CalSAWS

California Statewide Automated Welfare System

Design Document

CA-47608

MEDS: Update MEDS alert description

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Michael Barillas
	Reviewed By	Sunitha Sampathkumar; Edgars Reinholds; Tina Tran;

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/16/2022	1.0	Initial Draft	Michael Barillas

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1 OVERVIEW

Some MEDS Alerts displayed on the MEDS Alert Detail page have incomplete, incorrect, missing, or mismatched MEDS alert message details. To assist staff working through alerts in a timely manner, this SCR will update all CalSAWS MEDS Alert messages to match the Alert messages information in the MEDS system.

1.1 Current Design

CalSAWS receives daily MEDS alerts, monthly Renewal alerts and quarterly Recon alert files from the State. The system processes these files and to be viewed from the MEDS Alert Detail page as part of the updating process.

These files are loaded into CalSAWS to ensure that staff can work through alerts in a timely manner; however, some MEDS Alert message information on the page is incomplete, incorrect, missing, or mismatched MEDS alert message details.

1.2 Requests

Update all MEDS Alert Message records so that the MEDS alerts displayed on the MEDS Alert Detail page match the MEDS Alert message information in the MEDS system.

1.3 Overview of Recommendations

1. Update all MEDS Alert Messages records in accordance with the supporting document.

1.4 Assumptions

1. N/A

2   RECOMMENDATIONS

2.1   Update MEDS Alert Messages

2.1.1   Overview

CalSAWS receives daily MEDS alerts, monthly Renewal alerts and quarterly Recon alert files from the State. The system processes those files and can be viewed from the MEDS Alert Detail page as part of the updating process.

The fields that will be impacted by this SCR are highlighted below:

MEDS Alert Detail

			Close
Case Number:	Alert Date:	Transaction Date:	Alert Source:
County ID:	Case Name:	District:	Worker ID:
Person Name:	SSN:	DOB:	CIN:
Alert ID:	Alert Type:	Report Type:	Transaction Code:
Alert Action Type:	CalHEERS Case Number:		
Alert Description:			

Data Source	Data Element	Dictionary Number	Contents

Explanation

Action

Close

Note: MEDS Internal Alert Id is not displayed on the page.

2.1.2   Description of Change

1. Create a DCR to update the CalSAWS MEDS Alert Message fields:
   a. 'Alert ID', 'Alert Action Type', 'Alert Type', 'Alert Description', 'Explanation', 'Action' fields.
      i. The fields will be updated to reflect the Consolidated List in the supporting document 'MEDS Alerts_Final_Lists'.
      ii. 'Alert Action Type' and 'Alert Type' will always share the same Alert Message Type
   b. The DCR will identify the existing 'INTERNAL_NUM_IDENTIF' and 'ALERT_NUM_IDENTIF' combination update the message record to match the supporting document or remove the record from CalSAWS.

i. If the DCR does not identify an 'INTERNAL_NUM_IDENTIF' and 'ALERT_NUM_IDENTIF' combination, a new record will be created.

2.1.3 Estimated Number of Records Impacted/Performance

800+ MEDS Alert Message Records impacted

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	MEDS Alert Detail Page	Supporting document contains all the updated MEDS Alerts.	MEDS Alerts_Final_Lists.xls

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.9	CalSAWS shall display summary and detailed interface CalSAWS Data that has been received from external systems, as specified by COUNTY.	This SCR will be updating CalSAWs MEDS Alert message information to match the information displayed in the MEDS system.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-51956

Former Foster Youth (FFY) Threshold NOAs.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lianel Richwin
	Reviewed By	Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/05/2022	1.0	Initial Draft	Lianel Richwin

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1   OVERVIEW

This effort will add the MC 239 FFY-3 form and MC 239 FFY-1, MC 239 FFY-4 NOAs in all available system supported threshold languages.

1.1   Current Design

Currently MC 239 FFY-3 form and MC 239 FFY-1 NOA are available only in English and Spanish languages and MC 239 FFY-4 NOA is available only in English Language.

1.2   Requests

1. Add Automatic Renewal of Eligibility for Former Foster Youth Medi-Cal Program (MC 239 FFY-3 Rev. 12/15) form in available system supported threshold languages.
   Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Tagalog, and Vietnamese.
2. Add Approval of Eligibility for FFY (MC 239 FFY-1 Rev. 12/15) NOA in available system supported threshold languages.
   Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Tagalog, and Vietnamese.
3. Add Notice of Continuing Medi-Cal Coverage for the Former Foster Youth Medi-Cal Program (MC 239 FFY-4 Rev.12/15) NOA in available system supported threshold languages.
   Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Spanish, Tagalog, and Vietnamese.

1.3   Overview of Recommendations

1. Add MC 239 FFY-3 form in following available system supported threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Tagalog, and Vietnamese.
2. Add MC 239 FFY-1 NOA in following available system supported threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Tagalog, and Vietnamese.
3. Add MC 239 FFY-4 NOA in following available system supported threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Spanish, Tagalog, and Vietnamese.

1.4   Assumptions

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

2 RECOMMENDATIONS

2.1 Add available system supported threshold languages to MC 239 FFY-3

2.1.1 Overview

This section will cover the requirements for adding the MC 239 FFY-3 forms in available system supported threshold languages.

State Form: MC 239 FFY-3 (Rev. 12/15)

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish.

Template Description: This form is sent to a customer to inform them that their Medi-Cal has been automatically renewed and will be good until their 26th birthday.

Imaging Form Name: Automatic Renewal MC 239 FFY-3

Imaging Document Type: Customer Reporting

2.1.2 Form Verbiage

<u>Create MC 239 FFY-3 XDP's for available system supported threshold languages</u>

Threshold Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Tagalog, and Vietnamese.
Form Mockups/Examples: See Supporting Documents #1
Form Header: CalSAWS Standard Header #1
Include NA BACK 9: Yes

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

The CalSAWS will generate the MC 239 FFY-3 Form from Template Repository.

Form Print/Mailing Options

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

Print Options:

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

Mailing Options:

Mailing Options	Option for MC 239 FFY-3 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for MC 239 FFY-3 Form
Post to Self-Service Portal	N

2.2 Add available system supported threshold languages to MC 239 FFY-1

2.2.1 Overview

This section will cover the requirements for adding the MC 239 FFY-1 NOA in available system supported threshold languages.

Reason Fragment Name and ID:
MC_AP_FORMER_FOSTER_YOUTH_M147_EN (ID: 6326)
State Form/NOA: MC 239 FFY-1 (10/2015)
Current NOA Template: MC_NOA_TEMPLATE
Current Program(s): Medi-Cal
Current Action Type: Change
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.2.2 Form/NOA Verbiage

Add NOA fragments in the following languages:

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

NOA Mockups/Examples: Supporting Documents #2

2.2.3 Form/NOA Variable Population

No updates in this section.

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.3 Add available system supported threshold languages to MC 239 FFY-4

2.3.1 Overview

This section will cover the requirements for adding the MC 239 FFY-4 NOA in available system supported threshold languages.

Reason Fragment Name and ID: MC_CH_FORMER_FOSTER_YOUTH_M147_EN (ID: 6327)
State Form/NOA: MC 239 FFY-4 (10/2015)
Current NOA Template: MC_NOA_TEMPLATE
Current Program(s): Medi-Cal
Current Action Type: Change
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages: English

2.3.2 Form/NOA Verbiage

Add NOA fragments in the following languages:

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

NOA Mockups/Examples: Supporting Documents #3

2.3.3 Form/NOA Variable Population

No updates in this section.

2.3.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	MC 239 FFY-3 Threshold Languages	MC 239 FFY-3_NOA FY Auto MC_ARA_1215.doc MC 239 FFY-3_NOA FY Auto MC_ARM_1215.doc MC 239 FFY-3_NOA FY Auto MC_CAM_1215.docx MC 239 FFY-3_NOA FY Auto MC_CHI_1215.docx MC 239 FFY-3_NOA FY Auto MC_FAR_1215.docx MC 239 FFY-3_NOA FY Auto MC_HMO_1215.docx MC 239 FFY-3_NOA FY Auto MC_KOR_1215.docx MC 239 FFY-3_NOA FY Auto MC_RUS_1215.doc MC 239 FFY-3_NOA FY Auto MC_TAG_1215.doc MC 239 FFY-3_NOA FY Auto MC_VIE_1215.doc
2	Correspondence	MC 239 FFY-1 Threshold Languages	MC 239 FFY-1_NOA FY Aprov_ARA_1215.doc MC 239 FFY-1_NOA FY Aprov_ARM_1215.doc MC 239 FFY-1_NOA FY Aprov_CAM_1215.docx MC 239 FFY-1_NOA FY Aprov_CHI_1215.docx MC 239 FFY-1_NOA FY Aprov_FAR_1215.docx MC 239 FFY-1_NOA FY Aprov_HMO_1215.docx MC 239 FFY-1_NOA FY Aprov_KOR_1215.docx MC 239 FFY-1_NOA FY Aprov_RUS_1215.doc

			MC 239 FFY-1_NOA FY Aprov_TAG_1215.doc
			MC 239 FFY-1_NOA FY Aprov_VIE_1215.doc
3	Correspondence	MC 239 FFY-4 Threshold Languages	MC 239 FFY-4_NOA FY Cont_ARA_1215.doc
			MC 239 FFY-4_NOA FY Cont_ARM_1215.doc
			MC 239 FFY-4_NOA FY Cont_CAM_1215.docx
			MC 239 FFY-4_NOA FY Cont_CHI_1215.docx
			MC 239 FFY-4_NOA FY Cont_FAR_1215.docx
			MC 239 FFY-4_NOA FY Cont_HMO_1215.docx
			MC 239 FFY-4_NOA FY Cont_KOR_1215.docx
			MC 239 FFY-4_NOA FY Cont_RUS_1215.doc
			MC 239 FFY-4_NOA FY Cont_TAG_1215.doc
			MC 239 FFY-4_NOA FY Cont_VIE_1215.doc
			MC 239 FFY-4_NOA FY Cont_SP_1215.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	MC 239 FFY-3, MC 239 FFY-1 and MC 239 FFY-4 are being added in all available system supported threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-204822

Batch EDBC: Expand logging capabilities for tracking Batch EDBC trigger conditions

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Edgars Reinholds
	Reviewed By	Howard Suksanti, Carlos Zepeda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/2/2022	1.0	Initial version	Edgars Reinholds

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1 OVERVIEW

Batch EDBC creates a log of the programs that were run through EDBC. The log indicates which sweep triggered batch EDBC, result of processing and skip reasons. On demand Batch Eligibility Report uses this information to display on the report. This SCR will address the instances when process reason (trigger sweep) or skip reason is not available when it should be.

1.1 Current Design

CalSAWS triggers Batch EDBC for a host of scenarios. Every program run via Batch EDBC is logged, and the outcome of the EDBCs can be reviewed by the workers by generating the Batch Eligibility On Request Report.

Programs are filtered pre and post EDBC. When a program is skipped pre-EDBC then it will have a "Not Processed" status with all the skip reasons. Except when the program is being processed for a negative action, then the pre-EDBC skip reasons do not apply. If EDBC is successful, then the report will show a "Processed" status.

When program is skipped post-EDBC, then all the temporary EDBC results are discarded. All programs that were processed at that time will appear as not processed, but only the one that caused the skip will have the skip reasons.

When program is triggered by one or multiple sweeps, it does not always result in BATCH_ELIG_PROC with PROC_RSN_CODEs.

Batch Eligibility Report displays the following columns:
Worker ID
Case Number
Case Name
Program
Benefit Month
Batch Process Date
Status
Comments

When the status is "Not Processed" then the comment is displayed with a skip reason description. If the program is skipped for multiple reasons, then multiple rows appear on the report for that instance.
When the status is Processed the comment is blank.

The data captured in the Batch EDBC Logs, and the data subsequently available on the Batch Eligibility Report does not sufficiently capture the trigger conditions or scenarios that prompted Batch to Run EDBC. This makes it difficult for workers to pinpoint specific populations of batch EDBCs to review, such as after a COLA run.

1.2 Requests

Update Batch EDBC to provide one or more not processed reason codes when the status is Not Processed, and one or more process reason when status is either Processed or Not Processed.

1.3 Overview of Recommendations

1. Update Batch EDBC to save process reason regardless of the result, whether it was processed or not processed.
2. Update Batch EDBC to save a skip reason if the program was skipped due to another program skipping in post EDBC validation.
3. Update Batch EDBC to create a log with a skip reason when an exception occurs while processing a case.

1.4 Assumptions

1. Batch Eligibility Report will be updated by SCR CA-246115.
2. Existing skip logic will not change.
3. Existing task and journal creation will not change.
4. Batch EDBC module is common to DCFS Batch EDBC and Benefit Match.

2   RECOMMENDATIONS

Update Batch EDBC module to save process reasons in all instances and skip reasons when program is not processed.

2.1   Batch EDBC

2.1.1   Overview

Update Batch EDBC module to save process reasons in all instances and skip reasons when program is not processed.

2.1.2   Description of Change

1. Update Batch EDBC module to save a BATCH_ELIG_PROC.PROC_RSN_CODE regardless of the program status, whether it was Processed or Not Processed. All batch EDBC triggers are required to have SYS_TRANSACT.SUB_TYPE_CODE (CT942) and so it should be saved as PROC_RSN_CODE to indicate which sweep triggered the program. A program can be triggered by multiple sweeps and so multiple PROC_RSN_CODEs would exist.

2. Update batch EDBC module to save a BATCH_ELIG_NOT_PROC.NOT_PROC_RSN_CODE if the program/case was skipped due to another program being skipped in post EDBC validations.
Create a new skip reason "Skipped due to <Program(s)> being skipped in post EDBC validations". This way any program that has a status of Not Processed will always have a BATCH_ELIG_NOT_PROC.NOT_PROC_RSN_CODE.

3. Update Batch EDBC module to create a BATCH_ELIG_LOG record for each program if an exception causes the case to be skipped (SYS_TRANSACT.TYPE_CODE changes to BEL). Create a new skip reason "Batch EDBC failed to run determination". This skip reason will be in addition to any existing pre-EDBC or post-EDBC skip reasons already identified for the program. This skip would not result in a task.

2.1.3   Execution Frequency

No Change – Daily (Mon-Sat)

2.1.4   Key Scheduling Dependencies

No change in dependency.

2.1.5 Counties Impacted

All counties

2.1.6 Category

Core Batch Job

2.1.7 Data Volume/Performance

No change.

2.1.8 Failure Procedure/Operational Instructions

No change.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.6.2	The LRS shall display the results of the eligibility determination to COUNTY-specified Users by individual(s) and by case.	The results of batch EDBC are displayed on the Batch Eligibility Report and this SCR will provide more complete data for the report.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-206898

Authorized Representative Forms

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lianel Richwin
	Reviewed By	Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/29/2022	1.0	Initial Draft	Lianel Richwin

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1 OVERVIEW

This SCR is to add to CalSAWS the following forms: MC380, MC381, MC382, MC383 for the designation of Medi-Cal authorized representative (AR) as per ACWDL 18-26 and add the forms in all available system supported threshold languages.

1.1 Current Design

Currently MC 306 (6/07)- Appointment of authorized Representative, generates via the Template Repository.

1.2 Requests

1. Add the "Appointment Form MC 382" in English and following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese
2. Add the "Appointment Notice MC 380" in English and following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese
3. Add the "Standard Agreement Form MC 383" in English language
4. Add the "Cancellation or Change Letter MC 381" in English and following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese
5. Delete Form MC 306 "Appointment of Representative" from the Template Repository

1.3 Overview of Recommendations

1. Add the "Appointment Form MC 382" in English and following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese
2. Add the "Appointment Notice MC 380" in English and following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese
3. Add the "Standard Agreement Form MC 383" in English language
4. Add the "Cancellation or Change Letter MC 381" in English and following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese
5. Delete Form MC 306 "Appointment of Representative" from the Template Repository

1.4 Assumptions

1. The new Authorized Representative Forms will only be added in English and all available system supported threshold languages.
2. No variables will be populated on the new Authorized Representative Forms (aside from the standard header and footer information).

3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2   RECOMMENDATIONS

2.1   Add new Authorized Representative form MC 380 in English and system supported threshold languages in CalSAWS.

2.1.1   Overview

Add the new Appointment Notice MC 380 in English and system supported threshold languages in CalSAWS.

State Form: MC 380 (6/18)

Programs: Medi-Cal

Attached Forms: N/A

Template Description: Notice of Authorized Representative Appointment.

Forms Category: Forms

Template Repository Visibility: All Counties

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

2.1.2   Form Verbiage

<u>Create MC 380 XDP</u>

A new XDP will be created for the Notice of Authorized Representative Appointment.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): Notice of Authorized Representative Appointment

Form Number: MC 380

Include NA Back 9: No

Imaging Form Name: Notice of Appointment of Authorized Rep

Imaging Document Type: Authorized Rep and Release of Info

Form Mockups/Examples: See supporting document #1

2.1.3   Form Generation Conditions

1. **<u>Add MC 380 – Notice of Authorized Representative Appointment form to Template Repository</u>**

   The MC 380 Notice of Authorized Representative Appointment form is added only to the Template Repository.

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

2. **Add Form Control**

   Add an imaging barcode for MC 380.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

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

   The following are the print and mailing requirements for MC 380 Notice of Authorized Representative Appointment.

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

Mailing Options:

Mailing Options	Option for MC380
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for MC 380 Form
Post to Self-Service Portal	Y
TSIGN_IND	Y

2.2 Add new Authorized Representative form MC 381 in English and system supported threshold languages in CalSAWS.

2.2.1 Overview

Add the new Cancellation or Change Letter MC 381 in English and system supported threshold languages in CalSAWS.

State Form: MC 381 (6/18)

Programs: Medi-Cal

Attached Forms: N/A

Template Description: Cancellation or Change to a Medi-Cal Authorized Representative Appointment

Forms Category: Forms

Template Repository Visibility: All Counties

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

2.2.2 Form Verbiage

Create MC 381 XDP

A new XDP will be created for the Cancellation or Change to a Medi-Cal Authorized Representative.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): Cancellation or Change to a Medi-Cal Authorized Representative Appointment

Form Number: MC 381

Include NA Back 9: No

Imaging Form Name: Cancellation/Change to MC Auth Rep Appt

Imaging Document Type: Authorized Rep and Release of Info

Form Mockups/Examples: See supporting document #2

2.2.3 Form Generation Conditions

1. **Add MC 381 – Cancellation or Change to a Medi-Cal Authorized Representative Appointment form to Template Repository**

   The MC 381 Cancellation or Change to a Medi-Cal Authorized Representative Appointment form is added only to the Template Repository.

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

2. **Add Form Control**

   Add an imaging barcode for MC 381.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

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

   The following are the print and mailing requirements for MC 381 Cancellation or Change to a Medi-Cal Authorized Representative Appointment.

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

Mailing Options:

Mailing Options	Option for MC381
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for MC 381 Form
Post to Self-Service Portal	Y

2.3 Add new Authorized Representative form MC 382 in English and system supported threshold languages in CalSAWS.

2.3.1 Overview

Add the new Appointment Form MC 382 in English and system supported threshold languages in CalSAWS.

State Form: MC 382 (6/18)

Programs: Medi-Cal

Attached Forms: N/A

Template Description: Appointment of Authorized Representative

Forms Category: Forms

Template Repository Visibility: All Counties

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

2.3.2 Form Verbiage

Create MC 382 XDP

A new XDP will be created for the Appointment of Authorized Representative.

The MC382 form will have 4 impressions which will consist of static verbiage provided by the State and several non-prepopulated input fields. The first impression will be a coversheet with the standard header. The second impression will be empty. The third and fourth impressions will be the actual MC 382 State form.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): Appointment of Authorized Representative.

Form Number: MC 382

Include NA Back 9: No

Imaging Form Name: Appointment of Authorized Rep

Imaging Document Type: Authorized Rep and Release of Info

Form Mockups/Examples: See supporting document #3

2.3.3 Form Generation Conditions

1. **Add MC 382 – Appointment of Authorized Representative form to Template Repository**

   The MC 382 Appointment of Authorized Representative form is added only to the Template Repository.

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

2. **Add Form Control**

   Add an imaging barcode for MC 382.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

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

   The following are the print and mailing requirements for MC 382 Appointment of Authorized Representative form.

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

   Mailing Options:

Mailing Options	Option for MC 382
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

   Additional Options:

Requirement	Option for MC 382 Form
Post to Self-Service Portal	Y
TSIGN_IND	Y
ESIGN_IND	Y

2.4 Add new Authorized Representative form MC 383 in English language in CalSAWS.

2.4.1 Overview

Add the new Standard Agreement Form MC 383 in English language in CalSAWS.

State Form: MC 383 (6/18)

Programs: Medi-Cal

Attached Forms: N/A

Template Description: Authorized Representative Standard Agreement for Organizations

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: English

2.4.2 Form Verbiage

Create MC 383 XDP

A new XDP will be created for the Authorized Representative Standard Agreement for Organizations.

The MC383 form will have 4 impressions which will consist of static verbiage provided by the State and several non-prepopulated input fields. The first impression will be a coversheet with the standard header. The second impression will be empty. The third and fourth impressions will be the actual MC 383 State form.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): Authorized Representative Standard Agreement for Organizations

Form Number: MC 383

Include NA Back 9: No

Imaging Form Name: Auth Rep Standard Agreement for Org

Imaging Document Type: Authorized Rep and Release of Info

Form Mockups/Examples: See supporting document #4

2.4.3 Form Generation Conditions

1. **Add MC 383 – Authorized Representative Standard Agreement for Organizations form to Template Repository**

   The MC 383 Authorized Representative Standard Agreement for Organizations form is added only to the Template Repository.

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

2. **Add Form Control**

   Add an imaging barcode for MC 383.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

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

   The following are the print and mailing requirements for MC 383 Authorized Representative Standard Agreement for Organizations.

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

Mailing Options:

Mailing Options	Option for MC 383
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	Y
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Mailing Options	Option for MC 383
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for MC 383 Form
Post to Self-Service Portal	Y
TSIGN_IND	Y
ESIGN_IND	Y

2.5 Delete the MC 306 "Appointment of Representative" form in CalSAWS

2.5.1 Overview

Delete Form MC 306 "Appointment of Representative" from the Template Repository in CalSAWS.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	MC 380 Threshold Languages	MC380.zip
2	Correspondence	MC 381 Threshold Languages	MC381.zip
3	Correspondence	MC 382 Threshold Languages	MC382_zip
4	Correspondence	MC 383 Threshold Languages	MC383_English.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

| 2.18.3.3
CAR-1239 | The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:

a. Appointment notices;

b. Redetermination, Recertification, and/or Annual Agreement notices and forms;

c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);

d. Periodic reporting notices;

e. Contact letters;

f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;

g. Information notices and stuffers;

h. Case-specific verification/referral forms;

i. GR Vendor notices;

k. Court-mandated notices, including Balderas notices;

l. SSIAP appointment notices;

m. Withdrawal forms;

n. COLA notices;

o. Time limit notices;

p. Transitioning of aid notices;

q. Interface triggered forms and notices (e.g., IFDS, IEVS);

r. Non-compliance and sanction notices;

s. Benefit issuance and benefit recovery forms and notices, including reminder notices;

t. Corrective NOAs on State Fair Hearing decisions;

u. CSC paper ID cards with LRS-generated access information; and

v. CSC PIN notices. | New Authorized Representative Forms MC 380, MC 381, MC 382, MC 383 added in English and all available system supported threshold languages |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-212089

Implement Threshold languages for CCP 7 & CCP 8 (10/19) version

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Anumula Atchi Reddy
	Reviewed By	Madhan Kumar P

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/23/2022	1.0	Initial Draft	Anumula Atchi Reddy

Table of Contents

1 OVERVIEW

This effort will add the CCP 7 & CCP 8 form in all available threshold languages.

1.1 Current Design

The system only has English and Spanish of the CCP 7(10/19) and CCP 8(10/19).

1.2 Requests

1. Add CDSS Threshold Languages to the CalSAWS for the CCP 7(10/19) form Template Repository and system generated.
   Languages include:
   Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

2. Add CDSS Threshold Languages to the CalSAWS for the CCP 8(10/19) form Template Repository and system generated.
   Languages include:
   Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

1.3 Overview of Recommendations

1. Add the CCP 7(10/19) form in available threshold languages.
   Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

2. Add the CCP 8(10/19) form in available threshold languages.
   Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

1.4 Assumptions

1. The new CCP 7 and CCP 8 forms will be added in all the Threshold Languages
2. No variables will be populated on the new CCP 7 and CCP 8 Forms (aside from the standard header and footer information).
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2   RECOMMENDATIONS

2.1   Add CalWORKs Child Care Request Form and Child Care Payment Rules (CCP 7) in all the Threshold Languages.

2.1.1   Overview

The CCP 7 form will be added in all the Threshold Languages.

