

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208600 Batch Scheduling CalWIN Counties
Wave 1

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Carlos Zepeda, Pandu Gupta, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/14/2022	1.0	Initial version	Jennifer Muna
6/20/2022	1.1	<ul style="list-style-type: none"> Remove PBXX127 – Terminate GA/GR Recovery account from 'CalWIN All Other Batch Jobs Wave 1.xlsx' to 'CalWIN Fiscal Batch Jobs Wave 1.xlsx' Moved CRFI 22-003 CalWIN decisions for GA/GR Recovery Account from 'Batch' to 'Fiscal' list on Requests section Added CRFI 22-043 – Update Child Care Certificate under 'Batch' list in Requests section 	Jennifer Muna
6/28/2022	1.2	<p>1. Added the following SCRs to the Fiscal list:</p> <ul style="list-style-type: none"> CA-235652 CRFI 21-036: Update Warrant Expiration for CalWIN Counties CA-207137 DDID 2196, 2200, 2201 – CalWIN Fiscal Interfaces <p>2. Removed statement for scheduling FC Main payroll around the 10th of the month for counties 01, 10, 34, 42, 43, 44, 49, and 57.</p> <p>3. Added the following jobs associated to the above Fiscal SCRs:</p> <ul style="list-style-type: none"> PBXX1114 PIXXF500 POXXF108 POXXF148 POXXF100 POXXF140 POXXF101 POXXF141 POXXF102 POXXF142 PIXXF100 PIXXF101 PIXXF102 	Jennifer Muna

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1 OVERVIEW

This SCR will outline the necessary modifications for scheduling the CalSAWS batch jobs for the CalWIN Wave 1 Conversion. The CalWIN Wave 1 Counties include Placer and Yolo County.

1.1 Current Design

Various CalSAWS Migration DDIDs implemented in R1 through R8 include functionality to turn on/turn off Batch jobs for the 58 Counties. CA-208599 implemented batch schedule updates for the C-IV Migration counties. The SCR contained DDID references and county responses from C-IV and CalWIN Counties per batch job/functionality.

CalWIN Conversion is scheduled to begin in October 2022 in which Placer and Yolo County will be added initially as Wave 1 into the CalSAWS System. The scheduling of the remaining CalWIN Counties will occur for each conversion wave in future system change requests.

1.2 Requests

Update Batch Scheduling CalWIN Conversion Wave 1 to schedule the various Batch jobs for Placer and Yolo. Batch jobs from the following SCRs will be scheduled for the CalWIN Wave 1 Counties starting 10/31/2022:

Batch:

1. CA-207374: DDID 1110 – Update Negative Action Batch jobs to be configurable
2. CA-207302: DDID 1527 - CalFresh Denial Due to Missed Interview
3. CA-207363: DDID 1236 – Update the Non-MAGI RE Discontinuance Batch Job to run for all 58 Counties
4. CA-208568: DDID 1967 – Modify WTW Batch job related to Sanctions for all 58
5. CA-222369: Update Batch jobs for Foster Care program when NMD turns 21
6. CA-207476: DDID 266 – Update No Change SAR 7 functionality to be configurable
7. CA-207148: DDID 2143 – Batch Job to Discontinue Special Care Increment Payment
8. CA-207145: CAPI Discontinuance (PB00E917) for C-IV and CalWIN Counties.
9. CRFI 22-031: CalWIN - CFET Automation Jobs
10. CRFI 22-043: CalWIN – Update Child Care Certificate
11. CRFI 22-021: CalWIN – WTW program Activation Batch Job
12. Schedule the following IVR jobs for CalWIN counties: POxxM300, POxxM301, POxxM302, POxxM303, POxxM304, POxxM305

Correspondence:

1. CA-201968: DDID 1967 - Add WTW Activity Attendance and Progress Forms

2. CA-50988: Automation of the Medi-Cal Request for Information Form MC 355
3. CA-215153: DDID 2659 FDS: Non State Forms – Update MATURES 1
4. CA-215155: DDID 2660 FDS: Non State Forms – Update MATURES 2
5. CRFI 19-030: DDID 2280 CSF 285 form
6. Schedule the following print bundling and print file FTP jobs for the CalWIN counties: PBXXP400, PBXXP401, PBXXP404, PBXXP405, PBXXP500, PBXXP501, PBXXP504, PBXXP420, PBXXP421, PBXXP424, etc., and conduct central print testing.
7. Schedule the remaining NOA and FORM Generation thread jobs for the CalWIN Counties.

Fiscal:

1. CA-216568: DDID 1787 and 1789 – Migrate C-IV County Specific Batch Jobs Phase 5
2. CA-207344: DDID 1360 – Add Direct Deposit Functionality to CalSAWS for C-IV Migration Counties
3. CA-217791: DDID 1967 – Update RDB With Direct Deposit Data Collection
4. CA-207266: DDID 1652 – Enable Recovery Account Activation Batch Job for all 58 Counties
5. CA-207157: DDID 2128 – Add Tax Intercept Functionality to CalSAWS
6. CA-212361: DDID 2194 - Add Positive Pay Interface Functionality to CalSAWS for CalWIN Migration Counties
 - a. Do not schedule Positive Pay job/FTP for Yolo County
7. Foster Care Main Payroll
 - a. Schedule Main Payroll on 1st of the month, similar to C-IV counties, for all CalWIN counties.
8. CA-215679: DDID 2376 FDS: GA GR Overpayment Suspension/Termination Batch Changes
 - a. CRFI 22-003: CalWIN - Terminate GA/GR Recovery Account
9. CA-235652: CRFI 21-036 Update Warrant Expiration for CalWIN Counties
10. CA-207137: DDID 2196, 2200, 2201 - CalWIN Fiscal Interfaces

1.3 Overview of Recommendations

1. Update CalSAWS batch jobs via BPCR/BSCR to run for Placer and Yolo Counties based on county opt in/opt out decisions starting 10/31/2022.

1.4 Assumptions

1. Batch Scheduling for CalWIN Migration Counties will occur with the following SCRs for each conversion wave:
 - a. CA-208601 CalWIN Wave 2: Contra Costa, Santa Clara and Tulare (Release 23.01)

- b. CA-208602 CalWIN Wave 3: Orange, Santa Barbra, and Ventura (Release 23.03)
 - c. CA-208603 CalWIN Wave 4: San Diego, San Mateo, Santa Cruz, and Solano (Release 23.05)
 - d. CA-208604 CalWIN Wave 5: Alameda, Fresno, Sonoma (Release 23.07)
 - e. CA-208605 CalWIN Wave 6: Sacramento, San Francisco, and San Luis Obispo (Release 23.09)
- 2. The CalWIN Counties will be scheduled for batch jobs that are currently running for all former C-IV Counties and Los Angeles County in CalSAWS. These batch jobs will retain their current batch job frequencies and dependencies, with the exception of some Fiscal jobs.
 - a. For Foster Care Main payroll, the CalWIN Counties will run on the 1st business day of the month the same as the C-IV Counties.
- 3. CalWIN opt in/opt out decisions for the forms CSF 124 and CSF 125 will be addressed in CA-245691.
- 4. The following SCRs/DDID are interfaces job and Batch scheduling/Batch Property updates will be addressed in CA-237629:
 - a. CA-207329: DDID 1395 – IEVS Batch Assignment
 - b. CA-212490: DDID 1395 – IEVS Batch Assignment for CalWIN
 - c. CA-207438: DDID 571 Migrate C-IV WDTIP Jobs
 - d. CA-207232: DDID 1964,1955 – MEDS
- 5. Scheduling for CMSP Discontinuance Sweep (PB00E147) in DDID 1859 will be addressed in CA-214453.
- 6. SCR CA-245280 Update Yolo County Positive Pay Option will opt out Yolo County Positive Pay functionalities.

2 RECOMMENDATIONS

2.1 Schedule Batch Jobs to run for the CalWIN Wave 1 Counties

2.1.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for Placer and Yolo Counties.

2.1.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Create BSCR/BPCR (if necessary) to schedule batch jobs for the CalWIN Wave 1 Counties.
 - a. Refer to Supporting Document 'CalWIN All Other Batch Jobs Wave 1' for detailed list of batch jobs.
 - b. There are existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out responses.
2. Update PB00E914 batch properties by removing duplicate 'countyCodeList' property that does not include County 19.

2.1.3 Execution Frequency

Refer to Supporting Document 'CalWIN All Other Batch Jobs Wave 1' for batch job frequencies.

2.1.4 Key Scheduling Dependencies

Refer to Supporting Document 'CalWIN All Other Batch Jobs Wave 1' for batch job dependencies.

2.1.5 Counties Impacted

Placer and Yolo Counties

2.1.6 Data Volume/Performance

N/A

2.1.7 Failure Procedure/Operational Instructions

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

2.2 Schedule Correspondence Jobs to run for the CalWIN Wave 1 Counties

2.2.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for Placer and Yolo Counties.

2.2.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Create BSCR/BPCR (if necessary) to schedule batch jobs for the CalWIN Wave 1 Counties.
 - a. Refer to Supporting Document 'CalWIN Correspondence Batch Jobs Wave 1' for detailed list of batch jobs.
 - b. There are existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out responses.
2. Create BSCR to schedule Print Bundling and Print File FTP jobs for the CalWIN Wave 1 counties: PBXXP400, PBXXP401, PBXXP404, PBXXP405, PBXXP500, PBXXP501, PBXXP504, PBXXP420, PBXXP421, PBXXP424, etc. and conduct central print testing.
3. Schedule remaining NOA and Form Generation thread jobs for the CalWIN Wave 1 Counties.

2.2.3 Execution Frequency

Refer to Supporting Document 'CalWIN Correspondence Batch Jobs Wave 1' for batch job frequencies.

2.2.4 Key Scheduling Dependencies

Refer to Supporting Document 'CalWIN Correspondence Batch Jobs Wave 1' for batch job dependencies.

2.2.5 Counties Impacted

Placer and Yolo Counties

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

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

2.3 Schedule Fiscal Jobs to run for the CalWIN Wave 1 Counties

2.3.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for Placer and Yolo Counties.

2.3.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Create BSCR/BPCR (if necessary) to schedule batch jobs for the CalWIN Wave 1 Counties.
 - a. Refer to Supporting Document 'CalWIN Fiscal Batch Jobs Wave 1' for detailed list of batch jobs.
 - b. There are existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out responses.
2. Do not schedule Positive Pay Writer job for Yolo County.
3. Foster Care Main Payroll
 - a. Schedule FC Main Payroll on 1st of the month, similar to C-IV counties, for all CalWIN Counties.

2.3.3 Execution Frequency

Refer to Supporting Document 'CalWIN Fiscal Batch Jobs Wave 1' for batch job frequencies.

2.3.4 Key Scheduling Dependencies

Refer to Supporting Document 'CalWIN Fiscal Batch Jobs Wave 1' for batch job dependencies.

2.3.5 Counties Impacted

Placer and Yolo Counties

2.3.6 Data Volume/Performance

N/A

2.3.7 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch/Interfaces	List of all other batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	CalWIN All Other Batch Jobs Wave 1.xlsx
2	Correspondence	List of Correspondence batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	CalWIN Correspondence Batch Jobs Wave 1.xlsx
3	Fiscal	List of Fiscal batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	CalWIN Fiscal Batch Jobs Wave 1.xlsx

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-209184

Processing Eligibility Determinations for 250%
Working Disabled Program

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Josias Caveto, Vallari Bathala, Renee Gustafson
	Reviewed By	Derek Goering, Prashant Goel, Geetha Ramalingam, William Baretsky, Balakumar Murthy, Chad Quan, Raju Indala

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/20/2020	0.1	Initial Design	Josias Caveto
10/05/2020	0.2	Review Medi-Cal EDBC and data collection changes with Committee	Renee Gustafson
01/12/2021	0.3	Added Batch recommendations	Vallari Bathala
02/09/2021	0.4	Reviewed Batch recommendations	Renee G
05/03/2021	0.5	Added NOA recommendations	Connor Gorry
05/10/2021	0.6	Updated MC EDBC rules section to track Disc reasons	Renee G
05/25/2021	0.7	Removed references to SDI and Workers Comp - Temp being counted as Unearned. Confirmed Prod exempts for Working Disabled budget	Renee G
08/19/2021	0.8	Updated 2.5.4.3 for calculation of 26 weeks of unemployment per CRPC response	Renee G
01/04/2022	0.9	Added 2.5.4.7.b to detail the WD Disc Reason criteria.	Renee G
01/24/2022	1.0	Removed Client Correspondence changes and updates to spousal deeming. Spousal Deeming is working as expected in prod. Added Veterans Disability - Partial and IHSS Caregiver sections	Renee G
04/26/2022	1.1	Confirmed with DHCS that 'Veterans Disability – Partial' should not be countable in WDP.	Renee G
05/26/2022	1.2	Updated numbering. Removed references to treating WD as OPA in other budgets per the CRPC 2101. Updated property limits per CRPC to state that SSI/SSP limits are also updated.	Renee G
06/01/2022	1.3	Reviewed with MC Committee, Added ART section	Renee G, Lena Lam

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/27/2022	1.4	Updated Current Design and Recommendations for Disability and 'enrolled in a work activity' Added mockup for Retained Earned Income Property budget Updated List for only SOC Non-MAGI and included SSD income. Clarified 'latest RE Begin Date' Updated List to be for SOC individuals only and include SSD income type.	Renee G

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1 OVERVIEW

The purpose of this SCR is to update the 250% Working Disabled Program (known in CalSAWS as 'Working Disabled') logic as recommended in ACWDLs 11-38, 19-12 and MEPM 5R. ACWDL 19-12 emphasizes changes in the Working Disabled exemptions, the property limit verification process for individuals applying for Working Disabled and the unemployment record registration. Furthermore, per MEPM 5R & ACWDL 11-38, all disability income of the working disabled individual will be excluded from the Working Disabled eligibility determination. The Medi-Cal EDBC rules will be updated to only consider Verified SSA Disabled or SP-DDSD Disabled individuals for the Working Disabled program. The income types that qualify an individual to meet the 'enrolled in a work activity' will be updated. The Medi-Cal EDBC rules perform a SSI/SSP Income test for the Working Disabled eligibility determination but does not display it in EDBC. This SCR will update the EDBC pages to display the SSI/SSP Income test.

1.1 Current Design

CalSAWS Medi-Cal EDBC rules determine an individual eligible for the Working Disabled program when all the following is met:

- A. The individual is a California Resident at least one day in the EDBC benefit month.
- B. The individual is 'SSA Disabled', 'SP-DDSD Disabled', Declared or Presumptive Disabled for at least one day in the EDBC benefit month, regardless of verification status
- C. The individual is 'enrolled in a work activity'.
 - o Medi-Cal EDBC rules consider an individual 'enrolled in a work activity' if they have non-zero income with an income type considered 'Earned, non-exempt' effective at least one day in the EDBC benefit month. (See 'Income Types Considered Enrolled in Work Activity for WDP' in Supporting Documents for full list of Income Types.)
 - o The 'enrolled in a work activity' check does not require an individual to have an employment record, nor does it allow for periods of unemployment .
 - o The 'enrolled in a work activity' check does not consider an individual enrolled in a work activity if they have income as an IHSS Caregiver 'IHSS – Wages - Caregiver For Spouse/Minor'.
- D. The individual meets the income and property eligibility requirements of the SSI/SSP program; however, there is no requirement to have received SSI/SSP at any time.
 - o The individual meets SSI/SSP income eligibility requirements when the **Total Net Nonexempt Income** minus the **Net Earned Income** is less than or equal to the SSI/SSP Payment Level for the household size.
 - o The individual meets SSI/SSP property eligibility requirements when the **Total Countable Property** is at or below \$130,000 for an individual and \$195,000 for a couple.

E. The **Total Net Nonexempt Income** is below 250% of the Federal Poverty Level (FPL)

- o Medi-Cal EDBC rules do not consider countable the disability-based income for the Working Disabled applicant(s) in the Working Disabled income determination. The following Income types are not countable in the Working Disabled income determination when they belong to the Working Disabled applicant(s):

Income Category	Income Type
Disability	Employee - Temporary
	Employee – Permanent
	Private - Temporary
	Private - Permanent
	SDI
	Worker's Comp - Temporary
	Worker's Comp – Permanent
Railroad	Railroad – Disability
Social Security	Social Security Disability
Veterans	Disability - Total

- o Medi-Cal EDBC rules consider countable the unearned disability-based income type for the Working Disabled applicant(s) of 'Veterans Disability – Partial' in the Working Disabled income determination.
- o Medi-Cal EDBC rules consider countable the 'Social Security Retirement' income for the Working Disabled applicant(s) even if the Social Security converted from Disability.
- o Medi-Cal EDBC rules count an ineligible spouse's income in the Working Disabled income determination if Spousal Deeming applies. Spousal Deeming applies if the spouse's **Total Net Income** minus **Allocation to Ineligible Children** is equal to or above the **Standard SSI Allocation** amount.

Technical Note: The 'Standard SSI Allocation' amount is the difference between 'SSI Aged or Disabled Couple Amount' and 'SSI Aged or Disabled Individual Amount' (CT963). The 'Allocation to Ineligible Children' is the Standard SSI Allocation amount minus the child's income (including student deduction) – per child.

F. The individual continues to make premium payments.

- o Medi-Cal EDBC rules consider an individual up to date on premium payments if there is no high-dated non-compliance record for 'Non-Payment of Premium' effective for the entire EDBC benefit month.

Note: Proposed legislation to reduce premiums to \$0 will be updated in CalSAWS with CA-239984 if the legislation is passed.

G. The individual is a US Citizen or has Satisfactory Immigration Status.

Medi-Cal EDBC rules perform the SSI/SSP Income calculation for the Working Disabled eligibility determination, but the calculation does not display in the 'Working Disabled' income budget. This makes it difficult for a user to understand when a 'Working Disabled' budget fails for Over SSI/SSP Income limits, especially when the Total Net Nonexempt Income is less than 250% FPL. Also, the Maintenance Need, Unit Size and Income Result does not display for the 250% FPL Income calculation.

Medi-Cal EDBC - Working Disabled

Close

Begin Month	End Month	Run Date	Run Status	Accepted By
01/2022		12/10/2021	Pending Verification	Renee Gustafson

Income Determination

Unearned Income	\$	974.60
Unearned Income Deductions	-	20.00
Net Unearned Income	=	954.60
Earned Income	\$	2,014.80
Earned Income Deductions	-	1,039.90
Net Earned Income	=	974.90
Total Net Income	\$	1,929.50
Combined Income Deductions	-	0.00
Income Adjustments	+	0.00
Allocation and Other Deductions	-	0.00
Total Net Nonexempt Income	=	1,930.00
Premium Amount	=	0.00

Close

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Example Medi-Cal EDBC - Working Disabled Budget Failed for Over SSI/SSP Income Limits

Medi-Cal EDBC - Working Disabled				
				Close
Begin Month	End Month	Run Date	Run Status	Accepted By
01/2022	01/2022	01/28/2022	Not Accepted	Renee Gustafson
Income Determination				
Unearned Income		\$		0.00
Unearned Income Deductions		-		0.00
Net Unearned Income		=		0.00
Earned Income		\$		5,600.00
Earned Income Deductions		-		2,842.50
Net Earned Income		=		2,757.50
Total Net Income		\$		2,757.50
Combined Income Deductions		-		0.00
Income Adjustments		+		0.00
Allocation and Other Deductions		-		0.00
Total Net Nonexempt Income		=		2,758.00
Premium Amount		=		0.00

Example Medi-Cal EDBC – Working Disabled Budget Failed for Over 250% FPL

The reason(s) why an individual is no longer eligible to the Working Disabled program are not displayed in the EDBC results.

CalSAWS does not have a liquid property type for 'Retained Earned Income' to be used by the Working Disabled individual for income saved in separately identifiable account that will be exempted from the Working Disabled property budget.

There is no automated process to re-evaluate the beneficiaries at the end of the 26 weeks of unemployment.

1.2 Requests

Per ACWDL 11-38 and ACWDL 19-12, effective August 1, 2011, the Working Disabled beneficiary may remain in the program for up to 26 weeks of temporary unemployment for each annual eligibility period if the individual continues paying their monthly premiums. Unemployment generally means that the individual is incapacitated to work during a period of up to 26 weeks such as: illness, hospitalization, and the like. The individual does not necessarily have to be receiving any type of unemployment benefit.

Per the MEPM 5R, all disability income of the Working Disabled is exempt; per CRPC 2101, this includes 'Veterans Disability – Partial'.

Per ACWDL 19-12, DHCS clarified, "In order to meet the federal definition of disability, an individual must be determined disabled by Social Security Administration (SSA) or undergo a disability determination from the Disability Determination Service Division (DDSD)...If an applicant or beneficiary alleges a disability but has not yet had a disability determination, refer the case to DDSD for a disability determination. During the period of time the individual is going through the DDSD disability determination, they will not be eligible for the 250% WDP until they are determined disabled.

The Working Disabled beneficiary has the option to retain their earned income in a separately identifiable account and it will be exempted from the Working Disabled property budget.

The Working Disabled individual's Social Security Disability income that has converted to Social Security Retirement income is exempt in the Working Disabled income budget.

1. Update CalSAWS to allow a Working Disabled beneficiary to remain on the program for up to 26 weeks of unemployment. After this period, the beneficiary will no longer be eligible to Working Disabled and will be screened for other Medi-Cal programs.
2. Update CalSAWS to not count 'Veterans Disability – Partial' for a Working Disabled individual in the Working Disabled income determination.
3. Update CalSAWS to consider an individual with income as an IHSS Caregiver as meeting work activity requirements for a Working Disabled eligibility determination and no longer consider income for Interest, Dividends or Tax Refunds/Credits as meeting work activity requirements.
4. Update CalSAWS to only consider Verified 'SSA Disabled' and 'SP-DDSD Disabled' as disabilities that qualify an individual to be tested for Working Disabled program.
5. Add a new Property type named, 'Retained Earned Income' that will not be counted in the Working Disabled property determination.

6. Update CalSAWS to exempt 'Social Security Retirement' income for the Working Disabled individual if 'Social Security Disability' income converted to Social Security Retirement.
7. Update CalSAWS to save and display specific discontinuance reasons when an individual is discontinued from Working Disabled because they no longer meet Working Disabled eligibility requirements, even when they remain Active and move to another aid code. This will assist the user to manually create the Working Disabled Discontinuance NOA.
8. Update CalSAWS to display the SSI/SSP Income test information and the 250% FPL Maintenance Need and Unit Size for a Working Disabled eligibility determination.
9. Add a batch to re-evaluate individuals in Working Disabled who have exhausted their 26th week of unemployment.
10. Provide a list of individuals currently in a Share of Cost Non-MAGI Medi-Cal aid code that may qualify for Working Disabled with the updated rules.

