>Languages | CF_377_7B_Arabic.pdf<br>CF_377_7B_Armenian.pdf<br>CF_377_7B_Cambodian.pdf<br>CF_377_7B_Chinese.pdf<br>CF_377_7B_Farsi.pdf<br>CF_377_7B_Hmong.pdf<br>CF_377_7B_Korean.pdf<br>CF_377_7B_Lao.pdf<br>CF_377_7B_Russian.pdf<br>CF_377_7B_Tagalog.pdf<br>CF_377_7B_Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CF 377.7B is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239013

Update English, Spanish and add Threshold  
Languages to CF 377.7C

| CalSAWS | DOCUMENT APPROVAL HISTORY |                  |
|---------|---------------------------|------------------|
|         | Prepared By               | Gerris Prakash J |
|         | Reviewed By               | Ravi Gupta       |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR           |
|------------|---------------------|----------------------|------------------|
| 05/30/2022 | 1.0                 | Initial Draft        | Gerris Prakash J |
|            |                     |                      |                  |
|            |                     |                      |                  |
|            |                     |                      |                  |
|            |                     |                      |                  |

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| 2.1.4 | Form Generation Conditions .....                                       | 5 |
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## 1 OVERVIEW

---

This effort will update English and Spanish to match state version and add the CF 377.7C in all available threshold languages.

### 1.1 Current Design

The system has English and Spanish of the form CF 377.7C(05/02).

### 1.2 Requests

Update English and Spanish to match state version and add CDSS Threshold Languages to the CalSAWS for the CF 377.7C (2/2014) form Template Repository and system generated.

Languages include:

English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

### 1.3 Overview of Recommendations

1. Update the English and Spanish version of form CF 377.7C and add Other Language Translations to CalSAWS for CF 377.7C  
Languages: English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.

### 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Update English, Spanish and add Threshold Languages to CF 377.7C

#### 2.1.1 Overview

This section will cover the requirements for adding the CF 377.7C forms in available threshold languages.

**State Form:** CF 377.7C

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** This form is generated when an over issuance has occurred due to IHE. Also send with FSLA-01 for clients who had been on Benefit Recoupment requesting repayment plan when aid is terminated. Or this form to be re-sent with FSLA-02 when received incomplete. Users to decide if to reprint or photocopy form and send same one. Same 30 days FAC in effect.

**Imaging Form Name:** CF Repay Agreement - IHEs Only

**Imaging Document Type:** Overpayment/Overissuance (OP/OI)

### 2.1.2 Form Verbiage

#### Create CF 377.7C XDP's for Threshold Languages

**Threshold Languages:** English, Spanish, Arabic, Armenian, Cambodian, Chinese\*, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** NO

### 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

### 2.1.4 Form Generation Conditions

The following business rules will trigger the automatic generation of this form. If applicable, the web pages and/or batch processes that are involved in the triggering event are listed.

| TRIGGER CONDITION | WEB PAGE/ BATCH PROCESS | NOTES  |
|-------------------|-------------------------|--|
| Online            | Repayment Term Detail   | This form is generated when an over issuance has occurred due to IHE. Also send with FSLA-01 for clients who had been on Benefit Recoupment requesting repayment plan when aid is terminated. Or this form to be re-sent with FSLA-02 when received incomplete. Users to decide if to reprint or photocopy form and send same one. Same 30 days FAC in effect. |

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

### Print Options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

### Mailing Options:

| Mailing Options        | Option for CF 377.7C Form                           |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

### Form Control:

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| Y                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for CF 377.7C Form |
|-----------------------------|---------------------------|
| Post to Self-Service Portal | Y                         |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                        | Attachment   |
|--------|-----------------|------------------------------------|--|
| 1      | Correspondence  | CF377_7C<br>Threshold<br>Languages | cf377_7c_english.pdf<br>cf377_7c_arabic.pdf<br>cf377_7c_armenian.pdf<br>cf377_7c_cambodian.pdf<br>cf377_7c_chinese.pdf<br>cf377_7c_farsi.pdf<br>cf377_7c_hmong.pdf<br>cf377_7c_korean.pdf<br>cf377_7c_lao.pdf<br>cf377_7c_russian.pdf<br>cf377_7c_spanish.pdf<br>cf377_7c_tagalog.pdf<br>cf377_7c_vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met   |
|----------------------|--|---|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CF377.7C is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239014

Add Threshold Languages to CF 377.7D3

| CalSAWS | DOCUMENT APPROVAL HISTORY |                   |
|---------|---------------------------|-------------------|
|         | Prepared By               | Abinash Kumar Jha |
|         | Reviewed By               | Ravi Kumar Gupta  |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR          |
|------------|---------------------|----------------------|-----------------|
| 05/31/2022 | 1.0                 | Initial Draft        | Abinash Kr. Jha |
|            |                     |                      |                 |
|            |                     |                      |                 |
|            |                     |                      |                 |
|            |                     |                      |                 |



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## 1 OVERVIEW

---

This effort will add Threshold Languages to CF 377.7D3 Form.

### 1.1 Current Design

The system only has English & Spanish of the CF 377.7D3.

### 1.2 Requests

Add the CDSS Threshold languages to CalSAWS for the CF 377.7D3 (10/2017) form. Languages include:

Arabic, Cambodian, Chinese, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese, Armenian

### 1.3 Overview of Recommendations

1. Add the CF 377.7D3 form in available threshold languages.  
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian and Tagalog, Vietnamese.

### 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All Triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add Threshold Languages to CF 377.7D3

#### 2.1.1 Overview

This section will cover the requirements for adding CF 377.7D3 form in available threshold languages.

**State Form:** CF 377.7D3

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** NOA

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template description:** This notice of action is sent out when a CalFresh overissuance occurs due to administrative errors.

**Imaging Form Name:** CF OI Notice for Administrative Errors

**Imaging Document Type:** Overpayment/Overissuance (OP/OI)

## 2.1.2 Form Verbiage

### Create CF 377.7D3 XDP for Threshold Languages

**Threshold Languages:** Arabic, Cambodian, Chinese\*, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese, Armenian

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK9:** Yes

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish forms for existing population logic.

## 2.1.4 Form Generation Conditions

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### Print Options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for CF 377.7D3                               |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard Outgoing Mail                              |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for CF 377.7D3 |
|-----------------------------|-----------------------|
| Post to Self-Service Portal | Y                     |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                       | Attachment   |
|--------|-----------------|-----------------------------------|--|
| 1      | Correspondence  | CF 377.7D3 in threshold languages | CF_377_7D3_Arabic.pdf<br>CF_377_7D3_Armenian.pdf<br>CF_377_7D3_Cambodian.pdf<br>CF_377_7D3_Chinese.pdf<br>CF_377_7D3_Farsi.pdf<br>CF_377_7D3_Russian.pdf<br>CF_377_7D3_Hmong.pdf<br>CF_377_7D3_Korean.pdf<br>CF_377_7D3_Lao.pdf<br>CF_377_7D3_Tagalog.pdf<br>CF_377_7D3_Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met   |
|----------------------|--|---|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CF 377.7D3 is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239016

Add Threshold Languages to CF 377.7E1 Form

| CalSAWS | DOCUMENT APPROVAL HISTORY |                  |
|---------|---------------------------|------------------|
|         | Prepared By               | Abhijit Tiwari   |
|         | Reviewed By               | Narendar Sabbani |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR         |
|------------|---------------------|----------------------|----------------|
| 06/02/2022 | 1.0                 | Initial Draft        | Abhijit Tiwari |
|            |                     |                      |                |
|            |                     |                      |                |
|            |                     |                      |                |
|            |                     |                      |                |



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| 4.1   | Project Requirements.....                       | 8 |

# 1 OVERVIEW

---

This effort will add the CF 377.7E1 in all available threshold languages.

## 1.1 Current Design

The system only has English & Spanish of the CF 377.7E1.

## 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the CF 377.7E1 (1/14) form Template Repository and system generated.

Languages include:

Arabic, Armenian, Cambodian, Chinese, Farsi, Tagalog, Hmong Korean, Lao, Russian and Vietnamese.

## 1.3 Overview of Recommendations

1. Add the CF 377.7E1 form in available threshold languages.  
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add Threshold Languages to CF 377.7E1 Form

### 2.1.1 Overview

This section will cover the requirements for adding the CF 377.7E1 forms in available threshold languages.