State Form: CCP 7 (10/19)

Programs: Child Care

Attached Forms: N/A

Template Description: CalWORKs Child Care Request Form and Child Care Payment Rules (CCP 7).

Forms Category: Forms

Template Repository Visibility: All Counties

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

2.1.2   Form Verbiage

Create CCP 7 XDP

All threshold languages XDP will be created for CCP 7 form.

The CCP7 form will have 4 impressions which will consist of static verbiage provided by the State and several non-prepopulated input fields.

The first impression will be a coversheet with the standard header. The second impression will be empty. The third and fourth impressions will be the actual CCP7 State form.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): CalWORKs Child Care Request Form and Child Care Payment Rules (CCP 7)

Form Number: CCP 7

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #1

2.1.3 Form Generation Conditions

1. **Add CCP 7 in all the Threshold Languages:**

   The CalWORKs Child Care Request Form and Child Care Payment Rules (CCP 7) is added only to the Template Repository.

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

2. **Add Form Control**

   Add an imaging barcode for CCP 7.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

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

   The following are the print and mailing requirements for the CCP 7 form.

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

   Mailing Options:

Mailing Options	Option for CCP 7
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

   Additional Options:

Requirement	Option for CCP 7 Form
Post to Self-Service Portal	Y

2.2 CalWORKs Stage One Child Care Authorization Form (CCP 8) in all the Threshold Languages.

2.2.1 Overview

The CCP 8 forms will be added in all the Threshold Languages.

State Form: CCP 8 (10/19)

Programs: Child Care

Attached Forms: N/A

Template Description: CalWORKs Stage One Child Care Authorization Form (CCP 8).

Forms Category: Forms

Template Repository Visibility: All Counties

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

2.2.2 Form Verbiage

Create CCP 8 XDP

All threshold languages XDP will be created for CCP 8 form.

The CCP8 form will have 4 impressions which will consist of static verbiage provided by the State and several non-prepopulated input fields.

The first impression will be a coversheet with the standard header. The second impression will be empty. The third and fourth impressions will be the actual CCP8 State form.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): CalWORKs Stage One Child Care Authorization Form (CCP 8)

Form Number: CCP 8

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #1

2.2.3 Form Generation Conditions

1. **<u>Add CCP 8 in all the Threshold Languages:</u>**

The CalWORKs Stage One Child Care Authorization Form (CCP 8) is added only to the Template Repository.

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

2. **<u>Add Form Control</u>**

Add an imaging barcode for CCP 8.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. **<u>Add Form Print Options and Mailing Requirements</u>**

The following are the print and mailing requirements for the CCP 8 form.

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

Mailing Options:

Mailing Options	Option for CCP 8
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for CCP 8 Forms
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Forms	CalWORKs Child Care Request Form and Child Care Payment Rules (CCP 7)	CCP7_AE.pdf CCP7_AR.pdf CCP7_CA.pdf CCP7_CH.pdf CCP7_FA.pdf CCP7_HM.pdf CCP7_KO.pdf CCP7_LA.pdf CCP7_RU.pdf CCP7_TG.pdf CCP7_VI.pdf
2.	Forms	CalWORKs Stage One Child Care Authorization Form (CCP 8)	CCP8_AE.pdf CCP8_AR.pdf CCP8_CA.pdf CCP8_CH.pdf CCP8_FA.pdf CCP8_HM.pdf CCP8_KO.pdf CCP8_LA.pdf CCP8_RU.pdf CCP8_TG.pdf CCP8_VI.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices. b. Redetermination, Recertification, and/or Annual Agreement notices and forms. c. other scheduling notices (e.g., quality control, GR hearings, and appeals). d. Periodic reporting notices: e. Contact letters. f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site. g. Information notices and stuffers. h. Case-specific verification/referral forms. i. GR Vendor notices. k. Court-mandated notices, including Balderas notices. l. SSIAP appointment notices. m. Withdrawal forms. n. COLA notices. o. Time limit notices. p. Transitioning of aid notices. q. Interface triggered forms and notices (e.g., IFDS, IEVS). r. Non-compliance and sanction notices. s. Benefit issuance and benefit recovery forms and notices, including reminder notices.	CCP 7 & CCP 8 are being added in all available threshold languages.

t. Corrective NOAs on State Fair Hearing decisions. u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218510

Update the CMS PI Report Template and Indicator 12

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Ravneet Bhatia; Thao Ta; Elisa Miller

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/03/2020	1.0	Initial revision	Esequiel Herrera-Ortiz
12/21/2020	1.1	Updated design document per DHCS response.	Esequiel Herrera-Ortiz

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1 OVERVIEW

This document outlines updates to the DHCS Performance Indicators Master Data Request Report as requested by DHCS. The document also outlines the requirements for the new DHCS CMS Performance Indicator 12 Details report.

1.1 Current Design

The DHCS Performance Indicators Master Data Request report provides information for: Medi-Cal applications received, Medi-Cal renewals, Medi-Cal eligibility, Medi-Cal ineligibility, Medi-Cal pending applications and renewals, and Medi-Cal determination processing time. The report consists of the following 6 indicators:

> Indicator 5 – Number of Applications Received
>
> Indicator 7 – Renewals
>
> Indicator 9 - Total Number of Individuals Determined Eligible
>
> Indicator 10 - Total Number of Individuals Determined Ineligible
>
> Indicator 11 - Number of Pending Applications or Redeterminations
>
> Indicator 12 - Processing Time for Determinations

A state version of the report containing summary information for the 6 indicators is submitted to DHCS. A county version containing summary and detail information is provided in the system for county validation.

The report includes the following information.
- Indicator 10 categorizes a determination as CHIP based on Aid Code.
- The report includes cash assistance Medi-Cal programs.
- The state version of the report's template is not up to date with the latest version provided by DHCS.
- For Indicator 12, the report is reporting determination times for MAGI and Non-MAGI based on aid code. This means if eligibility was determined for both MAGI and Non-MAGI then the determination is only reported for one program.
- The state version of the report includes the '#' special character which is causing issue for DHCS.
- The report is displaying 'LRS' as the SAWS system in the header.
- The header for 9a. is '9a. Total Eligible'.
- The header for 10a is '10a Total Ineligible'.

1.2 Requests

1. Update the DHCS CMS Performance Indicators Master Data Request report as directed by DHCS.

2. Create a CIN-level detailed version of the report for the CMS Performance Indicator 12: Processing Time for Determinations.

1.3   Overview of Recommendations

1. Update all Indicators to remove cash assistance Medi-Cal programs.
2. Update Indicator 10 to use the age-based methodology defined by DHCS to determine whether the determination is related to the CHIP program.
3. Update the report mockups to have matching column headers and tab names as the Master Template provided by DHCS.
4. Update Indicator 12 to look at budget tests along with Aid Code for determinations which were assigned an aid code to determine whether eligibility was checked for MAGI, Non-MAGI, or both.
5. Update Indicator 12 to look at an individual's age and self-reported Medical condition for denied determinations which were not assigned an aid code to categorize the denied determination as MAGI or Non-MAGI.
6. Add a new column to Indicator 12 which indicates if the individual had a self-reported disability.
7. Update the aid code mapping to remove the 'P0' aid code from all indicators.
8. Update Indicator 11 to exempt Pending Applications from the Aid Code restriction.
9. Create the DHCS CMS Performance Indicator 12 Details report. The report will read off the existing data collecting logic for the existing DHCS CMS Performance Indicators Master Data Request report county version of the report. The report will collect the detailed information for all counties. The data will reflect the summary counts of the state version of the report. The report will be in .csv formant and sent directly to DHCS via SFTP process.

1.4   Assumptions

1. The instructions to updated DHCS CMS Performance Indicators Master Data Request report have been finalized.
2. This SCR will be implemented in parallel with CA-215280 DDID 1631 Modify DHCS CMS PI Master Data Report. This SCR is considered the later version. If there are any discrepancies this SCR will serve as the overwriting version.
3. CMSP determinations will not be included in the report as they are county-maintained services.

2 RECOMMENDATIONS

The DHCS CMS Performance Indicators Master Data Request report is being updated in accordance with the instructions provided by DHCS. Additionally, a new report will be created which contains the detailed information for Indicator 12 from the state version of the report.

2.1 DHCS CMS Performance Indicators Master Data Request Report

2.1.1 Overview

DHCS has requested the DHCS CMS Performance Indicators Master Data Request Report be updated to report on Medicaid and CHIP information more accurately.

2.1.2 DHCS CMS Performance Indicators Master Data Request Report Mockup

SAWS:	CalSAWS	Report Date:	FEB-02-2020 8:13:00 PM			
Reporting Level:	Application Level	Reporting Period (monthly reporting):	01-01-2020 to 01-31-2020			

		CMS Performance Indicator 5. Number of Applications Received				

County	5a./5b. Apps Received/By MC Agency	Application Received by Medicaid Agency, by Channel				
		5c. Online	5d. Mail	5e. In Person	5f. Phone	5g. Other
Alpine	1	1	1	1	1	1
Amador	1	1	1	1	1	1
Butte	1	1	1	1	1	1
Calaveras	1	1	1	1	1	1
Colusa	1	1	1	1	1	1
Del Norte	1	1	1	1	1	1
El Dorado	1	1	1	1	1	1
Glenn	1	1	1	1	1	1
Humboldt	1	1	1	1	1	1
Imperial	1	1	1	1	1	1
Inyo	1	1	1	1	1	1
Kern	1	1	1	1	1	1
Kings	1	1	1	1	1	1
Lake	1	1	1	1	1	1
Lassen	1	1	1	1	1	1
Los Angeles	1	1	1	1	1	1
Madera	1	1	1	1	1	1
Marin	1	1	1	1	1	1
Mariposa	1	1	1	1	1	1
Mendocino	1	1	1	1	1	1
Merced	1	1	1	1	1	1
Modoc	1	1	1	1	1	1
Mono	1	1	1	1	1	1
Monterey	1	1	1	1	1	1
Napa	1	1	1	1	1	1
Nevada	1	1	1	1	1	1
Plumas	1	1	1	1	1	1
Riverside	1	1	1	1	1	1
San Benito	1	1	1	1	1	1
San Bernardino	1	1	1	1	1	1
San Joaquin	1	1	1	1	1	1
Shasta	1	1	1	1	1	1
Sierra	1	1	1	1	1	1
Siskiyou	1	1	1	1	1	1
Stanislaus	1	1	1	1	1	1
Sutter	1	1	1	1	1	1
Tehama	1	1	1	1	1	1
Trinity	1	1	1	1	1	1
Tuolumne	1	1	1	1	1	1
Yuba	1	1	1	1	1	1
Total	40	40	40	40	40	40

Figure 2.1.2-1 CMS Performance Indicators Master Data Request Report – State Version

CalSAWS DHCS CMS Performance Indicators Master Data Request

Los Angeles
Run Date: JUN-04-19 12:35 AM
Report Month: 03/2020
Indicator 5 – Number of Applications Received

5a./5b. Apps Received/By MC Agency	Application Received by Medicaid Agency, by Channel				
	5c. Online	5d. Mail	5e. In Person	5f. Phone	5g. Other
1	1	0	0	0	0

Total:	1
	2:A1048576<>"")),"#,##0")

Case Number	Case Name	Person Name	DOB	CIN	Specific Application Source	Application Source
1000001	Case Name1	Person Name1	12/30/1900	90000000C	C4Y	Online

Figure 2.1.2-2 DHCS CMS Performance Indicators Master Data Request Report – County Version

2.1.3 Description of Change

1. Make the following changes to the state version of the ==DHCS CMS PI Indicator Master Data Request== report:
   a. Update the header for Performance Indicator 9a to read 'Total Medicaid Eligible' rather than 'Total Eligible'.
   b. Update the header for Performance Indicator 10a to read 'Total Medicaid Ineligible' rather than 'Total Ineligible'.
   c. In the header of all the sheets update the SAWS value to be 'CalSAWS' rather than 'LRS'.
   d. ==Remove the '#' character from all the tab names. For example, the 'CMS#5' sheet will be renamed to 'CMS5'.==
2. Make the following changes to the county version of the ==DHCS CMS PI Indicator Master Data Request== report:
   a. Update the header for Performance Indicator 9a to read 'Total Medicaid Eligible' rather than 'Total Eligible'.
   b. Update the header for Performance Indicator 10a to read 'Total Medicaid Ineligible' rather than 'Total Ineligible'.
   c. Make the following column changes to the Performance Indicator 7:

Field Name	Short Description

Medicaid Type	Rename the 'MAGI / Non-MAGI' column to 'Medicaid Type' which will provide the Medicaid type related to the determination. The column will now include CHIP as a possible value. Possible values include the following: • MAGI – The renewal is for MAGI. • Non-MAGI – The renewal is for Non-MAGI. • CHIP – The renewal is for CHIP.
Program	Remove the program column. With the removal of cash assistance Medi-Cal programs this column will always display Medi-Cal.

d. Make the following column changes to the Performance Indicator 9:

Field Name	Short Description
Medicaid Type	Rename the 'MAGI/Non-MAGI' column to 'Medicaid Type' which will provide the Medicaid type related to the determination. Possible values include the following: • MAGI – The renewal is for MAGI. • Non-MAGI – The renewal is for Non-MAGI. • CHIP – The renewal is for CHIP. *Note – The logic for this column is existing and will not change. This is only updating the column header.

e. Make the following column changes to the Performance Indicator 10:

Field Name	Short Description
MC / CHIP	Rename the 'Program' column to 'MC / CHIP'. The logic will be updated to provide whether the determination relates to MC or CHIP. Possible values include the following: • MC – The determination relates to MC. • CHIP – The determination relates to CHIP. Note: The logic which determines MC vs CHIP is updated in section 2.1.3.c.

f. Make the following column changes to the Performance
    Indicator 11:

Field Name	Short Description
Type	Update the 'Type' column to have one of the possible values: Application – If the pending determination relates to an application. Previously the value was 'Pending Application'. Renewal – If the pending determination relates to a renewal. Previously the value was 'Redetermination'. *Note: The logic to determine whether the pending determination relates to an application or renewal is not changing. Only the value that is displayed on the report.

g. Rename the 'MAGI/Non-MAGI' column in Performance
    Indicator 12 to 'Medicaid Type' and update the logic as follows:

Field Name	Short Description
Medicaid Type	Rename the 'Magi/Non-MAGI' header to 'Medicaid Type' which will provide the Medicaid type related to the determination. Possible values include the following: • MAGI – The determination relates to MAGI. • Non-MAGI – The determination relates to Non-MAGI.

h. Add a new column to Performance Indicator 12 in the county
    detailed version.

Field Name	Short Description
Disability Indicator	The disability indicator will report whether the individual had a self-reported disability during the reporting month. Possible values: • 'Y' – The program application has an associated e-Application that is marked with a disability indicator OR the individual has a Medi-Cal condition with a begin / end date during the report month. • 'N' – The program application does not have an associated e-Application that is marked with a disability indicator OR the individual

	does not a Medi-Cal condition with a begin end date in the report month.
	Technical Note: Associated e-Application is the e-Application populated in the PGM_APP. C4Y_APP_ID column. The disability indicator is obtained from C4Y_PERS. DISAB_IND.
	Note – A medical condition record can be viewed in the Customer Information Medical Condition List page.

3. Make the following changes to the state and county version of the DHCS CMS PI Indicator Master Data Request report:

    a. Update Performance Indicator 12 to report approved or denied determinations which were assigned an aid code under the MAGI processing time and Non-MAGI processing time if the MC applications was evaluated for both MAGI and Non-MAGI. Currently the report is only reporting such determinations once depending on the single assigned aid code. Updated the report logic for approved determinations as follows:
        - Count the processing time only under the MAGI Processing time if:
            - The assigned aid code is a MAGI aid code.
            - The EDBC record has only an associated MAGI budget test.

Code (318)	Short Description
ZZ	MAGI

        - Count the processing time only under Non-MAGI processing time if:
            - The assigned aid code is a Non-MAGI aid code.
            - The EDBC has at least one budget test not equal to 'MAGI' and no associate MAGI budget test.
        See Appendix 7.1 for a list of Non-MAGI budget tests. Note Appendix 7.1 is only provided for reference. The report will not restrict to the provided list.

        - Count the processing time under MAGI and Non-MAGI processing time if:
            - The assigned aid code is a MAGI or Non-MAGI aid code.

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The EDBC has at least 2 associated budget tests. One is a MAGI budget test and the other is any other type of budget test.

Determinations which were made for MAGI and Non-MAGI will appear as two separate rows on the county detailed version of the DHCS CMS PI Indicators Master Data Request report and the DHCS CMS Performance Indicator 12 Details report.

Example:
Case 1000001 applied for Medi-Cal on 02/15/2020. The application was processed on 02/19/2020 where MAGI and Non-MAGI eligibility was checked. The program was approved for MAGI and was assigned an 'M3' aid code. On the 02/2020 DHCS CMS PI Master Data Request Report and the Performance Indicator 12 Details reports the determination will appear as follows:

Case	Person	Aid Code	Medicaid Type	Application Received	Determination Date	Determination Result	Days to Process
1000001	John Doe	M3	MAGI	02/15/2020	02/20/2020	Approved	5
1000001	John Doe		Non-MAGI	02/15/2020	02/20/2020	Denied	5

*Note not all the rows of the report are included.

One record will have a Determination Result of Approved and the Medicaid Type of MAGI due to the assigned aid code.
The second record will default to having a Determination Result of Denied, a Medicaid Type of Non-MAGI, opposite of the first record, and the aid code will be blank. All other columns of the report will match.

See appendix 7.2 for a second example.

b. Update Performance Indicator 12 to report denied determinations with no aid code under the Non-MAGI processing time if it meets one of the 3 listed conditions else report the determination under the MAGI processing time:
   i. The Individual is 65 years or older as of the first day of the reporting month.
   ii. The individual's program application is associated to an e-Application with a disability indicator set to 'Yes'.
   iii. The individual has a medical condition record with a begin and end date that fall within the reporting month.

c. Update Indicator 10 to categorize an Ineligibility as either Medicaid or CHIP using the following logic:
- If the individual is 18 years or younger as of the <mark>first day of the report month</mark>, then the determination falls under CHIP.
- If the individual is 19 years or older as of the <mark>first day of the report month</mark>, then the determination is considered for Medicaid.

This change should be reflected on the DHCS CMS Performance Indicator Master Data Request county version's Determination Reason and Determination Type column since the column displays whether the Ineligible determination was counted as a MC or CHIP sub metric.

d. <mark>Update the Aid Code mapping for Indicators 7, 9, 11 and 12 to remove 'P0'. Please see the Supporting Document for the latest Master Aid Code List provided by DHCS.
Note: This aid code was added as part of CA-215280 DDID 1631 Modify DHCS CMS PI Master Data Report. However, DHCS later updated the Master Aid Code list to remove the aid code.</mark>
e. <mark>Update Indicator 11 to exempt Pending Applications from the Aid Code restriction. In the system Pending Applications do not have an associated aid code. Only after a determination is made does the individual get assigned an aid code.</mark>

2.1.4 Report Location
- **Global: Reports**
- **Local: Scheduled**
- **Task: State**

2.1.5 Counties Impacted
All CalSAWS counties will be impacted by the changes outlined in this section.

2.1.6 Security Updates
No updates will be made to the report's security.

2.2 DHCS CMS Performance Indicator 12 Details

2.2.1 Overview

The new DHCS CMS Performance Indicator 12 Details report provides CIN-level detailed inform for Performance Indicator 12 on the state version of the DHCS CMS Performance Indicators Master Data Request report.

Performance Indicator 12 captures all MAGI/ Non-MAGI application determinations made during the reporting month regardless of when the application was submitted. The indicator provides processing of applications which are calculated from the date the county received the initial application until the date of determination.

Note: The report is a comma-separated values (CSV) file. It does not have a template with the standard header or formatting like other scheduled reports. DHCS has requested this format due to the large data size that is being transmitted via SFTP process.

2.2.2 Description of Change

1. Create the DHCS CMS Performance Indicator 12 Details report. The report will use the existing logic for the county version of the DHCS CMS Performance Indicator Master Data Request report for Indicator 12. This report will consist of all CalSAWS counties' data to reflect the Performance Indicator 12 summary count found on state version of the report.

2. Include the following columns in the CSV file:

Field Name	Short Description
Cnty_Cd	18- The county ID of the county which processed the Medi-Cal application.
Cnty_Name	The county name of the county which processed the Medi-Cal application.
Case_No	The case number of the case.
F_Name	The applicant's first name.
M_Initial	The applicant's middle initial.
L_Name	The applicant's last name.

DOB	The applicant's date of birth. Format: MMDDYYYY
CIN	The applicant's Client Index Number (CIN).
MAGI_v_NonMAGI	Distinguishes whether the determination was made for MAGI or Non-MAGI. Possible values: MAGI – The determination related to MAGI. NonMAGI – The determination relates to Non-MAGI.
App_Recvd_Dt	The date the county received the initial application. Format: MMDDYYYY
Determ_Dt	The event date for the disposition of the application. This is the first 'Approved' or 'Denied' status for the application. Format: MMDDYYYY
Determ_Result	Indicates whether the application was Approved or Denied. Possible Values: 'Approved' - The individual is determined eligible 'Denied' - The individual is determined ineligible.
Aid_CD	The applicant's approved Medi-Cal aid code. This field will be blank if no aid code was assigned due to the determination.
Days_Process	The number of days it took to make the final determination of the application. This will be from the date the application was received until the application as dispositioned.

Disab_Flag	Indicate whether the individual self-reported a disability.
	'Y' – The program application has an associated e-Application that is marked with a disability indicator OR the individual has a Medi-Cal condition with a begin end date in the report month.
	'N' – The program application does not have an associated e-Application that is marked with a disability indicator OR the individual does not a Medi-Cal condition with a begin end date in the report month.
	Technical note: Associated e-Application is the e-Application populated in the PGM_APP. C4Y_APP_ID column. The disability indicator is obtained from C4Y_PERS. DISAB_IND.
	Note – A medical condition record can be viewed in the Customer Information Medical Condition List page.

3. The report will be generated on same days as the DCHS CMS Performance Indicator Report which is on the 3rd business day of every month.
4. The .csv report will be sent directly to DHCS via SFTP process.

2.2.3 Report Location

This report will not be accessible through the web application. The report will be submitted directly to DHCS. This will be in the same directory as the State Summary version.

2.2.4 Counties Impacted

No impact to counties as the report is not accessible through the web application.

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

DHCSCMSPerformanceIndicator12Details	Provides access to the DHCS CMS Performance Indicator 12 Details report.	

*Note – The report will not be accessible through the web application, but a security right is being assigned.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Master Aid Code List	CMSPI Master Aid Code List 04.02.2020
2	Reports	CMS Performance Indicators Master Template	CMS Performance Indicators Master TE
3	Reports	CMS Performance Indicators Master (Report Instructions)	DHCS CMS Performance Indicat
4	Reports	DHCS CMS Performance Indicators Master Data Request – State Mockup	DHCS CMS PI State Report Mockup.xls
5	Reports	DHCS CMS Performance Indicators Master Data Request – County Mockup	DHCS CMS PI County Report Mock
6	Reports	DHCS CMS Performance Indicator 12 Details	DHCS CMS Performance Indicat
7	Reports	DHCS CMS PI Indicator 12 Final Template	DHCS CMS PI Indicator 12 final Ten
8	Reports	DHCS CMS PI Indicator 12 Final Request	DHCS CMS PI Indicator 12 Final Rec
9	Reports	Security Matrix	CA-218510 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.1.11	The LRS shall support all reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures, including statistical, operational, workload, and fiscal reports.	The DHCS CMS Performance Indicator report is a state mandated report. It is being modified in compliance with State policy.