1.3 Overview of Recommendations

1. Add a new Customer Options Type named, 'Working Disabled - Unemployment' to track the 26 weeks of allowable unemployment for the Working Disabled beneficiary.
2. Add a new Type of Liquid Property named, 'Retained Earned Income' to be used by Working Disabled. Medi-Cal EDBC rules will include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property. eICT logic will send 'Retained Earned Income' as "Other Liquid Property" in the outbound interface. The new property type will not be included in any other program property budget.
3. Add a new 'Working Disabled Discontinuance Reasons' section to the Individual Detail page to display the reasons an individual is discontinued from Working Disabled, even when they are eligible to another MC program.
4. Update Medi-Cal EDBC rules to:
 - a. only consider Verified 'SSA Disabled' and 'SP-DDSD Disabled' as disabilities to qualify an individual to be tested for Working Disabled program; no longer consider 'Declared' or 'Presumptive'
 - b. consider an individual enrolled in a work activity in the Working Disabled eligibility determination if they have income as an IHSS Caregiver and no longer consider Interest income, dividends or tax refunds.
 - c. allow 26 weeks of unemployment in the Working Disabled eligibility determination
 - d. include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property; exclude it from all other Property budgets
 - e. exempt 'Social Security Retirement' income for the Working Disabled individual if 'Social Security Disability' income converted to Retirement
 - f. exempt 'Veterans Disability – partial' from the Working Disabled budget
 - g. track specific Discontinuance reasons when an individual is no longer eligible to Working Disabled, even if they move to another aid code

5. Update the Medi-Cal EDBC – Working Disabled page to display the SSI/SSP Income Test and additional information for the 250% FPL Income Test.
6. Update the EDBC Person Line Item Detail page for the SSI/SSP Income Test.
7. Create a batch sweep job that identifies Medi-Cal individuals in the Working Disabled who have been unemployed for 26 weeks.
 - a. Add a Batch EDBC Sub Run Reason (CT 942) for an automatic journal.
8. Provide a list of individuals currently in a Share of Cost Non-MAGI Medi-Cal aid code that may qualify for Working Disabled with the updated rules.

1.4 Assumptions

1. The user determines when the liquid property qualifies as 'Retained Earned Income' and that it is held in a separately identifiable account, and it is not comingled with other resources.
2. The user will add a non-compliance for non-payment of premium if the Working Disabled beneficiary does not pay; otherwise, Medi-Cal EDBC rules assume payments are made when determining an individual in Working Disabled as still eligible, including during the 26 weeks of unemployment.
3. The Medi-Cal re-evaluation of an individual for the end of 26 weeks of unemployment for the Working Disabled will be for Non-MAGI Medi-Cal only and will not automate an EDR to CalHEERS for a MAGI redetermination.
4. Users are responsible for confirming the Working Disabled individual's Social Security Retirement income converted from Social Security Disability and will indicate this in the Income Detail page (recommendation 2.3.3.1).
5. The MC 338A line 10 states: "If a couple is ineligible, redo with only one applicant." Users will leverage the Customer Options type of 'MC Declining Working Disabled' for the excluded spouse in the Working Disabled budget and re-run EDBC; this will result in the other spouse being tested as a single applicant for the Working Disabled program.
6. NOAs and forms for Working Disabled will be addressed in separate SCR CA-239596.
 - a. CalSAWS does generate a SOC Change NOA when an individual moves from no SOC to Working Disabled with a premium or, moves from Non-MAGI Medi-Cal with a SOC to Working Disabled and the SOC and Premium amounts are different.
 - b. CalSAWS does not generate an Approval Notice of Action (NOA) when an individual is approved for Working Disabled.
 - c. CalSAWS does not generate a Change NOA when an individual changes from Non-MAGI Medi-Cal or MAGI Medi-Cal to Working Disabled.
 - d. CalSAWS does not generate a Discontinuance NOA specific to losing coverage in Working Disabled.
 - e. CalSAWS does not have available the Working Disabled Informing Notice (MC 338 G) for the user to generate from the Template repository nor does it generate from an EDBC run.

7. The user will manually generate a Working Disabled NOA and/or forms until CA-239596 is implemented. Recommendations 2.4 and 2.5.4.7 will display some 'Working Disabled Discontinuance Reasons' to assist the user when manually creating the Working Disabled Discontinuance NOA.

2 RECOMMENDATIONS

2.1 Customer Options Detail Page

2.1.1 Overview

Add a new Customer Options Type named, 'Working Disabled - Unemployment' to track the 26 weeks of allowable unemployment for the Working Disabled beneficiary.

2.1.2 Customer Options Detail - Mockup

The mockup shows a form titled "Customer Options Detail". At the top right are three buttons: "Save and Add Another", "Save and Return", and "Cancel". Below the title, a red asterisk indicates required fields. The "Name:" field is required and contains "Rubio, Marco 40F". The "Type:" field is required and has a dropdown menu open, showing a list of options. The option "Working Disabled-Unemployment" is highlighted at the bottom of the list. To the right of the "Type:" field is an "End Date:" field with a calendar icon. At the bottom of the form are three buttons: "Save and Add Another", "Save and Return", and "Cancel".

Figure 1: Working Disabled-Unemployment Type for the Working Disabled

2.1.3 Description of Changes

1. Add a new Customer Options Type (CT_1707) named, 'Working Disabled - Unemployment'
 - a. Display in the Type list alphabetically
 - b. Name, Type and Begin Date are required fields
 - c. End Date is optional
 - d. The new Type will not have additional input fields

Note: The new Type will follow existing effective-dating rules and only allow one high-dated 'Working Disabled-Unemployment' record per person at a time.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Non-Financial→Customer Options**

2.1.5 Security Updates

None

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.2 Liquid Property Detail Page

2.2.1 Overview

Add a new Type of Liquid Property named, 'Retained Earned Income' to be used by Working Disabled. Medi-Cal EDBC rules will include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property. eICT logic will send 'Retained Earned Income' as "Other Liquid Property" in the outbound interface.

2.2.2 Liquid Property Detail - Mockup

Liquid Property Detail

* - Indicates required fields

Save and Add Another Save and Return Cancel

Liquid Property Type: *

Received Date:

Considered by SSA (1931b only):

Account Number:

Percentage

100

Add

Comments:

Figure 2: Liquid Property Detail

2.2.3 Description of Changes

1. Add a new Liquid Property Type (CT_208) named, 'Retained Earned Income'
 - a. Display in the Type list alphabetically
 - b. Map to 'Other Liquid Property' (19) for eICT outbound
 - c. Translations of the "Retained Earned Income" in the threshold languages (translations will be requested after Committee Approval of the SCR).

Note: There will be no mapping for CMIPS and BenefitsCal

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Financial→Property**

2.2.5 Security Updates

None

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.3 Income Detail Page

2.3.1 Overview

Add a new checkbox named, 'Converted from Social Security Disability' to be used by Working Disabled. Medi-Cal EDBC rules will exclude the 'Social Security Retirement' income in the Working Disabled budget when the checkbox is checked. No change to eICT logic for 'Social Security Retirement' income type.

2.3.2 Income Detail - Mockup

The mockup shows the 'Income Detail' form with the following fields and options:

- Name:** * (required field) with a dropdown menu showing 'Mouse, Mickey 45M' and a 'Retrieve Information' button.
- Category:** Social Security
- Type:** * (required field) with a dropdown menu showing 'Social Security Retirement'. A red box highlights a new checkbox option: ☒ Medi-Cal 250% Working Disabled: Converted from Social Security Disability at Retirement.
- Source:** Text input field.
- Frequency:** * (required field) with a dropdown menu showing 'Select -'.
- Description:** Text input field.
- Buttons:** 'Save and Add Another', 'Save and Return', and 'Cancel'.
- Footer:** 'Shared with RDP'.

Figure 3: Income Detail Page with New “Medi-Cal 250% Working Disabled: Converted from Social Security Disability at Retirement” Checkbox option

2.3.3 Description of Changes

1. Add a checkbox named 'Medi-Cal 250% Working Disabled: Converted from Social Security Disability at Retirement' as shown in Figure 3.
 - a. Conditionally display the 'Medi-Cal 250% Working Disabled: Converted from Social Security Disability at Retirement' checkbox as an optional field only when 'Social Security Retirement' Income Type is selected.
 - b. Display the field under the 'Type' drop-down list.

2.3.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Financial→Income**

2.3.5 Security Updates

None

2.3.6 Page Mapping

Update page mapping for the new field.

2.3.7 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.4 Individual Detail Page

2.4.1 Overview

Add a new 'Working Disabled Discontinuance Reasons' section to the Individual Detail page that will display the reasons an individual is discontinued from the Working Disabled, even when they are eligible to another MC program.

2.4.2 Individual Detail - Mockup

The mockup shows a web interface titled "Individual Detail". Below the title is a "Close" button. A form field labeled "Name:" contains the text "Sunset, Arizona 36F". Below this is a new section titled "Working Disabled Discontinuance Reasons" in a blue header. This section contains two lines of text: "Working Disabled - Over 250% FPL" and "Working Disabled - Over resources". At the bottom right of the section is another "Close" button. A red rectangular box highlights the "Working Disabled Discontinuance Reasons" section.

Figure 4: Individual Detail

2.4.3 Description of Changes

1. Update Individual Detail page to have a new view-only section for 'Working Disabled Discontinuance Reasons'.
 - a. Display the reason(s) determined from the Working Disabled Discontinuance Reasons from Recommendation 2.5.4.7
 - b. Display the section first if multiple sections display
 - c. Display only when there are 'Working Disabled Discontinuance Reasons' for the individual; otherwise, hide the section.

2.4.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Run EDBC→EDBC List→Medi-Cal hyperlink→Medi-Cal EDBC Summary→Person Name hyperlink**

2.4.5 Security Updates

None

2.4.6 Page Mapping

Update Page Mapping for the new section.

2.4.7 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.5 Medi-Cal EDBC Updates

2.5.1 Overview

1. Update Medi-Cal EDBC rules to:
 - a. only consider Verified 'SSA Disabled' and 'SP-DDSD Disabled' as disabilities to qualify an individual to be tested for Working Disabled program; no longer consider 'Declared' or 'Presumptive'
 - b. consider an individual enrolled in a work activity in the Working Disabled eligibility determination if they have income as an IHSS Caregiver and no longer consider Interest income, dividends or tax refunds.
 - c. allow 26 weeks of unemployment in the Working Disabled eligibility determination
 - d. include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property; exclude it from all other Property budgets
 - e. exempt 'Social Security Retirement' income for the Working Disabled individual if 'Social Security Disability' income converted to Retirement
 - f. exempt 'Veterans Disability – partial' from the Working Disabled budget
 - g. track specific Discontinuance reasons when an individual is no longer eligible to Working Disabled, even if they move to another aid code
2. Update the Medi-Cal EDBC – Working Disabled page to display the SSI/SSP Income Test and additional information for the 250% FPL Income Test.
3. Update the EDBC Person Line Item Detail page for the SSI/SSP Income Test.

2.5.2 Medi-Cal EDBC – Working Disabled - Mockup

Medi-Cal EDBC - Working Disabled

Close

Begin Month	End Month	Run Date	Run Status	Accepted By
12/2021	12/2021	12/03/2021	Not Accepted	Renee Gustafson

Income Determination

250% FPL Income Test

Unearned Income

\$

620.00

Unearned Income Deductions

-

440.00

Net Unearned Income

=

180.00

Earned Income

\$

2,830.00

Earned Income Deductions

-

1,447.50

Net Earned Income

=

1,382.50

Total Net Income

\$

1,562.50

Combined Income Deductions

-

0.00

Income Adjustments

+

210.00

Allocation and Other Deductions

-

0.00

Total Net Nonexempt Income

=

1,453.00

Maintenance Need

\$

2,683.33

Unit Size

1

Income Result

Pass

Premium Amount

=

125.00

SSI/SSP Income Test

Income Calculation

\$

70.50

SSI/SSP Payment Level

\$

954.72

Unit Size

1

Income Result

Pass

Close

Figure 5: Medi-Cal EDBC – Working Disabled page Updated to display SSI/SSP Income Calculation

2.5.3 EDBC Person Line Item Detail – SSI/SSP Income Calculation – Mockup

EDBC Person Line Item Detail - SSI/SSP Income Calculation			
			Close
Name	Type	Description	Amount
(Total Net Nonexempt Income) \$1,453.00 - (Net Earned Income) 1,382.50			\$ 70.50
Total			\$ 70.50

Figure 6: EDBC Person Line Item Detail – SSI/SSP Income Calculation

2.5.4 Description of Changes

1. Update Medi-Cal EDBC Rules, effective benefit months August 2011 or later, to only consider 'SSA Disabled' and 'SP-DDSD Disabled' Medical Conditions as disabilities that qualify an individual to be tested for Working Disabled program. The Medical Condition must have Verified status. No longer consider 'Declared' or 'Presumptive' Medical Conditions for Working Disabled program.
2. Update Medi-Cal EDBC Rules, effective benefit months August 2011 or later, to:
 - a. Add an exception to longer consider the following 'Earned' income types as potentially qualifying an individual as 'enrolled in work activity' for the Working Disabled program:
 - i. Taxable refunds, credits, or offsets of state/local income taxes
 - ii. Interest income (taxable and non-taxable), 1099-INT
 - iii. Ordinary/qualified dividends, 1099-DIV
 - b. Remove the exception that excludes 'IHSS - Wages - Caregiver For Spouse/Minor' income type as potentially qualifying an individual as 'enrolled in work activity' for the Working Disabled program so it is now considered or Working Disabled program.

Technical Note: All other conditions for considering an individual 'enrolled in work activity' are unchanged. See 'Income Types Considered Enrolled in Work Activity for WDP' in Supporting Documents for full list of Income Types.

3. Add an 'Unemployment exception' to the Medi-Cal EDBC rules, effective benefit months August 2011 or later, to allow the Working Disabled beneficiary to remain on Working Disabled program for up to 26 weeks (182 days) of unemployment as follows:
 - a. The individual is currently Active MEM on Working Disabled (aid code 6G), and
 - b. The individual does not meet 'enrolled in a work activity' criteria, and
 - c. The individual has a Customer Options 'Working Disabled-Unemployment' record(s) during the redetermination period for no more than 182 days effective the first day of the EDBC benefit month.
 - i. Count the number of days the Customer Options 'Working Disabled-Unemployment' record(s) was effective from the latest Medi-Cal program Redetermination Begin Date to the first day of the EDBC benefit month.
 1. If the number of days is 182 or less, the individual meets the requirements for the 'Unemployment exception' and is eligible to Working Disabled, if otherwise eligible.

2. If the number of days is 183 or more, the individual does not meet the requirements for 'Unemployment exception' and is no longer eligible to Working Disabled. Discontinue the individual from the Working Disabled program with 'Working Disabled - Unemployed' status reason (See Recommendation 2.5.4.7).

Technical Note: Find the 'latest Medi-Cal program Redetermination Begin Date' by sorting 'Begin Date' in descending order for all Redetermination records for the program, and using the top begin date. Do not consider the Completion Reason (if any) in the sort order.

4. Update Medi-Cal EDBC rules, effective benefit months August 2011 or later, for the treatment of the new Liquid Property 'Retained Earned Income' as follows:
 - a. Include 'Retained Earned Income' in the Working Disabled Property budget as an exempt property.
 - b. Exclude 'Retained Earning Income' from all other Medi-Cal Property budgets and do not count towards the property limit.

Note: 'Retained Earned Income' is excluded from all other EDBC programs.

Property Detail					
					Close
Owner	Property Type	Ownership	Value	VLF Value	Countable Amount
Mouse, Mickey 45M	Retained Earned Income	100.0%	\$650.00	\$0.00	\$0.00
Mouse, Mickey 45M	Checking Account	100.0%	\$3,000.00	\$0.00	\$3,000.00
Total					\$3,000.00
					Close

Figure 7 – Example Property Detail page with Retained Earned Income

5. Update Medi-Cal EDBC rules, effective benefit months August 2011 or later, to exempt the 'Social Security Retirement' income belonging to the Working Disabled individual in the Working Disabled income budget when the 'Social Security Retirement' income record has the 'Medi-Cal 250% Working Disabled: Converted from Social Security Disability at retirement' checkbox checked.

Note: The logic to determine if 'Social Security Retirement' income record is applicable to the Working Disabled income budget for that benefit month remains unchanged.

6. Update Medi-Cal EDBC rules, effective benefit months August 2011 or later, to exempt the unearned Income Type 'Veterans Disability – partial' belonging to the Working Disabled individual in the Working Disabled income budget.
7. Update Medi-Cal EDBC rules to save specific discontinuance reasons when an individual is no longer eligible for Working Disabled; this

includes when an individual is not discontinued from Medi-Cal entirely but is no longer eligible to Working Disabled and moves to another Medi-Cal program aid code. A discontinuance reason is not saved when the Working Disabled individual is eligible to a program higher in the Medi-Cal hierarchy.

For example:

- An individual moves from having aid code 6G to aid code 67 because they are over SSI/SSP Levels. Since they are no longer eligible to the Working Disabled program, the 'Working Disabled - Over SSI/SSP Levels' reason is saved for the discontinuance from Working Disabled.
 - An individual moves from having aid code 6G to aid code 6H when household income is reduced. 6H is higher in the Medi-Cal hierarchy so no Working Disabled-specific discontinuance reason is saved.
- a. Add the following reasons. These reasons will display on the Individual Detail page when they apply to an individual discontinued from Working Disabled.

Working Disabled Discontinuance Reasons
Working Disabled - Over 250% FPL
Working Disabled - Over Resources
Working Disabled - Unemployed
Working Disabled - No Longer Disabled
Working Disabled - Over SSI/SSP Levels

- b. Using the Medi-Cal EDBC rules for the Working Disabled eligibility determination, save the 'Working Disabled Discontinuance Reason(s)' when the following criteria is met:

i. 'Working Disabled - Over 250% FPL' when the 'Working Disabled' income budget is failed for being over 250% FPL

ii. 'Working Disabled - Over Resources' when the 'Working Disabled' property test result is "Fail"

Technical Note: CalSAWS Non-MAGI Medi-Cal rules check if an individual meets resource requirements before building out Income budgets, so the individual may fail the property test without having a failed 'Working Disabled' income budget.

iii. 'Working Disabled - Unemployed' when the Working Disabled individual is found to no longer be 'enrolled in a work activity' and does not meet the 'unemployment exception' per rules in 2.5.4.2 and 2.5.4.3

Technical Note: CalSAWS Non-MAGI Medi-Cal rules check if an individual is 'enrolled in a work activity' before building out Income budgets, so the individual may not have a 'Working Disabled' Income budget in the EDBC.

- iv. 'Working Disabled - No Longer Disabled' when the Working Disabled individual is found to no longer have verified 'SSA Disabled' or 'SP-DDSD Disabled' record effective at least one day in the EDBC benefit month.
Technical Note: CalSAWS Non-MAGI Medi-Cal rules check if an individual is verified 'SSA Disabled' or 'SP-DDSD Disabled' before building out Income budgets, so the individual may not have a 'Working Disabled' Income budget in the EDBC.
 - v. 'Working Disabled - Over SSI/SSP Levels' when the Working Disabled individual is over SSI/SSP levels and fails the 'Working Disabled' income budget
8. Add new optional fields to the database to store the following fields: SSI/SSP Income Calculation, SSI/SSP Payment Standard, SSI/SSP Unit Size, SSI/SSP Income Result, SSI/SSP Income Test Description
Technical Note: The SSI/SSP Income Test logic is already calculated for the Working Disabled income budget but not saved to the database. This recommendation now saves each of the values to the database for use in the online page display and to have history.
9. Update Medi-Cal EDBC – Working Disabled page to have two sections as follows (see Figure 5 for example):

250% FPL Income Test

- a. Add a bolded label, "**250% FPL Income Test**" as the first line in the 'Working Disabled' income budget.
- b. Unhide the "Maintenance Need" line and display it under "Total Net Nonexempt Income"
- c. Unhide the "Unit Size" line and display it under the "Maintenance Need" line.
- d. Unhide the "Income Result" line and display it under the "Unit Size" line – this displays the 'Pass/Fail' result for the 250% FPL Income Test.
- e. Add a blank line below "Premium Amount"

SSI/SSP Income Test

- f. Add a new section for the SSI/SSP Income Test. Dynamically display the new section for EDBC's with data in the SSI/SSP Income Test fields.
For example: EDBC's with a 'Working Disabled' income budget created prior to the page changes in this SCR will not display the SSI/SSP Income Test section at all. Whereas EDBC's with a Working Disabled income budget run after the implementation of this SCR will display the SSI/SSP Income Test section.
- g. Add a bolded label, "**SSI/SSP Income Test**" as the first line in the SSI/SSP Income Test section, below the new blank line in Rec 2.5.4.9.e.

- h. Add a new line labeled, "Income Calculation" that displays the SSI/SSP Income Calculation. The amount is a clickable hyperlink that opens the 'EDBC Person Line Item Detail – SSI/SSP Income Calculation' page as described in Recommendation 2.5.4.10
- i. Add a new line labeled, "SSI/SSP Payment Standard" that displays the SSI/SSP Payment Standard used for the household size in the Working Disabled income budget
- j. Add a new line labeled, "Unit Size" that displays the Household size used in the SSI/SSP Income Calculation
- k. Add a new line labeled, "Income Result" that displays "Pass" or "Fail"

Note: 'Pass' means the **SSI/SSP Income Calculation** is less than or equal to the **SSI/SSP Payment Standard** for the household size. 'Fail' means the **SSI/SSP Income Calculation** is more than the **SSI/SSP Payment Standard** for the household size.

- 10. Update the EDBC Person Line Item Detail page to have a version for the SSI/SSP Income Calculation as follows (see Figure 6 for example):
 - a. Header of the page is, "EDBC Person Line Item Detail – SSI/SSP Income Calculation"
 - b. 'Name' and 'Type' have no value in the column
 - c. 'Description' displays the 250% FPL Income Test **Total Net Nonexempt Income** minus the **Net Earned Income** in the following format:
 "(Total Net Nonexempt Income) \$" <Net Nonexempt Income Amount from the 250% FPL Income Test> " – (Net Earned Income) " <Net Earned Income Amount from the 250% FPL Income Test>
 - d. 'Amount' displays the SSI/SSP Income Calculation amount
- 11. Provide a list of individuals on SOC Non-MAGI Medi-Cal who may be eligible to Working Disabled due to the updated logic. See Outreach section for List details.

2.5.5 Programs Impacted

Medi-Cal

2.5.6 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Run EDBC→EDBC List→Medi-Cal hyperlink→Medi-Cal EDBC Summary→Person Name hyperlink→Working Disabled income budget**

2.5.7 Page Mapping

Update Page Mapping for the new fields.

2.5.8 Security Updates

None

2.5.9 Performance Impacts

No noticeable impacts to performance.

2.5.10 Page Usage/Data Volume Impacts

No impacts to page usage or data volume.

2.6 Create Working Disabled End of Unemployment Batch Sweep

2.6.1 Overview

Create a new batch sweep job that will identify individuals in the Working Disabled Program after their 26th week of unemployment. The batch job will trigger the identified population to run through batch EDBC to re-evaluate for the appropriate Medi-Cal program.