**State Form:** CF 377.7E1

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** This form is used to notify a Customer of a CalFresh over issuance. The over issuance occurred as a result of a mistake made by the welfare department. The agreement that the customer makes on this form is to repay the over issuance. The form must be signed and returned to the county office.

**Imaging Form Name:** CF Repay Agreement - AE Only

**Imaging Document Type:** Overpayment/Overissuance (OP/OI)

## 2.1.2 Form Verbiage

### Create CF 377.7E1 XDP's for Threshold Languages

**Threshold Languages:** Arabic, Armenian, Cambodian, Chinese\*, Farsi, Tagalog/Filipino, Hmong Korean, Lao, Russian and Vietnamese.

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** NO

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

## 2.1.4 Form Generation Conditions

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

**Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for CF 377.7E1 Form                          |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | Worker's Office Address                             |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | Standard  |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| Y                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for CF 377.7E1 Form |
|-----------------------------|----------------------------|
| Post to Self-Service Portal | Y                          |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                          | Attachment  |
|--------|-----------------|--------------------------------------|---|
| 1      | Correspondence  | CF 377.7E1<br>Threshold<br>Languages | CF 377.7E1 _Arabic.pdf<br>CF 377.7E1 _Armenian.pdf<br>CF 377.7E1 _Cambodian.pdf<br>CF 377.7E1 _Chinese.pdf<br>CF 377.7E1 _Farsi.pdf<br>CF 377.7E1 _Hmong.pdf<br>CF 377.7E1 _Korean.pdf<br>CF 377.7E1 _Lao.pdf<br>CF 377.7E1 _Russian.pdf<br>CF 377.7E1 _Tagalog.pdf<br>CF 377.7E1 _Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met   |
|----------------------|--|---|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CF 377.7E1 is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239020

Add Threshold Languages to CF 389

| CalSAWS | DOCUMENT APPROVAL HISTORY |                        |
|---------|---------------------------|------------------------|
|         | Prepared By               | Thanushree Veereshappa |
|         | Reviewed By               | Narendar Sabbani       |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR                    |
|------------|---------------------|----------------------|---------------------------|
| 05/25/2022 | 1.0                 | Initial Draft        | Thanushree<br>Veereshappa |
|            |                     |                      |                           |
|            |                     |                      |                           |
|            |                     |                      |                           |
|            |                     |                      |                           |



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# 1 OVERVIEW

---

This effort will add the CF 389 in all available threshold languages.

## 1.1 Current Design

The system only has English & Spanish of the CF 389.

## 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the CF 389 (02/14) form Template Repository and system generated.

Languages include:

Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.3 Overview of Recommendations

1. Add the CF 389 form in available threshold languages.  
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add Threshold Languages to CF 389 Form

### 2.1.1 Overview

This section will cover the requirements for adding the CF 389 forms in available threshold languages.

**State Form:** CF 389

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** NOA

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** Notice of Denial of Restoration

**Imaging Form Name:** Notice of Denial of Restoration

**Imaging Document Type:** Notification/NOA

### 2.1.2 Form Verbiage

#### Create CF 389 XDP's for Threshold Languages

**Threshold Languages:** Arabic, Armenian, Cambodian, Chinese\*, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Vietnamese and Russian.

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** YES

### 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

### 2.1.4 Form Generation Conditions

#### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for CF 389 Form                              |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for CF 389 Form |
|-----------------------------|------------------------|
| Post to Self-Service Portal | Y                      |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                | Attachment  |
|--------|-----------------|----------------------------|---|
| 1      | Correspondence  | CF 389 Threshold Languages | CF389_Arabic.pdf<br>CF389_Armenian.pdf<br>CF389_Cambodian.pdf<br>CF389_Chinese.pdf<br>CF389_Farsi.pdf<br>CF389_Hmong.pdf<br>CF389_Korean.pdf<br>CF389_Lao.pdf<br>CF389_Russian.pdf<br>CF389_Tagalog.pdf<br>CF389_Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met   |
|----------------------|--|---|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CF 389 is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239023

Add Threshold Languages to CW 2211

| CalSAWS | DOCUMENT APPROVAL HISTORY |                     |
|---------|---------------------------|---------------------|
|         | Prepared By               | Maria Sharanya J. K |
|         | Reviewed By               | narendar.sabbani    |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR                 |
|------------|---------------------|----------------------|------------------------|
| 05/24/2022 | 1.0                 | Initial Draft        | Maria Sharanya<br>J. K |
|            |                     |                      |                        |
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## 1 OVERVIEW

---

This effort will add the CW 2211 Your CalWORKs Reporting Rules Have Changed (11/2014) in all available threshold languages.

### 1.1 Current Design

The system has English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese of the CW 2211.

### 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the CW 2211 (11/2014) form Template Repository and system generated.

Languages include: Arabic, Farsi, Hmong, Lao.

### 1.3 Overview of Recommendations

Add the CW 2211 form in available threshold languages.

Languages: Arabic, Farsi, Hmong, Lao.

### 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add Threshold Languages to CW 2211 Form

#### 2.1.1 Overview

This section will cover the requirements for adding the CW 2211 forms in available threshold languages.

**State Form:** CW 2211

**Current Programs:** CalWORKs

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

**Template Description:** This form is sent to participants when their CalWORKs case changes from Semi-Annual Reporting to Annual Reporting due to the case no longer including aid for an adult.

**Imaging Form Name:** Your CalWORKs Reporting Rules Have Changed

**Imaging Document Type:** Customer Reporting

### 2.1.2 Form Verbiage

#### Create CW 2211 XDP's for Threshold Languages

**Threshold Languages:** Arabic, Farsi, Hmong, Lao

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** NO

### 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

### 2.1.4 Form Generation Conditions

#### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

#### **Mailing Options:**

| Mailing Options     | Option for CW 2211 Form                             |
|---------------------|---|
| Mail-To (Recipient) | Applicant selected on the document parameters page. |

| Mailing Options        | Option for CW 2211 Form |
|------------------------|-------------------------|
| Mailed From (Return)   | Worker's Office Address |
| Mail-back-to Address   | N/A                     |
| Outgoing Envelope Type | Standard                |
| Return Envelope Type   | N/A                     |
| Special Paper Stock    | N/A                     |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for CW 2211 Form |
|-----------------------------|-------------------------|
| Post to Self-Service Portal | N                       |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                 | Attachment  |
|--------|-----------------|-----------------------------|---|
| 1      | Correspondence  | CW 2211 Threshold Languages | CW2211_Arabic.pdf<br>CW2211_Farsi.pdf<br>CW2211_Hmong.pdf<br>CW2211_Lao.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met   |
|----------------------|--|---|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CW2211 is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239025

Add Threshold Languages for CW 2212 Form

| CalSAWS | DOCUMENT APPROVAL HISTORY |                  |
|---------|---------------------------|------------------|
|         | Prepared By               | Sreeshma Patteti |
|         | Reviewed By               | Sabbani Narendar |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR              |
|------------|---------------------|----------------------|---------------------|
| 05/27/2022 | 1.0                 | Initial Draft        | Sreeshma<br>Patteti |
|            |                     |                      |                     |
|            |                     |                      |                     |
|            |                     |                      |                     |
|            |                     |                      |                     |



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## 1 OVERVIEW

---

This effort will add the CW 2212 The Rules for Your CALWORKS Case Have Changed (11/14) in all available threshold languages.

### 1.1 Current Design

The system only has English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog and Vietnamese of the CW 2212.

### 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the CW 2212 (11/14) form Template Repository and system generated.

Languages include:

Arabic, Farsi, Hmong, Lao.

### 1.3 Overview of Recommendations

1. Add the CW 2212 (11/14) form in available threshold languages.

Languages: Arabic, Farsi, Hmong, Lao.

### 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add Threshold Languages to CW 2212 Form

#### 2.1.1 Overview

This section will cover the requirements for adding the CW 2212 forms in available threshold languages.

**State Form:** CW 2212

**Current Programs:** CalWORKs

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog and Vietnamese.

**Template Description:** This form is sent to participants when their CalWORKs case changes from Annual Reporting to Semi-Annual Reporting due to the case now including aid for an adult.