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

7.1 Examples of Non-MAGI Budget Tests

Code (318)	Short Description
21	100% FPL
24	100% FPL Sneede
22	133% FPL
25	133% FPL Sneede
09	1931(b) Alt. "A"
11	1931(b) Alt. "A" Sneede
41	1931(b) Alt. "A" Sneede Individual Income
10	1931(b) Alt. "B"
12	1931(b) Alt. "B" Sneede
42	1931(b) Alt. "B" Sneede Individual Income
07	1931(b) Property
08	1931(b) Property Sneede
44	1931(b) Sneede MFBU Property
06	1931(b) U-Parent
23	200% FPL
26	200% FPL Sneede
32	200% Pregnancy

62	200% Pregnancy - Second Test
13	4 Month Continuing
63	A&D - Individual Spouse
15	AFDC-MN U-Parent
27	Aged and Disabled
60	Auto Test Medi-Cal
52	Board & Care or LTC with no Community Spouse
31	Bridging
29	CE
30	CEC
DS	Deemed Protection with SOC
DP	Deemed Protection without SOC
33	Dialysis
64	Edwards
92	Former Foster Youth
99	Healthy Families Percent
69	Healthy Families Percent Premium
03	LTC
48	LTC Child Allocation
47	LTC Spouse Allocation
ZZ	MAGI

18	MC Income
19	MC Income Sneede
16	MC Property
17	MC Property Sneede
59	MC Sneede FPL Individual Income
40	MC Sneede Individual Income
43	MC Sneede MFBU Property
93	MC TLI/FPL Child-H1
94	MC TLI/FPL Child-H1 Sneede
95	MC TLI/FPL Child-H2
96	MC TLI/FPL Child-H2 Sneede
70	MC TLI/FPL Child-H3
71	MC TLI/FPL Child-H3 Sneede
97	MC TLI/FPL Child-H4
98	MC TLI/FPL Child-H4 Sneede
72	MC TLI/FPL Child-H5
73	MC TLI/FPL Child-H5 Sneede
38	MPPP - MC
39	MPPP - SSI
02	Minor Consent
20	Percent

04	Pickle
05	Pickle Spouse
36	Postpartum
37	QDWI
50	SSI Child Allocation
51	SSI Ineligible Parent Allocation
49	SSI Ineligible Spouse Allocation
61	SSI Property Deeming
14	TMC
34	TPN
55	Ten Day Added Member SOC
53	Ten Day w/Added Member(s)
54	Ten Day w/o Added Member(s)
56	Transitional Medi-Cal Month 1
57	Transitional Medi-Cal Month 2
58	Transitional Medi-Cal Month 3
35	Tuberculosis
01	Waiver
28	Working Disabled

7.2 Example of a single MAGI and Non-MAGI Determination Reported on Indicator 12

Assume the report month is 11/2020.

11/09/2020 – John Doe applies for Medi-Cal.

11/20/2020 – EDBC was ran for MAGI and Non-MAGI determination. John Doe was denied for MAGI but approved for Non-MAGI. He was assigned aid code 30.

*Note: This is determined by having an EDBC Budget test of 'MAGI' as well as any other budget test.

The processing time for this determination is 11 days.

Summary Before:

The DHCS CMS Performance Indicators Master Data request reported the determination on the following lines on Indicator 12:

Processing Time for Determination (Days)

  12a: Median Processing Times

  12c: Non-MAGI Determinations

Number of Medicaid Non-MAIG Applications, by Processing Time

  12k: Less than 30 Days

Summary After:

The DHCS CMS Performance Indicators Master Data request reported the determination on the following lines on Indicator 12:

Processing Time for Determination (Days)

  12a: Median Processing Times

  12b: MAGI Determinations

  12c: Non-MAGI Determinations

Number of Medicaid MAGI Determinations, by Processing Time

  12f: Less than 24 hours

Number of Medicaid Non-MAIG Applications, by Processing Time

  12k: Less than 30 Days

Details Before:

Case Number	Person Name	Aid Code	MAGI / Non-MAGI	Determination Date	Determination Result	Days to Process

Case Number	Person Name	Aid Code	MAGI / Non-MAGI	Determination Date	Determination Result	Days to Process
1000001	John Doe	30	Non-MAGI	11/20/2020	Approved	11

Details After:

Case Number	Person Name	Aid Code	MAGI / Non-MAGI	Determination Date	Determination Result	Days to Process
1000001	John Doe	30	Non-MAGI	11/20/2020	Approved	11
1000001	John Doe		MAGI	11/20/2020	Denied	11

*Note the second program is reported with no Aid Code and a Determination Result of Denied. All other fields including the processing time will be the same.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-225996

ACL 21-52 Update CF 285, Add CF 285A, Cover Letter and Pre-Populated Application Source

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Phong Xiong, Tom Lazio, Andrea Rodriguez
	Reviewed By	Priya Sridharan, Prakash Thota, Naga Chinduluru

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/20/2021	1.0	Initial Draft	Phong Xiong
04/29/2022	2.0	Added Section 2.1 and assumption # 6	Tom Lazio
05/24/2022	2.1	Added Section 2.6, 2.7, and 2.8	Andrea Rodriguez
07/28/2022	3.0	Updated as per Client Correspondence Committee Review	Phong Xiong
08/09/2022	4.0	Added clarification to Section 2.1.2.2.b to include both 'Safe at Home' and 'Safe at Home Case Flag'	Tom Lazio

Table of Contents

1   OVERVIEW

Batch job PB00R1948 generates the CF 285 for all counties for potentially eligible individuals for CalFresh benefits. For LA County, a solicitation letter (PA 6174) is also sent for potentially eligible CalFresh households alongside the CF 285. The CalSAWS system will no longer send the solicitation letter for LA County. The CF 285 will be updated to match the latest State version as provided by ACL 21-70. A new form, the CF 285A, will also be implemented.

1.1   Current Design

At the time of a Medi-Cal renewal, the system runs the CalFresh non-financial and financial eligibility rules, using the income and expense details available at the time of approving the Medi-Cal program. The System generates a pre-populated CF 285 (6/19) (CA-228332) in batch (batch job PB00R1948) when a Medi-Cal household is potentially eligible for CalFresh benefits for all counties. Additionally, the existing job has functionality to skip the CalFresh Eligibility test when there is CAPI or GA on the Medi-Cal case.

1.2   Requests

1.   Update CalFresh Solicitation Letter Requirements to:
    a.   Exclude Minor Consent, Safe at Home, and Foster Care Medi-Cal cases, as well as
    b.   Include Medi-Cal persons who are aided on CalWORKs only, CAPI, or GA programs.
2.   Update the CF 285 to the most current version (04/21) and make the pre-populated fields editable in the Template Repository. Update the CF 285 for the TNB 4 RE Packets.
3.   Add application source of "Pre-Populated CalFresh" to be able to track the pre-populated applications.
4.   The System must stop mailing the CF Solicitation Letter (PA 6174) for LA County.
5.   Add new CF 285A (11/21) with the new cover letter (PUB 520) into the system.
6.   Update Medi-Cal RE batch job to replace the CF 285 with the new CF 285A and PUB 520.
7.   Post CF 285, CF 285A, and CF 285A Application Packet to the self-service portal.
8.   Enable E-Signature for both CF 285 and CF 285A.

1.3   Overview of Recommendations

1.   Update CalFresh Solicitation Letter rules with the following:
    a.   Exclude Minor Consent cases, Safe at Home cases, and Foster Care Medi-Cal cases.
    b.   Include Medi-Cal cases that also has CalWORKs only, CAPI or General Assistance programs.
2.   Update the CF 285 to match the most current version from CDSS and make the pre-populated fields editable in the template repository.

a. The CF 285 also exists in the TNB 4 RE packets.
3. Remove the PA 6174 for LA County.
4. Add new CF 285A into CalSAWS.
5. Add new PUB 520 into CalSAWS.
6. Create new CF 285A Application Packet.
7. Update Medi-Cal RE batch job to generate the CF 285A Application Packet.
8. Add an application source of "Pre-Populated CalFresh".

1.4 Assumptions

1. The CF 285 also exists in the TNB 4 RE Packet.
2. The CF 285 will be replaced in the Medi-Cal RE batch job (PB00R1948) by the CF 285A Application Packet.
    a. The CF 285 can now only be generated via template repository.
3. The CF 285 and CF 285A can be generated as a blank template or pre-populated from the template repository. All variable fields for the CF 285 and CF 285A are editable when generated from the template repository.
    a. SCR CA-248361 will add the threshold languages for the CF 285A and PUB 520.
4. Medi-Cal program persons who are also active on Managed GR, Non-Managed GR or GAGR Automated Solution will <u>not</u> be skipped for CF 285A Application packet batch job generation.
5. The Reports impact related to the addition of the new application source of "Pre-Populated CalFresh" will be handled by SCRs CA-234730 and CA-227569. These SCRs are to be implemented in the system prior to the implementation of SCR CA-225996.
6. This SCR will introduce the new application source of "Prepopulated CalFresh" into the system; however, the Source drop down will be made a required field with SCR CA-246284 and the change is expected to be implemented at the time of this SCR's release.

2 RECOMMENDATIONS

2.1 Update CalFresh Solicitation Letter Requirements for Medi-Cal Program Persons

2.1.1 Overview

When EDBC is run on Medi-Cal cases, CalSAWS checks for CalFresh eligibility in order to set the form indicator flag that is picked by the correspondence batch job PB00R1948 to generate the CF 285A Application Packet. These rule checks exclude Medi-Cal persons who also receive benefits from other programs such as Cash Assistance Program for Immigrants (CAPI) or LA General Assistance (GA). The regulations do not support this condition so the functionality will be modified to <u>not</u> skip the CalFresh Eligibility test for Medi-Cal program persons who are also active on CAPI or GA programs.

Currently, Medi-Cal persons who are on Minor Consent, Safe at Home, and Foster Care Medi-Cal cases are included in the CF 285 form generation. Per CRPC 2296, these persons should be excluded from CF 285A Application Packet generation.

2.1.2 Description of Changes

1. Modify the CF 285A form generation rules to no longer skip CalFresh eligibility test for Medi-Cal program persons who are aided on the following programs:
    a. California Work Opportunity and Responsibility to Kids (CalWORKs) only
    b. Cash Assistance Program for Immigrants (CAPI)
    c. LA General Assistance/General Relief (GA)

2. Exclude Medi-Cal program person(s) from the CalFresh eligibility checks for CF 285A form generation who meet any of the following conditions:

    a. Is receiving Minor Consent aid.
    b. On a case that is flagged as 'Safe at Home' or 'Safe at Home Case Flag'
    c. Is active on a Foster Care program.

2.1.3 Programs Impacted

Medi-Cal

CalFresh

2.2 Updates to the CF 285 – Application for CalFresh Benefits

2.2.1 Overview

The CF 285 is the application used for applying for CalFresh benefits.

State Form: CF 285 (04/2021)
Current Programs: CalFresh
Current Attached Form(s): None
Current Forms Category: Application
Current Template Repository Visibility: All
Existing Languages: English and Spanish

2.2.2 Form Verbiage

The verbiage of the CF 285 will be updated as described in the table below to match the 04/2021 State version.

Update Form XDP

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

Form Mockups/Examples: See supporting document #1

Existing Verbiage	Updated Verbiage	Location in Document
You can also apply for CalFresh or other programs online by going tohttp://www.benefitscal.org/. You can see if you may be eligible by going tohttp://www.cdss.ca.gov/foodstamps/PG849.htm.	You can also apply for CalFresh or other programs online by going to http://www.benefitscal.com/	Page 1 First paragraph under "How Do I Apply?"
For a list of locations near you that accept EBT please go to: https://www.ebt.ca.gov or https://www.snapfresh.org.	For a list of locations near you that accept EBT please go to: https://www.ebt.ca.gov	Page 2 Fourth bullet under "How do I get/use my CalFresh benefits?"
To file a program complaint of discrimination, complete the USDA	To file a program complaint of	Page 6

Program Discrimination Complaint Form, (AD 3027) found online at http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or contact your County's Civil Rights Coordinator, or write a letter addressed to USDA and provide in the letter all of the information requested in the form or write to California Department of Social Services (CDSS) address below.	discrimination, complete the USDA Program Discrimination Complaint Form, (AD 3027) found online at https://www.usda.gov/oascr/how-to-file-a-program-discrimination-complaint, and at any USDA office, or contact your County's Civil Rights Coordinator, or write a letter addressed to USDA and provide in the letter all of the information requested in the form or write to California Department of Social Services (CDSS) address below. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:	"Nondiscrimination Statement"

2.2.3 Form Generation Conditions

1. **Updates to Form Generation**

   The CF 285 will no longer be generated via batch job PB00R1948.

   The CF 285 will only be available in the template repository.

   The CF 285 is included in the TNB 4 RE Packet; it will also be updated with the above changes.

2. **Update Form to Template Repository**

   The CF 285 currently exists in the Template Repository in only English and Spanish. The following languages will be added:

   - Arabic
   - Armenian
   - Cambodian
   - Chinese
   - Farsi
   - Hmong

- Korean
- Lao
- Russian
- Tagalog
- Vietnamese

3. **Update Form Print/Mailing Options**

   All print options are currently available for this form.

   Additional Options:

   Electronic Signature: Yes

       Electronic Signature (IVR/Text): Yes

       Check to Sign: No

   Post to Self Service Portal (SSP): Yes

4. **Update Journal Entry**

   Update existing CF 285 Journal Entry Short Description to the following:

   "CF 285A/PUB 520 – Application for CalFresh Benefits and Cover Letter"

2.3 Updates to PA 6174 – CalFresh Solicitation Letter

2.3.1 Overview

The PA 6174 is the CalFresh Solicitation Letter that is used only by LA County as a cover sheet to inform a customer they may be eligible for CalFresh benefits. It is currently only used by LA County and generated via batch. It can also be generated in the Template Repository.

State Form: PA 6174 (09/2017)

Current Programs: CalFresh

Current Attached Form(s): None

Current Forms Category: Form

Current Template Repository Visibility: LA County

Existing Languages: English

2.3.2 Form Verbiage

There are no updates in this section for this form.

2.3.3 Form Variable Population

There are no updates in this section for this form.

2.3.4 Form Generation Conditions

1. **Updates to Form Generation**

   Remove the PA 6174 from generating via batch job PB00R1948.
   Remove the PA 6174 from the Template Repository.

2.4 Add New CF 285A – Prepopulated Application for CalFresh Benefits

2.4.1 Overview

The CF 285A is generated when a case is potentially eligible for CalFresh Benefits during Medi-Cal renewal for Medi-Cal beneficiaries.

State Form: CF 285A (11/21)

Programs: CalFresh

Attached Forms: PUB 520 (see section 2.5)

Forms Category: Application

Template Repository Visibility: All counties

Languages: English and Spanish

2.4.2 Form Verbiage

Create Form XDP

Form Header: Header_1 (CalSAWS Standard Header) & Header_BRM

Form Title (Document List Page Displayed Name): Prepopulated Application for CalFresh Benefits

Form Number: CF 285A

Include NA Back 9: No

Imaging Form Name: Prepopulated Application for CF Benefits

Imaging Document Type: Application

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #2

2.4.3 Form Variable Population

The CF 285A will follow the variable population logic of the existing CF 285 as implemented in SCR CA-207112.

2.4.4 Form Generation Conditions

1. **Add Form to Template Repository**
   The CF 285A will be implemented into the Template Repository.

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

2. **Add Form Control**

Add the following barcodes to the CF 285A.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	Y	Y

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

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

Mailing Options:
Mail-To (Recipient): Applicant
Mailed From (Return): Sending Office
Mail-back-to Address: BRM
Outgoing Envelope Type: Full Size Flat Mail
Return Envelope Type: BRM

Additional Options:
Special Paper Stock: None
Enclosures: None
Electronic Signature: Yes
    Electronic Signature (IVR/Text): Yes
    Check to Sign: No
Post to Self Service Portal (SSP): Yes

2.5 Add New PUB 520 – CalFresh Prepopulated Application Informational Flyer

2.5.1 Overview

The new PUB 520 will inform households of their potential CalFresh eligibility, define CalFresh, explain why they are receiving the CF 285A, and describe how to apply for CalFresh.

State Form: PUB 520 (11/21)

Programs: CalFresh

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All counties

Languages: English and Spanish

2.5.2 Form Verbiage

Create Form XDP

A new XDP will be created for the PUB 520 flyer.

Form Header: None

Form Title (Document List Page Displayed Name): CalFresh Prepopulated Application Informational Flyer

Form Number: PUB 520

Include NA Back 9: No

Imaging Form Name: CF Prepop App Informational Flyer

Imaging Document Type: CalFresh (CF)

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #3

2.5.3 Form Variable Population

There is no variable population logic for this form.

2.5.4 Form Generation Conditions

1. **Add Form Control**

   Add the following barcodes to the PUB 520.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

2.6 Add New CF 285A Application Packet Recommendation

2.6.1 Overview

This new packet will be generated via batch (PB00R1948) and Template Repository. It will include the PUB 520 and CF 285A.

State Form: N/A
Programs: CalFresh
Attached Forms: None
Forms Category: Application
Template Repository Visibility: All counties
Languages: English and Spanish

2.6.2 Form Verbiage

Create Form XDP

A new XDP will be created for the CF 285A Application Packet. The packet contains the following forms in the following order:

Forms
PUB 520
CF 285A

Form Header: CalSAWS Standard Coversheet (CSF 147) & Header_BRM
Form Title (Document List Page Displayed Name): CalFresh CF 285A Application Packet
Form Number: CF 285A Application Packet
Include NA Back 9: No
Imaging Form Name: CalFresh CF 285A Application Packet
Imaging Document Type: CalFresh (CF)
Imaging Case/Person: Case
Form Mockups/Examples: See supporting document #4

2.6.3 Form Variable Population

The variable population of the forms in this packet will follow their respective form variable population logic as mentioned in sections 2.4.3 and 2.5.3.

2.6.4 Form Generation Conditions

1. **<u>Add Form Generation</u>**
   The CF 285A Application Packet will be generated via batch job PB00R1948.
   The generation conditions of batch job PB00R1948 remains the same, the CF 285 that is generated will be replaced by the new CF 285A Application Packet.
   The packet will be used by all counties.

2. **<u>Add Form to Template Repository</u>**
   The CF 285A Application Packet will be implemented into the Template Repository.

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

3. **<u>Add Form Control</u>**

   Add the following barcodes to the CF 285A Application Packet.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	Y	Y

4. **<u>Add Form Print Options and Mailing Requirements</u>**

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

   Mailing Options:
   Mail-To (Recipient): Applicant
   Mailed From (Return): Sending Office
   Mail-back-to Address: BRM
   Outgoing Envelope Type: Full Size Flat Mail
   Return Envelope Type: BRM

   Additional Options:
   Special Paper Stock: None
   Enclosures: None
   Electronic Signature: Yes
       Electronic Signature (IVR/Text): Yes
       Check to Sign: No

Post to Self Service Portal (SSP): Yes

2.7 Application Registration Summary

2.7.1 Overview

The Application Registration page allows a user to register an application for a potential participant/beneficiary. This SCR adds "Pre-Populated CalFresh" as an option to the Source drop-down.

2.7.2 Application Registration Summary Mockup

Figure 2.6.1 – Application Registration Summary Mockup

2.7.3 Description of Changes

1. Update the Application Source drop-down to include "Pre-Populated CalFresh" as an option, as shown in Figure 2.6.1.

2.7.4 Page Location

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

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

N/A

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 New/Reapplication Detail

2.8.1 Overview

The New/Reapplication Detail page displays detailed application information for a specific case. This SCR adds "Pre-Populated CalFresh" as an option to the Source drop-down.

2.8.2 New/Reapplication Detail Mockup

Figure 2.7.1 – New/Reapplication Detail Mockup

2.8.3 Description of Changes

1. Update the Application Source drop-down to include "Pre-Populated CalFresh" as an option, as shown in Figure 2.7.1.

2.8.4 Page Location

- **Global:** Case Info

- **Local:** Case Summary
- **Task:** New Program

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 New Programs Detail

2.9.1 Overview

The New Programs Detail page allows the user to add or create multiple program(s) for a participant/beneficiary during the application process. This SCR adds "Pre-Populated CalFresh" as an option to the Source drop-down.

2.9.2 New Programs Detail Mockup

New Programs Detail

* - Indicates required fields

Figure 2.8.1 – New Programs Detail Mockup

2.9.3 Description of Changes

1. Update the Application Source drop-down to include "Pre-Populated CalFresh" as an option, as shown in Figure 2.8.1.

2.9.4 Page Location

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

2.9.5 Security Updates

N/A

2.9.6 Page Mapping

N/A

2.9.7 Page Usage/Data Volume Impacts

N/A

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	CF 285 Mockup	CF_285_EN.pdf
2	Forms	CF 285A Mockup	CF_285A_EN.pdf
3	Forms	PUB 520 Mockup	PUB_520_EN.pdf
4	Application	CF 285A Application Packet Mockup	CF285A_APP_Packet.pdf

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.5.2	The LRS shall evaluate all new and/or changed information in order to determine if any new correspondence needs to be generated and distributed to the applicant/participant, and then shall generate and distribute the correspondence, as appropriate.	Updating CalFresh Solicitation Letter Requirements for generating CF 285A form for MC persons eligible for CalFresh.
2.18.1.15	The LRS shall pre-populate fields of notices, NOAs, forms, and letters with designated applicant, participant, caregiver, sponsor, authorized representative, and/or any other entity s information.	Adding the pre-populated CF 285A into CalSAWS.

California Statewide Automated Welfare System

Design Document

CA-227245

ACL 21-93 CF 377.1A Notice of Denial Updates

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Jasmine Chen
	Reviewed By	Tiffany H.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/18/2022	1.0	Initial Document	Jasmine Chen
07/14/2022	1.1	Technical updates of design after CC Build review	Jasmine Chen
07/25/2022	1.2	Updates to Assumptions 7,10 per CC User Group's review	Jasmine Chen
07/28/2022	1.3	Updates to Assumptions, added note	Jasmine Chen

Table of Contents

1   OVERVIEW

This effort will be updating and adding new NOA reasons for CalFresh (CF) Denial: Initial Application based on the current State version of the CF 377.1A (08/21).

1.1   Current Design

Currently the System has several versions of DFA 377.1A (03/02). Because the DFA 377.1A notice has been overridden by the State with new CF 377.1A, CA-235013 has added the latest CF 377.1A (08/21) into the Template Repository. The System also has a specific version of the DFA 377.1A (03/02) in the Template Repository with verbiage: "You have failed to complete the application process and have missed your interview(s)." This specific version was initially reserved and generated via batch. Per 22.03 CA-235407, this DFA 377.1A batch generation logic was turned off, leaving the NOA version for 'Missed Intake Interview' now generatable through EDBC only.

Per 22.05 CA-226508, the 'Denial: Recertification (RE) Application' section of CF 377.1A (08/21) has been added into the system as NOA verbiage. The System does not have the latest State verbiage for CF 'Denial: Initial Application'.

Currently, CF Denial NOA for reason e.g. 'Ineligible due to Institution', has extra Failure to Provide (FTP) message verbiage, '…If you give us this information within 30 days…'. This verbiage is not needed as 'Ineligible due to Institution' is considered a non-FTP reason and not requiring proof or documentation. Other reasons such as 'No Proof Severe Crime Victim' is missing the FTP message verbiage as this reason is requesting for proof.

1.2   Requests

1. Obsolete the DFA 377.1A (03/02) version.
2. Add 'Denial: Initial Application' verbiage of CF 377.1A (08/21) into the system as NOA verbiage.
3. Update CF 'Missed Intake Interview' Denial NOA reason's regulations.
4. Update CF 'Missed Recertification Interview' Denial generation logic to include conditions for: CF program discontinued and when the RE Interview was missed.
5. Update fragment configurations of certain CF Denial reasons.

1.3   Overview of Recommendations

1. DCR: Obsolete the DFA 377.1A (03/02) form versions from the Template Repository.
2. DCR: Update remaining 'DFA 377.1A' NOA footers to 'CF 377.1A (08/21)'.
3. Update Denial NOA Action6 generation logic to be used with non-FTP Denial NOA reasons.

4. Update Denial NOA Action1 verbiage and generation logic to be used with FTP Denial NOA reasons.
5. Add new CF Initial Application Denial NOA Reason, FTP Missing Verifications.
6. Create 'Missed RE Interview' Denial NOA reason generation logic when CF program status is Discontinued and RE Interview is missed.
7. Update 'Missed Intake Interview' non-FTP Denial NOA reason's regulations and fragment configuration.
8. Add Denial NOA Message6 in remaining system-supported threshold languages.
9. DCR: Replace existing message fragments with general Message6 for certain non-FTP Denial reasons.
10. DCR: Update certain non-FTP Denial reasons to associate with Action6, Message6.
11. Update FTP-Denial NOA Message1 verbiage and generation logic per CF 377.1A.
12. DCR: Use FTP-Denial NOA Message1 with certain FTP-Denial reasons.
13. Update 'Non-Coop Sponsored Non-Citizen' FTP-Denial NOA reason's verbiage.
14. Update 'Ineligible Student' non-FTP Denial NOA reason's verbiage.

1.4 Assumptions

1. CA-235013 has added the CF 377.1A (08/21) form into the Template Repository.
2. When CF Denial is due to more than one Denial NOA reason and all reasons are determined to have the exact same action/message verbiage, then those reasons will generate on the same NOA.
   > Note: This is not true for the Denial Reasons – Missed Intake Interview, Missed RE Interview, as these reasons will not generate with any other reasons.
3. CA-245999 will add the threshold language versions of the new Denial reason fragment, 'FTP Missing Verifications' of Recommendation 2.5.
4. CA-236896 will add the threshold language versions of CF 377.1A's section 'Denial: Recertification Application'.
5. CA-238892 will remove obsoleted CF Denial NOA reason, 'Receipt of SSP'.
6. CA-247999 will remove obsoleted CF Denial NOA reasons from the System such as denial reason, 'Convicted Drug Felon'.
7. CA-56887 will update CalFresh change and denial NOAs to include the name(s) of the individual(s) who are impacted the negative action.
8. CA-240701 will add verbiage and scope the generation logic of 'Failure to meeting CF Work Registration Rules' on a CF 377.1A Denial NOA, regardless of if from an intake or recertification.
9. CA-240872 will address the CF Sanction NOAs to display the correct sanction period, number of disqualified months and will remove the references of 'CalFresh Employment and Training (E&T)' from the verbiage of work registration failure reason 'Voluntary Job Quit'.