2.6.2 Description of Change

1. Create a new batch sweep job that will identify programs for which to trigger Medi-Cal EDBC when all the following are true:
 - a. The individual is an active MEM on aid code '6G' (6G - 250% Working Disabled-Full) for the current and come-up month, as of the day of the batch run.
 - b. The individual has a Customer Options record for 'Working Disabled - Unemployment' that meets the following criteria:
 - i. the Customer Options 'Working Disabled-Unemployment' record(s) are effective from the latest Medi-Cal program Redetermination Begin Date up to and including the first day of the targeted Batch EDBC Benefit Month.
 1. Count the number of days the Customer Options 'Working Disabled - Unemployment' record(s) was effective from the Medi-Cal program Redetermination Begin Date to the first day of the targeted Batch EDBC benefit month.
 - a. If the number of days is 183 or more then pick up the program for EDBC processing.

Technical Note: Find the 'latest Medi-Cal program Redetermination Begin Date' by sorting 'Begin Date' in descending order for all Redetermination records for the program, and using the top begin date. Do not consider the Completion Reason (if any) in the sort order.

2. Insert the identified Medi-Cal program into SYS_TRANSACT for Batch EDBC processing for the come-up month in Targeted Program mode for all MC programs with the SUB_TYPE_CODE created in Recommendation 2.6.2.3.
3. Add a new SUB_TYPE_CODE in CT_942 - Batch Eligibility Sweep Codes for this batch job. This code detail will also be used as a Journal Entry when Batch EDBC ran on a case.

Batch EDBC Sweep Code	Description
New/Update	New
Category Id	942
Short Decode Name	Working Disabled - End of 26 weeks of Unemployment
Long Decode Name	Working Disabled - End of 26 weeks of Unemployment
Begin date	Default / System Min Date / 01-JAN-00 00:00:00
End date	Default / System High Date /31-DEC-99 00:00:00

2.6.3 Execution Frequency

Monthly on the Batch 10-day cutoff

Reminder: This Batch process does not target MAGI Medi-Cal individuals nor sends a new EDR for a MAGI Medi-Cal redetermination. Medi-Cal EDBC rules will use the valid DER already in the case, if applicable.

2.6.4 Key Scheduling Dependencies

Schedule this batch job to run as a predecessor to the Batch EDBC.

2.6.5 Counties Impacted

CalSAWS counties

2.6.6 Category

Core job

2.6.7 Data Volume/Performance

Not Available

2.6.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.7 Automated Regression Test

2.7.1 Overview






Create new ART scripts to confirm the changes in this SCR.

2.7.2 Description of Change

1. Confirm that the new fields and sections display and behave correctly on the following pages:
 - a. Customer Options Detail page
 - b. Liquid Property Detail page
 - c. Income Detail page
 - d. Individual Detail page
 - e. Medi-Cal EDBC page
 - f. EDBC Person Line Item Detail page
 - g. Sub point (if needed)
2. Confirm that Medi-Cal EDBC behaves correctly in the following scenarios:
 - a. Non-zero IHSS income with the following types are considered enrolled in a work activity
 - i. Wages - Caregiver For Spouse/Minor
 - b. Non-zero income with the following types are not considered enrolled in a work activity
 - i. Taxable refunds, credits, or offsets of state/local income taxes
 - ii. Interest income (taxable and non-taxable), 1099-INT
 - iii. Ordinary/qualified dividends, 1099-DIV
 - c. Verified SSA Disabled and SP-DDSD Disabled are considered for Working Disabled.
 - d. Unverified SSA Disabled, SP-DDSD are not considered for Working Disabled.
 - e. Declared and Presumptive are not considered for Working Disabled – regardless of verification status.
 - f. A Working Disabled – Unemployment record allows the applicant to remain on the program for up to 26 weeks of unemployment.
 - g. Retained Earned Income is included in the Working Disabled Property budget as an exempt property.
 - h. Social Security Retirement income is exempt when the checkbox on the Income Detail page is checked.
 - i. Veterans Disability – Partial income is exempt.

- j. The following Discontinuance Reasons are used and saved correctly:
- i. Working Disabled - Over 250% FPL
 - ii. Working Disabled - Over Resources
 - iii. Working Disabled - Unemployed
 - iv. Working Disabled - No Longer Disabled
 - v. Working Disabled - Over SSI/SSP Levels

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
ACWDL 19-12	Eligibility	Working Disabled eligibility clarifications	 ACWDL 19-12.pdf
ACWDL 11-38	Eligibility	Instructions for Implementing the Less Restrictive Provisions of AB 1269 for 250% Working Disabled Program	 ACWDL 11-38.pdf
MEPM 5R	Eligibility	Medi-Cal Eligibility Procedures Manual: 5R – 250% Working Disabled Program	 5R MEPM.pdf
ACWDL 17-03	Eligibility	Revised Medi-Cal Hierarchy	 ACWDL 17-03.pdf
		Income Types Considered Enrolled in Work Activity for WDP	 Income Types Considered Enrolled i

4 OUTREACH

Include a list of Active Non-MAGI Medi-Cal individuals with a Share of Cost who meet preliminary Working Disabled criteria who also have income for 'Social Security Disability', 'Social Security Retirement', 'Veterans Disability – partial', or IHSS 'Wages - Caregiver For Spouse/Minor'.

List Name: Potential Working Disabled

List Criteria: A list of individuals who are Active on Non-MAGI Medi-Cal SOC who meet all the following criteria:

- Active MEM in one of the following Non-MAGI Medi-Cal aid codes:
 - 17, 27, 37, 67, 83, 87
- Individual is 'enrolled in a work activity' (see Recommendation 2.5.4.2)
- Has high-dated Medical Condition for 'SSA Disabled', 'SP-DDSD Disabled'
- Has high-dated income with any one of the following income types:
 - Social Security Disability
 - Social Security Retirement
 - Veterans Disability – partial
 - IHSS 'Wages - Caregiver For Spouse/Minor', or

Standard Columns:

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

Additional Column(s):

- CIN
- Person Name (Format is <First Name Last Name>)
- DOB
- Aid Code(s) – if multiple aid codes, display in a comma delimited list on the same row to keep one row per individual
- Social Security Disability Y/N – If the individual has a high-dated SSD income, then Y; otherwise, N
- Social Security Retirement Y/N – If the individual has a high-dated SSR income, then Y; otherwise, N
- IHSS Income Y/N – If the individual has a high-dated IHSS 'Wages - Caregiver For Spouse/Minor' income, then Y; otherwise, N
- Veterans Disability Partial Y/N – If the individual has a high-dated 'Veterans Disability – partial' income, then Y; otherwise, N

Frequency: One-time

County Action: Workers should evaluate individuals on the list due to the following updates. If an individual is eligible to the 250% WDP, the worker should grant the benefits and send a notice of action to the beneficiary.

- Social Security Retirement (SSR)/Social Security Disability (SSD) should have their income record updated to indicate that the social security income was converted from SSD to SSR by selecting the 'Converted from Social Security Disability' checkbox on the Income Detail page if applicable.
- Veteran's Disability-Partial income type is now exempted by the system in the 250% WDP.
- IHSS income types are now considered a work activity for the purposes of the 250% WDP.

List Location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2022>CA-209184



California Statewide Automated Welfare System

Design Document

CA-217127

Migrate BRM Addresses for CalWIN Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Jensen
	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/09/2021	0.1	Initial Draft	Maria Jensen
03/09/2022	0.2	Added Assumptions and Supporting Documents	Maria Jensen
03/11/2022	0.3	Added Default Address mention	Maria Jensen
04/04/2022	0.4	BA/QA comments and followup: -Assumption #3 mentions 'all forms' and lists SCRs -Assumption #5 leaves no county behind -Assumption #6 corrected	Maria Jensen
05/04/2022	0.5	Added CT15 requirement	Maria Jensen
05/25/2022	0.6	Added Assumption regarding placeholder SCRs for test	Maria Jensen

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1 OVERVIEW

This SCR will add the pre-population of the BRM Mailback Address on forms for the CalWIN migrating Counties, by migrating the BRM addresses for CalWIN Counties into the CalSAWS system.

1.1 Current Design

CA-201214 introduced the BRM Header in the CalSAWS system in English and 12 threshold languages, and migrated BRM office address data of C-IV Counties from C-IV to the CalSAWS system.

Currently Business Reply Mail addresses for CalWIN Counties do not exist in the CalSAWS system.

1.2 Requests

Migrate the BRM addresses for CalWIN Counties.

1.3 Overview of Recommendations

Migrate the BRM addresses for CalWIN Counties into the CalSAWS system.

Commented [NC1]: Instead of 'CT1622' please say 'CalSAWS system' to make it non-technical.

1.4 Assumptions

1. This effort will pre-populate the BRM address on forms for CalWIN Counties. This effort will bring no other updates to the Forms that use BRM Addresses, nor to the BRM Headers.
2. This effort does not impact any program and does not require any translations.
3. After the CalWIN cutover, Reprint Centrally functionality will be disabled for all forms (not just forms containing BRM) generated before the cutover. This update will be implemented with the following SCRs:
 - i. CA-208600 - Batch Scheduling Updates for CalWIN Conversion (Wave 1)
 - ii. CA-208601 - Batch Scheduling Updates for CalWIN Conversion (Wave 2)
 - iii. CA-208602 - Batch Scheduling Updates for CalWIN Conversion (Wave 3)
 - iv. CA-208603 - Batch Scheduling Updates for CalWIN Conversion (Wave 4)
 - v. CA-208604 - Batch Scheduling Updates for CalWIN Conversion (Wave 5)
 - vi. CA-208605 - Batch Scheduling Updates for CalWIN Conversion (Wave 6)
4. Correspondence could be generated from a non-district office. If the non-district office is tied to a district office, the office relationship can be viewed in Admin -> Office Admin -> Office -> Office Detail -> Office Relationship.
5. Central Print bundle testing will be done with this effort, CA-217127.

6. Mock office data will be used for testing migrated CalWIN BRM addresses. Refer to Supporting Document #3 for office data.
7. Currently only the default approach can be tested, namely the centralized logic, for all counties.
SCRs CA-245276, CA-245277 and CA-245278 have been created to test the office IDs for Non-Centralized Counties in waves. Once office IDs are offered by conversion team, these 3 SCRs respectively will update refer_table_9_descr and will test the non-centralized logic for the remaining 4 Non-Centralized Counties.

2 RECOMMENDATIONS

2.1 Migrate BRM data

2.1.1 Overview

This effort is to migrate the BRM office addresses from CalWIN to CalSAWS.

2.1.2 Description of Change

1. Migrate the BRM address data from CalWIN to CalSAWS.
Refer to Supporting Document #1 for the complete CT 1622 data including Encoded Barcode values and Supporting Document #3 for the consolidated BRM addresses for testing purposes.
2. If the mapping does not exist for a particular district office or non-district office, the address marked as Default Address for that County will be populated on the form/packet, see Supporting Document #1 for Default Address indicator.
3. Currently CT15, refer_table_19_descr column namely 'CentralizedBRMAddress' has 'Y' values for all CalWIN counties. Update this column according to the correct values in Supporting Document #1, BRM Type indicator.

2.2 Regression test the impacted forms/packets

2.2.1 Overview

This effort is to test the BRM address population for all the forms impacted by this SCR.

2.2.2 Description of change

The list of forms and RE packets to be regression tested to validate the BRM address population can be found under Supporting Document #2.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CALWIN BRM SUITE	CALWIN_BRM SUITE.xlsx
2	Client Correspondence	Affected Forms	Affected Forms.xlsx
3	Client Correspondence	Mock Office Data	Office data.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.3.3.2 .8	The CalSAWS shall accommodate various envelope sizes for mailing while conforming to USPS standards for mail piece size.	With SCR CA-217127, the BRM addresses for CalWIN Counties will be added to the CalSAWS system.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-239294

Performance: Convert current CC process to event streaming architecture

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Dana Petersen
	Reviewed By	Angela Zhao

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/13/2021	1	Initial Revision	Dana Petersen
4/28/2022	1.1	Updates to NOAs and Forms. Added Forms Generation Job scheduling.	Chris Carandang
6/14/2022	1.2	Updated the Key Scheduling in section 2.1.4	Chris Carandang
7/6/2022	1.3	Removed assumption 1.4.3 about the delete process on Orphaned NOAs/Forms. Removed batch job numbers in section 2.1.4 that are no longer running in Production.	Chris Carandang

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1 OVERVIEW

Reduce the Overall Batch impact required for rendering online NOAs and Forms by implementing a continuous, event-driven process to render PDFs during business hours.

1.1 Current Design

Online-generated NOAs and Forms are queued for batch threaded processing. The underlying data is captured real-time; however, the PDF file is not yet rendered unless the worker reviews the document, at which point the Adobe SaaS is invoked to render the PDF. Any NOAs and Forms currently rendered real-time will not be captured by Event Streaming to prevent duplicate processing. During Batch, the non-rendered NOAs and forms are identified, the PDF is rendered, and later bundled and sent to the Central Print facility.

The process of rendering the PDF using the Adobe SaaS solution requires several jobs running in parallel threads. Depending on the number of files to be rendered, this process can take considerable time during the batch window, causing downstream processes to wait.

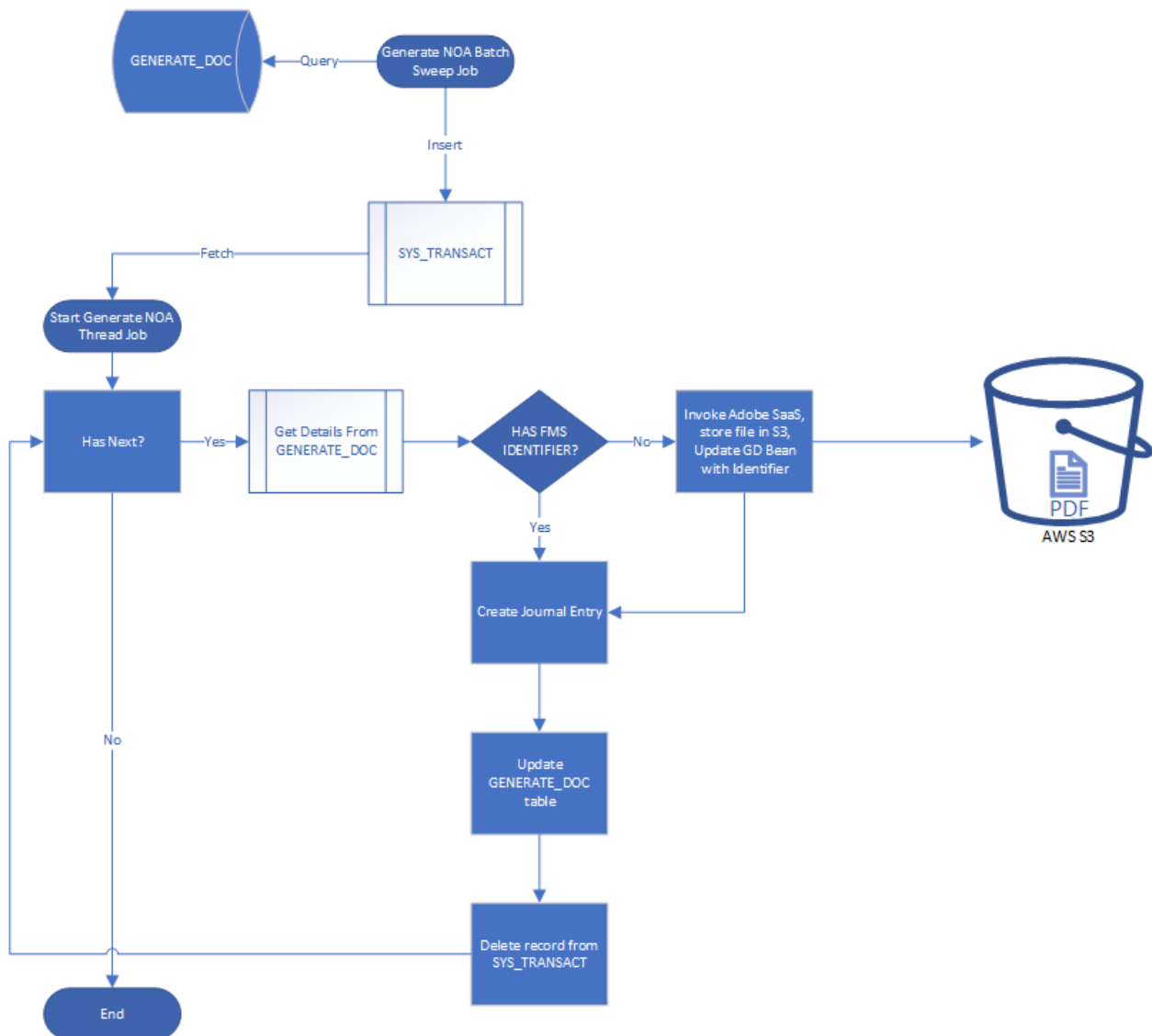


Figure 1.1: Current Generate NOA Batch Flow

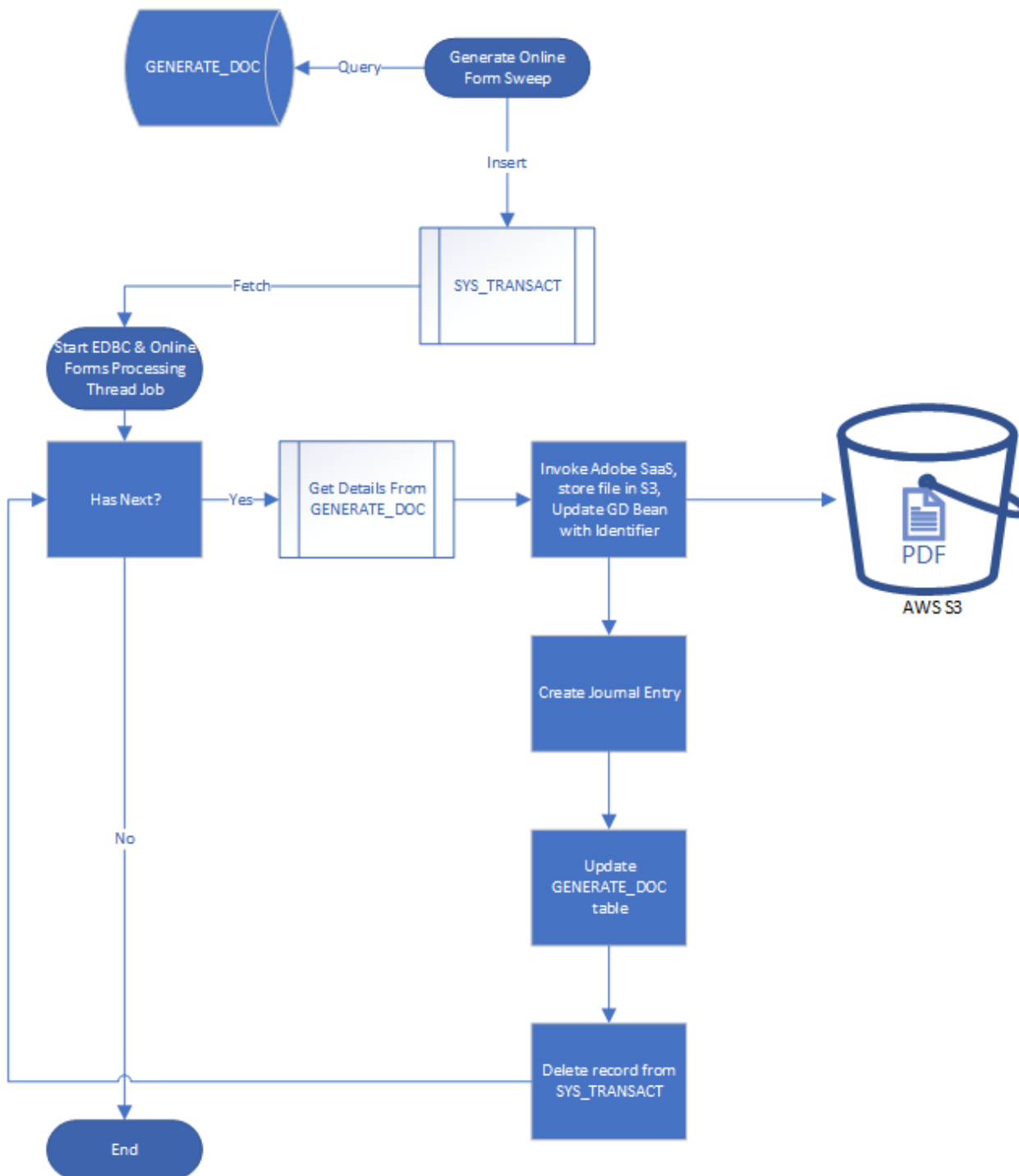


Figure 1.2: Current Generate Online Forms Batch Flow

1.2 Requests

Introduce a new event-driven process to invoke the Adobe PDF rendering service to generate PDF files continuously to distribute the load during business hours.

1.3 Overview of Recommendations

1. Forms and NOAs that are currently queued for batch rendering will be rearchitected to leverage the Stream Processing Architecture.

2. Create new Event Streaming applications within CalSAWS to publish document identifiers to the Kafka Cluster.
3. Create new topics within the Kafka Cluster to allow for downstream processing of Forms and NOAs.
4. Create new Kafka Streams and Consumer applications to subscribe to the new Kafka Topics, invoke the Adobe SaaS service to render the PDF file, save the file to S3, and update the document metadata back into the core CalSAWS database.

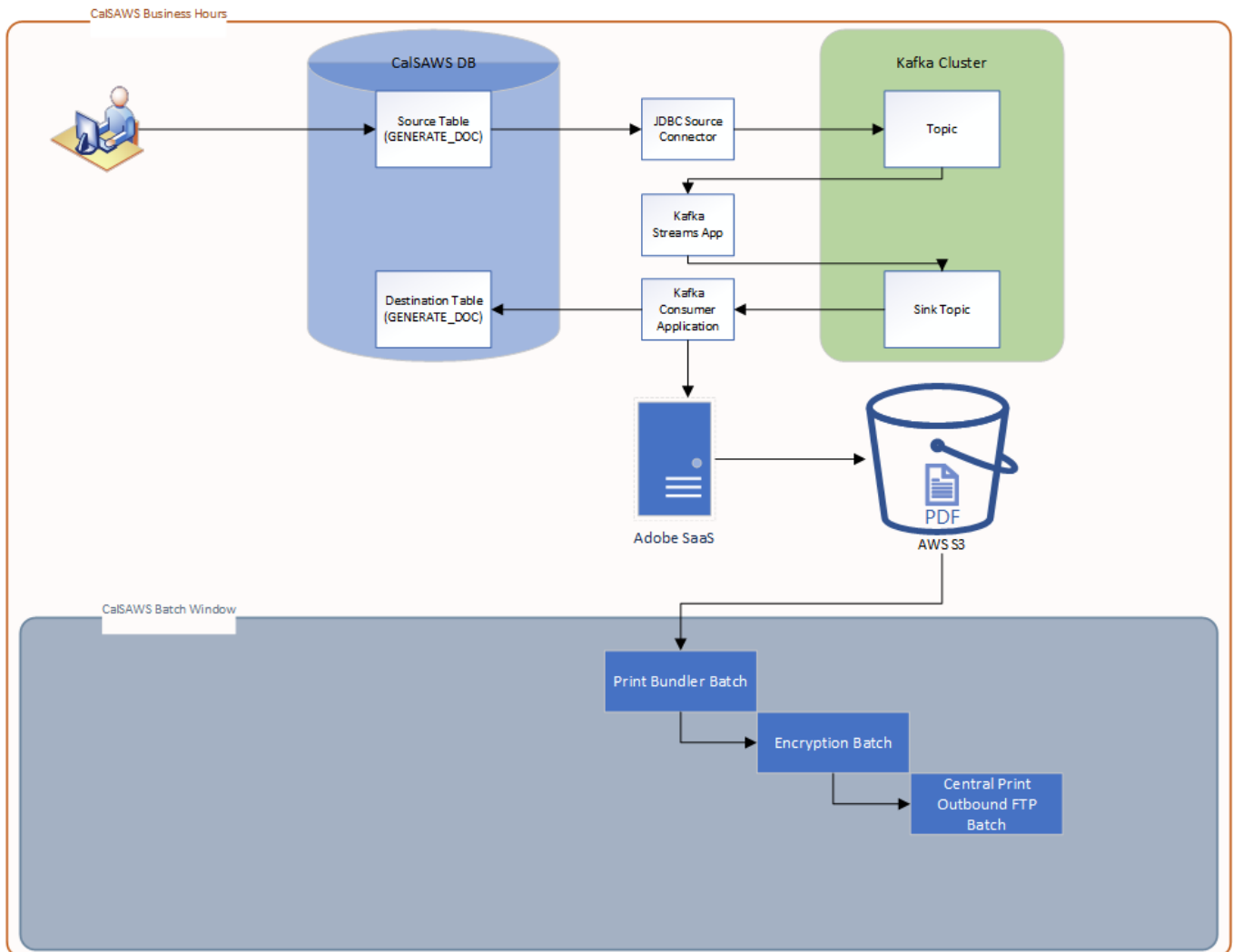


Figure 3: Proposed event driven framework

1.4 Assumptions

1. The existing batch processes will continue to operate as-is to serve to capture any batch-generated NOAs resulting from Batch EDBC
2. The existing Adobe SaaS limit should handle the new event streaming process. If in the future we are getting closer to the limit, we will work with Tech Arch team to increase the limit.