**Imaging Form Name:** The Rules for Your CW Case Have Changed

**Imaging Document Type:** CalWORKs (CW)

### 2.1.2 Form Verbiage

#### Create CW 2212 XDP's for Threshold Languages

**Threshold Languages:** Arabic, Farsi, Hmong, Lao.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** NO

### 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

#### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for CW 2212 Form                             |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for CW 2212 Form |
|-----------------------------|-------------------------|
| Post to Self-Service Portal | N                       |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                 | Attachment  |
|--------|-----------------|-----------------------------|---|
| 1      | Correspondence  | CW 2212 Threshold Languages | CW2212_Arabic.pdf<br>CW2212_Farsi.pdf<br>CW2212_Hmong.pdf<br>CW2212_Lao.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CW 2212 is being added in all available threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239038

Add Threshold Languages to DFA 377.7G Form

| CalSAWS | DOCUMENT APPROVAL HISTORY |                   |
|---------|---------------------------|-------------------|
|         | Prepared By               | Singaram Manickam |
|         | Reviewed By               | P Madhan Kumar    |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR               |
|------------|---------------------|----------------------|----------------------|
| 05/31/2022 | 1.0                 | Initial Draft        | Singaram<br>Manickam |
|            |                     |                      |                      |
|            |                     |                      |                      |
|            |                     |                      |                      |
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# 1 OVERVIEW

---

This effort will add the DFA 377.7G in all available threshold languages.

## 1.1 Current Design

The system only has English & Spanish of the DFA 377.7G.

## 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the DFA 377.7G (5/02) form Template Repository and system generated.

Languages include:

Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.3 Overview of Recommendations

1. Add the DFA 377.7G form in available threshold languages.  
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add Threshold Languages to DFA 377.7G

### 2.1.1 Overview

This section will cover the requirements for adding the DFA 377.7G forms in available threshold languages.

**State Form:** DFA 377.7G

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** This form is used to create a repayment agreement between the customer and the county in the case of an IPV overpayment.

**Imaging Form Name:** CF Repay Agreement for an IPV Only

**Imaging Document Type:** Overpayment/Overissuance (OP/OI)

## 2.1.2 Form Verbiage

### Create DFA 377.7G XDP's for Threshold Languages

**Threshold Languages:** Arabic, Armenian, Cambodian, Chinese\*, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** No

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

## 2.1.4 Form Generation Conditions

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

**Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for DFA 377.7G Form                          |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | Worker's Office Address                             |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | Return Standard Mail – No Postage                   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| Y                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for DFA 377.7G Form |
|-----------------------------|----------------------------|
| Post to Self-Service Portal | Y                          |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                          | Attachment   |
|--------|-----------------|--------------------------------------|--|
| 1      | Correspondence  | DFA 377.7G<br>Threshold<br>Languages | DFA377_7G_AE.pdf<br>DFA377_7G_AR.pdf<br>DFA377_7G_CA.pdf<br>DFA377_7G_CH.pdf<br>DFA377_7G_FA.pdf<br>DFA377_7G_HM.pdf<br>DFA377_7G_KO.pdf<br>DFA377_7G_LA.pdf<br>DFA377_7G_RU.pdf<br>DFA377_7G_TG.pdf<br>DFA377_7G_VI.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | <p>DFA 377.7G is being added in all available threshold languages.</p> |



California Statewide Automated Welfare System

## **Design Document**

CA-239058

Add Threshold Languages to TNB 5 Form

| CalSAWS | DOCUMENT APPROVAL HISTORY |                  |
|---------|---------------------------|------------------|
|         | Prepared By               | Pooja Pandey     |
|         | Reviewed By               | Narendar Sabbani |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR       |
|------------|---------------------|----------------------|--------------|
| 05/31/2022 | 1.0                 | Initial Draft        | Pooja Pandey |
|            |                     |                      |              |
|            |                     |                      |              |
|            |                     |                      |              |
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# 1 OVERVIEW

---

This effort will add the TNB 5 in Lao and Hmong threshold languages.

## 1.1 Current Design

The system has all languages except Lao and Hmong of the TNB 5 form.

## 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the TNB 5 (8/18) form Template Repository and system generated.

Languages include:

Hmong, Lao.

## 1.3 Overview of Recommendations

Add the TNB 5 in Lao and Hmong threshold languages.

Languages include Hmong, Lao.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add Threshold Languages to TNB 5 form

### 2.1.1 Overview

This section will cover the requirements for adding the TNB 5 forms in available threshold languages.

**State Form:** TNB 5

**Current Programs:** Nutritional Benefit

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** Arabic, Armenian, Cambodian, Chinese, Farsi, Tagalog, Korean, Russian, Vietnamese, English, Spanish.

**Template Description:** Notice to Customers that a completed Transitional Nutrition Benefit Recertification form has not been received or has been received and is incomplete.

**Imaging Form Name:** RE Reminder Notice for TNB Program.

**Imaging Document Type:** TNB/SNB

## 2.1.2 Form Verbiage

### Create TNB 5 XDP's for Threshold Languages

**Threshold Languages:** Hmong, Lao.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** NO

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

## 2.1.4 Form Generation Conditions

### Update TNB 5 Form generation batch job to generate threshold languages

Update batch job (PB00R503) to generate the TNB 5 form in newly added threshold languages.

Tech Note: Update CT942\_T5 (TNB 5)

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for TNB 5 Form                               |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard Outgoing Mail                              |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for TNB 5 Form |
|-----------------------------|-----------------------|
| Post to Self-Service Portal | Y                     |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                  | Attachment                       |
|--------|-----------------|------------------------------|----------------------------------|
| 1      | Correspondence  | TNB 5 in threshold languages | TNB_5_Hmong.pdf<br>TNB_5_Lao.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met  |
|----------------------|--|--|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | TNB 5 is being added in Lao and Hmong threshold languages. |



California Statewide Automated Welfare System

## **Design Document**

CA-239159

Add Threshold Languages to CF 29A

| CalSAWS | DOCUMENT APPROVAL HISTORY |                |
|---------|---------------------------|----------------|
|         | Prepared By               | Anil Ankad     |
|         | Reviewed By               | P Madhan Kumar |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR     |
|------------|---------------------|----------------------|------------|
| 05/25/2022 | 1.0                 | Initial Draft        | Anil Ankad |
|            |                     |                      |            |
|            |                     |                      |            |
|            |                     |                      |            |
|            |                     |                      |            |



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| 2.1.3 | Form Variable Population .....              | 5 |
| 2.1.4 | Form Generation Conditions .....            | 5 |
| 3     | Supporting Documents                        | 7 |
| 4     | Requirements                                | 8 |
| 4.1   | Project Requirements.....                   | 8 |

# 1 OVERVIEW

---

This effort will add the CF 29A in all available threshold languages.

## 1.1 Current Design

The system only has English & Spanish of the CF 29A.

## 1.2 Requests

Add CDSS Threshold Languages to the CalSAWS for the CF 29A (2/14) form Template Repository and system generated.

Languages include:

Arabic, Vietnamese, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian and Tagalog.

## 1.3 Overview of Recommendations

1. Add the CF 29A form in available threshold languages.

Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add Threshold Languages to CF 29A Form

### 2.1.1 Overview

This section will cover the requirements for adding the CF 29A forms in available threshold languages.

**State Form:** CF 29A

**Current Programs:** CalFresh

**Current Attached Forms:** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** This Appointment Letter to notify household in writing of their scheduled initial intake for CalFresh.

**Imaging Form Name:** CalFresh Initial Appointment Letter

**Imaging Document Type:** Appointment Letter

## 2.1.2 Form Verbiage

### Create CF 29A XDP's for Threshold Languages

**Threshold Languages:** Armenian, Arabic, Cambodian, Chinese\*, Farsi, Tagalog, Hmong, Korean, Lao, Russian and Vietnamese.