2   RECOMMENDATIONS

2.1   DCR: End-date old versions, DFA 377.1A, from Template Repository, DB

2.1.1   Overview

This technical effort is turning off the obsoleted DFA 377.1A (03/02) from the Template Repository and turning off the DFA 377.1A form (specifically with Missed Intake Interview verbiage) from the database as its related-batch has been turned off by CA-235407.

Note: CA-235013 already added the latest CF 377.1A (08/21) State form version into the Template Repository.

State Form: DFA 377.1A (03/02) - Notice of Denial or Pending Status

Current Program: CalFresh

Current Attached Forms: NA Back 9

Current Forms Category:

DFA 377.1A (DOC_TEMPL.ID = 6306), Notice

DFA 377.1A with Missed Intake Interview verbiage (DOC_TEMPL.ID = 6250), Form

Current Template Repository Visibility: Both 'All Counties'

Existing Languages: Refer to Section 2.1.4 for existing languages of each document.

2.1.2   Form Verbiage

There are no changes to verbiage as these documents are being turned off.

2.1.3   Form Variable Population

There are no changes to variable population as these are being turned off.

2.1.4   Form Generation Conditions

Note: The below are technical database changes.

1) <u>**State's full DFA 377.1A document**</u>

   DFA 377.1A (DOC_TEMPL.ID = 6306)

Existing languages (13): English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Lao, Korean, Russian, Tagalog, Vietnamese

Turn off the document in all languages from Template Repository by providing each an end date under DOC_TEMPL_LANG.PERIOD_END_DATE and updating the DOC_TEMPL_LANG.FORMAT_CODE to 'FN - Form Not Requested from Repository'.

2) **DFA 377.1A form with Missed Intake Interview verbiage**
DFA 377.1A (DOC_TEMPL.ID = 6250)
Existing languages (10): English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

Turn off the document in all languages from the database by providing each an end date under DOC_TEMPL_LANG.PERIOD_END_DATE.

2.2 DCR: Update Remaining NOA Footers to 'CF 377.1A'

2.2.1 Overview

This recommendation is updating the System's remaining NOA footers labeled with DFA 377.1A to reference the latest State notice, CF 377.1A.

Fragment Name and ID:
Refer to list of reason fragments in Supporting Document #1
State Form/NOA: DFA 377.1A (03/02) But per this recommendation, will be updated to reference the latest State notice, CF 377.1A (08/21)
NOA Template ID(s): CalSAWS CalFresh NOA Template, CF_NOA_TEMPLATE (ID = 3027)

Program(s): CalFresh

Action Type(s): Denial

2.2.2 NOA Verbiage

There are no changes to the NOAs' verbiage per this recommendation.

2.2.3 NOA Variable Population

1) **Variable Population**

No changes to variables per this recommendation.

2) Regulations
No changes to regulations per this recommendation.

3) Update NOA Footer for Reasons
Create a DCR to update any remaining NOA footers containing 'DFA 377.1A' to 'CF 377.1A (08/21)' for the (36) reasons listed in Supporting Document #1.

2.2.4 NOA Generation Conditions

There are no changes to the NOAs' generation logic per this recommendation.

2.3 Update CF Denial NOA non-FTP Action, CF_DN_ACTION6

2.3.1 Overview

This recommendation is updating an existing action fragment to be used with CF non-FTP denial NOA reasons.

Action Fragment Name and ID: CF_DN_ACTION6 (ID = 4157)
State Form/NOA: CF 377.1A (08/21), verbiage is derived from 1st checkbox under the Denial: Initial Application section of CF 377.1A
Current Program(s): CalFresh
Current Action Type(s): Denial
Current Fragment Level: Program
Currently Repeatable: No
Existing Languages (10)**:** English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese
NOA Mockup / Example: See Supporting Document #6 for the non-FTP action verbiage in a mockup

2.3.2 NOA Verbiage

1.) Update XDP for existing threshold languages
Update XDPs and verbiage for the action fragment in the existing languages for the 'has been denied' to be bolded.

Description	Existing Text	Updated Text	Formatting
Static	Your household's application for	Your household's application for	Arial Font Size 10

	CalFresh benefits has been **denied** because:	CalFresh benefits **has been denied** because:	"has been denied" will be in Bold

2.) <u>Add XDPs for remaining threshold languages</u>
Add XDPs and verbiage of the action fragment for the remaining (3) threshold languages:
  Arabic, Hmong, Lao

Final Availability of Languages (13)**:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

2.3.3 NOA Variable Population

1.) <u>Fragment Variable Population</u>
There are no variables in the verbiage.

2.3.4 NOA Generation Conditions

1.) <u>Fragment Generation</u>
Update the generation logic for this action fragment to generate with non-FTP denial reasons (also indicated by the reason fragment not being associated with FTP-message fragment, CF_DN_MESSAGE1, ID = 5008).

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

2.4   Update CF Denial NOA FTP-Action, CF_DN_ACTION1

2.4.1 Overview

This recommendation is updating the action fragment's verbiage to be dynamic when used with CF FTP/Verifications denial NOA reasons. The action fragment will display different fragment sections or verbiage dependent upon when the denial of the CF application had taken place.

Action Fragment Name and ID: CF_DN_ACTION1 (ID = 4008)
State Form/NOA: CF 377.1A (08/21), verbiage is derived from 1st or 2nd checkbox under the Denial: Initial Application section of CF 377.1A (dependent upon the denial date of the CF application)
Current Program(s): CalFresh
Current Action Type(s): Denial
Current Fragment Level: Program

Currently Repeatable: No
Existing Languages (13)**:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

2.4.2 NOA Verbiage

3.) <u>Update XDP in all Threshold</u>
Update the existing action fragment verbiage in all threshold languages.

Description	Existing Text	Updated Text	Format ting
<DNactionOnafter30bda>	The County has denied your application for Calfresh benefits dated <DenialEffDate>. Here's why:	Your household's application for CalFresh benefits **has been denied** because:	Arial Font Size 10 "has been denied" will be in Bold
<DNactionBefore30bda>		Your household's application for CalFresh benefits **will be denied** because you have not provided the requested information listed below:	Arial Font Size 10 "will be denied" will be in Bold

2.4.3 NOA Variable Population

1.) <u>Fragment Variable Population</u>
There are no variables in the updated verbiage.

2.4.4 NOA Generation Conditions

1.) <u>Fragment Generation</u>
The action fragment's generation conditions will be updated for the dynamic fragment sections to be generated.

2.) <u>Add Fragment Section Generation</u>

The updated action fragment will have dynamic sections that will generate per the following conditions:

Section	Generation Conditions
<DNactionOnafter30bda> *Verbiage -* *Your household's application for CalFresh benefits **has been denied** because:*	Generate this section if the associated reason fragment is: <u>FTP/Verification</u> • Considered a FTP denial reason, indicated by having the associated message fragment (ID = 5008) and • The denial of the application was on or after 30 days of the application date Note: This section will not display and will be hidden if the <DNactionBefore30bda> dynamic section was triggered. **NOA Mockup / Example**: See Supporting Document #4,5,8
<DNactionBefore30bda> *Verbiage –* *Your household's application for CalFresh benefits **will be denied** because you have not provided the requested information listed below:*	Generate this section if the associated reason fragment is: <u>FTP/Verification</u> • Considered a FTP denial reason and is associated to message fragment (ID = 5008) and • The denial of the application was before 30 days of the application date Note: This section will not display and will be hidden if the <DNactionOnafter30bda> dynamic section was triggered. **NOA Mockup / Example**: See Supporting Document #3,7

Ordering on NOA: The action fragment will be the first fragment generated on the NOA.

2.5 Add new CF Initial App Denial FTP-Reason: Failure to Provide Missing Verifications

2.5.1 Overview

This recommendation will add a new CalFresh Denial: FTP Missing Verifications NOA Reason Fragment when failing to provide mandatory verifications.

Note: List of mandatory verifications and MCE/CE checks are provided in Supporting Document #2.

State Form/NOA: CF 377.1A (08/21), this verbiage will populate the fill-in-reason textboxes in either 1st or 2nd checkbox under the Denial: Initial Application section of CF 377.1A
NOA Template: CalSAWS CalFresh Template (CF_NOA_TEMPLATE)
Program(s): CalFresh
Action Type(s): Denial
Fragment Level: Program
Repeatable: No
Include NA Back 9: Yes
Forms/NOAs Generated with this NOA: N/A
Languages (2)**:** English, Spanish
Note: Threshold Language versions of this NOA fragment will be added with CA-245999

2.5.2 Form/NOA Verbiage

1.) <u>Create Fragment XDP</u>
Add a new Reason NOA Fragment XDP for failing to provide mandatory verification information (See Supporting Documents #2 for list of mandatory verifications).

Description	Text	Formatting*
<DNonafter30listed>	You have not provided the requested information listed below:	Arial Font Size 10
<LIST_OF_VERIFS>	<PERSON> - <VERIFICATION> <DESCR>	Arial Font Size 10
<DNbefore30info10>	We asked you for the above information when you applied for CalFresh benefits. You did not give us the information within ten (10)	Arial Font Size 10

	days of the day it was requested, and you did not ask us for help in getting the missing information.	

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

The new Reason fragment will have dynamic sections e.g. <LIST_OF_VERIFS> that will generate for each Verification per Person.

Example of <LIST_OF_VERIFS> Dynamic Section:

John Doe - Income: No paystub yet
Jane Doe - Income
Jane Doe - Residence: No proof of residence

2.5.3 NOA Variable Population

1.) Add Fragment Variable Population
The new NOA Reason for failure to provide verifications will have the following variables:

Variable Name	Population	Formatting*
PERSON	Name of the Person associated to the missing verification. Example variable population: "John Doe"	Arial Font Size 10
VERIFICATION	Populates with the verifications not at 'Verified' or 'Not Applicable' status and are past the Verification Due Date and past any applicable Extension End Date (VERIF and CT170 tables). Example variable population: "Medical Condition"	Arial Font Size 10
DESCR	Description of the Verification taken from the Verification Page. (VERIF_DESCR) A	Arial Font Size 10

| | colon (':') will precede the description, see example below.

Note: If there is not a Description, this variable will not populate. If there is a Description available and the language requested is not English, the NOA will default to English as this Description is entered by the worker and there is currently not a way to translate what the worker has provided in the field.

Example variable population:

": Missing Driver's License" | |

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

Variables Requiring Translations: No, for the VERIFICATION variable. Note: Verifications for CalFresh in Spanish are already available in the database (CT170 REFER_TABLE_17_DESCR).

2.) <u>**Add Fragment Regulations**</u>
The new NOA Reason for failure to provide verifications will have the following regulation:
MPP 63-300.5, 63-300.5(e), 63-504, 63-504.23

3.) <u>**Add NOA Title and Footer Reference for new Reason**</u>
The new NOA Reason for failure to provide verifications will have the following References:

NOA Reference on Document List Page: MISSING VERIFS
NOA Title: CF_DN_NOA_TYPE (ID = 3102)
NOA Footer: CF 377.1A (08/21)

2.5.4 NOA Generation Conditions

1.) <u>**Add Fragment Generation**</u>
The new NOA Reason for failure to provide verifications will generate when running EDBC for CalFresh when all the following is true:
- the CalFresh program is Denied
- The EDBC did not fail with CF Missed Interview (New Application/Recertification) (CT73_CP)
- The EDBC did not fail with QC Failed to Keep 2 Appointments (CF) (CT73_XL)

- there are outstanding mandatory verifications (Verifications not at 'Verified' or 'Not Applicable' status and are past the Verification Due Date and past any applicable Extension End Date). The Date used to check this value will be the system run date.
See Supporting Documents #2 for list of mandatory verifications.

> Note:
> Supporting Document #2 is a list of mandatory verifications approved by the Committee in CA-226508 and is the same list referenced for this Recommendation.
>
> If the program is indicated as CF Modified Categorical Eligibility (MCE/CE), any mandatory verification listed under 'Does not apply to MCE/CE' will not populate. If the program is indicated as MCE/CE and all outstanding mandatory verifications of <LIST_OF_VERIFS> are 'Does not apply to MCE/CE', then this reason fragment will not generate on the NOA.

2.) **Add Fragment Configuration**

Add the following logic and fragments to be associated with this reason fragment:

Action Fragment: CF_DN_ACTION1 (ID = 4008)
Message Fragment: CF_DN_MESSAGE1 (ID = 5008)

Ordering on NOA: This reason fragment will generate prior to the associated Message Fragment listed above. When generating with other reasons on a Denial NOA this 'Missing Verifications' NOA reason will generate after the other reasons:

FTP Denial Action & Reason

Your household's application for CalFresh benefits **has been denied** because:

Jane Doe
have failed to provide any documentation evidence to show that you are a Victim of Human Trafficking.

New MISSING VERIFS Reason

You have not provided the requested information listed below:
John Doe - Income: No paystub yet
Jane Doe - Income
Jane Doe - Residence: No proof of residence

FTP-Message (ID = 5008)

If the information is received before <DUE_DATE60> (60 days after your date of application), your application will be reopened and you will not need to reapply. If eligible, you will be granted CalFresh benefits from the date we receive the information.

If your household's application for CalFresh benefits was denied, please note that your CalFresh eligibility may change if all household members begin receiving Supplemental Security Income (SSI) benefits. Contact your county if all members of the household begin receiving SSI benefits.

3.) <u>Add Fragment Section Generation</u>

The new NOA Reason will have dynamic sections that will generate per the following:

SECTION	GENERATION CONDITIONS
<DNonafter30listed> *Verbiage:* *You have not provided the requested information listed below:*	Generate this section if the dynamic fragment section of CF_DN_ACTION1 (ID = 4008) was determined as <DNactionOnafter30bda>. Note: This section will not display and the verbiage will be hidden if the determined dynamic section of the action fragment is <DNactionBefore30bda>. **NOA Mockup / Example**: See Supporting Document #4,5

<LIST_OF_VERIFS>	Generate the Person-Verification line item once per unique Person/Verification.
<DNbefore30info10> *Verbiage:* *We asked you for the above information when you applied for CalFresh benefits. You did not give us the information within ten (10) days…*	Generate this section if the dynamic fragment section of CF_DN_ACTION1 (ID = 4008) was determined as <DNactionBefore30bda> Note: This section will not display and the verbiage will be hidden if the determined dynamic section of the action fragment is <DNactionOnafter30bda>. **NOA Mockup / Example**: See Supporting Document #3

2.6 Generate CF Recertification Denial NOA for RE Missed Interview, Discontinuance

2.6.1 Overview

When EDBC results with a Discontinuance and additionally had a missed RE interview appointment, additional logic will be added to generate the 'Missed RE Interview' non-FTP reason verbiage on the CF Recertification Denial NOA.

Reason Fragment Name and ID:
> CF_DN_NO_RECERT_INTER_F922 (ID = 7257)

State Form/NOA:
> CF 377.1A (08/21), this reason verbiage currently exists in CalSAWS for CF Recertifications and will populate the fill-in-reason textbox of 1st checkbox under the Denial: Recertification Application section of CF 377.1A

Current NOA Template: CalSAWS CalFresh Template (CF_NOA_TEMPLATE)
Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages (1)**:** English

2.6.2 NOA Verbiage

There are no changes to the verbiage.

2.6.3 NOA Variable Population

1.) <u>Variable Population</u>

There are no changes to the variable population.

2.) <u>Regulations</u>

Update the reason's regulations to be:
MPP 22-001(a)(1), 22-001(t)(1); MPP 63-300.46, 63-504.23, 63-504.26, 63-504.61

3.) <u>NOA Title / Footer Reference</u>

There are no changes to the NOA Title / Footer reference.

2.6.4 NOA Generation Conditions

1.) <u>Fragment Generation</u>

Generation Type	Does this NOA reason currently generate prior to this effort?	Is this generation type being updated with this effort?
EDBC	No	**Yes**
Negative Action EDBC	Yes	No, the NOA will continue to be available via Negative Action
Batch	No	No

Add new logic to generate the existing reason fragment, CF_DN_NO_RECERT_INTER_F922 for the following scenario and conditions:

- The most recent CF or CW/CF RE packet has been received
- The CF program status is Discontinued:
    - There is at least one existing CalFresh EDBC for the current Benefit month and in the most recent saved CalFresh EDBC of the existing CalFresh EDBCs for that month, the person had a Discontinued status
    Or
    - There is not a previously existing CalFresh EDBC for the current Benefit month and there is at least one CalFresh EDBC for the previous month and in the most recent saved

> CalFresh EDBC for the previous month the person had a Discontinued status

- The EDBC failed with failure reason: 'CF Recert Expired' (CT73_E1), 'Failure to Complete RE Process' (CT73_87S), 'CF Missed Interview (New Application/Recertification)' (CT73_CP)
- The CF 386 – NOMI form has already been sent out for the latest CF missed interview appointment date
- And the missed interview appointment satisfies one of the Category / Appointment Type combinations for CF 'Missed Recertification Interview':

	Category	Appointment Type
Recertification	Re-Evaluation CW/CF Interview	N/A, no dropdown
	Telephone CW/CF RE Interview	N/A, no dropdown
	General Appointment	Telephone Interview Recertification
	General Appointment	Reaffirmation Non-Group

- o With the missed appointment's status code as 'No Show', 'Scheduled', or 'Rescheduled'.

Note: When this reason fragment CF_DN_NO_RECERT_INTER_F922 (ID = 7257) for 'Missed RE Interview' generates, all other reason fragments for Recertifications will be suppressed and only this reason will be displayed on the Denial NOA.

NOA Reference on Document List Page:
> Will continue to be: 'RE Denial- interview was not completed'

NOA Title:
> Will continue to have NOA Title for Recertification Denial NOA Type (CF_DN_NOA_TYPE_RE, ID = 7803) which displays 'Notice of Denial'

NOA Footer: Continues to be CF 377.1A (08/21)

2.) Add Fragment Configuration
No changes outside of the associated Action/Message fragments will be updated. The following associations will remain the same:

Action Fragment: Continues to be associated with CF_DN_ACTION4 (ID = 4066)

Message Fragment: Continues to be associated with CF_DN_MESSAGE6 (ID = 5135)

2.7 Update CF Denial non-FTP Reason, CF_DN_MISSD_INTAKE_SCHL_INTER_F374

2.7.1 Overview

The CF 'Missed Intake Interview' Denial NOA will generate if the program was denied due to missing the intake interview appointment with EDBC failure reason, 'CF Missed Interview (New Application/Recertification)' (CT73_CP).

This effort will update the NOA's existing regulations and fragment configurations.

Reason Fragment Name and ID: CF_DN_MISSD_INTAKE_SCHL_INTER_F374 (ID = 6482)
State Form/NOA:
> CF 377.1A (08/21), this reason currently exist in CalSAWS and will populate the fill-in-reason textbox of 1st checkbox under the Denial: Initial Application section of CF 377.1A

Current NOA Template: CalSAWS CalFresh Template (CF_NOA_TEMPLATE)
Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages (10)**:** English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

2.7.2 NOA Verbiage

There are no changes to the verbiage.

2.7.3 NOA Variable Population

1.) <u>Variable Population</u>

There are no variables in this fragment.

2.) <u>Fragment Regulation</u>

Update the reason's regulations to be:

MPP 22-001(a)(1); MPP 63-300.46, 63-301.3, 63-504.23

3.) <u>NOA Title / Footer Reference</u>

There are no changes to the NOA Title / Footer reference.

2.7.4 NOA Generation Conditions

1.) <u>Fragment Generation Conditions</u>

There are no changes to the generation conditions.

2.) <u>Fragment Configuration</u>

Action Fragment: Continue to be associated with CF_DN_ACTION6 (ID = 4157)

Message Fragment: There is currently no associated message fragment for this Denial reason. Per Recommendation 2.10.4.2a, the message fragment will be updated to CF_DN_MESSAGE6 (ID = 5135).

2.8 Add CF Message, CF_DN_MESSAGE6 in threshold languages

2.8.1 Overview

This effort will add this message fragment in the system-supported threshold languages.

Message Fragment Name and ID: CF_DN_MESSAGE6 (ID = 5135)
State Form/NOA: CF 377.1A (08/21), verbiage from the last paragraph of CF 377.1A
Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No

Existing Languages (2)**:** English, Spanish

Existing English verbiage:

If your household's application for CalFresh benefits was denied, please note that your CalFresh eligibility may change if all household members begin receiving Supplemental Security Income (SSI) benefits. Contact your county if all members of the household begin receiving SSI benefits.

2.8.2 NOA Verbiage

Add the existing message fragment in the system-supported threshold languages. See Supporting Document #1 for each threshold verbiage.

Updated List of Languages (13):

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

2.8.3 NOA Variable Population

There are no variables in this message fragment.

2.8.4 NOA Generation Conditions

No changes to the existing generation conditions.

2.9 DCR: Replace message fragment for certain CF Denial non-FTP reasons

2.9.1 Overview

The message fragment, CF_DN_MESSAGE1 (ID = 5008) is to appear only on CF Denial NOAs with reasons for failing to provide (FTP) information. Currently the System has certain non-FTP Denial NOAs with this extra message fragment displayed.

This effort will remove the extra FTP-message verbiage to no longer display on certain non-FTP information NOAs.

Fragment Name and ID:
Refer to list of reason fragments in Supporting Document #1
State Form/NOA: CF 377.1A (08/21)
Current NOA Template: CalSAWS CalFresh Template (CF_NOA_TEMPLATE)
Current Program(s): CalFresh
Current Action Type: Denial

2.9.2 NOA Verbiage

There are no changes to the verbiage per this recommendation.

2.9.3 NOA Variable Population

There are no changes to the variables per this recommendation.

2.9.4 NOA Generation Conditions

1.) Update Fragment Configuration
Create a DCR and replace action, message fragments associated with the (9) non-FTP reasons listed in Supporting Document #1 to be:

Action Fragment: CF_DN_ACTION6 (ID = 4157)
Message Fragment: CF_DN_MESSAGE6 (ID = 5135)

2.10 DCR: Update certain CF Denial reason configuration: CF_DN_MESSAGE6, CF_DN_ACTION1

2.10.1 Overview

Per CF 377.1A (08/21)'s last paragraph, any CF Denial NOA will end with verbiage, 'If your household's application for CalFresh benefits was denied...'.

This recommendation is updating certain non-FTP CF Denial NOAs that currently do not have any message fragment, to now be associated with message fragment, CF_DN_MESSAGE6 (ID = 5135). Correspondingly these reason fragments will then be associated with action fragment, CF_DN_ACTION6 (ID = 4157).

Also, this recommendation will update certain CF FTP Denial NOAs to now be associated with FTP-action fragment, CF_DN_ACTION1 (ID = 4008).

State Form/NOA: CF 377.1A (03/02), verbiage from the last paragraph.
NOA Template ID(s): CalSAWS CalFresh NOA Template, CF_NOA_TEMPLATE (ID = 3027)

Program(s): CalFresh

Action Type(s): Denial

2.10.2 NOA Verbiage

There are no changes to the NOA reasons' verbiage per this recommendation.

2.10.3 NOA Variable Population

1.) Variable Population

No changes to variables per this recommendation.

2.) Regulations

No changes to regulations per this recommendation.

3.) Update NOA Footer for Reasons

No changes to the NOA Title, Footer for the certain reasons.

2.10.4 NOA Generation Conditions

1.) NOA Generation

There are no changes to these NOA reasons' generation logic per this recommendation.

2.) Update Fragment Configuration

Non-FTP Reasons' Configuration Changes

    a. Create a DCR for (16) non-FTP reason fragments (currently not having any message fragment and listed in Supporting Document #1), to now be associated with:

      Action Fragment: CF_DN_ACTION6 (ID = 4157)
      Message fragment: CF_DN_MESSAGE6 (ID = 5135)

      Technical Notes:

- Recommendation 2.12 will add the (ID = 5008) message fragment to NOA reasons (ID = 7211, 7213). Hence these reasons will not be included in this DCR.
- Do not add, associate MESSAGE6 (ID = 5135) to reason fragment 'Receipt of SSP' (ID = 6015). Please see Assumption #6.

FTP Reasons' Configuration Changes

    b. Create a DCR to update the (7) FTP reason fragments, listed in Supporting Document #1, to now be associated with action fragment, CF_DN_ACTION1 (ID = 4008).