2 RECOMMENDATIONS

2.1 NOAs and Forms Event Streaming

2.1.1 Overview

- **NOA:** Currently a PDF document will not be created for NOAs generated by running EDBC until a worker saves the EDBC and then opens the generated NOA from Distributed Documents page. A nightly batch process creates PDF documents for NOAs which are not actioned/opened by a worker.
- **Form:** Currently a PDF document will not be created for Forms which are generated by clicking on a Generate Form button on Online pages. These records get saved onto a database trigger table which are then processed by a nightly batch process.

2.1.2 Description of Change – Notice of Actions

1. Create a new JDBC Source Connector to publish newly generated NOAs from the GENERATE_DOC table to the Kafka Cluster/Topic.
2. Create a new Kafka Topic for GENERATE_DOC data.
3. Create a new Sink Topic to handle updates as well as other configurations.
4. Create a new Kafka Streams app to subscribe to the GENERATE_DOC Kafka topic and publish updated data to the sink topic.
5. Create the Streams application to utilize properties to allow dynamic configuration for the below data points. This will allow the consumer to focus on specific attributes for maximum flexibility for future configuration requirements. Note: Keep similar functionality as Batch when looking up list of values:
 - a. County Code
 - b. Program Code
 - c. Language Code
 - d. Status Code
 - e. Action Code
 - f. Batch Status Code
6. Create a new Kafka Consumer application to subscribe to the Kafka topic and render each NOA. This process will perform the same actions as if a worker manually views the NOA via the CalSAWS online application. This includes:
 - a. Invoking the Adobe SaaS Solution
 - b. Storing the PDF File on the CalSAWS AWS S3 Bucket
 - c. Updating the GENERATE_DOC record with the corresponding file identifier (ALF_FMS_NUM)
7. Build a time delay of 30 minutes 30 seconds in processing these requests to provide some time for the workers to perform some actions. For example: After saving the EDBC worker might go to Distributed Documents page and open the generated NOAs which will create a PDF document.

2.1.3 Description of Change - Forms

1. Create a new Sink Topic to handle updates as well as other configurations.
2. Create a new Kafka Streams app to subscribe to the GENERATE_DOC Kafka topic and publish updated data to the sink topic.

3. Create a new Kafka Consumer application to subscribe to the Kafka topic and render each Form. This process will perform the same actions as if a batch job renders a form. This includes:
 - a. Invoking the Adobe SaaS Solution
 - b. Storing the PDF File on the CalSAWS AWS S3 Bucket
 - c. Updating/Inserting the GENERATE_DOC record with the corresponding file identifier (ALF_FMS_NUM).

2.1.4 Key Scheduling Dependencies

1. This consumer application is configurable to run 24X7 and will stage changes near real time. It will pause before the following jobs run and will resume at the end of the batch window:
 - a. Generate Online Form Sweep: PB00R3399
 - b. Batch Generate FMS Thread: PB00R3401- PB00R3440
 - c. Sweep job for NOAs: PB00P599
 - d. Balancer job: PB00P601
 - e. NOA thread jobs: PB00P6001 - PB00P6300

2.2 Forms Generation Job - PB00S801

2.2.1 Overview

PB00S801 is the job that generates Forms queued for batch processing. This job executes a stored procedure that creates record in GENERATE_DOC. This will be a cyclic job to run periodically throughout the day.

2.2.2 Description of Change

Schedule PB00S801 to run every 2 hours throughout the day.

2.2.3 Execution Frequency

Daily every 2 hours.

2.2.4 Key Scheduling Dependencies

No dependency.

2.2.5 Counties Impacted

All counties.

2.2.6 Data Volume/Performance

No change.

2.2.7 Failure Procedure/Operational Instructions

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

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-239421

Performance: Convert current Batch ABAWD
process to continuous processing

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Dana Petersen
	Reviewed By	Caroline Bui

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/10/2022	1	Initial Revision	Dana Petersen
6/16/2022	1.2	Removed changes for Eligibility Rules	Dana Petersen/Chris Carandang

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1 OVERVIEW

CalSAWS maintains the entire active CalFresh population's ABAWD (Able-bodied Adults Without Dependents) Determination status for each month of the current Statewide fixed 36-month ABAWD Calendar. The ABAWD status determination is separate from the tracking of individual ABAWD Time Limit months. For example, an active CalFresh Recipient who meets the following criteria is considered ABAWD:

- between 18 and 50 years old,
- does not have a child under 18 in the home,
- is not exempt from CalFresh work registration requirements,
- is not pregnant,
- is not disabled, and
- is not obviously unfit for employment

This determination continues until any of the above conditions change, at which point the person may be determined ABAWD-Exempt, or Non-ABAWD in the case of losing one's CalFresh Benefits during the fixed 36 months period. Once a person is determined ABAWD within the Statewide 36-month calendar, CalSAWS automatically creates a 36-month ABAWD Time Clock to track individual time limit months within the 36-month period.

1.1 Current Design

CalFresh EDBC evaluates every CalFresh program persons' ABAWD Determination for the EDBC effective month(s) and saves the determination outcome to the ABAWD Status pages. Throughout the course of the business day, workers and/or other automated processes (interfaces, batch jobs) may modify various data collection elements pertinent to ABAWD Determinations. Multiple data points that may result in an ABAWD Determination change do not always require workers or the System to run CalFresh EDBC. For example, a recipient reporting a pregnancy does not require CalFresh EDBC, as the pregnancy does not change CalFresh eligibility or benefit amounts. However, a person who is currently considered ABAWD gains an ABAWD exemption due to pregnancy. Another example is when an exempted person turns 18, or an ABAWD ages out at 50.

Because of this type of scenario, CalSAWS has a daily batch process to re-evaluate each month of the current 36-month period, through the come-up month, for all active CalFresh recipients in which one or more data elements may potentially change the ABAWD status determination.

The existing design does not scale well for a 58-County solution:

- The current processing is excessive:
 - The existing triggers are not targeted. Instead of evaluating if a data element contradicts the existing current ABAWD determination(s), most triggers rely on the ABAWD Rules to figure out if a change is required. This results in a high volume of records being processed daily unnecessarily.

- The majority of ABAWD Rules executions do not result in an ABAWD Status change
- The process triggers a large volume of requests and are handled during the batch window via 200 parallel execution threads. This causes contention in the CalSAWS Database.
- Downstream batch processes must wait for the threads to finish. On large volume batch dates (First of Month, 10-day cutoff, End of Month, etc.) the overall processing time can take several hours.
- Current logic utilizes captured data changes using the Super Trigger Framework, which only occurs during the Batch Window

1.2 Requests

Modify the current Batch ABAWD Determination process to run continuously during business hours against the secondary production database to eliminate the impact to Batch performance.

1.3 Overview of Recommendations

1. Move the overall processing of ABAWD re-evaluation outside of the production batch window and into an asynchronous process that runs continuously throughout the business day.
2. Modify existing queries that rely on Super Triggers to query from the source tables in the Secondary database
3. Modify existing queries that are sensitive to time changes, such as person Date of Birth or effective dating to run periodically and only when appropriate (i.e., the person's DOB or Income effective dating conflicts with their current ABAWD status).

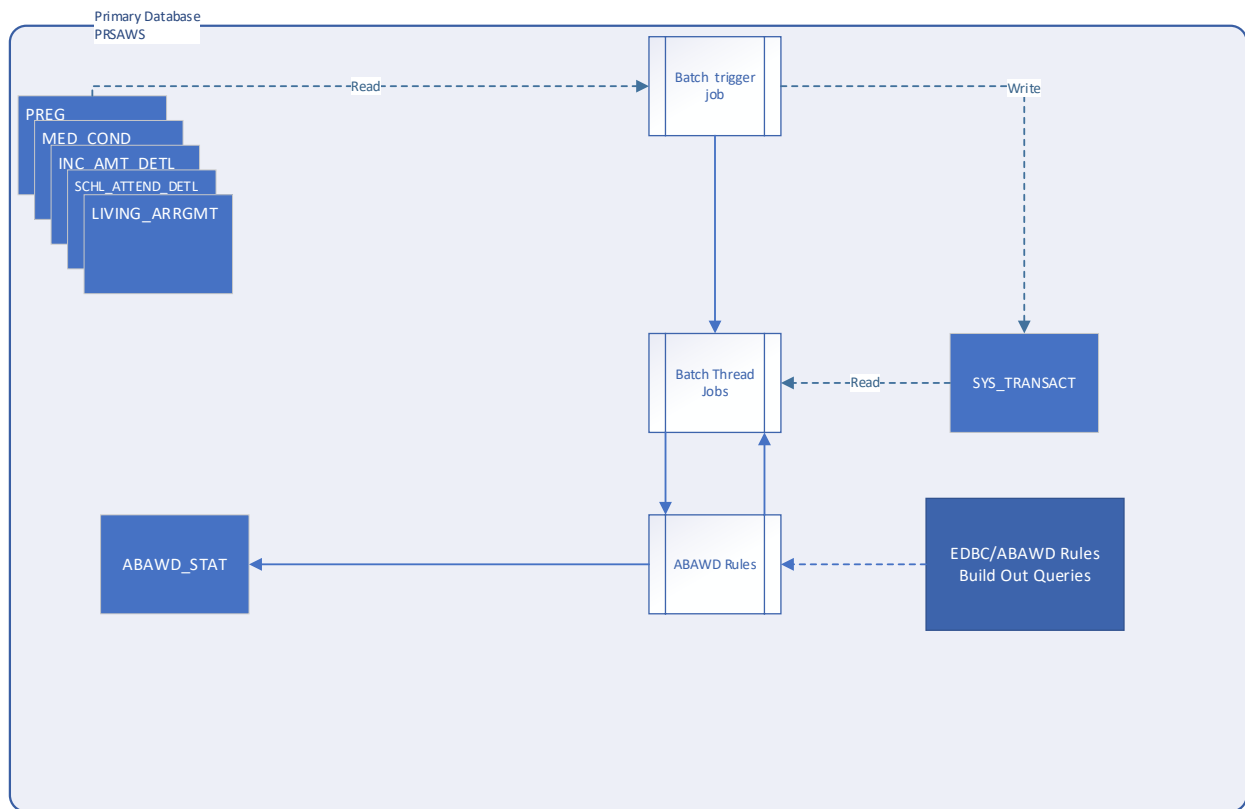


Figure 1.1: Current Batch ABAWD Determination Flow

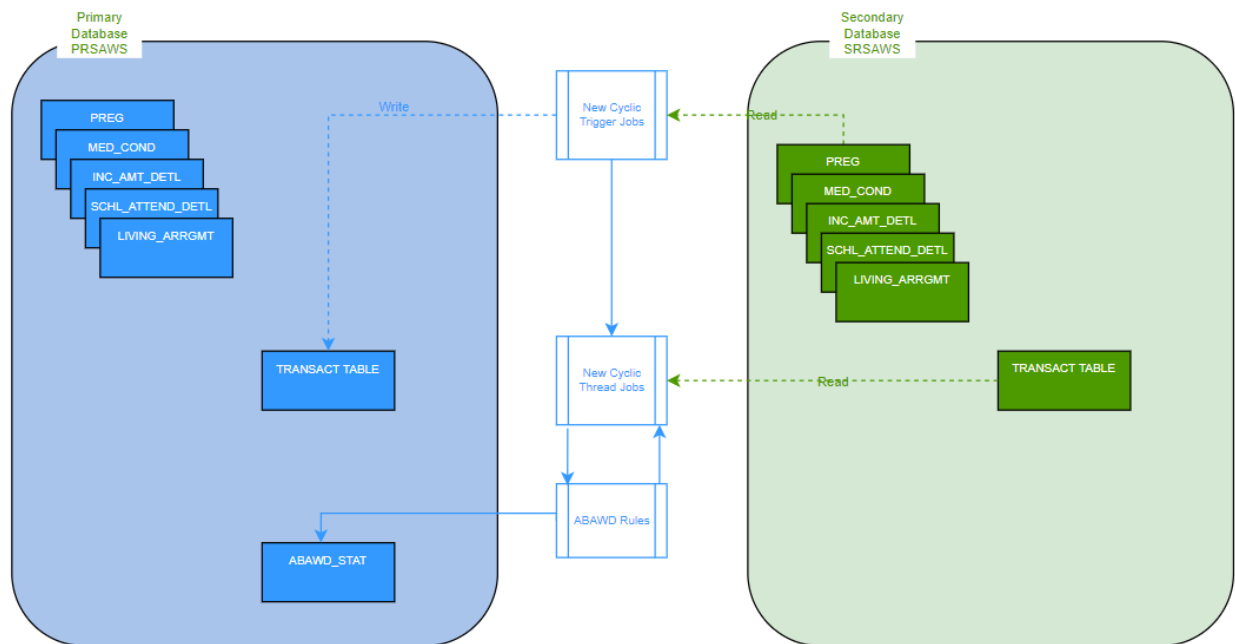


Figure 1.2: New Continuous ABAWD Determination Flow

1.4 Assumptions

1. No changes are required to MEDS trigger functionality. MEDS is currently configured to trigger using real time event streaming architecture and will continue to process updates to ABAWD Time Limit Data. This change will not directly impact ABAWD Time Limits, as the Batch ABAWD Determination process is decoupled from ABAWD Time Limits. The existing ABAWD Time Limit Sync job will continue to run in batch as an input to the FX20 and FX60 interfaces.

2 RECOMMENDATIONS

2.1 Automated ABAWD Determination Trigger updates:

2.1.1 Overview

Current Batch runs a sweep job to trigger cases to be processed by the Batch ABAWD Determination Thread Jobs. The existing sweep job includes 31 individual trigger conditions. Most of the trigger conditions fall into one of two main categories:

- 1) Data Collection Pages in which users have added or updated records, such as pregnancy, income, employment, activity, or expense records. The Super Trigger process detects these added/updated records (utilizing Materialized Views), and the batch sweep job reads from the super trigger tables.
- 2) Data Collection records in which one or more key dates elapse or become effective. For example, when a CalFresh Work Registration, Income, Employment, Activity, Expense, Medical Condition, etc. become "end dated" (no longer effective) or become effective (in the case of records entered prior to the effective begin date), the batch sweep job detects the effective date changes and trigger ABAWD rules to determine if there are any impacts to ABAWD determination.
 - a. Note – other dates are also detected, usually monthly. For example, Current ABAWD individuals who are turning 50 years of age in the month, or potential ABAWDs who are turning 18, are processed to affect age-based exemption updates.

In addition to the above logic, current ABAWD Triggers do not consider potential changes against existing changes, resulting in significant unnecessary executions.

Cases identified by the sweep job is placed into the SYS_TRANSACT table for downstream processing by the thread jobs.

2.1.2 Description of Change

1. Replace the existing Batch ABAWD Sweep trigger job with new cyclic job(s) that run against the standby database throughout the day. These jobs will run each trigger individually, with each trigger modified as described in the below requirements (See ABAWD query analysis.xls in appendix section).
2. Create a DBCR to add a new transaction/staging table to capture the case, program, and effective date trigger information identified by the individual triggers from the previous requirement.

3. Modify the triggers to insert individual months into the new transact table, rather than inserting for a range of months.
4. Update Super Trigger-based ABAWD triggers as follows:
 - a. Remove reliance on the Super Trigger Tables, using the primary table's UPDATED_ON column. Exclude records UPDATED_BY 90 or 91
 - b. Periodically query the online tables/historical tables (for updates) to determine which cases require re-evaluation for ABAWD Determination
 - i. Pregnancy
 - ii. Medical Condition
 - iii. Income Amount Detail
 - iv. School Attendance
 - v. Living Arrangement
 - vi. Person Relationship
 - vii. Other Program Assistance
 - viii. Work Registration
 - ix. Employment Month Actual Hours
 - x. Customer Activity Attendance
 - xi. Self-Employment Deduction
 - xii. Expense Amount Detail
 - xiii. Expense Contribution
 - xiv. Time Limit Detail (for Good Cause months set by workers)
 - xv. Local Minimum Wage
 - xvi. ABAWD Exempt
 - xvii. Non-Scheduled Activity Hours
5. Update "effective dated" triggers:
 - i. Pregnancy (Calculates 'Begin' and 'End Date' based on the expected date of delivery)
 - ii. Medical Condition
 - iii. Person Relationship
 - iv. School Attendance Detail
 - v. Living Arrangement
 - vi. Income Amount Detail
 - vii. Other Program Assistance
 - viii. Work Registration
 - ix. Employment
 - x. Employment Detail
 - xi. Minimum Wage Calculation
 - xii. Person – Date of Birth (Age in/out of ABAWD)
 - xiii. Household Status
 - xiv. Manual CalFresh EDBC
6. Update the following triggers to be more predictive and eliminate unnecessary executions when the triggering record agrees with the existing ABAWD status:
 - a. Income Amount Detail – Effective Dated Version
 - b. Person DOB Check.

- i. Modify the logic to look for age conflicts instead of simply running all persons with an 18th or 50th birthdate
 - c. Work Registration – New/Update trigger
 - d. Work Registration – Effective Dated
- 7. Schedule the Cyclic trigger jobs to run in a cyclic schedule during business hours.
- 8. Deactivate the Batch ABAWD Trigger Sweep Job from production Batch.

2.2 ABAWD Determination Thread Jobs

2.2.1 Overview

Once targeted cases have been queued for processing, 200 parallel Batch ABAWD Thread jobs run to invoke the ABAWD rules.

Repurpose the existing thread modules to be scheduled cyclically during business hours to process records staged in the new transaction table. These jobs will invoke the modified ABAWD Ruleset to run between the specified source and target databases (SRSAWS and PRSAWS, respectively).

2.2.2 Description of Change

1. Modify the Batch ABAWD Determination module to read from the new Transaction table for queued ABAWDs within the source database (as defined by the module's configuration/properties).
2. Add Error Handling/Notification mechanism, similar to MEDS Event Streaming
3. Schedule 10 threads to run continuously during business hours.
4. The existing thread jobs will run during the batch window to process any remaining records that may exist.
5. Create a new ABAWD Thread manager job to control the distribution of records to each cyclical thread job. This job will monitor requests from the thread jobs and prevent threads from attempting to process the same records.

2.2.3 Execution Frequency

Continuously throughout business hours

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

All 58 Counties

2.2.6 Data Volume/Performance

The anticipated average number of records processed is between 15,000 – 20,000 per day. Please note that this is an approximation, and the number of records may vary.

2.2.7 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

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

6 OUTREACH

N/A

7 APPENDIX

ABAWD query analysis spreadsheet



Abawd query
analysis.xlsx

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-239507

Update Application Page Flow for Minor
Consent Medi-Cal

CalSAWS	DOCUMENT APPROVAL HISTORY	
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04/25/2022	1.0	Initial Draft	Connor O'Donnell

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1 OVERVIEW

The Medi-Cal Eligibility Data System (MEDS) AP18 (Report New Application) reports a pending application to MEDS. The AP18 Interface job will be modified to exclude transaction when the person has the following Requested Medi-Cal Type: Minor Consent (12-21) FP/MntHlth, Minor Consent (12-21) FP/STD/D&A, Minor Consent (<12) FP/STD, Minor Consent (<21) Pregnancy. Additionally, the New Programs Detail page will be modified to allow for a selection of a Minor Consent value during case creation.

1.1 Current Design

Currently, AP18 transactions are queued to be sent to MEDS as soon as a program is created in Pending status. This can adversely impact Minor Consent Medi-Cal cases, if the MC program is not initially created with the Requested Medi-Cal Type of the following (Minor Consent (12-21) FP/MntHlth, Minor Consent (12-21) FP/STD/D&A, Minor Consent (<12) FP/STD, Minor Consent (<21) Pregnancy), causing downstream issues in MEDS.

The Application flow does not have an option to specify Minor Consent when selecting the Medi-Cal program on the New Programs Detail page.

1.2 Requests

Update the Application pages flow to allow a user to enter the Minor Consent Requested Medi-Cal Type before a MC program is created in Pending Status.

Update AP18 Interface job to exclude transaction when any active member person in the Medi-Cal program block has the Requested Medi-Cal Type is one of the following.

- a. Minor Consent (12-21) FP/MntHlth
- b. Minor Consent (12-21) FP/STD/D&A
- c. Minor Consent (<12) FP/STD
- d. Minor Consent (<21) Pregnancy

1.3 Overview of Recommendations

1. Add a Minor Consent field to the New Programs Detail page to enable a selection for a Minor Consent-related Requested Medi-Cal Type value if the case qualifies for Minor Consent.
2. Update AP18 Interface job (PO00EM400) to exclude transaction when any active member person in the Medi-Cal program block has the Requested Medi-Cal Type is one of the following:
 1. Minor Consent (12-21) FP/MntHlth
 2. Minor Consent (12-21) FP/STD/D&A
 3. Minor Consent (<12) FP/STD
 4. Minor Consent (<21) Pregnancy

3. Update MEDS AP18 to trigger a transaction to MEDS when the Requested Medi-Cal Type is changed from a Minor Consent case to a Non-Minor Consent case.

1.4 Assumptions

1. As the New/Reapplication Detail page already has a field where the Requested Medi-Cal Type can be selected, this Minor Consent-specific field will not be added to that page.
2. Minor Consent cases will not have any other programs or additional people on the case, the case will have one program (Medi-Cal) and one person (the person that Minor Consent is applicable to).
3. There current business process to update a Medi-Cal case to a Minor Consent case after the case registration date is to close the existing Medi-Cal case and open a new Medi-Cal program with a correct Requested Medi-Cal Type.
4. This SCR will only change MEDS AP18 transaction on a Minor Consent case. There is no change on the other MEDS transaction (EW12, EW20, etc.) on Medi-Cal program.