\*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** NO

## 2.1.3 Form Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for existing population logic.

## 2.1.4 Form Generation Conditions

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

**Print Options:**

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| Y              | Y                        | Y                    | Y                      | Y             | Y               |

**Mailing Options:**

| Mailing Options        | Option for CF 29A Form                              |
|------------------------|---|
| Mail-To (Recipient)    | Applicant selected on the document parameters page. |
| Mailed From (Return)   | Worker's Office Address                             |
| Mail-back-to Address   | N/A   |
| Outgoing Envelope Type | Standard  |
| Return Envelope Type   | N/A   |
| Special Paper Stock    | N/A   |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N                | N           | Y               |

**Additional Options:**

| Requirement                 | Option for CF 29A Form |
|-----------------------------|------------------------|
| Post to Self-Service Portal | Y                      |

### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description                | Attachment  |
|--------|-----------------|----------------------------|---|
| 1      | Correspondence  | CF 29A Threshold Languages | CF29A_Armenian.pdf<br>CF29A_Arabic.pdf<br>CF29A _Cambodian.pdf<br>CF29A _Chinese.pdf<br>CF29A _Farsi.pdf<br>CF29A _Hmong.pdf<br>CF29A _Korean.pdf<br>CF29A _Lao.pdf<br>CF29A _Russian.pdf<br>CF29A _Tagalog.pdf<br>CF29A_Vietnamese.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met   |
|----------------------|--|---|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | CF 29A is being added in all available threshold languages. |

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-240878

EW20 Term Reason Aid Code 38

| CalSAWS | DOCUMENT APPROVAL HISTORY |  |
|---------|---------------------------|--|
|         | Prepared By               | Michael Barillas   |
|         | Reviewed By               | Angela Zhao; Edgars Reinholds; Shilpa Suddvanda;<br>Jeyasundari Murugan; |

| DATE      | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR           |
|-----------|---------------------|----------------------|------------------|
| 3/24/2022 | 1.0                 | Initial Draft        | Michael Barillas |
|           |                     |                      |                  |
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# 1 OVERVIEW

---

MEDS Term Reason (DE 0185) is being incorrectly reported on the MEDS EW20 transaction. Term reason '38' is currently not being assigned when a record's aid code is '38' for the Eligibility Status Action Codes (ESAC) 6 (Closed New) and 9 (Closed Exception).

This discrepancy in the EW20 is causing the transaction to be rejected in MEDS and have worker alert 1038 (Edwards Termination Reason Required to Terminate Edwards) to be generated.

SCR will modify the EW20 batch job to assign Term Reason '38' when aid code is '38' for ESAC 6 and 9.

## 1.1 Current Design

Eligibility Status Action Code Closed New (ESAC 6) defaults term reason to '99' regardless of aid code when a record meets the following requirements:

- Benefits begin date dates back further than 8 months from the MEDS current month.
- Non-MAGI Aid Code
- Program is not high dated
- Record has no Eligibility Exceptions

Eligibility Status Action Code Closed Exception (ESAC 9) defaults term reason to '99' regardless of aid code when a record meets either of the following requirements:

- Requirement 1:
  - Benefits begin date dates back further than 8 months from the MEDS current month
  - Non-MAGI Aid Code
  - Program is not high dated
  - Record has an Eligibility Exception
- Requirement 2:
  - Benefits begin date is within 8 months from the MEDS current month

Eligibility Status Action Code Closed Exception (ESAC 9) assigns term reason as '38' when aid code is '38'. If aid code is not '38' term reason will be '99':

- Benefits begin date dates back further than 8 months from the MEDS current month.
- MAGI Aid Code
- Program is not high dated
- Record has an Eligibility Exception

## **1.2 Requests**

Modify the EW20 batch job to send term reason '38' when aid code is '38' for ESAC '6' and '9'.

## **1.3 Overview of Recommendations**

1. Modify the EW20 batch job to assign term reason '38' when aid code is '38' for ESAC '6' and '9'.

## **1.4 Assumptions**

1. Other ESAC codes term reason determination logic will not be modified.

## 2 RECOMMENDATIONS

---

### 2.1 Modify EW20 Batch Job – Send Term Reason '38'

#### 2.1.1 Overview

When the EW20 sends an ESAC 6, the term reason will always be '99' regardless of aid code. When the EW20 sends an ESAC 9, the batch job will not always send term reason '38' when aid code is '38'.

#### 2.1.2 Description of Change

1. Modify batch job 'PO00EM499' to determine term reason based on aid code:

If Aid Code is '38' assign Term Reason as '38'. If aid code is not '38' Term Reason will be '99'.

- a. When EW20 sends an ESAC 6.
- b. When EW20 sends an ESAC 9 for following requirements:
  - i. Requirements 1:
    1. Benefits begin date dates back further than 8 months from the MEDS current month
    2. Non-MAGI Aid Code
    3. Program is not high dated
    4. Record has an Eligibility Exception
  - ii. Requirements 2:
    1. Benefits begin date is within 8 months from the MEDS current month

#### 2.1.3 Partner Integration Testing

MEDS - Partner Testing Not Required

#### 2.1.4 Execution Frequency

Daily – No Change

#### 2.1.5 Key Scheduling Dependencies

N/A – No Change

#### 2.1.6 Counties Impacted

LA County– No Change

### **2.1.7 Category**

Non-Core – No Change

### **2.1.8 Data Volume/Performance**

N/A

### **2.1.9 Interface Partner**

MEDS

### **2.1.10 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  |
|----------|---|--|
| 2.20.1.7 | The CONTRACTOR shall analyze all interface alerts, perform corrective actions for interface alerts resulting from system-related errors, and provide recommendations for interface alerts resulting from User-related errors. | Updating EW20 transaction to prevent worker alert 1038 from being generated due to term reason being incorrectly reported. |
|          |   |  |



California Statewide Automated Welfare System

## **Design Document**

CA-242088

Prevent CW/CF/GR(LA) Discontinuances if GEN  
201 is not marked as 'Received'

| CalSAWS | DOCUMENT APPROVAL HISTORY |                            |
|---------|---------------------------|----------------------------|
|         | Prepared By               | Howard Suksanti, Tom Lazio |
|         | Reviewed By               |                            |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION   | AUTHOR                       |
|------------|---------------------|--|------------------------------|
| 04/05/2022 | 1.0                 | Initial Draft  | Howard Suksanti<br>Tom Lazio |
| 04/14/2022 | 2.0                 | Updated GA as impacted program   | Tom Lazio                    |
| 04/22/2022 | 3.0                 | Updated on Batch section 2.2   | Howard Suksanti              |
| 05/10/2022 | 4.0                 | <p>The following sections have been updated based on Region 6 feedback:</p> <ul style="list-style-type: none"> <li>- Updated Section 1.1 wording for generating the GEN 201 form and include RCA program.</li> <li>- Updated 1.3 Overview of Recommendations wording for 1 and 2.</li> <li>- Added assumption # 4 in Section 1.4.</li> <li>- Added RCA in Section 2.1.1 Overview and Section 2.1.3 Programs impacted.</li> </ul> | Tom Lazio                    |
|            |                     |  |                              |
|            |                     |  |                              |
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# 1 OVERVIEW

---

CalSAWS will be updated to not auto discontinue program when GEN 201 FORM is not marked as Received.

## 1.1 Current Design

Currently, when a GEN 201 is auto-generated by CalSAWS, when the IFDS abstract is received or generated by user and sent out on a case with CalWORKS (CW), CalFresh (CF), Los Angeles General Assistance/General Relief (GA) or Refugee Cash Assistance (RCA) CalSAWS will discontinue the programs if this is not marked as "Received". The functionality around state form GEN 201 was derived from ACL 20-84 which does not instruct for these discontinuances to occur. Based on the language in ACL 20-84, workers are still required to allow for third party verification of income before any discontinuances take place, and discontinuance should not be automated.

## 1.2 Requests

Disable EDBC logic that automatically discontinues the CW, CF, RCA and GA program and program person when the GEN 201 form (formerly PA 2418B form) is not received timely.

Turn off PB19E432 (GEN 201 Controlled Form) batch job. This batch triggers regular Batch EDBC when GEN 201 form is past due date. This job runs monthly on the Batch 10-day cutoff date.

## 1.3 Overview of Recommendations

1. Update EDBC logic to not automatically discontinue the CW, RCA, CF and GA program and program person when an EDBC is ran and the GEN 201 form is past due date. This logic is also applicable to individuals who reapply for aid after the programming change has taken place.
2. Turn off PB19E432 (GEN 201 Controlled Form) batch job. This batch triggers regular Batch EDBC when GEN 201 form (regardless of how it was generated via IEVS IFDS Abstract page or Template Repository Search page) is past due date. This job runs monthly on the Batch 10-day cutoff date.

## 1.4 Assumptions

1. This SCR will not be updating existing EDBCs. However, if EDBC is re-run for one of those months after this SCR is implemented, the functionality introduced with this SCR should take affect (assuming no other factors have changed on the case).

2. The worker will still have the option of denying or discontinuing CW, CF or GA programs with the program reason of 'Failed to Comply with IFDS' through manual or override EDBC.
3. SCR CA-243421 has been created to add functionality to use Eligibility Non-Compliance when GEN 201 Form is past due date.
4. The current CalSAWS logic to auto-generate the GEN 201 when IFDS abstracts are loaded to CalSAWS remains unchanged.