      Technical Note: As action fragments (ID = 4064, 4009) were only used for DFA 377.1A and are now being replaced by 4008 (with latest State verbiage), obsolete the 4064, 4009 action fragments from the System if there is no other impacts to correspondence.

2.11 Update CF Denial NOA FTP-Message, CF_DN_MESSAGE1

2.11.1 Overview

This effort will update the message fragment's verbiage, variable population, and will update the generation logic to be used with FTP denial NOA reasons to match the State's CF 377.1A.

Note: CF_DN_MESSAGE1 (ID = 5008) will be updated to dynamically display different verbiage dependent upon when the denial is authorized. Please see details of Recommendation 2.11.4.3.

Message Fragment Name and ID: CF_DN_MESSAGE1 (ID = 5008)
State Form/NOA: CF 377.1A (08/21), verbiage from 3rd, 4th checkboxes under the Denial: Initial Application section and the last paragraph of CF 377.1A

Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No

Existing Languages (13)**:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Lao, Korean, Russian, Tagalog, Vietnamese

2.11.2 NOA Verbiage

Update the message fragment's existing verbiage to match State's CF 377.1A verbiage in all existing languages. See Supporting Document #1 for the updated threshold verbiage.

Description	Existing Text	Updated Text	Format ting
<DN30beforeBDA>	We asked you for the above information when you applied for CalFresh benefits. You did not give us the information within ten (10) days of the day it was requested. If you give us this information within 30 days after your date of application, your application will be reopened. If you do not, you will have to reapply.	You must give us the information by <DUE_DATE30> (30 days after your date of application) or your application will be denied and you will not get another notice.	Arial, font size 10
Static **NOA Mockups/Examples:** See Supporting Document #3,4,5,7,8 for		If the information is received before <DUE_DATE60> (60 days after your date of application), your application will be reopened and you will not need to reapply. If eligible, you will be granted CalFresh	Arial, font size 10

		benefits from the date we receive the information.	
the static message verbiage in a mockup.		If your household's application for CalFresh benefits was denied, please note that your CalFresh eligibility may change if all household members begin receiving Supplemental Security Income (SSI) benefits. Contact your county if all members of the household begin receiving SSI benefits.	Arial, font size 10

2.11.3 NOA Variable Population

<u>Add Fragment Variable Population</u>

The updated message fragment will have the following variables:

Variable Name	Population	Formatting*
<DUE_DATE30>	This variable will populate with 30 **calendar-days** following the application date. For example: If the application date (Day 0) is on 10/31, then the due date would be 11/30. Example variable population: "11/30/2022"	Arial Font Size 10
<DUE_DATE60>	This variable will populate with 60 **calendar-days** following the application date. For example: If the application date (Day 0) is on 10/31, then the due date would be 12/30. Example variable population: "12/30/2022"	

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

Variables Requiring Translations: N/A

2.11.4 NOA Generation Conditions

1.) <u>Fragment Generation</u>

No changes to the existing generation conditions.

2.) <u>Fragment Generation</u>

Update the message fragment generation logic to generate per the dynamic sections' conditions.

3.) <u>Fragment Section Generation</u>

Update the message fragment generation logic to generate the dynamic sections per the following conditions:

SECTION	GENERATION CONDITIONS
<DN30beforeBDA>	Generate this section if the denial of the application (EDBC.RUN_DATE) is before 30 days from the application date. The application date will be counted as Day 0. Note: If the denial of the application is on or after 30 days from the application date, this dynamic section will not display and will be hidden. **NOA Mockups/Examples:** See Supporting Document #3,7 for the dynamic message verbiage in a mockup.

2.12 DCR: Update FTP-Message, CF_DN_MESSAGE1 for certain CF Denial FTP-Reasons

2.12.1 Overview

Certain reasons are considered FTP CF Denial reasons.

This effort is to associate the action fragment, CF_DN_ACTION1 and message fragment, CF_DN_MESSAGE1 to these FTP CF Denial reasons.

Reason Fragment Name and ID:

- CF_DN_UVISA_NO_PROOF_SEVERE_CRIME_VICTIM_F157 (ID = 7213)
- CF_DN_TVISA_NO_PROOF_TRAFFIKNG_VICTIM_F156 (ID = 7211)
- CF_DN_FAIL_CMPLY_NHR_F143 (ID = 6074)
- CF_DN_FAIL_COMPLY_IFDS_F133 (ID = 7232)

State Form/NOA: CF 377.1A (08/21)
Current NOA Template: CalSAWS CalFresh Template (CF_NOA_TEMPLATE)
Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages

For reasons 7211, 7213 (2)**:** English, Spanish

For reasons 6074, 7232 (10): English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

2.12.2 NOA Verbiage

There are no changes to the verbiage.

2.12.3 NOA Variable Population

There are no variables in this fragment.

2.12.4 NOA Generation Conditions

1.) Fragment Generation Conditions
There are no changes to the existing generation conditions.

2.) Update Fragment Configuration
a. For these reason fragments, create a DCR and associate with below action and message fragments:
- CF_DN_UVISA_NO_PROOF_SEVERE_CRIME_VICTIM_F157 (ID = 7213)
  NOA Mockup / Example: See Supporting Document #8

- CF_DN_TVISA_NO_PROOF_TRAFFIKNG_VICTIM_F156 (ID = 7211)
  NOA Mockup / Example: See Supporting Document #5
- CF_DN_FAIL_CMPLY_NHR_F143 (ID = 6074)
- CF_DN_FAIL_COMPLY_IFDS_F133 (ID = 7232)

Action Fragment: Associate with action fragment, CF_DN_ACTION1 (ID = 4008) to above reason fragments.

Message Fragment: Associate with message fragment, CF_DN_MESSAGE1 (ID = 5008) to above reason fragments.

Technical Note: As message fragment (ID = 5009) was only used with reasons ID = 6074, 7232 and is now being replaced by 5008 (with latest State verbiage), obsolete the 5009-message fragment from the System if there are no other impacts to correspondence.

2.13 Update CF Denial FTP-Reason, CF_DN_NCOOP_SPNSR_NCTZN_F377

2.13.1 Overview

The CF 'Non-Coop Sponsored Non-Citizen' Denial reason and its associated message fragment currently both contain the 'give us this information' verbiage, making it seemingly appear twice when viewing the whole NOA. This effort is to remove the extra 'give us this information' verbiage from the reason fragment and have it only appear from the message fragment.

Reason Fragment Name and ID:
    CF_DN_NCOOP_SPNSR_NCTZN_F377 (ID = 6103)
State Form/NOA:
    CF 377.1A (08/21), this reason currently exist in CalSAWS and will populate the fill-in-reason textbox under the 1st or 2nd checkbox of the Denial: Initial Application section of CF 377.1A
Current NOA Template: CalSAWS CalFresh Template (CF_NOA_TEMPLATE)
Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages (2)**:** English, Spanish

NOA Mockups/Examples: See Supporting Document #7

2.13.2 NOA Verbiage

Update the reason in English and Spanish to remove the extra verbiage of 'give us this information'.

Note: See Supporting Document #1 for the updated verbiage in Spanish.

Description	Existing Text	Updated Text	Formatting

Static	You told us that this/these non-citizen(s) has/have a sponsor. We asked for the sponsor information when you applied for CalFresh benefits. You did not give us the information within ten (10) days of the day it was requested. If you give us this information within 30 days after your date of application, your application will be reopened. If you do not, you will have to reapply. If the sponsor(s) has property, part of it will be used when determining your eligibility. If the sponsor(s) has income, part of it will be used in determining your CalFresh benefits.	You told us that this/these non-citizen(s) has/have a sponsor. If the sponsor(s) has property, part of it will be used when determining your eligibility. If the sponsor(s) has income, part of it will be used in determining your CalFresh benefits.	Arial, font size 10

2.13.3 NOA Variable Population

There are no variables in this fragment.

2.13.4 NOA Generation Conditions

1.) <u>Fragment Generation Conditions</u>

There are no changes to the generation conditions.

2.) <u>Fragment Configuration</u>

Action Fragment: Will be associated with CF_DN_ACTION1 (ID = 4008) per Recommendation 2.10.4.2b

Message Fragment – Continues to be associated with CF_DN_MESSAGE1 (ID = 5008)

2.14 Update CF Denial non-FTP Reason, CF_DN_INELIG_STUD_F017

2.14.1 Overview

This effort is to update the verbiage of reason fragment, 'Ineligible Student'.

Reason Fragment Name and ID: CF_DN_INELIG_STUD_F017 (ID = 6019)
State Form/NOA:
> CF 377.1A (08/21), this reason currently exist in CalSAWS and will populate the fill-in-reason textbox under the 1st checkbox of the Denial: Initial Application section of CF 377.1A

Current NOA Template: CalSAWS CalFresh Template (CF_NOA_TEMPLATE)
Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages (2)**:** English, Spanish

NOA Mockups/Examples: See Supporting Document #6

2.14.2 NOA Verbiage

Update the reason verbiage in English and Spanish.

Note: See Supporting Document #1 for the Spanish translation.

Description	Existing Text	Updated Text	Formatting
Static	\<Person\> Is/are no longer eligible student. To be an eligible student, the student must meet at least one of the following conditions:	\<Person\> Is/are an ineligible student. To be an eligible student, the student must meet at least one of the following conditions:	Arial, font size 10

- The student works 20 hours a week and is paid minimum wage.	- The student works 20 hours a week and is paid minimum wage.
- The student is in a college work study program paid for by the Federal government.	- The student is in a college work study program paid for by the Federal government.
- The student is a parent or guardian of a child under age 6.	- The student is a parent or guardian of a child under age 6.
- The student is a parent or guardian of a child age 6 to 12 and cannot work 20 hours a week or be in a work study program because the student cannot get child care.	- The student is a parent or guardian of a child age 6 to 12 and cannot work 20 hours a week or be in a work study program because the student cannot get child care.
- The student gets CalWORKs.	- The student gets CalWORKs.
- The student goes to school through JTPA, E&T, JOBS, a program under the Trade Act of 1974, or a training program paid for by the state or local government.	- The student goes to school through JTPA, E&T, JOBS, a program under the Trade Act of 1974, or a training program paid for by the state or local government.
- The student is a single parent caring for a child under 12 and goes to school full time.	- The student is a single parent caring for a child under 12 and goes to school full time.

2.14.3 NOA Variable Population

There are no changes to the variable population.

2.14.4 NOA Generation Conditions

Fragment Generation Conditions

There are no changes to the generation conditions.

Fragment Configuration

There are no configuration changes per this recommendation.

Note: The configurations were already updated by previous Recommendations:

> **Action Fragment:** CF_DN_ACTION6 (ID = 4157) per Recommendation 2.10.4.2a

> **Message Fragment:** CF_DN_MESSAGE6 (ID = 5135) per Recommendation 2.10.4.2a

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	An Excel sheet supplementing Recs 2.2, 2.3, 2.4, 2.8, 2.9, 2.10.4.2a, b, 2.11, 2.13, 2.14	CA 227245 Supplemental to Recs.xlsx
2	NOA	An Excel sheet listing the mandatory verifications and certain verifications with MCE/CE check.	CA 227245 Mandatory Verifs wMCE check.xlsx
3	NOA mockup	The new CF Denial: FTP 'Missing Verifications' NOA mockup for CF denial before 30 days of the application date	CA 227245 New_CF - DE – MISSING VERIFS_before30bda.pdf
4	NOA mockup	The new CF Denial: FTP 'Missing Verifications' NOA mockup for CF denial on or after 30 days of the application date	CA 227245 New_CF - DE – MISSING VERIFS_onafter30bda.pdf
5	NOA mockup	A CF combined Denial for FTP-reason and FTP-reason 'Missing Verifications' for denial on or after 30 days of the application date	CA 227245 New_CF - DE - CombinedReasons_onafter30bda.pdf
6	NOA mockup	A CF Denial non-FTP NOA mockup	CA 227245 CF - DE - INELIGIBLE STUDENT_nonVerif.pdf
7	NOA mockup	A CF Denial FTP-Reason NOA for denial before 30	CA 227245 CF - DE - Non-Coop Spon Non-Cit_before30bda.pdf

		days of the application date	
8	NOA mockup	A CF Denial FTP-Reason NOA for denial on or after 30 days of the application date	CA 227245 CF - DE - Not apply for UVisaUVIR_onafter30bda.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1239 (2.18.3.3)	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices;	Updating the system to generate the appropriate verbiage on CalFresh Denial: Initial Application NOAs.

s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-228877

Add Threshold Languages to existing
CalWORKs NOAs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lianel Richwin
	Reviewed By	P Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/28/2022	1.0	Initial Document	Lianel Richwin

Table of Contents

1 OVERVIEW

The purpose of this change is to Add Threshold Languages to existing CalWORKs NOAs in CalSAWS.

1.1 Current Design

Currently some of the CalWORKs NOAs are only available in English and Spanish Languages in CalSAWS.

1.2 Requests

1. Update English, Spanish and add Threshold languages to CalWORKs Approval notice M40-171D (6/2018) to match with the state version.
   Languages include:
   Cambodian, Chinese, Russian and Vietnamese
2. Add Threshold languages to CalWORKs Change notice M44-113G1(6/98) to match with the state version.
   Languages include:
   Chinese, Russian and Vietnamese
3. Update English, Spanish and add Threshold languages to CalWORKs Change notice M44-316B (9/2013) to match with the state version.
   Languages include:
   Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese
4. Update English, Spanish and add Threshold languages to CalWORKs Denial notice M40-129E4 (12/90) to match with the state version.
   Languages include:
   Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese

1.3 Overview of Recommendations

1. Update the M40-171D NOA in following threshold languages: Cambodian, Chinese, English, Russian, Spanish and Vietnamese
2. Add the M44-113G1 NOA in following threshold languages: Chinese, Russian and Vietnamese
3. Update the M44-316B NOA in English, Spanish and add the available threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese
4. Update the M40-129E4 NOA in English, Spanish and add the available threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese

1.4 Assumptions

1. The triggering conditions of the Common NOA Fragments for Threshold Generation remains the same and are not being updated.
2. The NOA template remains the same and is not being updated.
3. The existing variable population is not being updated with this effort.

2   RECOMMENDATIONS

2.1   Add (A900A) M40-171D-Approval CalWORKs NOA Fragments for Threshold Generation in CalSAWS.

2.1.1   Overview

Update English, Spanish and add A900A-Approval CalWORKS NOA Fragments for Threshold Generation in CalSAWS.

Reason Fragment Name and ID: CW_AP_CW_APPROVED_A900 (Fragment ID: 6405)
State Form/NOA: NOA 290 /M40-171D
Current NOA Template: CW_NOA_TEMPLATE (ID: 3026)
Current Program(s): CalWORKs
Current Action Type: Approval
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA 1239
Existing Languages: English and Spanish

2.1.2   Form/NOA Verbiage

Update existing English, Spanish and add CalWORKs NOA fragments in Threshold languages.

Updated Language: English, Spanish,

Add Threshold languages: Cambodian, Chinese, Russian and Vietnamese

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<DYNAMIC_SECTION1>	Your first month's cash aid payment amount is figured on this notice. You will not receive a cash aid payment if the amount you would get is less than $10. If the date your cash aid starts is after the first day of the month, your first month's cash aid is only from that date through the end of the month. If nothing changes, next month's cash aid will be the full grant amount which is <NextMonthAid>. Medi-Cal Cards: Soon you will get a plastic Benefits Identification Card in the mail for each eligible person. Take the card(s) to your medical provider when needing care. DO NOT THROW AWAY YOUR CARDS. They will be good as long as you get Medi-Cal.	The cash aid payment for your first month of aid is only for a part of a month. It is for the time from your first day of cash aid, shown above, through the end of the month. If nothing changes, next month's cash aid will be for a full month, and you will get <NextMonthAid>.	Arial Font Size 10
<DYNAMIC_SECTION2>	Your first month's cash aid payment amount is figured on this notice. You will not receive a cash aid payment if the amount you would get is less than $10. If the date your cash aid starts is after the first day of the month, your first month's cash aid is only from that date through the end of the month. If nothing changes, next month's cash aid will be the full grant amount which is <NextMonthAid>. Medi-Cal Cards: Soon you will get a plastic Benefits Identification Card in the mail for each eligible person. Take the card(s) to	You asked for an Immediate Need payment. Your immediate need is being met with a payment of your first month's cash aid within the immediate need time limit of 1 working day.	

	your medical provider when needing care. DO NOT THROW AWAY YOUR CARDS. They will be good as long as you get Medi-Cal.		

Action Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	As of <EffectiveApprovalDate>, the County has approved your application for cash aid and Medi-Cal.	The County has approved your cash aid and Medi-Cal. The cash aid payment for your first month of aid is <FirstMonthCashAid>. Your first day of cash aid is <EffectiveApprovalDate>. Your first day of Medi-Cal is the first day of the month you applied for aid.	Arial Font Size 10

2.1.3 Form/NOA Variable Population

1. **Action Fragment Variable Population**

Variable Name	Population	Formatting
<FirstMonthCashAid>	First Month Cash aid amount Format: $600.00	Arial Font 10

Variables Requiring Translations: N/A

2. **Add regulations**

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

Regulations: Reg Cite: 40-171.2, 40-129, 44-315, 44-315.7, 44-317, 82-510.4, 82-820.3, 82-828.2

3. **Add NOA Title and Footer Reference for new Reason**

   The following are the references that will be included for the Reason Fragment.

   NOA Reference on Document List Page: APPROVED: CALWORKS

   NOA Title: CALWORKS APPROVAL

   NOA Footer: M40-171D (6/2018)

2.1.4 Form/NOA Generation Conditions

Dynamic Reason Fragment Section Generation

DYNAMIC_SECTION1 – Populate this section only for Prorated Grant.

DYNAMIC_SECTION2 – Populate this section if Immediate need was requested but CW was approved instead.

2.2 Add (A753C) M44-113G1- CNTBL Income decrease NOA Fragments for Threshold Generation in CalSAWS.

2.2.1 Overview

Add Chinese, Russian and Vietnamese languages for A753C- CNTBL Income decrease NOA in CalSAWS.

Reason Fragment Name and ID: CW_CH_CNTBL_INCOME_DEC_A753 (Fragment ID: 6367)
State Form/NOA: M44-113G1(6/98)
Current NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)
Current Program(s): CalWORKs
Current Action Type: Change
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.2.2 Form/NOA Verbiage

Add CalWORKs NOA fragments in the following languages:

Add Threshold Languages: Chinese, Russian, Vietnamese.

NOA Mockups/Examples: Supporting Documents #3

2.2.3 Form/NOA Variable Population

1. **Add regulations**

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

   Regulations: EAS 44-100, 44-316, 44-313

2. **Add NOA Title and Footer Reference for new Reason**

   The following are the references that will be included for the Reason Fragment.

   NOA Reference on Document List Page: CNTBL INCOME DECREASED

   NOA Title: CALWORKS CHANGE

   NOA Footer: M44-113G1(6/98)

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.3 Add (A752C) M44-316B- CNTBL Income Increase NOA Fragments for Threshold Generation in CalSAWS

2.3.1 Overview

Update English, Spanish and add A752C- CNTBL Income Increase NOA Fragments for Threshold Generation in CalSAWS

Reason Fragment Name and ID: CW_CH_CNTBL_INCOME_INC_A752 (Fragment ID: 6366)
State Form/NOA: NOA 290 /M44-316B
Current NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)
Current Program(s): CalWORKs
Current Action Type: Change
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA 1239
Existing Languages: English, Spanish

2.3.2 Form/NOA Verbiage

Update existing English, Spanish and Add CalWORKs NOA Fragments for threshold Generation

Updated Language: English, Spanish,

Threshold languages to add: Cambodian, Chinese, Russian and Vietnamese, Arabic, Armenian, Farsi, Hmong, Korean, Tagalog

NOA Mockups/Examples: Supporting Documents #5

Reason Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	Your family income has changed. When your income changes, your cash aid amount also changes.	You reported income of <TotalMonthlyHouseholdIncome> This is over your family's income reporting threshold (IRT). Your IRT was <previousIRTLimit> for a family of <AU_SIZE>. When you report income over the IRT the County refigures your cash aid amount.	Arial Font Size 10

Message Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	Your new monthly cash aid amount is figured on the next page. Your Assistant Unit (AU) size is <CwAssistanceUnitSize>. Your Income Reporting Threshold (IRT) is <CurrentIrtLimit>. You must call your worker within 10 days when your income goes higher than your IRT level. EBT: Keep your plastic Golden State	Your new cash aid amount is figured on the next page. Your new income changed your IRT amount. Your new IRT is <CurrentIrtLimit>. This means that if your family gets more than <TotalMonthlyHouseholdIncome>, you must report this to the County. You have 10 days to report getting income over your IRT.	Arial Font Size 10

	Advantage card if you use Electronic Benefit Transfer (EBT), even if your aid is terminated. Please do not throw it away. Medi-Cal: This Notice of Action does NOT change or stop Medi-Cal benefits. If there is a change in your Medi-Cal benefits, you will receive another notice. Keep using your plastic Benefits Identification Card(s). CalFresh: This notice DOES NOT stop or change your CalFresh benefits. You will get a separate notice telling you about any changes to your CalFresh benefits. Receiving Medi-Cal and/or CalFresh only DOES NOT count against your cash aid time limits.		

2.3.3 Form/NOA Variable Population

1. **Reason Fragment Variable Population**

Variable Name	Population	Formatting
<TotalMonthlyHousehold Income >	Reported Monthly Income Format: $600.00	Arial Font 10
<CurrentIrtLimit >	Income Report Threshold Format: $600.00	Arial Font 10
<AU_SIZE>	The size of the AU	Arial Font 10

Variables Requiring Translations: N/A

2. **Add regulations**

   This fragment has associated regulations The following Regulations will be added when the Fragment is generated on the NOA:

   Regulations: EAS 44-315, 44-316

3. **Add NOA Title and Footer Reference for new Reason**

   The following are the references that will be included for the Reason Fragment.

   NOA Reference on Document List Page: CNTBL INCOME INCREASED

   NOA Title: CALWORKS CHANGE

   NOA Footer: M44-316B (09/2013)

2.3.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.4 Add (A238D) M40-129E4 - IMDT ND DENIED INGBL OTHR RSN NOA Fragments for Threshold Generation in CalSAWS.

2.4.1 Overview

Update English, Spanish and add A238D - IMDT ND DENIED INGBL OTHR RSN NOA Fragments for Threshold Generation in CalSAWS

Reason Fragment Name and ID: CW_DN_INVALID_REQ_IMM_NEEDS_A238 (Fragment ID: 6213)
State Form/NOA: NOA 290/M40-129E4
Current NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)
Current Program(s): CalWORKs
Current Action Type: Denied
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.4.2 Form/NOA Verbiage

Update existing English, Spanish and Add CalWORKs NOA Fragments for threshold Generation

Updated Language: English, Spanish

Threshold languages to add: Cambodian, Chinese, Russian and Vietnamese, Arabic, Armenian, Farsi, Hmong, Korean, Tagalog

NOA Mockups/Examples: Supporting Documents #7

Action Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	The County has denied your application for Immediate Need dated <EffectiveDenialDate>. Here's why: You can't get an Immediate Need payment because:	The County has denied your application for Immediate Need dated <EffectiveDenialDate>. Here's why:	Arial Font Size 10

Reason Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	You said you need an Immediate Need payment right away because you didn't have <UserInputImmediateNeed>. The rule says that Immediate Need is for only those needs which are essential for you to function in everyday life. The reason you gave us for needing an Immediate Need payment does not meet this rule.	You said you needed an Immediate Need payment right away because you didn't have <UserInputImmediateNeed>. The rule says that Immediate Need is only for those needs that are essential for you to function in everyday life. The reasons you gave us for needing an Immediate Need payment do not meet this rule.	Arial Font Size 10

Message Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	ADDITIONAL INFORMATION: - you may request an Immediate Need payment at any time before we approve or deny your cash aid. to request an Immediate Need payment, you must complete the Immediate Need payment request form and give it to us. - you will get another notice about your regular cash aid.	You may request an Immediate Need payment at any time before we approve or deny your cash aid. To request an Immediate Need payment, you must complete the Immediate Need Payment Request form and give it to us.

You will get another notice about your regular cash aid. | Arial Font Size 10 |

2.4.3 Form/NOA Variable Population

1. **Add NOA Title and Footer Reference for new Reason**

    The following are the references that will be included for the Reason Fragment.