2 RECOMMENDATIONS

2.1 New Programs Detail

2.1.1 Overview

Currently, Minor Consent is not specified until after a Medi-Cal program is pending, which can be done by going into Edit Mode on the Medi-Cal Person Detail page. Minor Consent will be a selectable value when the only program on the case is Medi-Cal and the case only has one person. Additionally, that person must be younger than twenty-one(21) years old.

2.1.2 New Programs Detail Mockup

New Programs Detail

*- Indicates required fields

Save and Continue

Cancel

Administrative Roles			
Primary: *	Date of Application: *	Source:	Language: *
<div></div>	<div>05/10/2022</div>	<div></div>	<div>English</div>

Program Information			
Name	DOB	Programs	Add/Remove Programs
<div></div>	<div></div>	Medi-Cal	<div>Edit</div>

Save and Continue

Cancel

Figure 2.1.1 – New Programs Detail Mockup - Current Version

New Programs Detail

*- Indicates required fields

Save and Continue

Cancel

Administrative Roles

Primary: *

Date of Application: *

Source:

Language: *

05/10/2022

English

Program Information

Name

DOB

Programs

CMSP Application

Add/Remove Programs

Medi-Cal

Edit

Save and Continue

Cancel

Figure 2.1.2 – New Programs Detail (CMSP County) Mockup – Current Version

New Programs Detail

*- Indicates required fields

Save and Continue

Cancel

Administrative Roles

Primary: *

Date of Application: *

Source:

Language: *

05/10/2022

English

Program Information

Name

DOB

Programs

Medi-Cal:Minor Consent

Add/Remove Programs

Medi-Cal

Minor Consent (12-21) FP/MntlHlth

Minor Consent (12-21) FP/STD/D&A

Minor Consent (<12) FP/STD

Minor Consent (<21) Pregnancy

Edit

Save and Continue

Cancel

Figure 2.1.3 – New Programs Detail Mockup – Updated Version

New Programs Detail

*- Indicates required fields

Administrative Roles			
Primary: *	Date of Application: *	Source:	Language: *
<div style="background-color: black; width: 100px; height: 20px;"></div>	<input type="text" value="05/10/2022"/>	<div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;">▼</div>	<div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;">English ▼</div>

Program Information				
Name	DOB	Programs	CMSP Application	Medi-Cal: Minor Consent
<div style="background-color: black; width: 100px; height: 20px;"></div>	<div style="background-color: black; width: 100px; height: 20px;"></div>	Medi-Cal <div style="border: 1px solid black; width: 40px; height: 20px; display: flex; align-items: center; justify-content: center;">▼</div>		<div style="border: 1px solid black; width: 150px; height: 40px; display: flex; align-items: center; justify-content: center;"> <div style="background-color: #005596; color: white; padding: 2px 5px;">▼</div> </div> <div style="border: 1px solid black; width: 150px; height: 100px; margin-top: 2px;"> <div style="background-color: #005596; color: white; padding: 2px 5px;">Minor Consent (12-21) FP/MntHlth</div> <div style="background-color: #005596; color: white; padding: 2px 5px;">Minor Consent (12-21) FP/STD/D&A</div> <div style="background-color: #005596; color: white; padding: 2px 5px;">Minor Consent (<12) FP/STD</div> <div style="background-color: #005596; color: white; padding: 2px 5px;">Minor Consent (<21) Pregnancy</div> </div>
				<input type="button" value="Edit"/>

Figure 2.1.4 – New Programs Detail (CMSP County) Mockup – Updated Version

2.1.3 Description of Changes

1. Update the New Programs Detail page with the following field that will display as a dropdown option when 'Medi-Cal' is selected as the only program and the only individual being linked to the program is younger than twenty-one (21) years old.
 - a. Field Name – 'Medi-Cal: Minor Consent'. This field will indicate the Requested Medi-Cal Type value for a Medi-Cal program, this dropdown list will only list the Requested Medi-Cal Types related to Minor Consent. The dropdown list will have the following values:
 - i. Blank (Default Value)
 - ii. Minor Consent (12-21) FP/MntHlth
 - iii. Minor Consent (12-21) FP/STD/D&A
 - iv. Minor Consent (<12) FP/STD
 - v. Minor Consent (<21) Pregnancy
 - b. If the application is in a CMSP county, there is an existing dynamic field labeled 'CMSP Application' that appears on the page. This new 'Medi-Cal: Minor Consent' field will appear to the right of this existing field, as can be seen in Figure 2.1.2.
 - i. If the application is being made in a CMSP county, the CMSP Application value should not be selected at the same time as a Minor Consent value. Therefore, if CMSP Application is set to 'Yes' and Medi-Cal: Minor Consent is set to any value besides the default null value display the following validation message:
 1. "A Medi-Cal: Minor Consent value may not be selected when CMSP Application is set to 'Yes'"

2.1.4 Page Location

- **Global: Case Info**
- **Local: New Application**
- **Task: New Programs Detail**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping for new fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 MEDS AP18 (PO00EM400)

2.2.1 Overview

The MEDS AP18 (Report New Application) reports a pending application to MEDS. The AP18 Interface job will be modified to exclude transaction when any active member person in the Medi-Cal program block has the Requested Medi-Cal Type is one of the following: Minor Consent (12-21) FP/MntHlth, Minor Consent (12-21) FP/STD/D&A, Minor Consent (<12) FP/STD, Minor Consent (<21) Pregnancy.

2.2.2 Description of Change

Modify AP18 Interface to exclude transaction when any active member person in the Medi-Cal program block has the Requested Medi-Cal Type on the program person level is in the following types. The program code must be Medi-Cal.

1. Minor Consent (12-21) FP/MntHlth
2. Minor Consent (12-21) FP/STD/D&A
3. Minor Consent (<12) FP/STD
4. Minor Consent (<21) Pregnancy

The batch will exclude the AP18 transaction when any active member person in the Medi-Cal program block has the Requested Medi-Cal Type updated to any of the above types in the same day that the program is registered prior to the batch run.

Update MEDS AP18 to trigger a transaction to MEDS when the Requested Medi-Cal Type is changed from a Minor Consent case to a Non-Minor Consent case. AP18 will be triggered only when the program code is Medi-Cal and the program status is still Pending.

Currently MEDS AP18 is triggered for one of the following scenarios. The new Minor Consent logic will only apply to the scenario#1 (New program application)

1. New program application
2. Change to MEDS Person #
3. Change to Participant Alien #
4. IEVS Applicant Request during RE period
5. When a worker requested the following (AVP, IEVS, SAVE etc.) from the IEVS Request List page

Examples:

Scenario 1:

- On June 1st, a Medi-Cal program is created with Requested Medi-Cal Type of - Medi-Cal
- On June 2nd, the Requested Medi-Cal Type was updated to - Medicare Premium Payment Programs

Result: AP18 will be sent for first day only (June 1st). The case is not a Minor Consent case. There will be no duplicate transaction on the second day.

Scenario 2:

- On June 1st, a Medi-Cal program is created with Requested Medi-Cal Type of - Medi-Cal
- On the same day before batch run, the Requested Medi-Cal Type was updated to - Minor Consent (12-21) FP/STD/D&A

Result: No AP18 transaction for this scenario.

Note: In a scenario that the Requested Medi-Cal Type is updated on any day after the program creation date, the AP18 transaction will be sent out. Please refer to Assumption section on the process to update a case to a Minor Consent case after the case registration date.

Scenario 3:

- On June 1st, a Medi-Cal program is created with Requested Medi-Cal Type of - Minor Consent (12-21) FP/STD/D&A. The program status is in Pending.
- On June 2nd, the Requested Medi-Cal Type was updated to - Medi-Cal. The program status is in Pending.

Result: AP18 will be sent for this scenario. AP18 will be sent on this scenario if the program status is still in pending.

2.2.3 Partner Integration Testing

No.

2.2.4 Execution Frequency

Daily (Mon-Sat) (Event Streaming).

2.2.5 Key Scheduling Dependencies

After Batch EDBC processing

2.2.6 Counties Impacted

CalSAWS Counties.

2.2.7 Category

Core-Off Prime.

2.2.8 Data Volume/Performance

N/A.

2.2.9 Interface Partner

Medi-Cal Eligibility Data System (MEDS).

2.2.10 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
2.8.2.17	The LRS shall determine program and case aid code based on individual and case information by program	The new Medi-Cal: Minor Consent field will allow workers to determine a Minor Consent value at a more appropriate time if the case fulfills certain qualifications for Minor Consent

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-240291

CalSAWS Application jQuery Upgrade

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Alan Yaung

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5/10/2022	1.0	Initial Draft	Alan Yaung
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1 OVERVIEW

This SCR describes the design of CalSAWS application jQuery upgrade to the latest version 3.6.0. jQuery is a JavaScript library designed to simplify HTML DOM tree traversal and manipulation, as well as event handling, CSS animation. While jQuery is one of popular JavaScript libraries, its older versions of core library are vulnerable to cross-site scripting. The SCR introduces the design of jQuery upgrade of its core library for CalSAWS application to minimize the attacker's exploitation of security vulnerabilities

1.1 Current Design

CalSAWS online application currently utilizes jQuery library version 1.9.1.

1.2 Requests

According to National Vulnerability Database (NVD) maintained by National Institute of Standards and Technology (NIST), it is reported that jQuery before version 3.5.0 is vulnerable to cross-site scripting. For security enhancement, jQuery upgrade to the latest version 3.6.0 is requested.

1.3 Overview of Recommendations

This SCR introduces the upgrade of jQuery library to its latest version 3.6.0 for security enhancement. This upgrade should not change the functional behavior of the current application. The upgrade will minimize the security vulnerabilities such as cross-site scripting (XSS).

1.4 Assumptions

This upgrade should not change the functional behavior of the current application.

2 RECOMMENDATIONS

This SCR introduces the upgrade of jQuery library to its latest version 3.6.0 for security enhancement.

2.1 Description of Changes

1. The jQuery library version 1.9.1 used in CalSAWS application will be replaced with the latest jQuery library version 3.6.0.
2. The core CalSAWS application will be updated to build and deploy the static content with new jQuery library.
3. The impact to the application due to jQuery API changes will be evaluated and addressed accordingly.

2.2 Security Updates

This is an enhancement of security for jQuery library.

3 SUPPORTING DOCUMENTS

N/A

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

N/A

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A



California Statewide Automated Welfare System

Design Document

CA-241941

Update the School Attendance List page to
Display School that does not Have an
Organization ID

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Andrea Rodriguez
	Reviewed By	Naga Chindurulu

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3/14/2022	1.0	Initial	Andrea Rodriguez

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1 OVERVIEW

This SCR will resolve the issue that prevented converted School Attendance records without Organization IDs to display on the School Attendance List and School Attendance Detail pages.

1.1 Current Design

Currently, the School Attendance List and School Attendance Detail pages do not display School Attendance Detail records that are not associated to an organization ID. Users are unable to edit or end date converted School Attendance Detail records that are not associated to an organization ID.

1.2 Requests

Expand the logic used on the School Attendance List and School Attendance Detail pages to display School Attendance record information for a record that does not have an organization ID.

1.3 Overview of Recommendations

1. Expand the logic used on the School Attendance List and Detail page to display School information for a converted record with no organization ID. The following applies to these records:
 - a. School Name will be displayed as a static field.
 - b. Address will be displayed as a static field.
 - c. The School Name field will be editable to allow users to make updates as necessary.
2. Update the SIP List and Detail pages to save with a SIP (Self-Initiated Program) record type indicator and only display records with that indicator.
3. Update the e-Application to add the record type indicator on generated School Attendance Detail data.
4. Process a data change on existing School Attendance and SIP records to indicate the record type.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically called out by this document.
2. This SCR will primarily impact CalWIN counties which had School Attendance record data imported to CalSAWS without organization IDs by request.
3. Organization IDs are used to identify Resources in CalSAWS.

2 RECOMMENDATIONS

This SCR will update the School Attendance List and School Attendance Detail page to be able to display School Attendance records without organization IDs and allow users to edit the records. An indicator will be added on the database to distinguish between School Attendance and SIP records. The SIP List and SIP Detail pages will also be updated to display only records with the SIP indicator. The e-Application page will also be updated to add the School Attendance indicator when School Attendance data is imported from an application. A data change will be processed to add an indicator on the database for existing School Attendance and SIP records.

2.1 School Attendance List

2.1.1 Overview

The School Attendance List page allows a user to access the list of school attendance detail and school attendance status information for all individuals associated to the case. Currently, users are unable to view records which do not have an organization ID. This only applies to School Attendance Detail records created without organization IDs.

This SCR will update the page such that it can also display School Attendance records without organization IDs and alternatively display the School Name information on the Name of School field.

2.1.2 School Attendance List Mockup

School Attendance List

Images Continue

► Root Questions

Search Results Summary Results 1 - 1 of 1

Display From: To: View Add

■	Name	Name of School	Begin Date	End Date	
<input type="checkbox"/>	DOE, JOHN 15M	Santa Clara High School	08/11/2020		Edit View History

Remove Add Complete

Images Continue

Figure 2.1.1 – School Attendance List Page

2.1.3 Description of Changes

1. Update the School Attendance List page to also be able to display the case's School Attendance Detail records that do not have an organization ID.
 - a. The Name of School field will display the School Name value for each School Attendance Detail record without an organization ID.
 - b. If no School Name value is available, display the Name of School field with an empty value.
2. Technical Enhancement: Update the School Attendance List page to ensure only School Attendance records display in the results.
Note: An additional indicator will be added on the database to distinguish School Attendance records from SIP records.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** School Attendance

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping to reflect the changes being made to the School Attendance List page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 School Attendance Detail

2.2.1 Overview

The School Attendance Detail page allows a user to add, edit, or view school attendance detail and school attendance status information for all individuals associated to the case.

Currently, users are unable to view records which do not have an

organization ID. This only applies to School Attendance Detail records created without organization IDs.

This SCR will update the page such that it can display for School Attendance records without organization IDs and alternatively display the converted School Name and Address information as static values on the School Name and Address fields. The School Name field as well as other fields on the page will be editable.

2.2.2 School Attendance Detail Mockup

School Attendance Detail

*- Indicates required fields

Images Save and Return Cancel

Name: *
DOE, JOHN 15M

School Name: *
Santa Clara High School [Select](#)

Address:
10 ROYAL LAKE DR
Santa Clara, CA 95050

School Attendance Type: *
High School

Hours/Week:
20

Enrollment Date: *
08/11/2020

Expected Completion Date: *
05/11/2021

Verified: *
Verified [View](#)

End Date:
05/11/2021

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

Attendance Status					
	Status	Date Reported	Status Begin Date	Status End Date	
<input type="checkbox"/>	Attending_Full Time	12/21/2020	08/11/2020		Edit
					Add
Remove					

Course Details		
Course	Begin Date	End Date
No Data Found		

[Add](#)

Images Save and Return Cancel

Figure 2.2.1 – School Attendance Detail page in Edit mode

School Attendance Detail

*- Indicates required fields

Images Edit Close

Name: *
DOE, JOHN 15M

School Name: *
Santa Clara High School

Address:
10 ROYAL LAKE DR
Santa Clara, CA 95050

School Attendance Type: *
High School


Hours/Week:
20

Enrollment Date: *
08/11/2020

Expected Completion Date: *
05/11/2024

Verified: *
Verified [View](#)

End Date:
05/11/2024

Display From: 

To: 

[View](#)

Attendance Status				
Status	Date Reported	Status Begin Date	Status End Date	
Attending Full Time	12/21/2020	08/11/2020		

Course Details		
Course	Begin Date	End Date
No Data Found		

Images Edit Close

Figure 2.2.2 – School Attendance Detail page in View mode

School Attendance Detail

*- Indicates required fields

Images

Save and Return

Cancel

- [School Name](#) - Field is required. Please enter a value or replace the existing value with another resource.

Name: *

School Name: *
Santa Clara High School [Select](#)

Address:
10 ROYAL LAKE DR
Santa Clara, CA 95050

School Attendance Type: *

Hours/Week:

Enrollment Date: *

Expected Completion Date: *

Verified: *
 [View](#)

End Date:

Display
From:

To:

[View](#)

Attendance Status					
<input type="checkbox"/>	Status	Date Reported	Status Begin Date	Status End Date	
<input type="checkbox"/>	Attending Full Time	12/21/2020	08/11/2020		Edit
Remove					Add

Course Details		
Course	Begin Date	End Date
No Data Found		
Add		

Figure 2.2.3 – School Attendance Detail Validation

2.2.3 Description of Changes

1. Update the School Attendance Detail page to also be able to display School Attendance Detail records that do not have an organization ID.
 - a. Update the School Name value to instead display the converted School Name value.
 - i. The name will display as a static value instead of a link.
Note: A link to a resource is not available without an organization ID.
 - ii. In edit mode, a select button will appear to the right of the School Name that will allow the user to select a different resource from the Resource Detail Search page (as shown in Figure 2.2.1).
Note: If the user saves the School Attendance Detail record with a new resource in the School Name field, the user will no longer be able to revert back to the prior value without the organization ID.
 - iii. If no school name value is available, display the School Name field with an empty value.
 - b. Update the Address field to instead display the converted Address value.
 - i. The address will display as a static value.
 - ii. In edit mode, the address field will not be editable.
Note: In order to change the address, the user must update the School Name value as described in Section 2.2.3.1.a.ii. The Address field value will be replaced with the Address value of the School saved in the School Name field.
 - iii. If no address value is available, display the Address field with an empty value.
2. Update the default required field validation for the School Name field to instead display a custom validation.
 - a. The validation will display when
 - i. The user attempts to save a record without a resource value in the School Name field.
 - ii. The user attempts to save a record with no organization ID and leaves the static value in the School Name field.
Note: The user will need to replace the static School Name value with an existing resource from the Resource Detail Search page to be able to save the page going forward.
 - b. The validation will display the following message, "School Name - Field is required. Please enter a value or replace the existing value with another resource." as shown in Figure 2.2.3.
3. Technical Enhancement: Update the School Attendance Detail page to save the record with an indicator on the database to distinguish the School Attendance record from SIP records.

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** School Attendance

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update Page Mapping to reflect the changes being made to the School Attendance Detail page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 SIP List

2.3.1 Overview

The SIP List page allows a user to add, edit, view, or remove a Self-Initiated Program Detail record for participants/beneficiaries associated to a case.

This SCR will update the page on the database to ensure only SIP records with the SIP indicator display in the results.

2.3.2 SIP List Mockup

SIP List

The mockup shows a web interface for the SIP List. At the top right is an 'Images' button. Below it are search filters: 'Display by Name:' with a dropdown menu set to 'All', 'From:' and 'To:' date pickers, and a 'View' button. A 'Search Results Summary' bar indicates 'Results 1 - 1 of 1' and contains an 'Add' button. Below this is a table with columns: Training Program, Name, Status, Enrollment Date, and Expected Completion Date. The first row shows 'MEDICAL ASSISTANT', 'DOE, JANE 44F', 'Approved', '01/10/2022', and '01/30/2023'. To the right of the table are 'Edit' and 'View History' buttons. At the bottom left is a 'Remove' button, and at the bottom right is an 'Add' button and another 'Images' button.

Training Program	Name	Status	Enrollment Date	Expected Completion Date
MEDICAL ASSISTANT	DOE, JANE 44F	Approved	01/10/2022	01/30/2023

Figure 2.3.1 – SIP List page

2.3.3 Description of Changes

1. Technical Enhancement: Update the SIP List page to ensure only SIP records with the SIP indicator display in the results (instead of displaying records without organization IDs).

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update page mapping to reflect the changes being made to SIP List page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 SIP Detail

2.4.1 Overview

The SIP Detail page allows a user to add, edit or view the details of a Self-Initiated Program activity.

This SCR will update the page on the database to save the record with an SIP indicator.

2.4.2 SIP Detail Mockup

SIP Detail

*- Indicates required fields

Images Edit Close

Name: *
DOE, JANE 44F

Training Program: *
MEDICAL ASSISTANT

Enrollment Date: * 01/10/2022 **Expected Completion Date: *** 01/30/2023

Comments:

Is the training program in a demand occupation? *
Yes

Is the customer making satisfactory progress?

Does the customer have a degree?

Complete within time on aid?
No

Meeting Required Number of hours per week? **Required Hours:**
No

School Status History *

Status	Status Reason	Status Begin Date	Status End Date
Approved	Meets SIP Criteria	03/29/2022	

Customer Activity *

Type	Activity Number	Provider Name	Start Date	Status	Status Date
Voc/Ed Training	VOC - Medical Assistant	Luann Dawn	03/29/22	Active	05/12/2022

Images Edit Close

Figure 2.4.1 – SIP Detail page

2.4.3 Description of Changes

1. Technical Enhancement: Update the SIP Detail page to save the record with an indicator to distinguish the SIP record from School Attendance records.

2.4.4 Page Location

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

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update page mapping to reflect the changes being made to SIP Detail page.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 E-Application

2.5.1 Overview

Data entered on the E-Application can be used to create School Attendance records for a case. This SCR will update the records created to be saved with the additional indicator for the record type.

2.5.2 E-Application Mockup

N/A

2.5.3 Description of Changes

1. Technical Enhancement: Update the E-Application to import School Attendance records with an additional indicator for the record type.

2.5.4 Page Location

- **Global:** Case Info
- **Local:** New Application

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

Update page mapping to reflect the changes being made to the E-Application page.

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 School Attendance and SIP Record Data Change

2.6.1 Overview

This data change will populate new indicator values on existing School Attendance and SIP Records in order to distinguish between the record types on the database.

2.6.2 Description of Change

1. Technical Enhancement: Update existing School Attendance and SIP Records to have an indicator for the record type.
 - a. Existing School Attendance records will be updated to have a School Attendance indicator.
 - b. Existing SIP records will be updated to have a SIP indicator.

2.6.3 Estimated Number of Records Impacted/Performance

Approximately all 7,700,000 records on the School Attendance and SIP table will be impacted.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.2.14	The LRS shall allow COUNTY-specified Users to collect school attendance information at the individual level.	This SCR will update the School Attendance List/Detail page to be able to display and edit School Attendance records without organization IDs.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-242135

Task Management

System Task Type and Task Category
Modifications

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

This design outlines modifications to the CalSAWS System to allow Task Category configurations to be consistent for processing that evaluates Task Category information.

1.1 Current Design

System Task Types can be associated to Automated Actions.

It is possible to create Task Types with Task Categories that are not selectable on the Bank Detail page or Position Detail page.

System Task Types are selectable for Append and Resulting Task processing.

1.2 Requests

1. Modify System Task Types to no longer be selectable for an Automated Action and for Append and Resulting Task processing.
2. Align selectable Task Categories between the Task Type Detail, Position Detail, and Bank Detail pages.

1.3 Overview of Recommendations

1. Update System Task Types so that they are not selectable for an Automated Action, Append or Resulting Task processing.
2. Update the Task Type detail page to remove certain Task Categories from the Category dropdown.
3. Update the Position Detail page and Bank Detail page to add additional selectable Task Categories.