## **2 RECOMMENDATIONS**

---

### **2.1 Update EDBC Logic – Forms Tracking**

#### **2.1.1 Overview**

The EDBC program forms tracking logic automatically discontinues the CW, RCA, CF, and GA programs when the past due GEN 201 (Income Verification) form has not been received. The consensus from the consortium is that this automation should not be occurring, and that any discontinuance of this type based on a GEN 201 needs to be manual and allow for time for third party verification.

#### **2.1.2 Description of Changes**

1. Update EDBC forms tracking logic to disable automatically setting the program and program person status of 'Denied' or 'Discontinued' with program and program person status reason of 'Failed to Comply with IFDS' when the past due GEN 201 (formerly PA 2418B) has not been received.

#### **2.1.3 Programs Impacted**

CF  
CW  
RCA  
GA

## **2.2 Turn off PB19E432 (GEN 201 Controlled Form) batch job**

### **2.2.1 Overview**

PB19E432 (GEN 201 Controlled Form) batch triggers Batch EDBC when GEN 201 form is past due date. As part of this SCR, the batch job will be turned off.

### **2.2.2 Description of Change**

Submit a BSCR to turn off PB19E432.

### **2.2.3 Execution Frequency**

N/A.

### **2.2.4 Key Scheduling Dependencies**

N/A.

### **2.2.5 Counties Impacted**

Los Angeles County

### **2.2.6 Category**

Core job.

### **2.2.7 Data Volume/Performance**

N/A.

### **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...)

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

| REQ #   | Requirement Text   | How Requirement Met              |
|---------|--|----------------------------------|
| 2.8.1.1 | The LRS shall fully automate and perform all aspects of the eligibility determination process and benefit level calculations for all categories of public assistance in a single pass without manual intervention. | Updating GEN 201 EDBC sweep job. |

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-243263

Update MAGI Case Linking Logic for Inbound  
eHIT Transaction for Purged CalSAWS Cases

| CalSAWS | DOCUMENT APPROVAL HISTORY |  |
|---------|---------------------------|--|
|         | Prepared By               | Cynthia Ridley   |
|         | Reviewed By               | Derek Goering, Prashant Goel, Geetha Ramalingam, William Baretsky, Renee Gustafson |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION   | AUTHOR         |
|------------|---------------------|--|----------------|
| 04/29/2022 | .01                 | Created Document   | Cynthia Ridley |
| 05/18/2022 | .02                 | Reviewed with Build/Test   | Cynthia Ridley |
| 05/24/2022 | .03                 | Reviewed with Consortium Analysts  | Cynthia Ridley |
| 05/27/2022 | .04                 | Updated Recommendation 2.1 – Added a flow for the Case Linkage Logic. Updated Recommendation 2.2 – Updated the 'auto-link' to not link to a purged CalSAWS case. | Cynthia Ridley |
| 05/31/2022 | .05                 | Reviewed with Consortium Analysts  | Cynthia Ridley |
| 06/01/2022 | .06                 | Sent for Review with Build/Test  | Cynthia Ridley |
| 06/02/2022 | 1.0                 | Sent out for Committee FYI   | Cynthia Ridley |
|            |                     |  |                |
|            |                     |  |                |

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## 1 OVERVIEW

CalSAWS Case Data Removal process purges CalSAWS cases that meet Case Data Removal criteria. Once a CalSAWS case has been purged, the CalSAWS case can no longer be used in the system. When CalSAWS MAGI Case Linkage logic is invoked for an Unsolicited Determination Eligibility Response (DER), it does not prevent linking to a purged CalSAWS case; therefore, the MAGI Case Linkage logic for Unsolicited DERs will be updated to prevent linking to a purged CalSAWS case.

### 1.1 Current Design

The CalSAWS Case Data Removal process removes all MAGI case links from the purged CalSAWS Case. CalSAWS eHIT Inbound MAGI Case Linkage logic links an unsolicited DER to an existing CalSAWS case if the DER contains a CalSAWS case number, it is in the receiving county, and a new link can be established, regardless of the age of the previous linkage and will save to the System as a 'Determination Change' type. (See flow chart below.) This may link the DER to a CalSAWS case that has been purged.

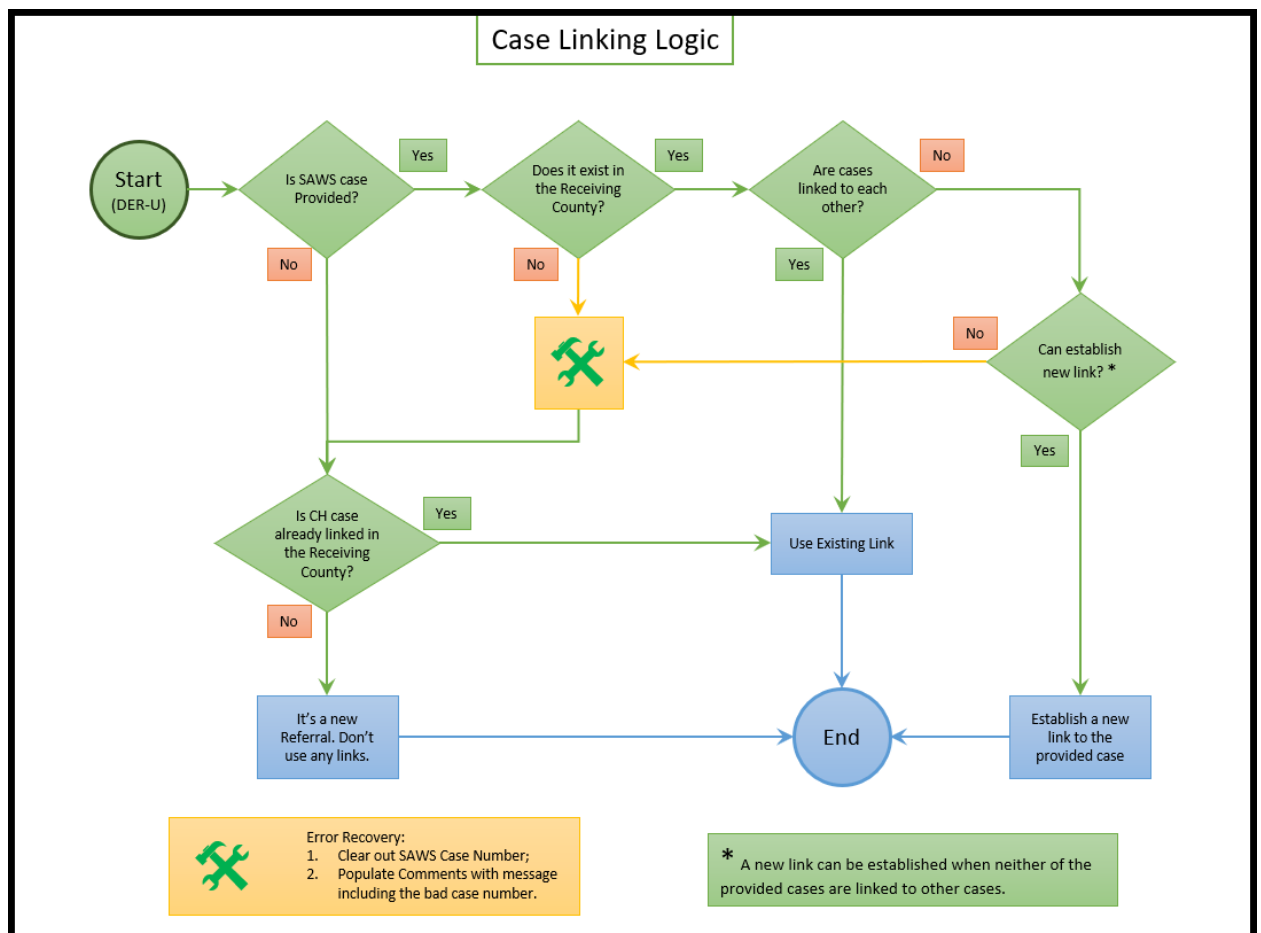


Figure 1: Current Case Linkage Logic

Purged cases should not have Medi-Cal programs re-opened nor be linked to MAGI cases.

When the MAGI Case Linkage logic does not find existing case linkage, the DER is saved as a 'Referral' type. MAGI Referrals require a user to link the MAGI case to either an existing CalSAWS case or create a new CalSAWS case. On the MAGI Referral Detail page, when the user clicks the 'Link to Case' button, CalSAWS 'auto-link' logic checks to confirm if existing case linkage is found, if so, then the MAGI Referral is auto-linked to the CalSAWS case and does not navigate the user to the Person Search page to complete the linking flow process. This 'auto-link' logic may end up linking to a CalSAWS purged case. If the MAGI Referral is unable to auto-link to a CalSAWS case, the user is navigated to the Person Search page to continue with the MAGI Case linking process and the system prevents the MAGI Referral from linking to a purged case (with CA-245885).