    NOA Reference on Document List Page: IMDT ND DENIED INGBL OTHR RSN

    NOA Title: CALWORKS DENIED

    NOA Footer: M40-129E4 (12/90)

2.4.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	A900A NOA M40-171D (6/2018) Mockup.	A900A NOA M40-171D.zip
2	NOA	NOA Fragments verbiage described in section 2.1.2	A900A NOA M40-171D.zip
3	NOA	A753C NOA M44-113G1(6/98) Mockup.	A753C NOA M44-113G1.zip
4	NOA	NOA Fragments verbiage described in section 2.2.2	A753C NOA M44-113G1.zip
5	NOA	A752C NOA M44-316B (9/2013) Mockup.	A752C NOA M44-316B.zip
6	NOA	NOA Fragments verbiage described in section 2.3.2	A752C NOA M44-316B.zip
7	NOA	A238D NOA M40-129E4 (12/90) Mockup	A238D NOA M40-129E4.zip
8	NOA	NOA Fragments verbiage described in section 2.4.2	A238D NOA M40-129E4.zip

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices;	M40-171D, M44-113G1, M44-316B, M40-129E NOA's are added in all available threshold languages.

b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-228937 | DDID 2150

Implement Child Placement Verification Process
for Sacramento and Alameda Counties

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Eric Wu
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/7/2022	1.0	Initial Version	Eric Wu

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1 OVERVIEW

1.1 Current Design

For Los Angeles County, all Foster Care (FC) Resources can have one of the following child placement verifications before receiving benefits in the system.

1. Blue Voucher

   When a child is initially placed with a FC Resource, a Blue Voucher is sent to the Resource. The Resource must return the Blue Voucher to DCFS to verify a child's placement.

   If Resources do not return the Blue Voucher for the impacted case and benefit month, all EDBC benefits will not be issued for that month until the Placement Verification is updated with a Received Date in the system.

   Note: The actual Blue Voucher is generated by the CalSAWS system.

2. White Voucher

   A White Voucher is like a Blue Voucher but for ongoing child placements. Similarly, all EDBC benefits will not be issued until the White Voucher is returned.

   Note: The actual White Voucher is generated by the eCAPS.

3. Voucherless

   A FC Resource is considered "Voucherless" when it does not require any placement verifications to receive benefits.

1.2 Requests

Per Design Differences ID (DDID) 2150, the CalSAWS will implement the Child Placement Verification process for Sacramento and Alameda Counties.

1.3 Overview of Recommendations

1. Create a new Foster Care Daily Voucher Writer to generate the White Voucher records and send them to the counties.
2. Create a new Foster Care Daily Voucher Reader to update the Received Date of the White Vouchers provided by the counties.
3. Enable Foster Care Voucher Exempted Vendors Batch.
4. Enable Skip Issuance logic for FC Voucher Verification.

1.4 Assumptions

1. The CalSAWS will not create or send any actual forms/notices for the placement verifications to the Resources.
2. Payment Requests and Auxiliary Authorizations do not require placement verifications for benefit issuances.
3. Data mappings for conversion of the CalWIN provider IDs and person IDs to new CalSAWS IDs will be provided to ALA and SAC.

2   RECOMMENDATIONS

2.1   Foster Care Daily Voucher Writer

2.1.1   Overview

The new interface batch will send the White Voucher files to Sacramento County and Alameda County. Below describes the required changes.

Note: This job will not generate any actual client correspondences to the counties and the resources.

2.1.2   Description of Change

1. Create a new daily interface batch job that will identify all FC placements with the following conditions.
   a. There is a Regular EDBC for the placement.
      i. The payment amount is more than 0.
      ii. The status is "Accepted and Saved"
      iii. EDBC is run during the day and the Benefit Month is prior to the batch month.
         Or the Benefit Month is the batch month regardless of EDBC Run Date.
   b. The placement is active for the Benefit month.
   c. The FC program is active for the benefit month.
   d. The Resource of the placement does not have any Placement Verification record for the Benefit month.
2. If the Resource of the placement requires placement verifications before benefits are issued, the batch will create a Placement Verification record with following values:
   a. Type will be White Voucher.
   b. Send Date will be the batch date.

   If the Resource is Voucherless, the batch will create a Placement Verification record with the following values:

   a. Type will be Exempt.
   b. Send Date and Received Date will be the batch date.
3. The batch job will send only the White Voucher records created in step 2 to the counties.
   Please see 'FC Voucher Outbound.xlsx' for the file layout.
4. The file will be encrypted and will have the 'pgp' file extension. The file name will be "fc_voucher_co[county code]o_MMDDYYYY.pgp" file extension. 'o' indicates the file is outbound and 'co' stands for county code.

2.1.3 Execution Frequency

Daily.

2.1.4 Key Scheduling Dependencies

Before Issuance Jobs

2.1.5 Counties Impacted

Sacramento County and Alameda County.

2.1.6 Data Volume/Performance

N/A

2.1.7 Interface Partner

Impacted counties.

2.1.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate the nature of the failure and determine the appropriate action, including email notification to the county Batch Process Administrators. This Batch job will not utilize restartability. The entire file will be written at the end of processing, or the file will not be created all. This approach will allow this job to be re-run without the possibility of creating a partial file and having to combine multiple partial files.

2.2 Foster Care Daily Voucher Reader

2.2.1 Overview

The new interface batch will process the inbound Foster Care Voucher file sent by the Sacramento County and Alameda County. The batch will update the Received Date of the Placement Verification record in the system when the White Vouchers are returned by the counties in the inbound file. Below describes the required changes.

2.2.2 Description of Change

1. Create a new interface batch that will update the Received Date of the Placement Verifications with the batch date. The job will process all Placement Verifications based on the Placement ID and the benefit

month in the FC Voucher Inbound file. Please see 'FC Voucher Inbound.xlsx' for the file layout.

2. The file name will be "fc_voucher_co[county code]i_MMDDYYYY.txt". 'i' indicates the file is inbound and 'co' stands for county code.

2.2.3 Execution Frequency

Daily

2.2.4 Key Scheduling Dependencies

It will run 8:00pm before Issuance batches start.

2.2.5 Counties Impacted

Sacramento County and Alameda County.

2.2.6 Data Volume/Performance

N/A

2.2.7 Interface Partner

Impacted counties.

2.2.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate the nature of the failure and determine the appropriate action, including email notification to the county Batch Process Administrators. This Batch job will not utilize restartability. The entire file will be written at the end of processing, or the file will not be created all. This approach will allow this job to be re-run without the possibility of creating a partial file and having to combine multiple partial files.

2.3 Foster Care Voucher Exempted Vendors Batch

2.3.1 Overview

The Foster Care Voucher Exempted Vendors batch job updates all pending Placement Verification records as received for the month when Resource becomes Voucherless. This job runs before Main Payroll so the benefits will not be skipped by the Skip Issuance logic.

This batch is currently available for Los Angeles County only. Below describes the required changes.

2.3.2 Description of Change

1. Enable the Foster Care Monthly Foster Care Voucher Exempted Vendors Batch (PBXXF222) for Sacramento and Alameda Counties.

2.3.3 Execution Frequency

Monthly

2.3.4 Key Scheduling Dependencies

It will run 8:00pm after FC Daily Voucher Reader and before Issuance batches.

2.3.5 Counties Impacted

Sacramento County and Alameda County.

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

Impacted counties.

2.3.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate the nature of the failure and determine the appropriate action, including email notification to the county Batch Process Administrators. This Batch job will not utilize restartability. The entire file will be written at the end of processing, or the file will not be created all. This approach will allow this job to be re-run without the possibility of creating a partial file and having to combine multiple partial files.

2.4 Enable Skip Issuance for FC Voucher Verification (DCR)

2.4.1 Overview

Below describes required changes to enable Skip Issuance logic to check for Foster Care Voucher verification for Sacramento and Alameda Counties.

2.4.2 Description of Change

1. Add "Skip Issuance Foster Care Voucher Verification" scenario in Fiscal Transact Map for all issuance Immediacy for Sacramento and Alameda Counties.

2.4.3 Estimated Number of Records Impacted/Performance

6 records.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Fiscal	FC Daily Voucher Writer File Definition	FC Voucher OutBound.xlsx
2	Fiscal	FC Daily Voucher Reader File Definition	FC Voucher Inbound.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2150	Revised requirement approved at App Dev Lead meeting on May 25, 2021: The CONTRACTOR shall update and incorporate into the CalSAWS Software an agreed upon list of CalWIN County specific batch processes. Original requirement from CalSAWS DD&I SOR: The CONTRACTOR shall update and incorporate into the CalSAWS Software an agreed upon list of CalWIN County specific batch processes. The list of batch processes shall be defined at design.	Assumptions removed via App Dev Lead meeting on May 25, 2021. Original assumptions from Exhibit U: - The following requirement states "The list of batch processes shall be defined at design". This requirement references new scope that will be defined during the Design phase. CONTRACTOR has not estimated this future scope. When the future scope is defined, CONTRACTOR will provide an updated estimate. - Assume 50 new Distinct CalWIN county specific batch processes, not including the 3 Auditor/Controller interfaces BIDD01J, BIDD03J, and BIDD06J. (Based on the Q&A response received 7/18/2018 estimating 40 to 50 county batch jobs.) - Assume combined database all 58 CalSAWS counties, removing the need for intra-CONSORTIUM interfaces. - Any new scheduled reports for CalWIN counties	Implement Child Placement Verification process to match CalWIN's Voice Response Unit functionalities.

		will be handled in a separate DDID. - This Estimate does not account for any interfaces with Auxiliary systems (e.g. SMART). These will be estimated once Auxiliary/Ancillary requirement are received. - The SMART system, currently used by CalWIN counties, will not be hosted, managed, or modified by Accenture. - Based on the inventory list of county specific batch jobs received, all 18 CalWIN counties utilize the same 3 auditor controller interfaces and same file layouts. These include BIDD01J, BIDD03J, and BIDD06J. - All fiscal transactions for warrant print and expenditure reporting are reported to auditor with the three interfaces received in the batch inventory. These include BIDD01J, BIDD03J, and BIDD06J.	

5 APPENDIX

Below is an example of how the FC Daily Voucher Writers generate vouchers.

Date	Events
2/27/2022	A Child is newly placed under Resource A and the worker runs FC EDBC to authorize benefits for 2/2022 to 4/2022 during the day. The FC Voucher Writer creates a White Vouchers 2/2022 for Resource A at night.
3/1/2022	The FC Voucher Writer creates a Voucher for the benefit month 3/2022 for Resource A.
3/10/2022	The Main Payroll skips Resource A's FC benefits for 2/2022 since the white Voucher for the benefit month has not been returned.
3/15/2022	The Resource A returns the Voucher for 2/2022. The Daily Issuance Batch issues FC benefits for 2/2022 to Resource A.
4/1/2022	The FC Voucher Writer create a Voucher for the benefit month 4/2022 for Resource A.
4/3/2022	The resource A returns Vouchers for 3/2022.
4/10/2022	The Main Payroll issues FC benefits for 03/2022 to Resource A.
4/21/2022	The placement changes and the child is moving from Resource A to Resource B. The worker run EDBC to authorize 20-day benefits for Resource A and 10-day benefits for Resource B for 4/2022. The FC Daily Voucher Writer creates one White Voucher for Resource B for 4/2022. Both Resources will need to return their vouchers to get the April benefits.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-233248

ACL 20-99- Update ABCD 350 Detail

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Diana Bonilla
	Reviewed By	Thao Ta, Ravneet Bhatia, Claudia Pinto

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/7/2022	1.0	Initial Document	Diana Bonilla

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1 OVERVIEW

Per ACL 20-99, on the ABCD 350 report CDSS has requested counties to specify the number of cases speaking each language for any cases included in Part B Primary Language Spoken under "Other Non-English".

The ABCD 350 identifies cases with Primary Language of "Other Non-English", but it does not identify which "Other Language". This SCR will add a column to identify what the "Other Non-English" language is.

1.1 Current Design

The current report does not specify what language the applicant speaks when the Primary Language is "Other Non-English".

1.2 Requests

Revise the "ABCD 350" detail pages to display the "Other language" for cases with Primary Language Spoken of "Other Non-English".

1.3 Overview of Recommendations

1. Add a new column "Other Language" to the detail sheets of the ABCD 350 to populate when the primary language is "Other Non-English".

1.4 Assumptions

1. No report other than the ones mentioned in this document will be impacted by this SCR.

2   RECOMMENDATIONS

2.1   ABCD 350 Detailed Report

2.1.1   Overview

ABCD 350 is an annual recipient report of Ethnic Origin & Primary Language for CalWORKs, FC, Social Services, NAFS, WTW, RCA, and CAPI. The report runs on the 2nd week of August. This SCR will update the detail sheets to include a new column titled "Other Language".

2.1.2   ABCD 350 Detailed Report Mockup

Cal**SAWS**	**ABCD 350 Detailed Report**							
COUNTY_NAME								
Run Date: MON-DD-YY HH:MM AM/PM								
Date: MM/YYYY								
CalWORKs – Two Parent								
								ABCD 350
Ethnic Total								
Language Total							Total	
Ethnic Origin	**Language**	**Gender Identity**	**Sexual Orientation**	**Case Number**	**Aid Code**	**Case Name**	**Primary Applicant**	**Worker ID**
ETHNIC_ORIGIN	LANGUAGE	GENDER_ID	SEX_ORIENT	CASE_NUM	AID_CODE	CASE_NAME	PRIMARY_APP	WORKER_ID

Figure 2.1.1 – Sheet 'CW Two Parent' has the newly added column of "Other Language"

Note: The full version of this report can be found under Supporting Documents.

2.1.3   Description of Changes

1. Update ABCD Detailed Report to add a new column, "Other Language," for the detailed sheets. This column will be used when "Other Non-English" is selected for the "Language" column.

Column Name	Description
Other Language	Displays the type of language the applicant speaks as their primary language. This column will be utilized when the "Language" column is "Other Non-English".
	This new column will be to the right of the "Language" column.
	*Note: This is a free form text column where users can enter any note from the application. Data is not standardized.
	*Tech Note: use LANG.OTHER_SPOKE_LANG where LANG.LANG_CODE = 03 (Other Non-English)

2.1.4 Page Location

- **Global: Reports**
- **Local: Scheduled**
- **Task: State**

2.1.5 Counties Impacted

All counties will be impacted.

2.1.6 Security Updates

1. No security updates will be made to the report.

2.1.7 Page Mapping

No notable page mapping for this report.

2.1.8 Page Usage/Data Volume Impacts

No notable impact to the system's performance.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	ABCD 350 Mockup	ABCD 350 Mockup.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.11.4.4	The LRS shall provide financial quarterly and monthly claiming reports in accordance with federal, State, and COUNTY policies to maintain audit trails in support of the federal/State claims.	This report will add a new column for the detail sheets.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
N/A	N/A	N/A	N/A

5 MIGRATION IMPACTS

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

6 OUTREACH

N/A

7 APPENDIX

When the Primary Language is NOT "Other Non-English".

Figure 7.1 – Individual Demographic when Primary Language is not "Other Non-English"

When the Primary Language IS "Other Non-English". A free from text is made available for the case worker to input what the "Other Non-English" language is. In the image below, the case worker left it blank.

Figure 7.2 – Individual Demographic when Primary Language is "Other Non-English"

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-236226

ACL 21-110 Update CF 377.1 Notice of Approval of CalFresh Benefits

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Deepika Gajendran
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/18/2022	1.0	Initial Draft	Deepika Gajendran

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1 OVERVIEW

This effort will Update the CF 377.1 to the current state version for English Language in CalSAWS

1.1 Current Design

Currently, the system has CF 377.1 form of version (06/19) in English language in CalSAWS.

1.2 Requests

Update the CF 377.1 to the current state version (CF 377.1(5/20)) for English Language in CalSAWS.

1.3 Overview of Recommendations

Update the CF 377.1 to the current state version (CF 377.1(5/20)) for English Language in CalSAWS.

1.4 Assumptions

1. Print options will remain the same as the print options for existing English form.
2. There are no changes to the generation logic of these forms. All triggers will be the same as the existing EN form.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.
5. The SCR CA-241120 that shall be responsible for implementing CF 377.1 (5/20) in Threshold languages.

2 RECOMMENDATIONS

2.1 Update The CF 377.1 To the Current State Version for English Language

2.1.1 Overview

This section will cover the requirements for Update the CF 377.1 to the most current state version.

State Form: CF 377.1(5/20)
Current Programs: CalFresh
Current Attached Forms: N/A
Current Forms Category: NOA
Current Template Repository Visibility: All counties
Template Description: Notice of Approval for CalFresh Benefits
Imaging Form Name: Notice of Approval for CF Benefits
Imaging Document Type: Notification/NOA

2.1.2 Form Verbiage

Update the CF 377.1 to the most current state version.
Languages: English
Form Mockups/Examples: See Supporting Documents #1
Form Header: CalSAWS Standard Header #1
Include NA BACK 9: Yes

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

The CalSAWS will generate the CF 377.1 Form from Template Repository.

Form Print/Mailing Options

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

Print Options:

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

Mailing Options:

Mailing Options	Option for CF 377.1 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for CF 377.1 Form
Post to Self-Service Portal	N

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CF 377.1 form	CF377.1_English.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	Update CF 377.1 Notice of Approval of CalFresh Benefits to the most current state version (5/20)

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237008

Update the Template Repository Forms for FC/KG/AAP/ARC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Phong Xiong
	Reviewed By	Priya Sridharan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/08/2022	1.0	Initial Draft	Phong Xiong
07/28/2022	1.1	Updates per Committee Review	Phong Xiong

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1 OVERVIEW

In the Template Repository, forms for Child Welfare Services Programs (AAP, ARC, Foster Care, and Kin-GAP) are determined individually if the form should be sent to a Resource instead. This effort will be to update the Document Parameters from the Template Repository to make a Resource or Payee available for the forms associated to the Child Welfare Services Programs.

1.1 Current Design

In general, forms in Template Repository are sent to the Primary Applicant. Forms for Child Welfare Services Programs are individually determined if this should be the resource instead. The Resource / Payee is not currently available in Template Repository for workers to use any FC, KG, ARC, and AAP forms or NOAs.

The Document Parameters Page is a pop-up page that displays when a form is generated from the Template Repository. This page is where the necessary fields are entered to generate a form for a specific case. The fields displayed on the page depends on the Parameter Pages associated to a form.

1.2 Requests

1. Update the logic for Template Repository to allow a Resource/Payee to be selected for forms associated to Child Welfare Services Programs (AAP, ARC, Foster Care, and Kin-GAP).

1.3 Overview of Recommendations

1. Updates to Parameter Pages in the Template Repository Associated to Child Welfare Services Program Only Forms to select a Resource (payee)
2. Updates to Parameter Pages in the Template Repository Associated to Multiple Programs to select a Resource (payee)
3. Regression Test for Forms Using Shared Parameter Pages in Multiple Programs

1.4 Assumptions

1. All of the Child Welfare Services Program forms are listed in the supporting document titled "CA-237008 Child Welfare Services Program Forms List.xlsx."
2. There are no changes to the existing automation and variable population logic to any of the forms. This is effort is for the Template Repository only.
3. There are no updates to the contents of the forms (verbiage, headers, footers, attached forms, etc.) in this effort.
4. Both a Customer Name and Resource/Payee can be selected from the Document Parameters Page.
5. ARC program is included under the Foster Care program.

2   RECOMMENDATIONS

2.1   Updates to Parameter Pages in the Template Repository Associated to Child Welfare Services Program Only Forms to Select a Resource/Payee

2.1.1   Overview

This effort will update the parameter pages that are used by forms that are associated to Child Welfare Services Programs only to create a new dropdown field for a Resource (payee) to be selected.

2.1.2   Description of Change

The Parameter Pages from the Template Repository are updated to have the new "Resource/Payee" field.

Parameter Page with new field:

The new field will be added to the Parameter Pages when the forms listed in the file "CA-237008 Child Welfare Services Programs Forms List.xlsx" are generated from the Template Repository to allow for the case's Resource (payee) to be selected.

The Resource/Payee field will always be visible in the Template Repository for the forms in the list.

The Resource/Payee field is not a mandatory field.

If a Resource/Payee is selected, the form will be sent to the Resource (payee); otherwise, it will be sent to the person selected under the Customer Name field.

Technical Note: *Resource/Payee are tied to specific cases. Please see supporting document titled "CA-237008 ResourcePayee.sql."*

Technical Note 2: *The following parameter pages requiring the update for this recommendation are as follows:*

- *CSF142.jsp*

- *CSF144.jsp*
- *FIN101.jsp*
- *FIN200.jsp*
- *Issuance.jsp*
- *Placement.jsp*
- *Placement2.jsp*
- *ServArrangement.jsp*

2.2 Updates to Parameter Pages in the Template Repository Associated to Multiple Programs to Select a Resource/Payee

2.2.1 Overview

This effort will update the parameter pages that are used by forms that are associated to Child Welfare Services Programs and other programs to create a new dynamic dropdown field for a Resource (payee) to be selected.

2.2.2 Description of Change

The Parameter Pages in this recommendation are used by forms that are also associated to non-Child Welfare Services Programs (e.g., CalWORKs, CalFresh, etc.).

The new "Resource/Payee" field will be a dynamic field depending on the program and form number selected. It will only display on the Parameter Page if the form is in the provided list and the program is either AAP, Foster Care, or Kin-GAP (please see first screenshot below).

Otherwise, the field will not display on the parameter page for forms not associated to Child Welfare Services Programs and use the same parameter pages and does not need the new "Resource/Payee" field (please see second screenshot below).

Parameter Page for Form Associated to a Child Welfare Services Program:

Parameter Page for Form Not Associated to Child Welfare Services Program:

Document Parameters ❓Help

✱- Indicates required fields unless generating a blank template   Generate Form   Generate Blank Template   Cancel

Case Number: ✱   Customer Name: ✱
[_____] Go   - Select - ▾

Program: ✱   Language: ✱
- Select - ▾   English ▾

                                         Generate Form   Generate Blank Template   Cancel

This Type 1 page took 0.54 seconds to load.

The new field will be added to the Parameter Pages when the forms listed in the file "CA-237008 Child Welfare Services Programs Forms List.xlsx" are generated from the Template Repository and the program is either AAP, Foster Care, or Kin-GAP to allow for the case's Resource (payee) to be selected.

The Resource/Payee field is not a mandatory field.

If a Resource/Payee is selected, the form will be sent to the Resource (payee); otherwise, it will be sent to the person selected under the Customer Name field.

Technical Note: Resource/Payee are tied to specific cases. Please see supporting document titled "CA-237008 ResourcePayee.sql."

Technical Note 2: The following parameter pages requiring the update for this recommendation are as follows:

- *ProgramRecovery.jsp*
- *Recovery.jsp*
- *Standard.jsp*
- *StaticPDF.jsp*
- *VER102.jsp*

2.3   Regression Test for Forms Using Shared Parameter Pages for All Programs

2.3.1   Overview

This regression testing effort is to test existing forms that are also associated to the list of Parameter Pages listed in section 2.2.2.

2.3.2   Description of Change

Regression test all forms listed in supporting document titled "CA-237008 Regression Test Forms List.xlsx" associated to the list of Parameter Pages from section 2.2.2.

The new Resource/Payee field is suppressed for these forms.

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3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	List	List of forms affected by the changes of this SCR.	CA-237008 Child Welfare Services Programs Forms List.xlsx
2	SQL	SQL showing the necessary tables that ties a Resource/Payee to a specific case.	CA-237008 ResourcePayee.sql
3	List	List of forms that need to be regression tested.	CA-237008 Regression Test Forms List.xlsx

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.11 CAR-1247	The LRS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	Updating the Parameter Pages to allow for forms to be generated for the Resource/Payee of a Child Welfare Services Program case.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237075

EBT 2260 (8/21) in Threshold Languages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mohammed Yasin S
	Reviewed By	Nagesha S

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/18/2022	1.0	Initial Draft	Mohammed Yasin S

Table of Contents

1   OVERVIEW

This effort will add the EBT 2260 (08/21) in all available threshold languages.

1.1   Current Design

Currently, the system only has English & Spanish of the EBT 2260 (08/21).

1.2   Requests

Add CDSS Threshold Languages to the CalSAWS for the EBT 2260 (08/21) form Template Repository and system generated.

Languages include:

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

1.3   Overview of Recommendations

Add the EBT 2260 (08/21) form in all available threshold languages.

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

1.4   Assumptions

1. Print options for threshold forms will remain the same as the print options for EBT 2260 English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing English and Spanish forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2   RECOMMENDATIONS

2.1   Add Threshold Languages to EBT 2260

2.1.1   Overview

This section will cover the requirements for adding the EBT 2260 (08/21) forms in available threshold languages.

State Form: EBT 2260

Current Programs: CalFresh, CalWORKs, CAPI, General Assistance/General Relief, RCA

Current Attached Forms: N/A

Current Forms Category: Forms
Current Template Repository Visibility: All counties
Existing Languages: English, Spanish

2.1.2 Form Verbiage

<u>Create EBT 2260 XDP's for Threshold Languages</u>
Create EBT 2260 XDPs for the following threshold languages with the CalSAWS standard fonts.