1.4 Assumptions

1. Counties have not associated any of the Task Types in [Section 7](#) to any Automated Action, with the exception of Clearance and Intake Task Types.

2 RECOMMENDATIONS

This section will outline recommendations to introduce changes to the Task Type Detail page in the CalSAWS System for Authorization Tasks Types.

2.1 Introduction

Task Categories are used to support Office Distribution Task assignments, Get Next functionality and for the determination of Positions/Banks that are “eligible” for certain Types of Tasks. The population of Task Categories that are available for association to a Task Type is not consistent with the selectable Task Categories on the Position Detail and Bank Detail pages. The result is that Task Types may be created with a Task Category that cannot be associated to a Position or Bank. If this occurs, these types of Tasks will not function with Office Distribution or Get Next functions.

The modifications in this enhancement will align the Task Categories between the Task Types that can be created and the Task Types that can be selected on the Position Detail and Bank Detail pages.

System Task Types are Task Types that are available in the CalSAWS System to support very specific Task processing which does not allow customization of Task Types. Examples of System Task Types are Authorization Task Types and Clearance/Intake Task Types. These Tasks have additional data attributes associated to them to support further processing of these specific types of Tasks. System Task Types cannot be manually created by a worker. Currently the Append and Resulting Task processing allows System Tasks to be selectable as a type of Task that can be appended to or created automatically by the System as a Resulting Task. This is problematic as these Tasks will not have the necessary data attribute(s) to support the additional processing for these Task Types.

The modifications in this enhancement will remove System Task Types from being selectable for Append and Resulting Task processing.

2.2 Task Type Detail Page

2.2.1 Overview

The Task Type Detail page is accessible from the Task Type List page. This page is used to capture and display detailed information about the Task Type.

2.2.2 Task Type Detail Reference Example

Task Type Detail

* - Indicates required fields Close

Task Type Information		
Name: * Payment Request Disapproved	Category: * Payment Request	Priority: Critical
Available Online: No	Available for Automation: No	
Instructions:		
Expire Tasks: * No		
Newly Assigned Indicator: * Tasks display indicator for 5 day(s)		

▸ Sub-Type Information

▸ Append Information

▸ Action Step Information

▸ Resulting Task Information

▸ Staff Classification Information

Close

Figure 2.2.2-1 – Task Type Detail Page Reference Example

2.2.3 Description of Changes

Authorization and CSC System Task Types have a value of "Yes" in the "Available for Automation" attribute. As a result, these Task Types can be associated to Automated Actions. This is problematic because System Task Types have very specific processing that is not part of Automated Actions.

1. Update the "Available for Automation" attribute on the Task Type Detail page to be set to "No" for the following Task Types (refer to [Appendix Section 7](#) for the list of Task Types included where the "Update "Available for Automation" field" column is set to "Yes").
2. The below Task Categories are associated to System Task Types only; they are not selectable on the Position Detail page. As a result, it is

currently possible to create Task Types with the below Categories that do not function with the Office Distribution and Get Next functionalities due to the absence of these categories on the Position Detail page. Remove the following options from the Category dropdown on the Task Type Detail Page:

- a. Auxiliary Issuance
- b. Computation Request
- c. CSC
- d. EDBC
- e. External Recovery Account
- f. Interest Allocation
- g. Invoice
- h. Issuance Method
- i. Issuance Replacement/Reissue
- j. Payment Request
- k. Transaction Refund
- l. Valuable

Note: If a County has configured a custom Task Type with one of the above Task Categories, the Office Distribution and Get Next functionalities will not function. If the intent of such Task Types is to use these functions, it is recommended to modify the Task Type category to a different value.

3. Update the Task Type dropdown inside the Append Information panel to exclude the Task Types in [Appendix Section 7](#) where the column "Exclude from Append Processing" is set to "Yes". A System Task is not a candidate for Append processing.
4. Update the Task Type dropdown inside the Resulting Task Information panel to exclude the Task Types in [Appendix Section 7](#) where the column "Exclude from Resulting Task Processing" is set to "Yes". A System Task is not a candidate for Resulting Task processing.

2.2.4 Page Validations

N/A.

2.2.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Task Types

2.2.6 Security Updates

N/A.

2.2.7 Page Mapping

There are no updates to page mapping.

2.2.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 Task Sub-Type Detail Page

2.3.1 Overview

The Task Sub-Type Detail page is accessible from the Task Type Detail page. This page is used to capture and display detailed information about the Task Sub-Type.

2.3.2 Task Type Detail Reference Example

Task Sub-Type Detail

* - Indicates required fields

EditClose

Task Sub-Type Information

Task Type:

11 months after Vocational Training Activity Start Date

Sub-Type Name: *

SubType 1

Available Online:

No

Available for Automation:

No

Priority:

Low

Expire Tasks:

No

▸ Append Information

▸ Action Step Information

▸ Resulting Task Information

▸ Staff Classification Information

EditClose

Figure 2.3.2-1 – Task Sub-Type Detail Page Reference Example

2.3.3 Description of Changes

Modify the Task Sub-Type Detail page as follows:

1. Update the Task Type dropdown inside the Append Information panel to exclude the Task Types in [Appendix Section 7](#) where the column "Exclude from Append Processing" is set to "Yes". A System Task is not a candidate for Append processing.
2. Update the Task Type dropdown inside the Resulting Task Information panel to exclude the Task Types in [Appendix Section 7](#) where the column "Exclude from Resulting Task Processing" is set to "Yes". A System Task is not a candidate for Resulting Task processing.

2.3.4 Page Validations

N/A.

2.3.5 Page Location

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

2.3.6 Security Updates

N/A.

2.3.7 Page Mapping

There are no updates to page mapping.

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 Position Detail Page

2.4.1 Overview

The Position Detail page is used to capture and display detailed information about the Position.

2.4.2 Position Detail Mockup

Tasks		
<input type="checkbox"/> Application (All)	<input type="checkbox"/> Batch EDBC	<input type="checkbox"/> CWS
<input type="checkbox"/> Application Registration	<input type="checkbox"/> Case Update	<input type="checkbox"/> EBT
<input type="checkbox"/> CMIPSI	<input type="checkbox"/> External Agency Admin	<input type="checkbox"/> Foster Care RDB
<input type="checkbox"/> CalHEERS	<input type="checkbox"/> Fraud	<input type="checkbox"/> IEVS
<input type="checkbox"/> e-Application	<input type="checkbox"/> IEVS Criminal	<input type="checkbox"/> IEVS Priority
<input type="checkbox"/> e-ICT	<input type="checkbox"/> Legacy	<input type="checkbox"/> MC 355
	<input type="checkbox"/> MEDS Alert	<input type="checkbox"/> MEDS Liaison
	<input type="checkbox"/> Manual	<input type="checkbox"/> QR7LA
	<input type="checkbox"/> Quality Assurance Assignment	<input type="checkbox"/> Quality Review
	<input type="checkbox"/> Redetermination	<input type="checkbox"/> SAR7
	<input type="checkbox"/> Screening Packet	<input type="checkbox"/> Self Service Portal Communications
	<input type="checkbox"/> Time Limits	<input type="checkbox"/> VITA

Figure 2.4.2-1 – Position Detail Page Edit Mode

2.4.3 Description of Changes

The following categories are associated to non-System Task Types and are currently not on the Position Detail page.

1. Update the Position Detail page to add the following Task Categories to allow the Task associated to be configurable.
 - a. Manual
 - b. Batch EDBC
 - c. CWS
 - d. Quality Review
 - e. Time Limits

Note: See Figure 2.4.2-1 for placement of the attributes.

2.4.4 Page Validations

N/A.

2.4.5 Page Location

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

2.4.6 Security Updates

N/A.

2.4.7 Page Mapping

There are no updates to page mapping.

2.4.8 Page Usage/Data Volume Impacts

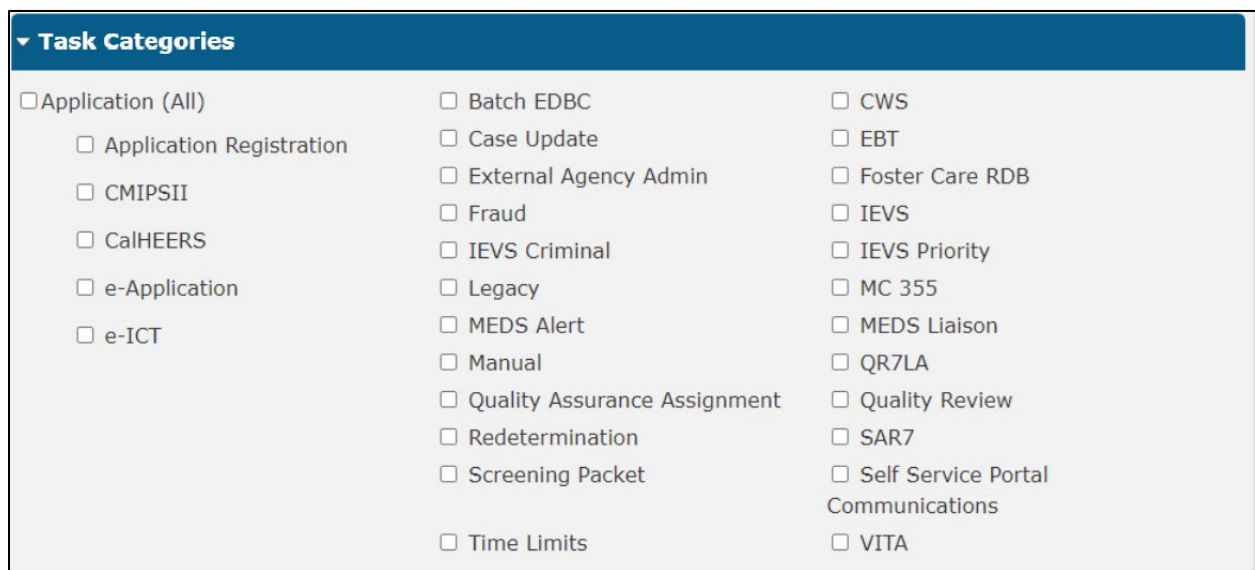
There are no expected page usage/volume impacts.

2.5 Bank Detail Page

2.5.1 Overview

The Bank Detail page is used to capture and display detailed information about the Bank.

2.5.2 Bank Detail Mockup



The mockup shows a 'Task Categories' section with a dark blue header and a light gray body. It contains three columns of checkboxes for various task categories. The categories are: Application (All), Application Registration, CMIPSI, CalHEERS, e-Application, e-ICT, Batch EDBC, Case Update, External Agency Admin, Fraud, IEVS Criminal, Legacy, MEDS Alert, Manual, Quality Assurance Assignment, Redetermination, Screening Packet, Time Limits, CWS, EBT, Foster Care RDB, IEVS, IEVS Priority, MC 355, MEDS Liaison, QR7LA, Quality Review, SAR7, Self Service Portal Communications, and VITA.

Task Categories		
<input type="checkbox"/> Application (All)	<input type="checkbox"/> Batch EDBC	<input type="checkbox"/> CWS
<input type="checkbox"/> Application Registration	<input type="checkbox"/> Case Update	<input type="checkbox"/> EBT
<input type="checkbox"/> CMIPSI	<input type="checkbox"/> External Agency Admin	<input type="checkbox"/> Foster Care RDB
<input type="checkbox"/> CalHEERS	<input type="checkbox"/> Fraud	<input type="checkbox"/> IEVS
<input type="checkbox"/> e-Application	<input type="checkbox"/> IEVS Criminal	<input type="checkbox"/> IEVS Priority
<input type="checkbox"/> e-ICT	<input type="checkbox"/> Legacy	<input type="checkbox"/> MC 355
	<input type="checkbox"/> MEDS Alert	<input type="checkbox"/> MEDS Liaison
	<input type="checkbox"/> Manual	<input type="checkbox"/> QR7LA
	<input type="checkbox"/> Quality Assurance Assignment	<input type="checkbox"/> Quality Review
	<input type="checkbox"/> Redetermination	<input type="checkbox"/> SAR7
	<input type="checkbox"/> Screening Packet	<input type="checkbox"/> Self Service Portal Communications
	<input type="checkbox"/> Time Limits	<input type="checkbox"/> VITA

Figure 2.5.2-1 – Bank Detail Page Edit Mode

2.5.3 Description of Changes

The following categories are associated to non-System Task Types and are currently not on the Bank Detail page.

1. Update the Bank Detail page to add the following Task Categories to allow the Task associated to be configurable.
 - a. Manual
 - b. Batch EDBC
 - c. CWS
 - d. Quality Review

e. Time Limits

Note: See Figure 2.5.2-1 for placement of the attributes.

2.5.4 Page Validations

N/A.

2.5.5 Page Location

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

2.5.6 Security Updates

N/A.

2.5.7 Page Mapping

There are no updates to page mapping.

2.5.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

3 SUPPORTING DOCUMENTS

N/A.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.4	The LRS shall generate alerts, reminders, and controls that may not directly affect eligibility.	This modification allows System Task Types to be properly configurable to support Office Distribution and Get Next functionalities.

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

7.1 Authorization Task Types

The Authorization Task functionality in the CalSAWS System is dependent on a specific inventory of authorization Task Types for each county being available. These Task Types are considered “system” Task Types because authorization Tasks are dependent on the specific Task Types, the relationships between Task Types and logic that creates/maintains a task attribute signifying what needs the authorization.

Task Type	Update “Available for Automation” field	Exclude from Append Processing	Exclude from Resulting Task Processing
Computation Request Rejected	Yes	Yes	Yes
2nd Level Authorization - Invoice	Yes	Yes	Yes
2nd Level Authorization - Issuance Replacement/Reissue	Yes	Yes	Yes
2nd Level Authorization - Payment Request (Lvl 1)	Yes	Yes	Yes
2nd Level Authorization - Payment Request (Lvl 2)	Yes	Yes	Yes
2nd Level Authorization - Transaction Refund	Yes	Yes	Yes
2nd Level Authorization - Valuable (Lvl 1)	Yes	Yes	Yes
2nd Level Authorization - Valuable (Lvl 2)	Yes	Yes	Yes
2nd Level Authorization EDBC	Yes	Yes	Yes
External Recovery Account Disapproved	Yes	Yes	Yes
Fraud Supervisor Authorization - Computation	Yes	Yes	Yes

Request			
Generate Manual NOAs	Yes	Yes	Yes
Interest Allocation Rejected	Yes	Yes	Yes
Issuance Method Disapproved	Yes	Yes	Yes
Issuance Replacement/Reissue Disapproved	Yes	Yes	Yes
Payment Request Disapproved	Yes	Yes	Yes
ReRun EDBC	Yes	Yes	Yes
Supervising Clerk Authorization - Computation Request	Yes	Yes	Yes
Supervisor Approval - Interest Allocation	Yes	Yes	Yes
Supervisor Authorization - External Recovery Account	Yes	Yes	Yes
Supervisor Authorization - Invoice	Yes	Yes	Yes
Supervisor Authorization - Issuance Method	Yes	Yes	Yes
Supervisor Authorization - Issuance Replacement/Reissue	Yes	Yes	Yes
Supervisor Authorization - Payment Request	Yes	Yes	Yes
Supervisor Authorization - Transaction Refund	Yes	Yes	Yes

Supervisor Authorization - Valuable	Yes	Yes	Yes
Supervisor Authorization EDBC	Yes	Yes	Yes
Transaction Refund Disapproved	Yes	Yes	Yes
Auxiliary Authorization – Awaiting Approval (L1)	Yes	Yes	Yes
Auxiliary Authorization – Awaiting Approval (L2)	Yes	Yes	Yes
Auxiliary Authorization – Disapproved	Yes	Yes	Yes

7.2 Clearance/Intake Task Types

Clearance Task Types are considered “system” Task Types because the Task processing is dependent on an attribute being available and associated to the Clearance Tasks. For example, a Clearance e-Application Task will be associated to an e-Application directly via a data attribute.

The Intake Task Type is considered a “system” Task Type because Intake Task processing is part of the larger Clearance task processing flow.

Task Type	Update “Available for Automation” field	Exclude from Append Processing	Exclude from Resulting Task Processing
Clearance	Yes	Yes	Yes
Clearance ICT	Yes	Yes	Yes
Clearance e-Application	Yes	Yes	Yes

Clearance CMIPSI (LA Only)	Yes	Yes	Yes
Intake	Yes	Yes	Yes

7.3 BenefitsCal Task Types

BenefitsCal Task Types are considered “system” Task Types because the BenefitsCal Task processing logic expects specific Task Types to exist for each county configured a specific way for purposes of Task creation and routing.

Task Type	Update “Available for Automation” field	Exclude from Append Processing	Exclude from Resulting Task Processing
Clearance BenefitsCal	No	Yes	Yes
Customer Appointment Requested Through Self-Service Portal	No	Yes	Yes
Customer VITA Appointment Requested Through Self Service Portal	No	Yes	Yes
Customer reported a change	No	Yes	Yes
Customer request BIC card replacement	No	Yes	Yes
Customer request EBT card replacement	No	Yes	Yes
Request to create a CBO account	No	Yes	Yes

7.4 CSC Task Types

Los Angeles Only: The following Task Types for LA only are considered “system” Task Types because the call center solution expects these Task Types to be available for the county. When Tasks with one of these types are created from the call center solution, the Tasks are associated directly to a call center ticket via a data attribute.

Task Type	Update “Available for Automation” field	Exclude from Append Processing	Exclude from Resulting Task Processing
ABAWD	Yes	Yes	Yes

Add Individual	Yes	Yes	Yes
Alternate Card Holder	Yes	Yes	Yes
Case Status	Yes	Yes	Yes
Documentation - Provided to District Office by PT.	Yes	Yes	Yes
Domestic Violence	Yes	Yes	Yes
Earned Income	Yes	Yes	Yes
Edit Individual	Yes	Yes	Yes
Employee Recipient	Yes	Yes	Yes
Fleeing Felon	Yes	Yes	Yes
Immigration Status	Yes	Yes	Yes
Marital Status	Yes	Yes	Yes
Medical Renewal - Change	Yes	Yes	Yes
Mental Health Appt. Request	Yes	Yes	Yes
Minor Consent	Yes	Yes	Yes
Missed 2nd Recertification Appt	Yes	Yes	Yes
Other CSC Task	Yes	Yes	Yes
Other Sensitive Services	Yes	Yes	Yes
Periodic Reports	Yes	Yes	Yes
Property	Yes	Yes	Yes
Pt. Requesting New/Cancel Direct Deposit	Yes	Yes	Yes
Remove Individual	Yes	Yes	Yes
Rent	Yes	Yes	Yes

Returning Workers Call	Yes	Yes	Yes
Sanctions	Yes	Yes	Yes
Time Limits	Yes	Yes	Yes
Unearned Income	Yes	Yes	Yes
Utilities	Yes	Yes	Yes
Workfare Project	Yes	Yes	Yes
eICT	Yes	Yes	Yes

7.5 Additional System Task Types

The following Task Types are considered “system” Task Types because the IVR solution expects these Task Types to be available and configured a specific way for each county for the purposes of Task creation/routing. Additionally, the “Telephonic Signature Quality” Tasks will be associated directly to a data attribute that will be used for specific CalSAWS System processing.

Task Type	Update “Available for Automation” field	Exclude from Append Processing	Exclude from Resulting Task Processing
Appointment Cancelled From Outbound IVR	No	Yes	Yes
Telephonic Signature Quality	No	Yes	Yes

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-242760

Enhance MAGI Request Delivery and Error
Logging

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Derek Goering, Maksim Volf, Prasant Goel, Geetha Ramalingam, Ritu China and Renee Gustafson

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6/29/2022	.11	2.4.2 Descriptions of Recommendation Added example screen for recommendation 2.4.2.3.b.	Carmen Kolaskey

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1 OVERVIEW

1.1 Current Design

1.1.1 JMS Settings

MAGI Request (EDR) delivery is facilitated by a Java Messaging Service (JMS) Queue named, "EDR Request." JMS Queues have settings for retry delay, retry count and forwarding. If an EDR message delivery fails, the queue will either try again if the retry count is not reached or forward the message somewhere else. In this case, JMS queue forwards the EDR message to another queue, named "EDR Error." The EDR Error queue is set up to stop processing upon initial failure.

Currently, the JMS setting for re-delivery is one (1) and the 'EDR Request' queue is set up with a 5-minute delay and one retry.

This means, the server will attempt to deliver the EDR message 3 times:

1. The Initial delivery by the EDR Request queue
2. A single re-try by the EDR Request queue (5 minutes later)
3. Another attempt by the EDR Error queue (immediately).

Note: The JMS Queue 'EDR Request' is not limited to only EDRs. The JMS Queue handles all outbound eHIT transitions which include EDR, Disposition, Cancel DER, and Information Update.

1.1.2 Transaction Timeout

The below definitions are intended to provide clarification for Transaction Timeouts.

- eHIT Transactions: Defined as eHIT transactions such as EDR, DER, Dispositions, CancelDER, etc.
- Storage Transaction: Defined as a collection of operations (such as Create/Update/Delete Records), within a storage that can be committed or rolled back.

Note: For the purposes of this design, when "transaction" is used, it means "storage transaction" unless otherwise noted.

A Queue Listener writes records into a file storage. That requires a transaction. Queues have their own transactions within the WebLogic server. All queues' transaction timeouts are set via a server-wide Java Transaction API (JTA) setting. A Queue Listener can have a separate transaction, but currently it shares the transaction with the Queue itself.

Timeouts cover the entire exchange: preparing the payload, connecting to the partner, sending, waiting for the partner to validate it, receiving the reply, and saving the reply to the database.

1.1.3 Error Logging

The logging of errors and statuses is implemented in Queues' Listeners.

The 'EDR Request' queue failures are not logged. When the EDR message is forwarded to the 'EDR Error' queue, then the EDR message failure is logged, and an EDR 'Error' status is created.

Issues:

1. If outbound eHIT transaction messages take too long to process, that usually indicates that the system is overloaded. Re-trying within a short period of time does not alleviate the load on the system. Not only does that have the potential of failing again, but it also jeopardizes other messages by contributing to the sustained overload.
With the current redelivery settings, the system attempts to deliver the same message 3 times within 5-6 minutes, while the system may be overloaded for several hours.
2. When a message takes too long to process on any step of the way, the Queue times out and schedules the message for re-delivery. Meanwhile, the interface partner may have successfully processed the message and sent the acknowledgement. However, the reply status is not saved to the Queue Listener because the Queue Listener shares the transaction with the Queue itself. This causes the transaction to timeout and be rolled back.
The subsequent iteration checks the reply status, but since the reply status was never persisted, the transaction is retried causing duplicate delivery to CalHEERS.
3. When message delivery is attempted multiple times and fails, the causes of failure may differ. By only logging the last attempt, the information about the previous failure(s) is lost.

Example:

The first attempt fails because some data is missing, the transaction goes through the iteration and fails the retry but the last attempt fails due to some network outage/timeout and the failure is logged as a timeout. As a Timeout, there is nothing for the Level 3 support to fix. Level 3 Support would always advise the user to try again. However, because of the data missing in the first failure, something else is broken which Level 3 Support could act upon differently had each failure been logged.