## **1.2 Requests**

Update the MAGI Case linkage logic to not link to a purged CalSAWS case.

## **1.3 Overview of Recommendations**

1. Update eHIT Inbound logic to save an unsolicited DER as a 'Referral' type when the DER contains the CalSAWS case number, is in the receiving county, and the CalSAWS Case has been purged.
2. Update the 'auto-link' logic for MAGI Referrals to no longer 'auto-link' to a purged CalSAWS case.

## **1.4 Assumptions**

1. CA-245885 implemented logic to display a validation on the Previous Case List page and will not allow a purged case to be linked to a MAGI referral.
2. The Information Update Linkage flow will not be impacted and will not be updated with this change.

## 2 RECOMMENDATIONS

---

### 2.1 eHIT

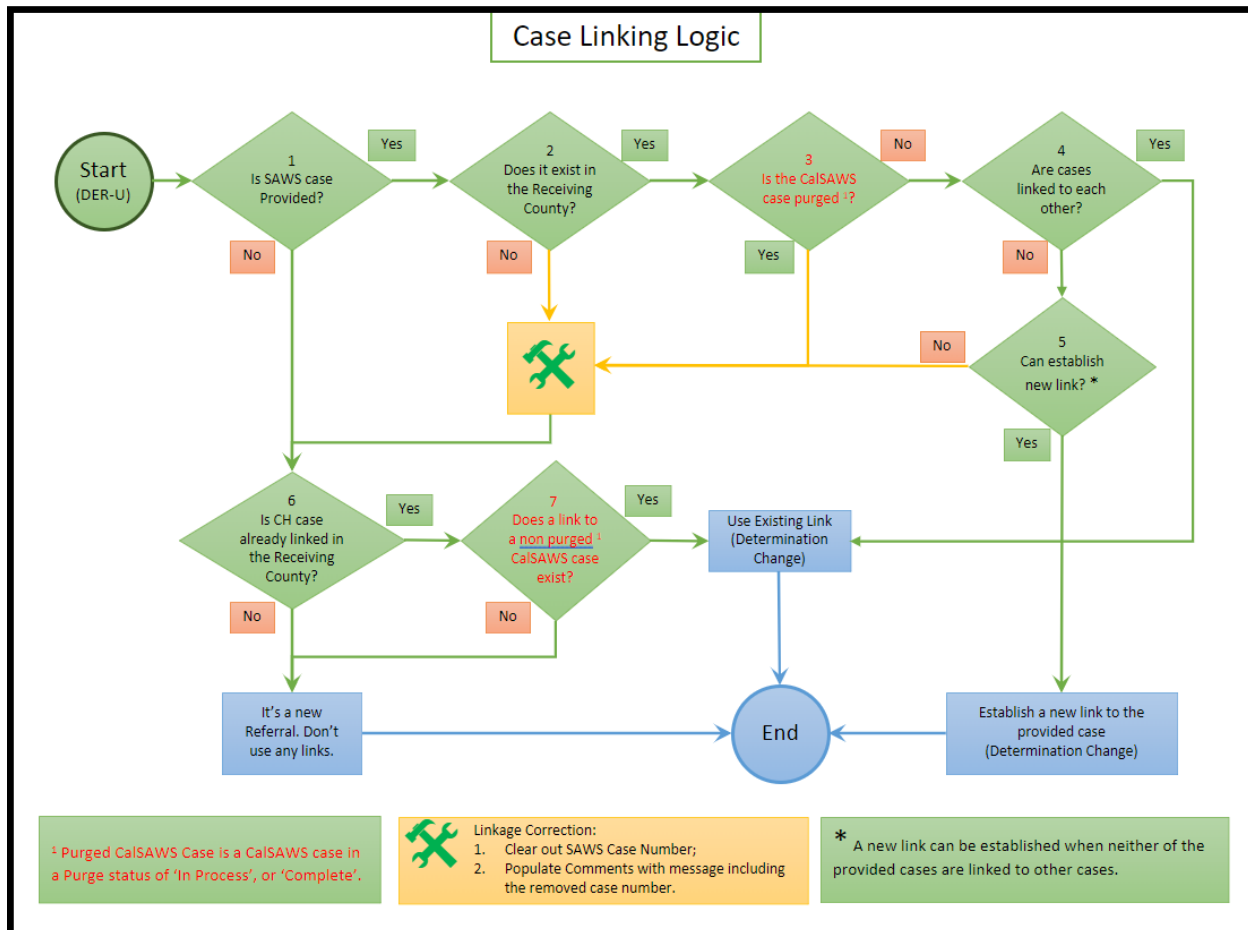
#### 2.1.1 Overview

Update eHIT Inbound MAGI Case Linkage logic to save an unsolicited DER as a 'Referral' type when the DER contains the CalSAWS case number, is in the receiving county, and the CalSAWS case has been purged, and no links exist to a non-purged CalSAWS case, or when the inbound transaction does not contain a CalSAWS case number and the CalHEERS case cannot establish linkage with a non-purged CalSAWS case.

Save the original CalSAWS case referenced in the DER as a comment when the CalSAWS Case number is cleared from the Unsolicited DER due to the updated linking logic. This comment is displayed on the MAGI Referral Detail page.

#### 2.1.2 Description of Change

1. Update eHIT Inbound MAGI Case Linkage logic flow per diagram below:



| Case Linkage Flow Steps                                      | Actions  |
|--|--|
| 1 – Is the SAWS Case provided in the DER transaction?        | <b>Yes</b> – Move to step 2<br><b>No</b> – Move to step 6  |
| 2 – Does the Case exist in the Receiving County?             | <b>Yes</b> – Move to step 3<br><b>No</b> – Move to Linkage Correction  |
| 3 – Is the CalSAWS case purged?                              | <b>Yes</b> – Move to Linkage Correction<br><b>No</b> – Move to step 4  |
| 4 - Are the CalSAWS and CalHEERS cases linked to each other? | <b>Yes</b> – Use existing linkage and save the DER as a 'Determination Change' type.<br><b>End</b><br><b>No</b> – Move to step 5                               |
| 5 – Can a new Case linkage be established?                   | <b>Yes</b> – Establish a new link to the provided case and save the DER as a 'Determination Change' type. <b>End</b><br><b>No</b> – Move to Linkage Correction |

|   |   |
|---|---|
| 6 – Is the CalHEERS Case number provided in the DER already linked in the Receiving County? | <b>Yes</b> – Move to step 7<br><b>No</b> – Save the DER as a 'Referral' type<br><b>End</b>  |
| 7 – Does a link to a non-purged CalSAWS case exist?   | <b>Yes</b> – Use existing linkage and save the DER as a 'Determination Change' type.<br><b>End</b><br><b>No</b> – Save the DER as a 'Referral' type.<br><b>End</b>  |
| Linkage Correction  | <p><b>Clear out the SAWS Case number and save it as 'Comments' in the DER in the following format:</b></p> <p><b>When CalSAWS case number is removed from either step 2 or step 5:</b> "Former case referenced by CalHEERS: &lt;CalSAWS Case Referenced in DER&gt; - &lt;County Name&gt;."</p> <p><b>Move to step 6</b></p> <p><b>When CalSAWS case number is removed from step 3:</b> "The CalSAWS case has been purged for Case &lt;CalSAWS Case referenced in DER&gt; - &lt;County Name&gt;."</p> <p><b>Move to Step 6</b></p> |

**Note:** The 'Comments' display on the MAGI Referral Detail page.

### 2.1.3 Interface Partner

CalHEERS

### 2.1.4 eHIT Schema Version

Version 18

## 2.2 MAGI Referral Case Linkage Flow

### 2.2.1 Overview

Update the MAGI Referral Case linking flow to no longer 'auto-link' a MAGI Referral to a purged CalSAWS.