Threshold Languages: Arabic, Armenian, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

Form Mockups/Examples: See Supporting Documents #1
Form Header: CalSAWS Standard Header #1
Include NA BACK 9: No

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

<u>Add EBT 2260 Addendum Form generation batch job to generate threshold languages</u>
Update batch job (PI00F400) to generate the EBT 2260 in all threshold languages.

> Tech Note: Update CT942_ WL (EBT 2260)

<u>Form Print/Mailing Options</u>

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

Print Options:

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

Mailing Options:

Mailing Options	Option for EBT 2260 Form
Mail-To (Recipient)	Primary Applicant
Mailed From (Return)	District Office
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for EBT 2260 Form
Post to Self-Service Portal	Y

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	EBT 2260 Threshold Languages	EBT_2260_AE.pdf EBT_2260_AR.pdf EBT_2260_CA.pdf EBT_2260_CH.pdf EBT_2260_FA.pdf EBT_2260_HM.pdf EBT_2260_KO.pdf EBT_2260_LA.pdf EBT_2260_RU.pdf EBT_2260_TG.pdf EBT_2260_VI.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices: e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	EBT 2260 is being added in all available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237224

Update the Logic Used in Address Normalization

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/08/2022	1.0	Initial Draft	Farhat Ulain

Table of Contents

1 OVERVIEW

The Address normalization and confidence score threshold logic is used in some of the online pages in CalSAWS to determine the search results for the user. When the user searches for a specific address or resource, based upon the Location, City, and Zip Code, the address normalization occurs, and the information gets sent to Spectrum (third party). Spectrum then sends the results back to CalSAWS, along with a Confidence Score of the search criteria. If the Confidence score is below 75, CalSAWS displays a validation message stating that the address does not exist in the database.

1.1 Current Design

When the user searches for the specific resource or address in the Select Service and Provider page, based upon the Location, City and Zip Code that is not accurate, CalSAWS displays a validation message.

1.2 Requests

Remove the validation message from the 'Select Service and Provider' page that gets displayed due to the low confidence scoring that CalSAWS receives from the Spectrum.

1.3 Overview of Recommendations

1. Update Select Service and Provider page to remove the validation message and add new search parameters.
2. Update Select School Resource page to add new search parameters.

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.
2. The validation message will not be displayed in the Select Service and Provider page, due to the low confidence scoring.

2   RECOMMENDATIONS

2.1   Select Service and Provider

2.1.1   Overview

The Select Service and Provider page allows the user to search and select a service and a provider for a Need. When the user searches for the specific resource or address, based upon the Location, City and Zip Code that is not accurate, CalSAWS displays a validation message. This SCR will be removing the validation message that gets displayed due to the low confidence score and adding new search parameters to the page.

2.1.2   Select Service and Provider Page Mockups

Figure 2.1.2.1 – Select Service and Provide Page

Select Service and Provider

✳ - Indicates required fields

Cancel

Search   Search All Statuses

Resource Name:

Resource ID:

Service Category:

Service Type:

Address Type:
Actual Address

Approved for County Use:

Address:

City:

State:
CA

Zip Code:

Results per Page: 25   Search   Search All Statuses

Cancel

Figure 2.1.2.2 – Select Service and Provider Page

2.1.3 Description of Changes

1. Remove the validation message given below that gets displayed when the CalSAWS receives the Confidence Score from Spectrum that is below 75.
"Starting Address – Address does not exist."

2. Add 'Address Type' field and a drop-down underneath as displayed in the figure 2.1.2.1.

   a. The Address Type drop-down will contain the following values.
   - Actual Address
   - Starting Address

   i. The Address Type drop-down will be defaulted to 'Starting Address'.

   ii. If the user selects the option 'Actual Address', then display the   following fields as displayed in the figure 2.1.2.2.

   - Address
   - City
   - State
   - Zip Code

Note: These filters will be used in addition to the other pages filters to find resources that have Address elements which match the provided Address filters.

iii. If the user selects the option 'Starting Address', then display the following fields as displayed in the figure 2.1.2.1.

- Starting Address
- City
- State
- Zip Code
- Maximum Distance From Address

Note: These filters are currently available on the page and will act as currently implemented which is to find a Resource based on the Starting Address in the proximity defined.

3. Add 'Approved for County Use' field, along with a drop-down as displayed in the figure 2.1.2.1.

a. The Approved for County drop-down will contain the following values.

- Yes
- No

i. Only Resources with an Approved for County Use record with an Approved value set to 'Yes' for the county the user is in the context of will return if this field is set to 'Yes'.
ii. Only Resources with an Approved for County Use record with an Approved value set to 'No' for the county the user is in the context of will return if this field is set to 'No'.
iii. If there is no Approved for County Use record for the Resource in the county the user is in the context of, the Resource will not return if the value is set to 'Yes' or 'No'.

2.1.4 Page Location
- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Select Service and Provider

2.1.5 Security Updates
N/A

2.1.6 Page Mapping
Update page mapping for the field label.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Select School Resource

2.2.1 Overview

This page allows you to search for a school resource to associate to a participant record. Based upon the search parameters entered, the user can see the search results in the page. This SCR will be adding new search parameters to the Select School Resource page to make it consistent with other resource search pages.

2.2.2 Select School Resource Page Mockup

Select School Resource

		Cancel
		Search

Name:	**ID:**	**Status:**
Category:	**Type:**	
School		
Address:	**Approved for County Use:**	
City:	**State:**	**Zip Code:**
Vendor ID:	**Tax ID:**	

Results per Page: 25 ∨   Search

Cancel

Figure 2.2.2.1 – Select School Resource Page

2.2.3 Description of Change

1. Add following field and a text box underneath as displayed in the figure 2.2.2.1.

- Address

2. Add 'Approved for County Use' field, along with a drop-down as displayed in the figure 2.2.2.1.

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a. The Approved for County drop-down will contain the following values.

- Yes
- No

    i. Only Resources with an Approved for County Use record with an Approved value set to 'Yes' for the county the user is in the context of will return if this field is set to 'Yes'.
    ii. Only Resources with an Approved for County Use record with an Approved value set to 'No' for the county the user is in the context of will return if this field is set to 'No'.
    iii. If there is no Approved for County Use record for the Resource in the county the user is in the context of, the Resource will not return if the value is set to 'Yes' or 'No'.

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Select School Resource

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update page mapping for the field label.

2.2.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.5	The CalSAWS shall provide field-level and cross-field validation upon completion of data entry by User and immediately display appropriate corrective instructions for the related field.	Additional Search Parameters will be added to the Select Service and Provider and Select School Resource pages, and the validation message will be removed.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237802

Add Other Language Translations To CalSAWS
For WINS 1239

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shaik Shahul
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/19/2022	1.0	Initial Draft	Shaik Shahul

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1 OVERVIEW

This effort will add available threshold languages for the WINS 1239 (05/14) form in CalSAWS.

1.1 Current Design

Currently, The System has only English and Spanish languages in CalSAWS.

1.2 Requests

Add available threshold languages to the CalSAWS for the WINS 1239 (05/14) form

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

1.3 Overview of Recommendations

Add available threshold languages to the CalSAWS for the WINS 1239 (05/14) form

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

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Add available threshold languages to CalSAWS for WINS 1239

2.1.1 Overview

This section will cover the requirements for adding the WINS 1239 form in all available threshold languages.

State Form: WINS 1239 (05/14)

Current Programs: CalFresh

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish.

Template Description: CalFresh Notice of Approval/Denial/Termination Work Incentive Nutritional Supplement (WINS) benefit.

Imaging Form Name: CF NOA WINS Benefit

Imaging Document Type: Notification/Notice of Action

2.1.2 Form Verbiage

Create WINS 1239 XDP's for all Threshold Languages

Threshold Languages: Arabic, Farsi, Hmong, Lao, Armenian, Chinese, Cambodian, Russian, Korean, Tagalog and Vietnamese.
Form Mockups/Examples: See Supporting Documents #1
Form Header: CalSAWS Standard Header #1
Include NA BACK 9: YES

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

Form Print/Mailing Options

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

Print Options:

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

Mailing Options:

Mailing Options	Option for WINS 1239 Form
Mail-To (Recipient)	Participant Mailing Address.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	N/A
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for WINS 1239 Form
Post to Self-Service Portal	N

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	WINS 1239 Threshold Languages	WINS1239_Armenian.pdf WINS1239_Farsi.pdf WINS1239_Hmong.pdf WINS1239_Lao.pdf WINS1239_Arabic.pdf WINS1239_Chinese.pdf WINS1239_Cambodian.pdf WINS1239_Korean.pdf WINS1239_Tagalog.pdf WINS1239_Russian.pdf WINS1239_Vietnamese.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	WINS1239 is being added in all available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237806

Add Other Language Translations to CalSAWS for CF 377.4 SAR

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Surendar Raja Gopal Murugesan
	Reviewed By	Narendar Sabbani

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/21/2022	1.0	Initial Draft	Surendar Raja Gopal Murugesan

Table of Contents

1 OVERVIEW

This effort will add the CF 377.4 SAR form in all available threshold languages.

1.1 Current Design

The system only has English and Spanish of the CF 377.4 SAR.

1.2 Requests

Add Other Language translations to the CalSAWS from the CDSS website for the CF 377.4 SAR form and system generated.

Languages include:

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

1.3 Overview of Recommendations

Add the CF 377.4 SAR form in all 9 threshold languages: Arabic, Armenian, Chinese, Farsi, Hmong, Korean, Lao, Russian and Tagalog.

1.4 Assumptions

1. Print options for threshold languages will remain the same as the print options for English and Spanish languages.
2. There are no changes to the generation logic of the CF 377.4 SAR form. All triggers for the new threshold languages will be the same as the existing English and Spanish languages.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 CF 377.4 SAR Form

2.1.1 Overview

This section will cover the requirements for adding the CF 377.4 SAR form in the available CDSS threshold languages.

State Form: CF 377.4 SAR (6/13)

Current Programs: CalFresh

Current Attached Forms: See included forms below

Current Forms Category: NOA

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

Template Description: CalFresh Notice of Change for Semi-Annual Reporting Households

Imaging Form Name: CF Notice of Change for SAR Households

Imaging Document Type: Notification/NOA

2.1.2 Form Verbiage

Create CF 377.4 SAR XDP's for Threshold Languages
Threshold Languages: Armenian, Arabic, Chinese*, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian.

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

Form Header: CalSAWS Standard Header #1
Include NA Back 9: Yes
Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form Variable Population

Field Mappings: Use the same field mappings as the CF 377.4 SAR English and Spanish forms for existing population logic.

2.1.4 Form Generation Conditions

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

Print Options:

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

Mailing Options:

Mailing Options	Option for CF 377.4 SAR
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for CF 377.4 SAR Form
Post to Self-Service Portal	N

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CF 377.4 SAR forms in threshold languages	CF377.4SAR_Arabic.pdf CF377.4SAR_Armenian.pdf CF377.4SAR_Chinese.pdf CF377.4SAR_Farsi.pdf CF377.4SAR_Hmong.pdf CF377.4SAR_Korean.pdf CF377.4SAR_Lao.pdf CF377.4SAR_Russian.pdf CF377.4SAR_Tagalog.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	CF 377.4 SAR form is added in all available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-238993

ACIN I-72-21 SB 1232 Mass Informing Notice

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Connor Gorry
	Reviewed By	Gingko Luna, Tiffany Huckaby, Lawrence Samy, Priya Sridharan, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/11/2022	1.0	Initial Draft	Connor Gorry
06/01/2022	1.1	Build and System Test Review	Connor Gorry
06/30/2022	1.2	Design Clarification for Legal Aid Phone, wording around GEN 1365 functionality. Added Estimated Impact to Section 2.2	Connor Gorry
07/19/2022	1.3	Updated Imaging Name, Program. Added programs with 'Good Cause' status as mailer recipients.	Connor Gorry
07/27/2022	1.4	Updated based on Committee Feedback to	Connor Gorry

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1   OVERVIEW

This SCR will implement the SB 1232 Informing Notice in the Template Repository and implement a one-time mass-mailing of the notice to applicable Welfare-to-Work and REP households.

1.1   Current Design

SB 1232 Informing Notice is not available in the CalSAWS Template Repository.

1.2   Requests

Add SB 1232 to Template Repository and issue a one time mass mailing to WTW/REP eligible clients (specific status conditions are defined in Section 2.2). Include the case specific WTW/REP worker and county specific legal aid number.

1.3   Overview of Recommendations

1. Add SB 1232 Informing Notice to the Template Repository
2. Mass mail the SB 1232 Informing Notice to all eligible Welfare-to-Work/REP participants.

1.4   Assumptions

1. The SB 1232 Informing Notice will be added to the Template Repository for Local and Central Print in English only; When sent via mass mailer or generated and printed centrally via the Template Repository, a GEN 1365 will be included for households with another primary language.
2. Notice will be sent to CW recipients with WTW program. CW Recipients with an RCA program will not be included in this mailing.
3. If a case does not have a WTW Worker assigned, the form header and body variable for worker phone number will populate with a default phone number for Migration Counties – based on entries in the Correspondence List page – and LA County – based upon existing population logic. This logic will not be altered as a part of this change.

2   RECOMMENDATIONS

2.1   Add SB 1232 Informing Notice to the Template Repository

2.1.1   Overview

Add the SB 1322 Informing Notice to the Template Repository in English.

State Form: SB 1232 Informing Notice
Programs: Multiple (WTW, REP)
Attached Forms: N/A
Forms Category: Form
Template Repository Visibility: All Counties
Languages: English

2.1.2   Create SB 1232 Form XDP

Create SB 1232 Informing Notice XDP

This will be a two-impression Form, containing the standard CalSAWS header.

Form Header: Header 1
Form Title (Document List Page Displayed Name): SB 1232 Informing Notice
Form Number: SB 1232
Include NA Back 9: No
Imaging Form Name: SB 1232 Informing Notice
Imaging Document Type: Welfare To Work (WTW)
Imaging Case/Person: Person
Form Mockups/Examples: See Supporting Documents #1

2.1.3   Form/NOA Variable Population

The new SB 1232 Informing Notice has new Variables that will be populated when generated for mass mailing.

Form Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
<WTW Worker Phone>	The phone number for the case's Welfare-to-Work or REP worker. **Note:** If there is no WTW/REP worker phone number available, populate with the 'default' phone number from the Correspondence List Page.	Arial Font Size 10	Y, 10-digit Phone Number	Y	Y
<Legal Aid Phone Number>	The phone number for the local Legal Aid or State Welfare Rights organization. **Technical Note:** This will use the same existing getLegalAidPhone Number logic as the NA Back 9, which populates Primary Phone, Toll Free Phone, or Additional Phone Number from DOC_DATA based upon county-specified prioritization.	Arial Font Size 10	Y, 10-digit Phone Number	Y	Y

2.1.4 Form Generation for SB 1232

1. **Add SB 1232 to the Template Repository**
   The SB 1232 Informing Notice will be added to Template Repository.

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

2. **Add Form Control**

   Add Imaging barcode.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. **Add Form Print Options and Mailing Requirements**
   The following Print Options will be included for the SB 1232 Informing Notice:

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

   Mailing Requirements:

   Mail-To (Recipient): WTW/REP participant selected from the drop-down

   Mailed From (Return): Sending Office

   Mail-back-to Address: N/A

   Outgoing Envelop Type: Standard

   Return Envelop Type: N/A

   Additional Requirements:

   Special Paper Stock: N/A

   Enclosures: None

   Electronic Signature: No

   Post to SSP: Yes

2.2   Perform a one-time mailing of the SB 1232 Informing Notice

Generate the SB 1232 Informing Notice via batch process for a one-time mailing for all eligible WTW/REP participants. This includes any CalSAWS client with an Active CalWORKS case, and a Welfare-to-Work/REP program block with any of the following statuses:

- AC - Active
- EX - Exempt
- GC - Good Cause
- NC - Non-Compliance
- SA - Sanctioned

- DG with status reason '73' – Deregistered due to Exemption*
- PE - Pending

If a program block has more than one participant, each participant with the aforementioned status(es) will receive an SB 1232 Informing Notice.

Estimated Impact: 1,500,000

Note: A GEN 1365 will be generated alongside the SB 1232 per existing functionality. This mailing will not be sent to cases with an CalWORKS RCA program block unless that case also has a WTW program block.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	SB 1232 Informing Notice Mockup	[PDF] SB 1232 Informing Notice

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.1 CAR-1237	The CalSAWS shall automatically generate the following correspondence online or in the batch process, as a result of individual and/or case action initiated by the CalSAWS or by COUNTY-specified Users, except when exempt due to program requirements: a. Adverse notices (includes: decrease, collection, denial, or termination of benefits); b. Non-adverse notices (includes: approval, increase in benefits, no change, and rescission); and c. Non-approval notices (includes: cancellation, withdrawal, informational, and benefit issuance).	Generating the SB 1232 via batch process for mass mailing.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-241120

Update CF 377.1 Notice of Approval of CalFresh
Benefits in Threshold Languages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vamsi Davuluri
	Reviewed By	Richwin Lianel

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
19/07/2022	0.1	Initial Draft	Vamsi Davuluri

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1 OVERVIEW

The purpose of this change is to update the CF 377.1 form in the CalSAWS Template Repository to match the latest state version.

1.1 Current Design

Currently, the system generates the CF 377.1 (6/19) in threshold languages.

1.2 Requests

Update the CF 377.1 form to match with the latest state version (5/20) in all available threshold languages.

Languages include:

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

1.3 Overview of Recommendations

Update the CF 377.1 form to match with the latest state version (5/20) in all available following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese.

1.4 Assumptions

1. There are no changes to the print options for all forms.
2. There are no changes to the generation logic of these forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.
5. SCR CA-236226 that shall be responsible for implementing CF 377.1 (5/20) in English language.

2 RECOMMENDATIONS

2.1 Update the CF 377.1 form to match with the latest state version (5/20) in all available threshold languages.

2.1.1 Overview

This requirement is to update the existing CF 377.1 form to match with the latest state version (5/20) in all available threshold languages.

State Form: CF 377.1 (5/20)

Current Programs: CalFresh

Current Attached Forms: N/A

Current Forms Category: NOA

Current Template Repository Visibility: All counties

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

Template Description: Notice of Approval for CalFresh Benefits.

Imaging Form Name: Notice of Approval for CF Benefits.

Imaging Document Type: Notification/NOA.

2.1.2 Form Verbiage

Update the CF 377.1 (5/20) in all available threshold languages

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

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

Form Mockups/Examples: See Supporting Documents #1
Form Header: CalSAWS Standard Header #1
Include NA BACK 9: YES

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

Form Print/Mailing Options

The following are the print and mailing requirements for CF 377.1 Notice of Approval of CalFresh Benefits.

Print Options:

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

Mailing Options:

Mailing Options	Option for CF 377.1 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for CF 377.1 Form
Post to Self-Service Portal	N

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CF 377.1 Threshold Languages	CF_377_1 _Arabic.pdf CF_377_1 _Armenian.pdf CF_377_1 _Cambodian.pdf CF_377_1 _Chinese.pdf CF_377_1 _Farsi.pdf CF_377_1 _Hmong.pdf CF_377_1 _Korean.pdf CF_377_1 _Lao.pdf CF_377_1 _Russian.pdf CF_377_1 _Spanish.pdf CF_377_1 _Tagalog.pdf CF_377_1 _Vietnamese.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	CF 377.1 (5/20) is added in all available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-241299

Add Missing Translations for AR 3

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Harshita S Bhat
	Reviewed By	P Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/18/2022	1.0	Initial Draft	Harshita S Bhat

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1   OVERVIEW

This effort will add the AR 3 in Arabic, Farsi, Hmong, and Lao Threshold languages.

1.1   Current Design

The system has English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese threshold languages of the AR 3.

1.2   Requests

Add Threshold Languages to the CalSAWS for the AR 3(2/2015) form generated via Template Repository.

Languages include:

Arabic, Farsi, Hmong, and Lao.

1.3   Overview of Recommendations

Add the AR 3(2/2015) form in the following threshold Languages: Arabic, Farsi, Hmong, and Lao.

1.4   Assumptions

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

2   RECOMMENDATIONS

2.1   Add Threshold Languages to AR 3 Form in CalSAWS

2.1.1   Overview

This section will cover the requirements for adding the AR 3 forms in available threshold languages.

State Form: AR 3(2/2015)

Current Programs: CalWORKs and CalFresh

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All counties

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

Template Description: This form allows a participant to update their household information**.**

Imaging Form Name: Mid-Year Status Report for CW and CF.

Imaging Document Type: Customer Reporting.

2.1.2   Form Verbiage

<u>Create AR 3 XDP's for Threshold Languages</u>

The AR3 form will have 4 impressions which will consist of static verbiage provided by the State and several non-prepopulated input fields. The first impression will be a coversheet with the standard header. The second impression will be empty. The third and fourth impressions will be the actual AR3 State form.

Threshold Languages: Arabic, Farsi, Hmong, and Lao
Form Mockups/Examples: See Supporting Documents #1
Form Header: CalSAWS Standard Header #1
Include NA BACK 9: No

2.1.3   Form Variable Population

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

2.1.4 Form Generation Conditions

Form Print/Mailing Options

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

Print Options:

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

Mailing Options:

Mailing Options	Option for AR 3 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	Worker's Office Address
Outgoing Envelope Type	Standard
Return Envelope Type	Return Standard Mail – No Postage
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Additional Options:

Requirement	Option for AR 3 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	AR 3 Threshold Languages	AR3_AR.pdf AR3_FA.pdf AR3_HM.pdf AR3_LA.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	AR 3 is being added In Arabic, Farsi, Hmong, and Lao threshold Languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-242617

Adding a Report Link to CalSAWS for BenefitsCal
Release 3.0

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Diana Bonilla
	Reviewed By	Thao Ta, Susanna Martinez

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/16/2022	1.0	Initial Document	Diana Bonilla

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1   OVERVIEW

BenefitsCal is a website that has replaced C4Yourself and will soon also replace YourBenefitsNow and MyBenefitsCalWIN. CalSAWS has six BenefitsCal dashboards and will add an additional dashboard as part of BenefitsCal release 3.0. This SCR will add an additional BenefitsCal dashboard link for "Customized Reports" for users to access the dashboard from CalSAWS.

1.1   Current Design

Currently, CalSAWS has six BenefitsCal dashboard links in production.

1.2   Requests

This SCR requests the addition of a new BenefitsCal dashboard link for "Customized Reports" to CalSAWS.

1.3   Overview of Recommendations

1. Add an additional BenefitsCal dashboard link to CalSAWS
   a. The dashboard link is labeled "Customized Reports"
   b. Location: Reports > Business Intelligence > BenefitsCal
   c. Use the same existing security group as the other BenefitsCal dashboards

1.4   Assumptions

1. There is a separate work effort to build the BenefitsCal dashboard and this SCR is dependent on that work effort to provide the final production URL to the dashboard.
2. This dashboard will be available within the existing CalSAWS Qlik application environment.
3. County Helpdesk will be responsible for adding users to the new BenefitsCal Consumer security group for users to have access.

2 RECOMMENDATIONS

2.1 Reports – Business Intelligence Page – BenefitsCal Dashboards

2.1.1 Overview

There are six BenefitsCal dashboard links in the Business Intelligence Report Search page and are accessible under the BenefitsCal navigation option. These dashboard links will navigate users to the BenefitsCal dashboards located at the CalSAWS Qlik environment. This SCR will add an additional BenefitsCal dashboard link labeled as "Customized Reports" to CalSAWS as part of BenefitsCal Release 3.0.