1.1.4 Error Acknowledgement (a.k.a ACK)

When MAGI Request (EDR) delivery is facilitated and an EDR is successfully sent to CalHEERS, CalHEERS will send Acknowledgement (ACK). The ACK either confirms successful receipt of the EDR or an error, if an error is returned the EDR cannot be processed by CalHEERS. In either instance, the System expects an Acknowledgement Status Code of either 'Success' (S) or 'Error' (E). If an Acknowledgement is received where both the Error Code and the Error Description is blank, this insufficient information and does not provide communication that CalSAWS delivery job is complete.

1.2 Requests

1. Update the JMS settings to allow a longer duration between the initial outbound eHIT transaction failure and the re-delivery outbound eHIT transaction attempt. Start including Acknowledgement in the re-delivery when both the Error Code and Error Description is blank. Additionally, update the Error Logging logic to include an error message at the initial outbound eHIT transaction failure and on the re-delivery outbound eHIT transaction failure.

Note: Including Acknowledgements in the re-delivery logic when both the Error Code and Error Description is blank is a preventative measure.

1.3 Overview of Recommendations

1. Update the JMS setting to allow a longer duration between the initial outbound eHIT transition failure and the re-delivering of the outbound eHIT transaction.
2. Update the system's Queue transaction to be separate from the Listener and increase the Listener time out setting.
3. Update the Error Logging logic to add an error message when the initial outbound eHIT transaction fails. The system will attempt to re-deliver after this initial failure. On the last attempt to re-deliver the outbound eHIT transaction, if the outbound eHIT transaction fails, insert a final error message.
4. Update the following pages to display the new Status of 'Incomplete'.
 - a. MAGI Determination List
 - b. MAGI Determination Summary
 - c. MAGI Disposition Detail
5. Add logic to start using re-delivery for Acknowledgments when both the Error Code and the Error Description is blank.

1.4 Assumptions

1. These changes will equally apply to Disposition and Outbound Information Update transactions because they are handled by the same JMS Queues and Listeners.
2. All outbound eHIT transactions are handled by the same JMS Queues and Listeners. The updates to the JMS Queue and Listener settings will apply to the following outbound eHIT transaction types:
 - a. MAGI Request (EDR)

- b. Disposition
- c. Cancel DER
- d. Information Update

2 RECOMMENDATIONS

2.1 MAGI Determination List Page

2.1.1 Overview

Update the MAGI Determination List page 'Search Results Summary' section to display a status of 'Incomplete' when an EDR has failed.

2.1.2 MAGI Determination List Page Mockup

MAGI Determination List

* - Indicates required fields

Request MAGI Determination

Begin Month: *

End Month: *

Program Identifier: *

Life Change Event:

☐ Bypass Primary Contact Matching Criteria

☐ Request Lift Options

☐ Request Negative Action Determination

☐ Restart VLP e-Verification

Request MAGI

Display MAGI Determinations

Begin Date:

End Date:

View

Search Results Summary

Results 1 - 3 of 3

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
05/2022	Request	Incomplete	03/28/2022 1:42 PM	CalSAWS	
04/2022	Request	Incomplete	03/28/2022 1:42 PM	CalSAWS	
03/2022	Request	Incomplete	03/28/2022 1:42 PM	CalSAWS	

Figure 2.1.1 – MAGI Determination List displaying a status of ‘Incomplete’

2.1.3 Description of Changes

1. Display the new Status of 'Incomplete' as hyperlink on the MAGI Determination List page 'Search Results Summary' section when EDR Error Handling logic determines the EDR status is 'Incomplete' (per recommendation 2.4.4.3.a).
 - a. The status 'Incomplete' hyperlink opens the MAGI Request Error Detail page to display the details for the 'Incomplete' Status.

The screenshot displays the 'MAGI Request Error Detail' page. It features a header with the title and a 'Close' button. Below the header, there are three columns of information: 'Message Type' (Determination Request), 'Request ID' (a hyperlink to 10036917982), and 'Message Received Date' (03/28/2022 1:42 PM). The second row shows 'Case Number' (M2010C8), 'MAGI Case Number', and 'Sent By Batch' (No). A section titled 'Error Details' contains 'Unique Error ID' (10036917982), 'Common Error ID' (Runtime Error), and 'Message Processed Date' (03/28/2022 1:42 PM). The 'Error Message' section, highlighted with a red border, states: 'Delivery attempt failed, but the request is posted for re-delivery. Check again in 1 hour'. A second 'Close' button is located at the bottom right.

MAGI Request Error Detail		
Message Type: Determination Request	Request ID: 10036917982	Message Received Date: 03/28/2022 1:42 PM
Case Number: M2010C8	MAGI Case Number:	Sent By Batch: No
Error Details		
Unique Error ID: 10036917982	Common Error ID: Runtime Error	Message Processed Date: 03/28/2022 1:42 PM
Error Message: Delivery attempt failed, but the request is posted for re-delivery. Check again in 1 hour		

Figure 2.1.2 – Example Error Message on the MAGI Request Error Detail page

2.1.4 Page Location

- Global: Eligibility
- Local: Customer Information
- Task: MAGI Eligibility > MAGI Determination List

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

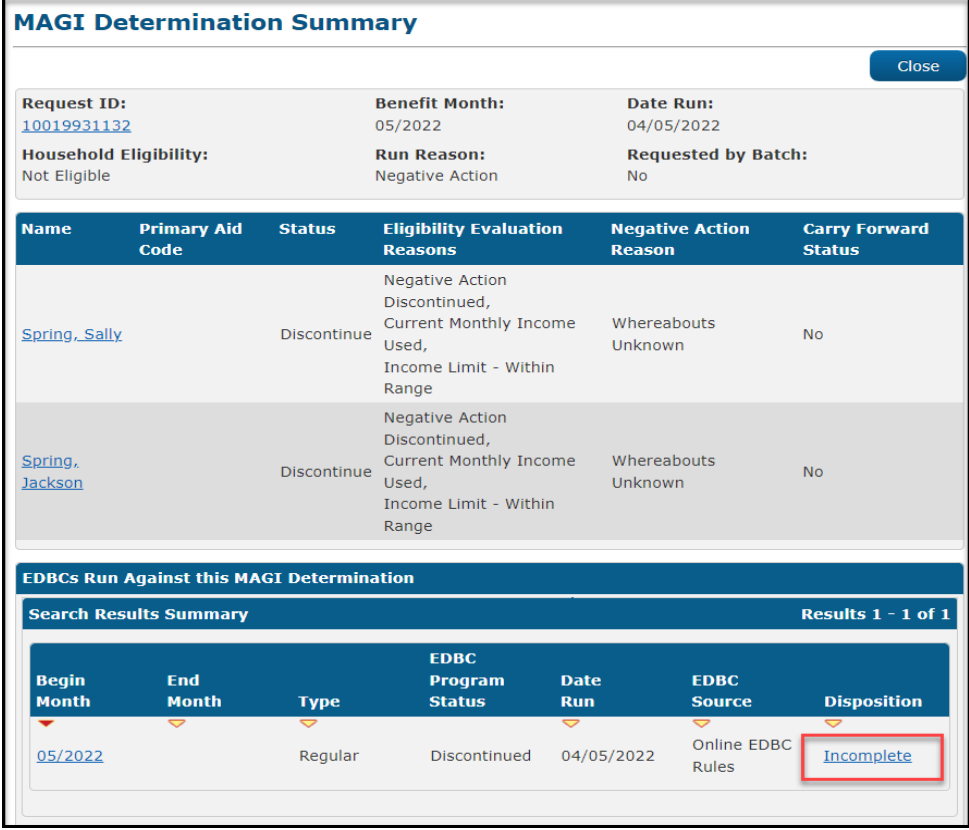
N/A

2.2 MAGI Determination Summary

2.2.1 Overview

Update the MAGI Determination Summary page, 'Search Results Summary' section to display a Disposition status of 'Incomplete' when a Disposition has failed.

2.2.2 MAGI Determination Summary Mockup



The mockup shows a 'MAGI Determination Summary' window with a 'Close' button. It contains a summary of the request and a table of results.

MAGI Determination Summary

Request ID: [10019931132](#) **Benefit Month:** 05/2022 **Date Run:** 04/05/2022

Household Eligibility: Not Eligible **Run Reason:** Negative Action **Requested by Batch:** No

Name	Primary Aid Code	Status	Eligibility Evaluation Reasons	Negative Action Reason	Carry Forward Status
Spring, Sally		Discontinue	Negative Action Discontinued, Current Monthly Income Used, Income Limit - Within Range	Whereabouts Unknown	No
Spring, Jackson		Discontinue	Negative Action Discontinued, Current Monthly Income Used, Income Limit - Within Range	Whereabouts Unknown	No

EDBCs Run Against this MAGI Determination

Search Results Summary Results 1 - 1 of 1

Begin Month	End Month	Type	EDBC Program Status	Date Run	EDBC Source	Disposition
05/2022		Regular	Discontinued	04/05/2022	Online EDBC Rules	Incomplete

Figure 2.2.1 – MAGI Determination Summary Page Displaying a Disposition Status of 'Incomplete'

2.2.3 Description of Changes

1. Display the new status reason, "Incomplete" as a hyperlink on the MAGI Determination Summary page "Search Result Summary" section when Disposition Error Handling logic determines the Disposition status is Incomplete (per Recommendation 2.4.4.3.a).
 - a. The status Incomplete hyperlink opens the MAGI Disposition Error Detail page.

MAGI Disposition Error Detail

Close

Message Type: Disposition	Disposition ID: 226148	Message Received Date: 03/28/2022 1:31 PM
Case Number: Z000012	MAGI Case Number: 5000000005	Sent By Batch: Yes

Error Details

Unique Error ID: 21297	Common Error ID: WQJVGHRP	Message Processed Date: 03/28/2022 1:31 PM
Error Message: Delivery attempt failed, but the request is posted for re-delivery. Check again in 1 hour		

Close

Figure 2.2.2 – Example Error Message on the MAGI Disposition Error Detail Page

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: MAGI Eligibility > MAGI Determination List > MAGI Determination Summary**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

No Change

2.3 MAGI Disposition Detail

2.3.1 Overview

Update the MAGI Disposition Detail page to display a Status of 'Incomplete' when a Disposition has failed.

2.3.2 MAGI Disposition Mockup

MAGI Disposition Detail

Close

MAGI Case Number:
5000000005

MAGI Case Name:
Spring

Determination ID:
226148

Case Number:
[Z000012](#)

Case Name:
Sally Spring

Type:
Disposition

Status:
[Incomplete](#)

▼ Case Members

Name	MEDS PN	Program	Program Status	Aid Code	Override Reason	Dates
Spring, Sally 49F	01	Medi-Cal	Discontinued			05/01/2022 -
Spring, Jackson 10F	02	Medi-Cal	Discontinued			05/01/2022 -

View Associations

Worker Information

Worker ID:
19LS00KH00

Status History

Status	Status Date	Initiated By
Incomplete	04/05/2022 1:30 PM	249763
Ready for Transfer	04/05/2022 1:30 PM	1002499

Figure 2.3.1 – MAGI Disposition Detail Page displaying a Status of 'Incomplete'

2.3.3 Description of Changes

1. Display the new status reason of 'Incomplete' as a hyperlink on the MAGI Disposition Detail page when Disposition Handling logic determines the Disposition is 'Incomplete' (per recommendation 2.4.4.3.a).
 - a. Clicking the hyperlink for Status 'Incomplete' opens the MAGI Disposition Error Detail page that displays the details for the 'Incomplete' Status

MAGI Disposition Error Detail

Close

Message Type: Disposition	Disposition ID: 226148	Message Received Date: 03/28/2022 1:31 PM
Case Number: Z000012	MAGI Case Number: 5000000005	Sent By Batch: Yes

Error Details

Unique Error ID: 21297	Common Error ID: WQJVGHRP	Message Processed Date: 03/28/2022 1:31 PM
Error Message: Delivery attempt failed, but the request is posted for re-delivery. Check again in 1 hour		

Close

2.3.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: IAT > MAGI Referral Detail > MAGI Disposition List > MAGI Disposition Detail**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

No change

2.4 Update JMS Settings

2.4.1 Overview

Update the JMS settings to allow a longer duration between the initial outbound eHIT transaction failure and the re-delivery outbound eHIT transaction attempt. Update the EDR Logging logic to include an error message at the initial EDR failure and on the final re-delivery EDR failure.

2.4.2 Description of Change

1. Update the JMS Queue settings as follows:

- a. Set the **EDR Request** queue's **Delivery Failure** "Redelivery Delay Override" to 1 hour (3,600,000 milliseconds); maintain the "Redelivery Limit" at 1.
- b. Set the **EDR Error** queue's **Overrides** "Time-to-Deliver Override" to 1 hour (3,600,000 milliseconds) to prevent an immediate re-try after the prior failure.

Note: Updates are required in all clustered domains for clustered environments.

2. Separate the Listener transaction from the Queue transaction and increase the Timeout for the Listener to 5 minutes (300 seconds) to allow the Queue's timeout to remain the same and to not impact the entire server by altering the JTA settings.
3. Update outbound eHIT transaction error logging as follows:
 - a. When an outbound eHIT transaction delivery fails but a re-delivery will be attempted, add a status of 'Incomplete' (CT450_IC) and 'Error Message': "Delivery attempt failed, but the request is posted for re-delivery. Check again in 1 hour" on the MAGI Request Error Detail Page (EDR failure) or MAGI Disposition Error Detail page (Disposition failure).
 - b. On the final re-delivery attempt, update the status to 'Error' on the MAGI Determination List page or MAGI Determination Summary page. Display the 'Error Message': "The system has encountered an error in processing the Outbound eHIT transaction. Final attempt failed. Please contact the Service Desk and report the appropriate details.", on the on the MAGI Request Error Detail Page (EDR failure) or MAGI Disposition Error Detail page (Disposition failure) *Example below

Technical Note: The status code of Error (CT450_ER) will remain unchanged.

Example: MAGI Determination List Page (2.4.2.3.b)

MAGI Determination List

*- Indicates required fields

Request MAGI Determination

Begin Month: *
03/2022

End Month: *
05/2022

Program Identifier: *
Medi-Cal

Life Change Event:

☐ Bypass Primary Contact Matching Criteria

☐ Request Lift Options

☐ Request Negative Action Determination

☐ Restart VLP e-Verification

Request MAGI

Display MAGI Determinations

Begin Date:

End Date:

View

Search Results Summary

Results 1 - 3 of 3

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
05/2022	Request	Error	03/28/2022 1:42 PM	CalSAWS	
04/2022	Request	Error	03/28/2022 1:42 PM	CalSAWS	
03/2022	Request	Error	03/28/2022 1:42 PM	CalSAWS	

Example: MAGI Request Error Detail Page (2.4.2.3.b)

MAGI Request Error Detail

Close

Message Type:
Determination Request

Request ID:
[10036917982](#)

Message Received Date:
03/28/2022 1:42 PM

Case Number:
[M2010C8](#)

MAGI Case Number:

Sent By Batch:
No

Error Details

Unique Error ID:
10036917982

Common Error ID:
Runtime Error

Message Processed Date:
03/28/2022 1:42 PM

Error Message:
The system has encountered an error in processing the Outbound eHIT transaction. Final attempt failed. Please contact the Service Desk and report the appropriate details.

Close

- c. Log the Error Message and the stack trace for every single attempt. Each Log entry will include ICT_ID.

4. If the Error Acknowledgement (a.k.a ACK), carries a blank Error Code and a Blank Message, do not stop re-delivery.

2.4.3 Interface Partner

CalHEERS

2.4.4 eHIT Schema Version

Version 18

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243640

Automated Action for Incoming CalHEERS
Referrals

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/9/2022	1.0	Initial Version	Mayuri Srinivas

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1 OVERVIEW

This design describes the creation of the "Clearance CalHEERS" Task and its corresponding Automated Action.

1.1 Current Design

The CalSAWS System includes functionality to create Tasks in an automated fashion via the Automated Action framework. SCR CA-214928 for DDID 34 includes recommendations to introduce Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated Tasks that can be maintained by the Counties.

CalHEERS Referrals are received by CalSAWS from Covered California. A Task is not created when a CalHEERS Referral is received.

1.2 Requests

Create a "Create Task" Automated Action when a CalHEERS Unsolicited Determination of Eligibility Response (DER) type "Referral" is received from Covered California.

1.3 Overview of Recommendations

1. Implement an Automated Action to be invoked when a CalHEERS DER of type "Referral" is received from Covered California.
2. Create a Task Type "Clearance CalHEERS" to support the new Automated Action.

1.4 Assumptions

1. The Automated Action is not invoked when "Determination Change" Reported Changes or Reapplications are received from the CalHEERS Portal. Similarly, the Automated Action is also not invoked when Referrals to Non-MAGI/CalWORKs/CalFresh are received.

2 RECOMMENDATIONS

This section will outline recommendations to add an Automated Action to function within the CalSAWS Automated Action framework.

2.1 Update CalSAWS to Include a CalHEERS Referral Automated Action

2.1.1 Overview

This section outlines the modifications required to support the new Automated Action in the CalSAWS System.

2.1.2 Automated Action Detail – Reference Example

Automated Action Detail

EditClose

Action Information		
Name: Clearance: CalHEERS	Type: Create Task	Status: * Inactive
Program(s): MC	Run Date: Daily (Mon-Sat)	Source: Batch
Scenario: A referral from Covered California has been received.		

Task Information	
Task Type: * Clearance CalHEERS	
Due Date: Default Due Date	Default Due Date: 1 day
Initial Assignment: Default Assignment	Default Assignment: Office Distribution
Guided Navigation: * Yes	
Long Description: Clearance CalHEERS	

EditClose

Figure 2.1.2.1 – Automated Action Detail

2.1.3 Description of Changes

Implement at Clearance: CalHEERS Automated Action as follows:

1. Clearance: CalHEERS

- a. Action Information
 - i. Name: Clearance: CalHEERS
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): MC
 - v. Run Date: Daily (Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A referral from Covered California has been received.
- b. Task Information
 - i. Task Type: Clearance CalHEERS
 - ii. Task Sub-Type: N/A.
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 1 day
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Office Distribution
 - vii. Guided Navigation: Yes
 - viii. Long Description: Clearance CalHEERS
- c. The only editable field on the Automated Action Detail page is the Status field.
- d. The Guided Navigation functionality for these Tasks will navigate the User to the MAGI Referral Detail page in the context of the CalHEERS Referral when the Task Type hyperlink is clicked.
- e. When these Tasks display on the Worklist page, the Task Type will have the Determination ID attribute value added to the end. The "Reference Number" attribute on the Task Pop-Up: Task Detail page will display the Determination ID attribute value.

Create the following Task Type for the 57 Counties (excluding LA County) on Task Type Detail Page. This Task Type will be read-only.

Note: This Task Type already exists for LA County.

1. Clearance CalHEERS
 - a. Task Type Information
 - i. Name: Clearance CalHEERS
 - ii. Category: CalHEERS
 - iii. Priority: High
 - iv. Available Online: No
 - v. Available for Automation: No
 - vi. Instructions: BLANK
 - vii. Expire Tasks: Yes
 - viii. Expiration Period: 30 day(s)
 - ix. Expiration Type: After Task Is Created

- x. Newly Assigned Indicator: Tasks display indicator for 5 day(s)

2.1.4 Page Validations

N/A.

2.1.5 Page Location

Automated Action Detail Page:

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin
Click on the hyperlink of the "Clearance CalHEERS" Automated Action result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.
The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

Task Type Detail Page:

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Types >
Click on a hyperlink of the desired result displayed in the Task Type Search page or the "Add Task Type" button to navigate to the Task Type Detail page.
The Task Navigation will display if the user profile contains the "TaskTypeListView" security right.

2.1.6 Security Updates

N/A.

2.1.7 Page Mapping

N/A.

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2. Clearance CalHEERS

2.2 Clearance CalHEERS Automated Action Batch Job

2.2.1 Overview

This section describes the behavior of a new batch process that will invoke the "Clearance CalHEERS" Automated Action.

2.2.2 Description of Change

1. Implement a new batch process to run daily and invoke the "Clearance CalHEERS" Automated Action when a DER of type "Referral" is received from Covered California where the latest status is "Received" and the Initiated Date is between the last successful run date of the batch process and the batch date. If a Task is created, the Reference Number attribute will be set to the CalHEERS Referral Determination ID. The default Office Distribution assignment logic will route Tasks to a Task Bank within the county configured to receive "CalHEERS" Tasks.

2.2.3 Execution Frequency

The batch job will be scheduled to run daily, excluding Sundays and Holidays.

2.2.4 Key Scheduling Dependencies

None

2.2.5 Counties Impacted

All CalSAWS Counties.

2.2.6 Category

Non-Core.

2.2.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.2.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

3 SUPPORTING DOCUMENTS

N/A.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.4	The LRS shall generate alerts, reminders, and controls that may not directly affect eligibility.	This modification creates a Task Type and Automated Action to be properly set up to support CalHEERS Referrals.

5 MIGRATION IMPACTS

N/A.

6 OUTREACH

N/A.

7 APPENDIX

N/A.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245231

Update imaging API for SAR 7 Customer Reporting
Logic when barcode is not available

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Chris Vasquez, Marqui Simmons
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR

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1 OVERVIEW

1.1 Current Design

The markDocumentReceived API can currently process requests if there is a provided imaging barcode. In scenarios where SAR 7 documents are uploaded via BenefitsCal and no barcode is available, the API will return an error message and not mark the document received in CalSAWS.

Document Routing Rules are not processed for No Change SAR 7 documents.

1.2 Requests

Update the imaging webservice and imaging solution to support updating customer reporting records of SAR 7 documents received via the Portal without an imaging barcode.

Introduce a configurable Task setting allowing Counties to control if Document Routing Rules are processed for the No Change SAR 7 document or not.

1.3 Overview of Recommendations

1. Update the markDocumentReceived API to process requests without an imaging barcode.
2. Update the Imaging "Generate Task and Mark Doc" queue logic to account for SAR 7 documents without a barcode.
3. Add a configurable Task Setting to control if Document Routing Rules are processed for the No Change SAR 7 document or not.

1.4 Assumptions

1. Imaging Logic will be configured to only apply this non-barcoded SAR 7 logic to BenefitsCal **Uploaded** documents (Where the "Capture Information" metadata is "Portal"). Worker Uploaded documents will continue to be marked received under existing logic dependent on a CalSAWS barcode
2. Documents from BenefitsCal with a No-Change flag set to true will not have additional validation performed within the imaging system. All verification of the version and validity of the **SAR 7** is performed within the BenefitsCal application prior to upload to imaging
3. If a participant submits a document incorrectly as a SAR 7 this would result in a false positive update of the reporting to "Received"
4. CSPM-50165 documents the scenarios where a No Change flag would be passed to the Imaging System
5. **Task Generation and updating a document's status will continue to occur from within the Imaging Solution when documents reach the "Generate Task and Mark Doc" system processing queue as previously designed in CA-214032 and CA-214058.**

2 RECOMMENDATIONS

2.1 Batch/Interfaces: markDocumentReceived API

2.1.1 Overview

Update the markDocumentReceived API to be able to process requests that do not contain an imaging barcode. These requests will be for CalSAWS SAR7 documents that do not contain a barcode number.