### 2.2.2 MAGI Referral Detail Mockup

**MAGI Referral Detail**

[Link to Case](#) [Edit](#) [Close](#)

|  |   |   |
|--|---|---|
| <b>MAGI Case Number:</b><br>5000019948   | <b>MAGI Case Name:</b><br>Adams                         | <b>Initiated Date:</b><br>06/20/2022 11:55 AM |
| <b>Origination:</b><br>Service Centre Representative,<br>Service Centre Supervisor | <b>Determination ID:</b><br>187752                      |   |
| <b>Case Number:</b>  | <b>Case Name:</b>                                       | <b>Request ID:</b>                            |
| <b>Type:</b><br>Referral   | <b>Status:</b> *<br>Received <a href="#">Cancel DER</a> | <b>Covered CA Change:</b><br>No               |
| <b>Run Reason:</b><br>Intake   | <b>Benefit Month:</b><br>06/01/2022                     | <b>Program:</b>                               |

Figure 2.1.1 – MAGI Referral Detail page

### 2.2.3 Description of Changes

1. Update MAGI Referral Detail page to no longer 'auto-link' the MAGI Referral to a Purged CalSAWS Case when the 'Link to Case' button is clicked.

**Note:** Purged CalSAWS case is a CalSAWS case with a Purge Status of 'In Process' or 'Complete'

### 2.2.4 Page Location

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

### 2.2.5 Security Updates

No changes

### **2.2.6 Page Mapping**

No changes

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

No changes



California Statewide Automated Welfare System

## **Design Document**

CA-244070

Mass mailer for PEAFF II



| CalSAWS | DOCUMENT APPROVAL HISTORY |                 |
|---------|---------------------------|-----------------|
|         | Prepared By               | Ayman Hussein   |
|         | Reviewed By               | Tiffany Huckaby |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR        |
|------------|---------------------|----------------------|---------------|
| 05/10/2022 | 0.1                 | Initial Draft        | Ayman Hussein |
|            |                     |                      |               |
|            |                     |                      |               |
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# 1 OVERVIEW

---

The President signed the American Rescue Plan Act of 2021 into law. Now Public Law 117-2, it establishes the Pandemic Emergency Assistance Fund (PEAF) in section 403(c) of the Social Security Act (the Act). Remaining unspent PEAF II funds will be issued in a one-time payment to CalWORKs recipients.

## 1.1 Current Design

In July 2021, CalSAWS sent the TEMP 513 form to inform CalWORKs households they will receive a one-time \$640 payment from the Pandemic Emergency Assistance Fund. The TEMP 513 form was sent out through batch to the CalWORKs households who received the PEAF payment.

## 1.2 Requests

- 1) Update form TEMP 513 - Pandemic Emergency Assistance Fund Payment to the latest State draft (4/22).
- 2) Mass mail the TEMP 513 - Pandemic Emergency Assistance Fund Payment to CalWORKs households who will be receiving a \$47 PEAF II payment.

## 1.3 Overview of Recommendations

- 1) Update form TEMP 513 - Pandemic Emergency Assistance Fund Payment to the latest State draft (4/22).
- 2) Mass mail the TEMP 513 - Pandemic Emergency Assistance Fund Payment to CalWORKs households who will be receiving a \$47 PEAF II payment.

## 1.4 Assumptions

- 1) The PEAF II Mass Mailer will only be sent in English and Spanish. Threshold has not been provided by the State and Threshold cases will be sent the English version.
- 2) A GEN 1365 form will be included in every envelope as per the existing logic for households with another primary language.
- 3) The PEAF II Mass Mailer notices will Not be visible in Template Repository.

## 2 RECOMMENDATIONS

---

### 2.1 Update form TEMP 513

#### 2.1.1 Overview

This SCR will update form TEMP 513 - Pandemic Emergency Assistance Fund Payment to match the latest State draft (4/22) and reflect the PEA II payment amount of \$47.

**State Form:** TEMP 513 (4/22)

**Current Programs:** CW

**Current Attached Forms:** None

**Current Forms Category:** Forms

**Current Template Repository Visibility:** Not visible in Template Repository

**Existing Languages:** English, Spanish

#### 2.1.2 Form/NOA Verbiage

##### Update Form XDP

This SCR will bring small updates to the verbiage of TEMP 513 (see Supporting Documents #1 mockup) to match the current State draft (4/22).

Update the TEMP 513 form as follows:

- 1) Under the (Pandemic Emergency Assistance Fund Payment) section, update the following:
  - A) Replace all references of the one-time payment \$640 with the new PEA II payment amount of \$47.
  - B) Update the Date of the payment availability from after **July 10, 2021** to after **July 16, 2022**.
  - C) Update the Date of the payment availability on the EBT card/bank account from the week of **July 11, 2021** to the week of **July 18, 2022**.
- 2) Update the Form number at the bottom of the page from **TEMP 513 (5/21)** to **TEMP 513 (4/22)**.

**Updated Languages:** English, Spanish

**Form Number:** TEMP 513 (4/22)

**Form Mockups/Examples:** See Supporting Documents #1 for the TEMP 513 Form mockup.

**Note:** *This effort does not bring any updates to the existing Form coversheet (CSF 147).*

### 2.1.3 Form/NOA Variable Population

This effort does not bring any updates to the form variable population, nor does it introduce any new variables.

### 2.1.4 Form/NOA Generation Conditions

There will be no updates to the Form Generation, Form Control, nor Print/Mailing Options.

## 2.2 Perform a one-time mailing of the TEMP 513

### 2.2.1 Overview

Generate the TEMP 513 via batch process for a one-time mailing to all active CalWORKs household who will be receiving a \$47 PEA II onetime payment.

### 2.2.2 Description of change

- 1) Create a data change request (DCR) to find active CalWORKs cases that have been authorized to receive a PEA II payment. These are cases that have an Auxiliary Authorization record with:
  - Program is CalWORKs
  - Begin Month 7/2022
  - End Month 7/2022
  - Amount of \$47
  - Comment of "One Time \$47 Pandemic Emergency Assistance Fund Payment II"
- 2) Send a mass mailer form TEMP 513 to the active CalWORKs program with the identified Auxiliary Authorization record for 7/2022 amount of \$47.

*Technical Note: The fiscal detail for PEA II payments DCR is in CA-242099 design document section 2.1.*

### 3 SUPPORTING DOCUMENTS

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| Number | Functional Area | Description               | Attachment                     |
|--------|-----------------|---------------------------|--------------------------------|
| 1      | Form            | TEMP 513 (English) mockup | Updated TEMP 513_EN_Mockup.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met   |
|----------------------|--|---|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> | -Form TEMP 513 will be updated to match the latest state draft (4/22) |
| 2.18.3.1<br>CAR-1237 | <p>The LRS shall automatically generate the following correspondence online or in the batch process, as a result of individual and/or case action initiated by the</p>   | Generating the TEMP 513 via   |

|  |  |                                 |
|--|--|---------------------------------|
|  | <p>CalSAWS or by COUNTY-specified Users, except when exempt due to program requirements:</p> <ul style="list-style-type: none"> <li>a. Adverse notices (includes: decrease, collection, denial, or termination of benefits);</li> <li>b. Non-adverse notices (includes: approval, increase in benefits, no change, and rescission); and</li> <li>c. Non-approval notices (includes: cancellation, withdrawal, informational, and benefit issuance).</li> </ul> | batch process for mass mailing. |
|--|--|---------------------------------|



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-244203

Update RPA for BIC Replacement through IVR

|         |                           |                |
|---------|---------------------------|----------------|
| CalSAWS | DOCUMENT APPROVAL HISTORY |                |
|         | Prepared By               | Richard Martin |
|         | Reviewed By               | Korey Edwards  |

| DATE       | DOCUMENT<br>VERSION | REVISION DESCRIPTION | AUTHOR         |
|------------|---------------------|----------------------|----------------|
| 2022-05-16 | 1.0                 | Initial Draft        | Richard Martin |
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# 1 OVERVIEW

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The design outlines modifications to automate Benefits Identification Card (BIC) card requests received from Los Angeles (LA) County customers via the Interactive Voice Response (IVR) system.

## 1.1 Current Design

LA County customers must talk to a Contact Center Agent to request a new BIC card. The agent then completes the request within the CalSAWS application.

## 1.2 Requests

Update the IVR workflow to allow customers to request a new BIC card from within the IVR system and automate the completion of the requests.

## 1.3 Overview of Recommendations

1. Update the IVR workflow to allow customers to request a new BIC card from within the IVR system.
2. Update the robotic process automation (RPA) workflow to automate BIC card requests.

## 1.4 Assumptions

1. No core CalSAWS application changes are required.
2. This System Change Request (SCR) accounts for design, configuration, and testing of the RPA technology only.
3. CA-240156 accounts for the design, configuration, and testing efforts that will be made to the LA County Amazon Connect solution that will allow LA County customers to request a new BIC card from within the Amazon Connect (IVR) solution.

## 2 RECOMMENDATIONS

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This section outlines the new IVR BIC card replacement process flow.

### 2.1 BIC Card Replacement

#### 2.1.1 Overview

This section describes the new IVR BIC card replacement business process.

#### 2.1.2 Description of Change

1. Update the IVR workflow with new BIC card replacement process flow. The new process flow involves two parts, the flow in which a customer calls the Contact Center, and the flow the RPA bot follows to create a request for a new BIC card.
  - a. The IVR System Workflow where a customer calls the Contact Center contains the following steps:
    - i. A customer from LA County calls the LA Contact Center.
    - ii. The Customer is then authenticated by the IVR system.
    - iii. Finally, the Customer selects the BIC card replacement option.
  - b. The RPA Bot Workflow where the RPA Bot creates a request for a new BIC card contains the following steps:
    - a. The BIC card replacement request is saved in a database which includes Case ID and Request Type.
    - b. The RPA bot logs into CalSAWS.
    - c. The RPA bot searches the database.
    - d. The RPA bot retrieves Case ID from the database.
    - e. The RPA bot completes BIC card request using the retrieved Case ID.
    - f. The RPA bot adds this journal entry: "Customer authenticated on IVR. BIC card replacement requested and issued via mail. Transaction completed by BOT."

### 3 SUPPORTING DOCUMENTS

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N/A

## 4 REQUIREMENTS

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N/A

## 5 APPENDIX

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N/A



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-244204

Update RPA for Exception Automation

|         |                           |                |
|---------|---------------------------|----------------|
| CalSAWS | DOCUMENT APPROVAL HISTORY |                |
|         | Prepared By               | Richard Martin |
|         | Reviewed By               | Korey Edwards  |

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# 1 OVERVIEW

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The design outlines modifications to automate robotic process automation (RPA) exceptions.

## 1.1 Current Design

The RPA bot will make three attempts to complete benefits card replacement requests. After the third failed attempt, the request data is manually saved into a Microsoft Excel file.

## 1.2 Requests

The RPA bot will automate exceptions by creating a CalSAWS task.

## 1.3 Overview of Recommendations

1. The RPA bot will automate exceptions by creating a CalSAWS task. –general-.
  - a. The Task will be assigned to the Bank associated to the exception.
  - b. The Task Type will be dependent on the exception.
2. LA County staff will identify the bank or location where the exception tasks will be routed.

## 1.4 Assumptions

1. No core CalSAWS application changes are required.
2. This System Change Request (SCR) accounts for design, configuration, and testing of the RPA technology only.

## 2 RECOMMENDATIONS

---

This section outlines the new exception automation process flow.

### 2.1 Exception Automation

#### 2.1.1 Overview

This effort will create a process by which failed benefit card replacement requests and exceptions are automated.

#### 2.1.2 Description of Change

1. The workflow used in order to automate a response to failed benefit card replacement requests and exceptions contains the following steps:
  - a. First, the RPA bot will create a CalSAWS task for the exception that occurs.
    - i. The Task will be assigned to the Bank associated to the exception.
    - ii. The Task Type will be dependent on the exception.
  - b. LA County staff will identify the bank or location where the exception tasks will be routed.

### 3 SUPPORTING DOCUMENTS

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N/A

## 4 REQUIREMENTS

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N/A

## 5 APPENDIX

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N/A



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-244205

Create New RPA Process  
(New Bot Development / Existing Bot Changes)

|         |                           |                |
|---------|---------------------------|----------------|
| CalSAWS | DOCUMENT APPROVAL HISTORY |                |
|         | Prepared By               | Richard Martin |
|         | Reviewed By               | Korey Edwards  |

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| 2022-05-16 | 1.0                 | Initial Draft        | Richard Martin |
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# 1 OVERVIEW

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The design outlines modifications to enhance robotic process automation (RPA) functionality and service capacity for Los Angeles (LA) County.

## 1.1 Current Design

The RPA bot automates Electronic Benefits Transfer (EBT) card replacement requests.

## 1.2 Requests

Configure enhancements to the RPA bot.

## 1.3 Overview of Recommendations

1. Update the RPA bot with the following enhancements:
  - a. Extend the duration between EBT card replacement requests
  - b. Migrate from Internet Explorer to Microsoft Edge
  - c. Change the standard journal entry

## 1.4 Assumptions

1. No core CalSAWS application changes are required.
2. This System Change Request (SCR) accounts for design, configuration, and testing of the RPA technology only.

## 2 RECOMMENDATIONS

---

This section outlines RPA enhancements.

### 2.1 RPA Enhancements

#### 2.1.1 Overview

RPA enhancements have been requested by LA County to improve RPA service delivery and quality.

#### 2.1.2 Description of Change

1. Update the RPA bot with the following enhancements:
  - a. The processing between the second and third attempt to complete an EBT card replacement will be extended to one hour.  
Note: This change is being performed because it was discovered that the most common reason for an attempt to complete an EBT card replacement to fail is that the CalSAWS system is down. By waiting an hour it will hopefully ensure that the System will be online by the time a third attempt is made.
  - b. The RPA bot will be migrated from Internet Explorer to Microsoft Edge
  - c. Update the standard journal entry for EBT requests that are picked up at the local office to the following:
    - a. "Customer authenticated on IVR. EBT Replacement Card requested and "set for pick-up at local office." Transaction completed by BOT."

### 3 SUPPORTING DOCUMENTS

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N/A

## 4 REQUIREMENTS

---

N/A

## 5 APPENDIX

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N/A



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-245923

BenefitsCal EBT/BIC Replacement

|         |                           |                |
|---------|---------------------------|----------------|
| CalSAWS | DOCUMENT APPROVAL HISTORY |                |
|         | Prepared By               | Richard Martin |
|         | Reviewed By               | Korey Edwards  |

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# 1 OVERVIEW

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The design outlines modifications to automate Electronic Benefits Transfer (EBT) and Benefits Identification Card (BIC) card requests received from Los Angeles (LA) County customers via BenefitsCal.

## 1.1 Current Design

LA County has elected to not allow their customers to request a new EBT or BIC card from BenefitsCal due to workload concerns. If the functionality was turned on, a unique task would be created in CalSAWS after a customer requests a new EBT or BIC card. Those requests would then have to be managed and processed manually by LA County staff.

## 1.2 Requests

Automate all EBT and BIC card requests that are received from BenefitsCal.

## 1.3 Overview of Recommendations

1. Turn on the functionality that allows LA County customers to request a new EBT or BIC card from BenefitsCal.
2. Use robotic process automation (RPA) technology to automate completion of all tasks stemming from EBT and BIC card requests that are received from BenefitsCal.
3. This only impacts LA County.

## 1.4 Assumptions

1. No core CalSAWS application changes are required.
2. This System Change Request (SCR) accounts for design, configuration, and testing of the RPA technology only.

## 2 RECOMMENDATIONS

---

This section outlines the new BenefitsCal EBT/BIC card replacement process flow.

### 2.1 BIC Card Replacement

#### 2.1.1 Overview

This section describes the new BenefitsCal EBT/BIC card replacement business process.

#### 2.1.2 Description of Change

1. Update the RPA bot with two new workflows. These two workflows describe the steps taken when a request for a BenefitsCal EBT/BIC card replacement is either completed or not completed:
  - a. Request Completed
    - a. A unique task type is created in CalSAWS for each EBT and BIC card replacement request received from BenefitsCal.
    - b. RPA bot logs into CalSAWS.
    - c. RPA bot searches the database for EBT and BIC task types.
    - d. RPA bot retrieves EBT or BIC task type.
    - e. RPA bot completes EBT or BIC card request.
    - f. RPA bot adds journal entry. "Customer authenticated on IVR. BIC card replacement requested and issued via mail. Transaction completed by BOT."
    - g. RPA bot completes the task.
  - b. Request Not Completed
    - a. A unique task type is created in CalSAWS for each EBT and BIC card replacement request received from BenefitsCal.
    - b. RPA bot logs into CalSAWS.
    - c. RPA bot searches the database for EBT and BIC task types.
    - d. RPA bot retrieves EBT or BIC task type.
    - e. RPA bot is unable to completes the EBT or BIC card request.
    - f. RPA bot completes the EBT or BIC card task.
    - g. RPA bot creates an exception task in accordance with CA-244204.

## 3 SUPPORTING DOCUMENTS

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N/A



## 4 REQUIREMENTS

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N/A

## 5 APPENDIX

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N/A