2.1.2 Description of Change

1. Update the markDocumentReceived API to add the following request fields:
 - a. caseNumber
 - b. countyCode
 - c. formName
2. Using the three new fields **in addition to the existing 2 fields**, in scenarios where the barcode is missing, add logic to the markDocumentReceived API to determine the correct customer report to update to 'Received' status when the "noChange" flag is set to "false" or 'Reviewed - Ready to Run EDBC' status when the "noChange" flag is set to "true".
 - a. Customer report must be of type 'SAR7'.
 - b. Customer report status must be in 'Sent' or 'Incomplete' status.
 - c. Customer reporting record 'due month' must be no older than the prior month at time of lookup
3. Update the validation logic for the markDocumentReceived API to return a 422 HTTP error code when the following occurs:
 - a. No SAR 7 customer report is found using the three new **and 2 pre-existing fields** that qualify (section 2.1.2 sub section 2).
 - b. Multiple SAR 7 customer reports are found using the three new fields that qualify (section 2.1.2 sub section 2).
4. Remove validation of 'barcode' request field. Under new logic, this field will be optional for the request to process.

2.1.3 Partner Integration Testing

Yes – Hyland, BenefitsCal

Design note: The No Change SAR 7 Batch Job should be tested as part of this change.

2.1.4 Execution Frequency

Realtime

2.1.5 Key Scheduling Dependencies

N/A

2.1.6 Counties Impacted

All counties

2.1.7 Category

Webservice

2.1.8 Data Volume/Performance

N/A

2.1.9 Interface Partner

Hyland

2.1.10 Failure Procedure/Operational Instructions

N/A

2.2 Hyland: Imaging API Handling

2.2.1 Overview

Update the imaging "Generate Task and Mark Doc" queue to apply specialized logic for SAR 7 documents without a barcode when received from BenefitsCal. Add additional error handling when error code is returned.

2.2.2 No Barcode SAR 7 Logic Branch

Apply the following logic to documents with a Form Name of "Eligibility Status Report Packet" (Non-Los Angeles Counties), and "Eligibility Status Report" (Los Angeles County).

1. If barcode is available – apply pre-existing logic
2. If barcode is not available and the Capture Information is "Portal"
 - a. Pass the below values to the imaging "markReceived" webservice
 1. Case Number
 2. County Code
 3. Form Name
 4. No Change Flag

5. Received Date

2.2.3 Error Handling

In the event of an error code (See Section 2.1.2 sub section 3, and CA-214032 for examples of currently existing error codes) being returned on this call, no task will be generated, and the document will be routed to the county Exception or Exception Confidential Queue (Based on the "Confidential" metadata flag value) with the following message added to the beginning of the notes field:

1. If an error code is encountered when processing a SAR 7 document with a No Change Indicator of "false", without a barcode
 - a. "Unable to mark document without barcode "Received" using case number" Note is applied
2. If an error code is encountered when processing a SAR 7 document with a No Change Indicator of "true", without a barcode
 - a. "Unable to mark document without barcode "Reviewed - Ready to Run EDBC" using case number" Note is applied

2.2.4 Partner Integration Testing

Yes – BenefitsCal Partner integration testing will be performed, testing will be performed on masked data

Design note: The No Change SAR 7 Batch Job should be tested as part of this change.

2.2.5 Interface Partner

BenefitsCal, CalSAWS

2.2.6 Counties Impacted

All CalSAWS counties would be impacted by this change. Specifically, this change would have an impact on any received SAR 7 from the BenefitsCal Portal. (Where document Capture Information = "Portal")

2.3 Task Settings Page

2.3.1 Overview

The Task Settings page includes configuration of specific Task Management settings that can be turned on or off for the county. This section will describe updates to the Task Settings page to include a setting

to control if Document Routing Rules are processed for No Change SAR 7 Documents.

2.3.2 Task Settings Page Mockup

Task Settings

*- Indicates required fields

Save

Cancel

Description	On/Off
Task Assignment Suggest Worker	<input type="radio"/> On <input checked="" type="radio"/> Off
Bundle Case Tasks	<input type="radio"/> On <input checked="" type="radio"/> Off
Get Next Limit	<input type="radio"/> On <input checked="" type="radio"/> Off
Process Document Routing Rules for No Change SAR 7	<input type="radio"/> On <input checked="" type="radio"/> Off

Save

Cancel

Figure 2.3.2-1 – Task Settings Page: Edit Mode

2.3.3 Description of Change

Update the Task Settings Page to include a "Process Document Routing Rules for No Change SAR 7" setting, which will control if Document Routing Rules are processed for No Change SAR 7 documents. This setting will be defaulted to "Off" for every County. Refer to Mockup Figure 2.3.2-1 for the layout of the new Task setting.

Technical Note: No Change SAR 7 for the purposes of Document Routing Rule processing is determined by the "noChangeSar7" attribute as received from the Imaging System.

2.3.4 Document Routing Rule Processing Update

1. Update Document Routing Rule processing to evaluate the new Task Setting described above. This setting will be defaulted to "Off" for every County; a county may enable this setting if a county requires Document Routing Rule processing to proceed with Task creation for No Change SAR 7 documents. If the "Process Document Routing Rules for No Change SAR 7" Setting is "On" for the county, continue processing Document Routing Rules for Task creation. If the Setting is "Off", Document Routing Rules will not be processed for No Change SAR 7s.

2.3.5 Page Validations

N/A.

2.3.6 Page Location

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

2.3.7 Security Updates

N/A - There are no modifications to existing security.



2.3.8 Page Mapping

Update Page Mapping for the Task Settings Page.

2.3.9 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
CA-214032	Interfaces	Original markDocumentReceived API Design Documentation	 CA-214032 Mark Document Received
CSPM-50165	BenefitsCal	BenefitsCal No Change Flag Design Documentation	 DesignConsiderations-CSPM-50165-v2.d

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245431

SB 1065 - Remove Valid Financial Hardship
requirement for Permanent Homeless Assistance

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Michael Wu, Naga Chinduluru, Shilpa Suddavanda, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/11/2022	1.0	Initial	Kusnadi.E
6/24/2022	1.1	Design Document updated with edits/inputs made by R6 and Tulare	Kusnadi.E

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1 OVERVIEW

The purpose of Senate Bill 1065 (SB 1065) is to expand and streamline the eligibility and administration of the CalWORKs Homeless Assistance (HA) Program through a series of policy changes impacting access to HA benefits. As part of the SB 1065, participants are no longer required to demonstrate to the county that the pay or quit is a result of a financial crisis. As part of CA-228806 the HP EDBC conditions were updated to no longer use the Valid Financial Hardship indicator to determine eligibility starting on 9/1/2022. This SCR will remove the Valid Financial Hardship field from the update the Homeless Assistance Detail – Permanent page since it is no longer needed. The requirement to provide verification of a financial hardship was only needed when determining eligibility for PHA to pay up to two months past rent, should this document state that? It is not a requirement for regular PH/THA.

1.1 Current Design

1. If a family has received a notice to pay rent or quit, the family is required to demonstrate that the pending eviction resulted from a verified financial hardship due to extraordinary circumstances beyond the family's control if the family is requesting PHA by paying up to two months back rent to allow the family to remain in the unit. HP EDBC was updated as part of CA-228806 to no longer fail the family if their hardship is not verified. However, the Valid Financial Hardship field still displays on the Homeless Assistance Detail – Permanent page.

1.2 Requests

1.3 Requests

1. Update the 'Valid Financial Hardship Y/N' field in Homeless Assistance Detail – Permanent page to no longer display.

1.4 Overview of Recommendations

1. Remove the 'Valid Financial hardship' field from the Homeless Assistance Detail – Permanent page.

1.5 Assumptions

1. All existing functionalities will remain unchanged unless updated in this SCR.
2. As part of CA-228806, EDBC logic was updated to no longer consider the Valid Financial Hardship requirement when determining eligibility for up to two months of rent arrearages under the Permanent Homeless Assistance benefit.

2 RECOMMENDATIONS

2.1 Homeless Assistance Detail – Permanent

2.1.1 Overview

The Homeless Assistance Detail page allows users to add, edit, or view Homeless Assistance Detail – Permanent page information associated to the case. As part of SB 1065, participants are no longer required to demonstrate to the county that the pay rent or quit notice is as a result of a verified financial hardship. This SCR will update the Valid Financial Hardship field to no longer display on the page.

2.1.2 Homeless Assistance Detail - Permanent Mockup

The mockup shows a web form titled "Homeless Assistance Detail - Permanent". At the top right are "Save and Return" and "Cancel" buttons. A legend indicates that an asterisk (*) denotes required fields. The form contains the following fields:

- Type:** Permanent (text label)
- Begin Date:** * (text input with a calendar icon)
- End Date:** * (text input with a calendar icon)
- Reason:** * (dropdown menu with "- Select -" as the current selection)
- Exception:** (dropdown menu)
- Prior Misuse of Funds:** * (radio button next to "No")
- CW 42 Received Date:** * (text input with a calendar icon)
- Rental Agreement Received Date:** (text input with a calendar icon)

At the bottom right are another "Save and Return" and "Cancel" buttons. A status bar at the very bottom states: "This Type_1 page took 0.56 seconds to load."

Figure 2.1.1 – Homeless Assistance Detail – Permanent (Create mode)

Homeless Assistance Detail - Permanent

*- Indicates required fields

Edit

Close

Type: Permanent

Begin Date: * 05/01/2022

End Date: * 05/20/2022

Reason: *

Lacks regular, fixed night time residence

Exception:

Prior Misuse of Funds: No

Valid Financial Hardship: No

CW 42 Received Date: * 05/01/2022

Rental Agreement Received Date:

Last Updated On 05/10/2022 11:36:12 AM By: [1034369](#)

Edit

Close

This Type 1 page took 0.31 seconds to load.

Figure 2.1.2 – Homeless Assistance Detail – Permanent (View mode for historical record)

Homeless Assistance Detail - Permanent

*- Indicates required fields

Save and Return

Cancel

Type: Permanent

Begin Date: * 05/01/2022

End Date: * 05/20/2022

Reason: *

Lacks regular, fixed night time residence

Exception:

Prior Misuse of Funds: No

Valid Financial Hardship: No

CW 42 Received Date: * 05/01/2022

Rental Agreement Received Date:

Last Updated On 05/10/2022 11:36:12 AM By: [1034369](#)

Save and Return

Cancel

This Type 1 page took 0.68 seconds to load.

Figure 2.1.3 – Homeless Assistance Detail – Permanent (Edit mode for historical record)

2.1.3 Description of Changes

1. Remove the 'Valid Financial Hardship' field from the Homeless Assistance Detail – Permanent page.
2. For historical records, the 'Valid Financial Hardship' field will continue to display when in "View" and "Edit" mode.
 - a. Update the field to no longer be required; and
 - b. To not be editable when in "Edit" mode.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Homeless Assistance**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping accordingly for the Valid Financial Hardship field.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Automated Regression Test

2.2.1 Overview

Update all existing automated regression test scripts that select a 'Valid Financial Hardship' value on the Homeless Assistance Detail – Permanent page, to no longer select this value.

2.2.2 Description of Changes

Remove the 'Valid Financial Hardship' selection step from all existing regression scripts.

Note: An estimated 17 scripts would be impacted at the time of this design.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.6	CalSAWS shall manage all of the critical start, end, and effective dates for all EDBC processes, including adverse action periods, in accordance with all applicable federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	The Homeless Assistance Detail – Permanent page will be updated to remove the “Valid Financial Hardship” field since it’s no longer required to determine eligibility for Permanent HA arrearages payments. For historical records, the “Valid Financial Hardship” field will continue to display when the user is in “View” mode but will not be editable in “Edit” mode.



California Statewide Automated Welfare System

Design Document

CA-245794

Auditor jQuery Upgrade

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Alan Yaung

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/10/2022	1.0	Initial Draft	Alan Yaung
5/19/2022	1.1	Review Comments	Sumeet Patil

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1 OVERVIEW

This SCR describes the design of Auditor jQuery Upgrade to the latest version 3.6.0. jQuery is a JavaScript library designed to simplify HTML DOM tree traversal and manipulation, as well as event handling, CSS animation. While jQuery is one of popular JavaScript libraries, its older versions of core library are vulnerable to cross-site scripting. The SCR introduces the design of jQuery upgrade of its core library Auditor to minimize the attacker's exploitation of security vulnerabilities

1.1 Current Design

Auditor currently utilizes jQuery library version 1.9.1.

1.2 Requests

According to National Vulnerability Database (NVD) maintained by National Institute of Standards and Technology (NIST), it is reported that jQuery before version 3.5.0 is vulnerable to cross-site scripting. For security enhancement, jQuery upgrade to the latest version 3.6.0 is requested.

1.3 Overview of Recommendations

This SCR introduces the upgrade of jQuery library to its latest version 3.6.0 for security enhancement. This upgrade should not change the functional behavior of the current application. The upgrade will minimize the security vulnerabilities such as cross-site scripting (XSS).

1.4 Assumptions

This upgrade should not change the functional behavior of Auditor.

2 RECOMMENDATIONS

This SCR introduces the upgrade of jQuery library to its latest version 3.6.0 for security enhancement.

2.1 Description of Changes

1. The jQuery library version 1.9.1 used in Auditor will be replaced with the latest jQuery library version 3.6.0.
2. Auditor will be updated to build and deploy the static content with new jQuery library.
3. The impact to Auditor due to jQuery API changes will be evaluated and addressed accordingly.

2.2 Security Updates

This is an enhancement of security for jQuery library.

3 SUPPORTING DOCUMENTS

N/A

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

N/A

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245795

Lobby Service jQuery Upgrade

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Alan Yaung

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/10/2022	1.0	Initial Draft	Alan Yaung
5/19/2022	1.1	Review Comments	Sumeet Patil

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1 OVERVIEW

This SCR describes the design of Lobby Service jQuery upgrade to the latest version 3.6.0. jQuery is a JavaScript library designed to simplify HTML DOM tree traversal and manipulation, as well as event handling, CSS animation. While jQuery is one of popular JavaScript libraries, its older versions of core library are vulnerable to cross-site scripting. The SCR introduces the design of jQuery upgrade of its core library for Lobby Service to minimize the attacker's exploitation of security vulnerabilities

1.1 Current Design

Lobby Service currently utilizes jQuery library version 1.9.1.

1.2 Requests

According to National Vulnerability Database (NVD) maintained by National Institute of Standards and Technology (NIST), it is reported that jQuery before version 3.5.0 is vulnerable to cross-site scripting. For security enhancement, jQuery upgrade to the latest version 3.6.0 is requested.

1.3 Overview of Recommendations

This SCR introduces the upgrade of jQuery library to its latest version 3.6.0 for security enhancement. This upgrade should not change the functional behavior of the current application. The upgrade will minimize the security vulnerabilities such as cross-site scripting (XSS).

1.4 Assumptions

This upgrade should not change the functional behavior of Lobby Service.

2 RECOMMENDATIONS

This SCR introduces the upgrade of jQuery library to its latest version 3.6.0 for security enhancement.

2.1 Description of Changes

1. The jQuery library version 1.9.1 used in Lobby Service will be replaced with the latest jQuery library version 3.6.0.
2. Lobby Service will be updated to build and deploy the static content with new jQuery library.
3. The impact to Lobby Service due to jQuery API changes will be evaluated and addressed accordingly.

2.2 Security Updates

This is an enhancement of security for jQuery library.

3 SUPPORTING DOCUMENTS

N/A

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

N/A

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A



California Statewide Automated Welfare System

Design Document

CA-245796

Performance Dashboard jQuery Upgrade

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Alan Yaung

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/10/2022	1.0	Initial Draft	Alan Yaung
5/19/2022	1.1	Review Comments	Sumeet Patil

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1 OVERVIEW

This SCR describes the design of Performance Dashboard jQuery upgrade to the latest version 3.6.0. jQuery is a JavaScript library designed to simplify HTML DOM tree traversal and manipulation, as well as event handling, CSS animation. While jQuery is one of popular JavaScript libraries, its older versions of core library are vulnerable to cross-site scripting. The SCR introduces the design of jQuery upgrade of its core library for LRS Dashboard to minimize the attacker's exploitation of security vulnerabilities

1.1 Current Design

Performance Dashboard currently utilizes jQuery library version 1.9.1.

1.2 Requests

According to National Vulnerability Database (NVD) maintained by National Institute of Standards and Technology (NIST), it is reported that jQuery before version 3.5.0 is vulnerable to cross-site scripting. For security enhancement, jQuery upgrade to the latest version 3.6.0 is requested.

1.3 Overview of Recommendations

This SCR introduces the upgrade of jQuery library to its latest version 3.6.0 for security enhancement. This upgrade should not change the functional behavior of the current application. The upgrade will minimize the security vulnerabilities such as cross-site scripting (XSS).

1.4 Assumptions

This upgrade should not change the functional behavior of Performance Dashboard.

2 RECOMMENDATIONS

This SCR introduces the upgrade of jQuery library to its latest version 3.6.0 for security enhancement.

2.1 Description of Changes

1. The jQuery library version 1.9.1 used in Performance Dashboard will be replaced with the latest jQuery library version 3.6.0.
2. Performance Dashboard will be updated to build and deploy the static content with new jQuery library.
3. The impact to Performance Dashboard due to jQuery API changes will be evaluated and addressed accordingly.

2.2 Security Updates

This is an enhancement of security for jQuery library.

3 SUPPORTING DOCUMENTS

N/A

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

N/A

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A



California Statewide Automated Welfare System

Design Document

CA-246472 LMRS endpoint changes needed for
Los Angeles

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti
	Reviewed By	Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/27/2022	1.0	Initial Draft	Howard Suksanti
7/12/2022	1.1	Updated table 1 in section 2.3	Howard Suksanti

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1 OVERVIEW

1.1 Current Design

The existing (Lobby Management Reservation System (LMRS) application is coming to end of life. As such, there's a new LMRS application that will be used by the San Fernando Valley (SFV) office in Los Angeles County. This means that the CalSAWS Lobby Springboot will need to be updated to call the new LMRS endpoint so that check-in information can continue to be provided for the SFV office.

1.2 Requests

Update the Lobby Springboot to call the new LMRS endpoint so that Check-In information can be send back to the LMRS application for the San Fernando Valley (SFV) office in Los Angeles County.

1.3 Overview of Recommendations

Tech Arch:

- Update the Lobby Springboot to use the new LMRS REST end point (it will change from SOAP to REST).

Tech Ops:

- Create new properties and connectivity for the new LMRS REST endpoint.

Batch&Interface:

- Update existing API that sends check-in information to LMRS (checkInLobbyTraffic, checkInReceptionLog) to use the newly created REST client.
- Update existing error to handle new errors responds that can be sent back from the new LMRS REST Service.

Online:

- Update Reception Log to remove a list of parameters that is no longer required by LMRS.

1.4 Assumptions

1. Any changes needed to be done to the SFV (San Fernando Valley) Lobby or Self Service application will be completed by the Los Angeles ISD (Internal Service Department) team.

2 RECOMMENDATIONS

2.1 Reception Log

2.1.1 Overview

Currently when a participant is checked-in by a worker directly through the Reception Log Detail page for the East Valley office (SFV), check-in information is communicated back to the LMRS application. This SCR will remove a total of 10 parameters that is no longer required by the new LMRS application.

2.1.2 Reception Log Mockup

N/A

2.1.3 Description of Changes

1. Update Reception Log to no longer have the following parameters when it invokes the LMRS webservice.
 - a. personIDNum
 - b. caseRelationship
 - c. visitorCellPhone
 - d. transportationType
 - e. hasIsAttorney
 - f. attorneyLastName
 - g. attorneyFirstName
 - h. visitationID
 - i. isAttorney
 - j. withAttorney
 - k. citationNumber

Note: This is a technical change only, and it only applies to the 011 East Valley office.

2.1.4 Page Location

- **Homepage Quick Links**

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 Create a web service client for requesting an OAuth token from LMRS (Tech Arch)

2.2.1 Overview

Create a web service client module that will be used for getting token from LMRS.

2.2.2 Description of Changes

Create a web service client module that will be used for getting token from LMRS

2.3 Create a REST web service module to pass check-in information to LMRS (Batch & Interface)

2.3.1 Overview

When there is a Lobby/Reception log check in for SFV office, CalSAWS Lobby service pass the check-in information to LMRS.

Currently the web service is a SOAP web service. This SCR will create a REST web service client module that will be used for passing check-in information to LMRS.

The following web service will be updated to call new LMRS Rest service.

1. checkInReceptionLog
2. checkInLobbyTraffic

2.3.2 Description of Changes

Create a web service client module that will be used for passing check-in information to LMRS.

All parameters in the new REST service are like the SOAP version of the web service.

Table 1 LMRS REST SERVICE PARAMETERS

Parameter Name	Description	Type	Required
checkInID	Check in ID	String	Y

Parameter Name	Description	Type	Required
departmentID	Pass in "SS".	String	Y
caseNumber	Case Number if applicable. Regular expression: "A-Za-z0-9-"	String	Y
caseLastName	Case Last Name	String	Y
caseFirstName	Case First Name	String	Y
caseMiddleName	Case Middle Name. Empty string if none	String	N
caseDateOfBirth	Date of Birth. MM/DD/YYYY. Empty string if none.	String	N
caseSSN	SSN number. Empty string if none.	String	N
staffLastName	Staff Last Name. Empty string if none	String	N
staffFirstName	Staff First Name. Empty string if none	String	N
visitorLastName	Visitor Last Name. Empty string if none.	String	N
visitorFirstName	Visitor First Name. Empty string if none.	String	N
visitorMiddleName	Visitor Middle Name. Empty string if none.	String	N
reasonForVisit	Same values as existing	String	Y
preferredLanguage	Same values as existing	String	Y
checkInDateTime	Required. MM/DD/YYYY HH:MM	String	Y
appointmentDateTime	MM/DD/YYYY HH:MM. Empty string if none.	String	N
greeterEmpNum	Greeter Employee number. Empty string if none.	String	N
miscellaneous	Miscellaneous. Empty string if none.	String	N
numberOfVisitors	Numeric. Send "1" or number of visitors if known	String	

Table 2 LMRS REST SERVICE RESPONSE PARAMETERS

NAME	Description	Required
returnCode	0-Success, 1-Failed	Y
returnMessage	Return message.	N

The following parameters will no longer be sent to LMRS as part of the new REST service.

1. personIDNum
2. caseRelationship
3. visitorCellPhone
4. transportationType
5. hasAttorney
6. attorneyLastName
7. attorneyFirstName
8. visitationID
9. isAttorney
10. withAttorney
11. citationNumber

2.3.3 Partner Integration Testing

Yes – county partners integrated testing.

2.3.4 Execution Frequency

Realtime.

2.3.5 Key Scheduling Dependencies

N/A.

2.3.6 Counties Impacted

LA County – SFV office

2.3.7 Category

N/A.

2.1.8 Data Volume/Performance

N/A.

2.1.9 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
3.5.2.2	The LRS shall include automated, integrated interfaces with COUNTY and external agencies known interfaces, as specified in Section 4 (Summary of Required LRS Interfaces) of this Attachment B.	Creating a new REST web service client module for passing check-in information to LMRS.