2.1.2 Business Intelligence Report Search Page Mockup
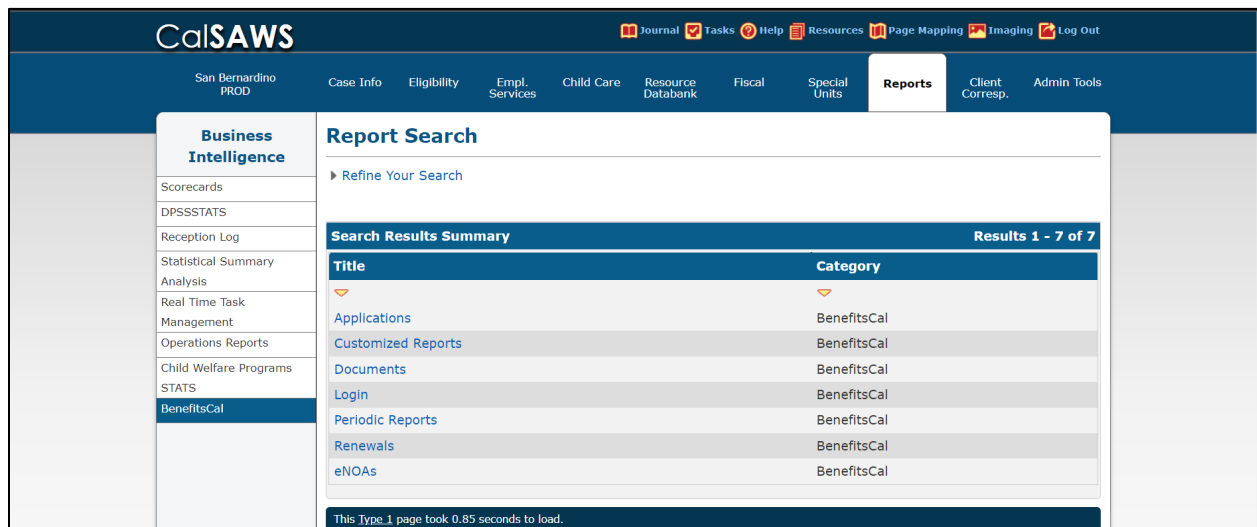
Figure 2.1.2.1 – Business Intelligence Report Search Page Current Design Mockup with new BenefitsCal dashboard link "Customized Reports"

2.1.3 Description of Change

1. Add a new dashboard link below the "Applications" dashboard link to the BenefitsCal dashboards that are accessible on the Business Intelligence Report Search page:
   a. Location: Reports > Business Intelligence > BenefitsCal
   b. Set the title and category as the following described in the table below:

Title	Category
Customized Reports	BenefitsCal

c. Use the existing security group as the BenefitsCal dashboards.

2.1.4 Page Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: BenefitsCal**

2.1.5 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
BenefitsCalConsumer	Business Intelligence-Report Search	BenefitsCal Consumer

2. Security Groups

Security Group	Group Description	Group to Role Mapping
BenefitsCal Consumer	Gives the worker the ability to view BenefitsCal dashboards only.	• View Only • BenefitsCal Consumer Role

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.1.5	The LRS/CalSAWS shall allow COUNTY-specified Users the online ability to generate reports.	Implementing an additional section in the Business Intelligence Report Search page to allow users to generate reports.

5   OUTREACH

6   APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-242705

Revised CW 2189A, CW 2189B, M40-107C1

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Connor Gorry
	Reviewed By	Gingko Luna, Priya Sridharan, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/19/2022	1.0	Initial Draft	Connor Gorry
06/03/2022	1.1	Build and System Test Review	Connor Gorry
07/05/2022	1.2	Additional Supporting Documents for variable population, batch scheduling details, and technical clarifications	Connor Gorry
07/18/2022	1.3	Shortened Imaging names to fit within 40-character limit	Connor Gorry
07/27/2022	1.4	Updated to add Assumption #3, and tidy up references to assumptions/notes for the attached CW 2184 Form. Updated mockups to correct reference to 48-month (now 60-month) Clock and fix line-break issue on the English M40-107C1.	Connor Gorry
08/08/2022	1.5	Updated per QA review	Connor Gorry

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1 OVERVIEW

This SCR adds two Form Packets – CW 2189A Packet and a CW 2189B Packet – to the CalSAWS Template Repository. It will also add automation to generate both packets at the 54th and 57th months of the CalWORKs clock, respectively.

1.1 Current Design

CA-224269 removed several Forms which referenced the 48-month CalWORKs clock. Some of these Forms were replaced with updated versions, which referenced the updated 60-month clock; However, the CW 2189 and M40-107C were not replaced.

1.2 Requests

Update versions of CW 2189A/B Notice of Your CalWORKs Time Limit in CalSAWS that reference CalWORKs 60 Month Time Clock as posted to the CDSS website. Automate form/NOA generation for the CW 2189A, CW 2189B, and M40-107C1.

1.3 Overview of Recommendations

1. Add and Automate Form CW 2189A Packet
2. Add and Automate Form CW 2189B Packet
3. Create new Batch Job for CW 2189A Packet
4. Create new Batch Job for CW 2189B Packet

1.4 Assumptions

1. Referenced Time Limits will use the 60-month logic established with SCR CA-217944, ACL 20-113. Logic that counts months towards time limits, does not count exempt months, adds extensions, etc. will not be altered with this change.
2. These Forms/Bundles will use the existing one-page NA Back 9.
3. Per existing Correspondence functionality, a GEN 1365 Form will be included when Forms are sent centrally via Batch or from the Template Repository for all languages.

2   RECOMMENDATIONS

2.1   Add and Automate Form CW 2189A Packet

2.1.1   Overview

Create a packet with the CW 2189A, M40-107C1, and CW 2184*. This packet will be added to the Template Repository, and automated to generate at the 54th month of the updated CalWORKs 60-month clock.

State Form: CW 2189A

Programs: CW

Attached Forms: M40-107C1, CW 2184*

Forms Category: Form

Template Repository Visibility: All Counties

Languages: English, Spanish

Note: *CDSS has not published a Spanish translation of the CW 2184 (4/21) informing notice. It will not be included in the Spanish bundle for either the CW 2189A or CW 2189B.*

2.1.2   Create CW 2189A Packet XDP

<u>Create CW 2189A Packet</u>

This packet will contain the CW 2189A, M40-107C1, and CW 2184. This template will have six impressions: one for the CW 2189A Form, one for the NA Back 9, two for the M40-107C1 notice, and two for the CW 2184 Informing Notice attachment (per above, the Spanish version of this packet will not contain the CW 2184, ad will be four impressions).

Form Header: Header 1

Form Title (Document List Page Displayed Name): Notice Of Your CalWORKs Time Limit – 54th Month On Aid

Form Number: CW 2189A Packet

Include NA Back 9: Yes

Imaging Form Name: CW Time Limit – 54th Month On Aid

Imaging Document Type: CalWORKs (CW)

Imaging Case/Person: Person

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form/NOA Variable Population

The new CW 2189A Form has new Variables that will be populated when generated via Batch. The M40-107C1 also has additional variable population.

CW 2189A Form Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
<Date>	The first day of the 54th Time Limit Month. ex: 08/01/2022	Arial, Size 10 mm/dd/yyyy	Y Date Field	N	Y
<Name>	The name of the person who has reached their 54th month of aid.	Arial, Size 10	Y Name Field	N	Y

M40-107C1 Form Body Variables:

(See following page; For additional details on M40-107C1 variable population, see Supporting Documents #3)

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
<LastTLSentDate >	The date when the last Time Limit NOA was sent. ex: 10/01/2021	Arial, Size 10	Y MM/DD/YYYY	N	Y
<Person>	Populate with the Person's Name (First Name and Last Name)	Arial, Size 10	Y Name Field	N	Y
<LifetimeMonthsLastNOA>	Number of used Time Limit Months that was listed in the previous Time Limit NOA	Arial, Size 10	Y Number Field	N	Y
<Date>	The date of this notice. ex: 08/01/2022	Arial, Size 10	Y Date Field	N	Y
<NumberOfMonths>	The number of countable months used. (This will be between 54 and 57, inclusive)	Arial, Size 10	Y Number Field	N	Y
<MonthsSinceLastNotice>	The number of months since the last Time Limit Notice	Arial, Size 10	Y Number Field	N	Y
Repeatable Section #1	<PeriodEligible AfterTLNOA>	<Time limit period begin month and year after the last Time Limit NOA was sent> to <Time limit period end month and year>	Arial, Size 10 Format : MM/YYYY to MM/YYYY	Y	N	Y

		Note: This section will be iterated based on the number of active time limit periods. For Example: If there are multiple time limit periods, the population will look like below From 01/2021 to 04/2021 =4 month(s) From 07/2021 to 08/2021 = 2 months					
	\<PeriodTotal NumberMonths>	Populate the number of months within the time limit period(s). Note: Refer to the example mentioned in the \<PeriodReceivedAid> population.	Arial, Size 10	Y Number Field	N	Y	
Repeatable Section #2	\<DatesOfExemptMonths>***** *(*Requires Translation for Spanish)*	Dates for which a month(s) were not counted towards the time limit since the last TL NOA. Ex: April 2022 – June 2022	Arial, Size 10 Month Year – Month Year	Y	N	Y	
	\<NumberOfExemptMonths>	The number of months exempted from a particular range.	Arial, Size 10 Number Field	Y	N	Y	

		ex: 3				
	<ReasonForExemption>	The reason this month(s) were exempted from the Time Limit Month Detail Page. Ex: Reimbursed Child Support	Arial, Size 10	Y	N	Y
	<AdditionalCount>	Number of months of aid not counted since the previous Time Limit NOA.	Arial, Size 10	Y	N	Y
	<PeriodTotalNumberMonths>	Total number of months on aid. (At least 54 months.)	Arial, Size 10	Y	N	Y
	<TotalNumberOfExemptedMonths>	The total number of exempted months.	Arial, Size 10	Y	N	Y
	<NumberUntickedMonthsChildSupport>	The total number of months unticked for collected child support.	Arial, Size 10	Y	N	Y
	<NumberUntickedMonthsOverpayment>	The total number of months unticked for collected full month overpayments.	Arial, Size 10	Y	N	Y
	<NumberTotalMonths>	The total months used against the 60-month time limit. Ex: 54	Arial, Size 10	Y	N	Y
	<NumberRemainingMonths>	Total months remaining on the 60-month time limit.	Arial, Size 10	Y	N	Y

	(60 – countable months) Ex: 6				

*Variables Requiring Translation: <DatesOfExemptMonths>

Technical Note: *The Template Repository version of the M40-107C1 will contain five (5) countable windows, and four (4) exemption window tables.*
When generated via Batch, the M40-107C1 will dynamically generate with an initial 5 rows for countable months and 4 tables for exemptions, and will dynamically add rows/tables as is needed.

2.1.4 Form Generation for CW 2189A Packet

1. **Add CW 2189A Generation Conditions**
   Generate the CW 2189A Packet 10 business days before the end of a person's 54th countable CW Time Limit Month.

   (See Recommendation 2.3.2 for additional details)

2. **Add CW 2189A Packet to the Template Repository**
   The CW 2189A Packet will be added to Template Repository.

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

3. **Add Form Section Generation**

   The M40-107C1 section will have two dynamic sections, repeatable for each window of months were either countable or exempted.

Section	Generation Conditions
Period Received NOA Aid Since Last TL Section	Repeat this section (and variable population) for based upon the number of active Time Limit periods since the previous TL NOA. (A similar iteration was implemented for several NOAs as a part of CA-224269. **Note:** The Template Repository version of this Form will include space for five (5) periods.
Exempt Months Since Last TL NOA Section	Repeat this table (and variable population) for each exempt Time Limit Period(s) since the previous TL NOA.

	Note: The Template Repository version of this Form will include four (4) tables for potential exemption period.

4. <u>**Add Form Control**</u>

Add Imaging barcode.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

5. <u>**Add Form Print Options and Mailing Requirements**</u>

The following Print Options will be included for the CW 2189A:

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

Mailing Requirements:

Mail-To (Recipient): Participant who has reached their 54th Countable Month* or CW Participant Selected from the Parameters Page when generated from the Template Repository

Mailed From (Return): Sending Office

Mail-back-to Address: N/A

Outgoing Envelop Type: Standard

Return Envelop Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: None

Electronic Signature: No

Post to SSP: Yes

Technical Note: *This will use the same CT_942 parameter as did CW TL A981I.*

2.2 Add and Automate Form CW 2189B Packet

2.2.1 Overview

Create a packet with the CW 2189B, M40-107C1, and CW 2184*. This packet will be added to the Template Repository, and automated to generate at the 57th month of the updated CalWORKs 60-month clock.

State Form: CW 2189B

Programs: CW

Attached Forms: M40-107C1, CW 2184*

Forms Category: Form

Template Repository Visibility: All Counties

Languages: English, Spanish

***Note:** CDSS has not published a Spanish translation of the CW 2184 (4/21) informing notice. It will not be included in the Spanish bundle for either the CW 2189A or CW 2189B.*

2.2.2 Create CW 2189B Packet XDP

Create CW 2189B Packet

This packet will contain the CW 2189B, M40-107C1, and CW 2184. This template will have six impressions: one for the CW 2189B Form, one for the NA Back 9, two for the M40-107C1 notice, and two for the CW 2184 Informing Notice attachment (per above, the Spanish version of this packet will not contain the CW 2184, ad will be four impressions).

Form Header: Header 1

Form Title (Document List Page Displayed Name): Notice Of Your CalWORKs Time Limit – 57th Month On Aid

Form Number: CW 2189B Packet

Include NA Back 9: Yes

Imaging Form Name: CW Time Limit – 57th Month On Aid

Imaging Document Type: CalWORKs (CW)

Imaging Case/Person: Person

Form Mockups/Examples: See Supporting Documents #2

2.2.3 CW 2189B Variable Population

The new CW 2189B Packet has new Variables that will be populated when generated via Batch. The M40-107C1 also has additional variable population, detailed previously in section 2.1.3.

CW 2189B Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
<Date>	The first day of the 57th Time Limit Month. ex: 08/01/2022	Arial, Size 10 mm/dd/yyyy	Y Date Field	Y	Y
<Name>	The name of the person who has reached their 57th month of aid.	Arial, Size 10	Y Name Field	Y	Y

M40-107C1 Body Variables:

(See section 2.1.3, Supporting Documents #5)

2.2.4 Form Generation for CW 2189B

1. **Add CW 2189B Packet Generation Conditions**
   Generate the CW 2189B Packet 10 business days before the start of a person's 57th countable CW Time Limit Month.

   (See Recommendation 2.4.2 for additional details)

2. **Add CW 2189B to the Template Repository**
   The CW 2189B Packet will be added to Template Repository.

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

3. **Add Form Control**
   Add Imaging barcode.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

4. <u>Add Form Print Options and Mailing Requirements</u>

The following Print Options will be included for the CW 2189B Packet:

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

Mailing Requirements:

Mail-To (Recipient): Participant who has reached their 57th Countable Month* or CW Participant Selected from the Parameters Page when generated from the Template Repository

Mailed From (Return): Sending Office

Mail-back-to Address: N/A

Outgoing Envelop Type: Standard

Return Envelop Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: None

Electronic Signature: No

Post to SSP: Yes

Technical Note: *This will use the same CT_942 parameter as did CW TL A981I.*

2.3 Create new Batch Job for CW 2189A Packet

2.3.1 Overview

Create a new batch job to send out the CW 2189A Packet for households on their 54th Countable Month.

2.3.2 Description of Change

1. Create a new batch job that will send the CW 2189A Packet to Active CalWORK persons 10 business days before the end of their 54th Countable Month.

   Note: For example, a Form is generated on July 18th for the July 1 effective month, which was a person's 54th month used against the CalWORKs clock.
   This is calculated by total months on the Time Limit Clock, minus any exempt months. The CW 2189A Packet will use the same generation scheduling as did the M40-107C (implemented as Forms CW TL A980I, CW TL A979I, and A981I/Sweeps PB00R1941, PB00R1940, and PB00R1942) in terms of when in each month it generates – 10 days from the end of the 54th countable month.
   This will leverage previous logic that sent the M40-107 for persons' 42nd/46th Countable Month with Form Sweep PB00R1942, except for logic that suppressed that Form for cases with any exemptions.

2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values below.

Field to Populate	Population for Packet
Case Id	The case Id associated to the current CalWORKs program.
Program Id	The program Id of the current CalWORKs program.
Person Id	The Person ID of the person who has reached their 54th Countable Month.
Type Code	FR
Sub Type Code	CT_942 Sub-type 'C54'
Effective Date	Batch Month

2.3.3 Execution Frequency

The batch job will run monthly, 10 business days before the end of the month.

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

All Counties.

2.3.6 Data Volume/Performance

An estimated 3,000 records will be processed monthly by the batch job.

2.3.7 Failure Procedure/Operational Instructions

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

2.4 Create new Batch Job for CW 2189B Packet

2.4.1 Overview

Create a new batch job to send out the CW 2189B Packet for households on their 57th Countable Month.

2.4.2 Description of Change

1. Create a new batch job that will send the CW 2189B Packet to Active CalWORKs persons 10 business days before the end of their 57th Countable Month.

   Note: For example, a Form is generated on July 18th for the July 1 effective month, which was a person's 57th month used against the CalWORKs clock.
   This is calculated by total months on the Time Limit Clock, minus any exempt months. The CW 2189A Packet will use the same generation scheduling as did the M40-107C (implemented as Forms CW TL A980I, CW TL A979I, and A981I/Sweeps PB00R1941, PB00R1940, and PB00R1942) in terms of when in each month it

generates – 10 business days from the end of the 57th countable month.
This will leverage previous logic that sent the M40-107C for persons' 42nd/46th Countable Month with Form Sweep PB00R1942, except for logic that suppressed that Form for cases with any exemptions.

2. For each record returned from the driving query, insert a record into the system transaction table with the following transactional values below.

Field to Populate	Population for Packet
Case Id	The case Id associated to the current CalWORKs program.
Program Id	The program Id of the current CalWORKs program.
Person Id	The Person ID of the person who has reached their 57th Countable Month.
Type Code	FR
Sub Type Code	CT_942 Sub-type 'C57'
Effective Date	Batch Month

2.4.3 Execution Frequency

The batch job will run monthly, 10 business days before the end of the month.

2.4.4 Key Scheduling Dependencies

N/A

2.4.5 Counties Impacted

All Counties.

2.4.6 Data Volume/Performance

An estimated 3,000 records will be processed monthly by the batch job.

2.4.7 Failure Procedure/Operational Instructions

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

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CW 2189A Mockup	CW2189A__Packet_EN.pdf CW2189A_Packet_SP.pdf
2	Client Correspondence	CW 2189B Mockup	CW2189B_Packet_EN.pdf CW2189B_Packet_SP.pdf
3	Client Correspondence	XDPs XDP files for the CW 2189A and CW 2189B Packets	CA-242705 XDPs.zip
4	M40-107C1 Population Details	Spreadsheet with additional details for M40-107C1 Variable Population	SharePoint

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.1 CAR-1237	The LRS shall automatically generate the following correspondence online or in the batch process, as a result of individual and/or case action initiated by the CalSAWS or by COUNTY-specified Users, except when exempt due to program requirements: a. Adverse notices (includes: decrease, collection, denial, or termination of benefits); b. Non-adverse notices (includes: approval, increase in benefits, no change, and rescission); and c. Non-approval notices (includes: cancellation, withdrawal, informational, and benefit issuance).	Adding and Automating Generation for the CW 2189A Packet and CW 2189B Packet

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243960

Activate E2Lite Automation for CalWIN Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Supritha Sundaram
	Reviewed By	Balakumar Murthy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/28/2022	1.0	Original Draft	Supritha
06/16/2022	1.1	County CRFI update	Supritha
06/28/2022	1.2	Minor Revisions	Supritha
07/28/2022	1.3	Added Contra Costa and Ventura Counties	Howard Suksanti

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1   OVERVIEW

E2Lite Interface Automation process will be implemented to be available to the incoming CalWIN counties as part of the migration processes. CRFI 22-036 was

sent out and used to determine if each CalWIN county wishes to opt in to the E2Lite functionality.

As part of this SCR, E2lite Inbound and Outbound writers will be added to run for CalWIN Counties.

1.1 Current Design

- CalSAWS does not have E2Lite Interface Automation for CalWIN counties.
- The E2Lite Interface Automation process works in conjunction with the comma-separated values (CSV) sample file provided by the California Department of Social Services (CDSS). CDSS uses the E2Lite data to calculate county-specific work participation (WPR) based on TANF data reporting requirements.

1.2 Requests

Create BPCR for the inbound and outbound FTP, reader and writer E2Lite jobs for CalWIN counties:

- E2LiteInboundFTP (PIXXE900)
- E2LiteInboundReader (PIXXE901)
- E2LiteOutboundWriter POXXE903 (3 month offset)
- E2LiteOutboundWriter POXXE904 (6 month offset)
- E2LiteOutboundFTP POXXE905 (3 month offset)
- E2LiteOutboundFTP POXXE906 (6 month offset).

1.3 Overview of Recommendations

Create new inbound FTP and inbound reader E2Lite functionality to cover CalWIN counties. Create new outbound FTP and writer E2Lite functionality to cover CalWIN counties on monthly basis per county requirements.

1.4 Assumptions

1. County would be able to download the inbound e2lite interface file from E2L via the webpage on the E2LA website to transfer to CalSAWS.
2. CalWIN counties running E2Lite will operate on same logic as existing county functionality

2   RECOMMENDATIONS

2.1   E2Lite Inbound

2.1.1   Overview

Create new E2LiteInboundFTP (PIXXE900) and E2LiteInboundReader (PIXXE901) to run for specified CalWIN counties per county requirements.

2.1.2   Description of Changes

1. Create batch properties for E2LiteInboundFTP (PIXXE900), E2LiteInboundReader (PIXXE901) for CalWIN counties. Please refer to the list of counties below for county numbers

2.1.3   Partner Integration Testing

Yes – county partners integrated testing.

2.1.4   Execution Frequency

- Daily

2.1.5   Key Scheduling Dependencies

- Predecessor for PIXXE900:
  - JB00S100D - Set Batch Date
- Predecessor for PIXXE901:
  - JB00S100D - Set Batch Date
  - JIXXE900D – WPR E2Lite Inbound FTP
- Successor for PIXXE900:
  - JIXXE901D – WPR E2Lite Inbound Reader
- Successor for PIXXE901:
  - JB00E821M – Batch WPRD Sweep – 30 Day
  - JB00E822M - Batch WPRD Sweep - 60 Day
  - JB00E823M - Batch WPRD Sweep - 90 Day (POXXE717)

2.1.6   Counties Impacted

- Placer (wave 1)
- Tulare (wave 2)
- Contra Costa (wave 2)
- Ventura (wave 3)

- Solano (wave 4)
- Sonoma (wave 5)
- Sacramento (wave 6)
- San Francisco (wave 6)
- San Luis Obispo (wave 6)

2.1.7 Category

Non-Core job.

2.2.8 Data Volume/Performance

Data volume should match existing CalWIN County.

2.2.9 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…)

2.2   E2Lite Outbound

2.2.1 Overview

Create new E2LiteOutboundWriter (POXXE903 and POXXE904), E2LiteOutboundFTP (POXXE905 and POXXE906) to run for specified CalWIN counties per county requirements. The E2Lite interface reports on the 3rd and 6th months post processing. These will be controlled by the offsetMonth batch property. POXXE903 and POXXE904 both map to E2LiteOutboundWriter, POXXE903 with offset property of 3 months and POXXE904 with offset property of 6 months. POXXE905 and POXXE906 both map to E2LiteOutboundFTP, POXXE905 with offset property of 3 months and POXXE906 with offset property of 6 months.

2.2.2 Description of Changes

1. Create batch properties for E2LiteOutboundWriter (POXXE903 and POXXE904), E2LiteOutboundFTP (POXXE905 and POXXE906) for CalWIN counties. Please refer to the list of counties below for county numbers

2.2.3 Partner Integration Testing

Yes – county partners integrated testing.

2.2.4 Execution Frequency

- POXXE903 and POXXE905 - 3 month – 10th day of the month

- POXXE904 and POXXE906 - 6 month - 10th day of the month

2.2.5 Key Scheduling Dependencies

- Predecessor for PIXXE903:
  - JB00S100D - Set Batch Date
- Predecessor for PIXXE904:
  - JB00S100D - Set Batch Date
- Predecessor for PIXXE905:
  - JB00S100D - Set Batch Date
  - JOXXE903D - WPR E2Lite Outbound Writer
- Predecessor for PIXXE906:
  - JB00S100D - Set Batch Date
  - JOXXE904D - WPR E2Lite Outbound Writer
- Successor for PIXXE903:
  - JOXXE905D - WPR E2Lite Outbound FTP
- Successor for PIXXE904:
  - JOXXE906D - WPR E2Lite Outbound FTP
- Successor for PIXXE905:
  - None
- Successor for PIXXE906:
  - None

2.2.6 Counties Impacted

- Placer (wave 1)
- Tulare (wave 2)
- Contra Costa (wave 2)
- Ventura (wave 3)
- Solano (wave 4)
- Sonoma (wave 5)
- Sacramento (wave 6)
- San Francisco (wave 6)
- San Luis Obispo (wave 6)

2.2.7 Category

Non-Core job.

2.2.8 Data Volume/Performance

Data volume should match existing CalWIN County.

2.2.9 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
2.20.1.3	The LRS shall include the ability to exchange LRS Data residing on external systems and communicate the results of any automated LRS Data matches.	Systems have ability to transfer files for E2Lite

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-244068

Export C-IV C4Y Tables into CalSAWS database

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Edgars Reinholds
	Reviewed By	Karthikeyan Krishnamoorthy, Howard Suksanti, Himanshu Jain, Sauvik Basu, Jyoti Rani

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/29/2022	1.0	Initial version	Edgars Reinholds
7/6/2022	1.1	Peer Review updates.	Edgars Reinholds
7/15/2022	1.2	Updated assumption four	Edgars Reinholds

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1 OVERVIEW

This SCR will migrate C4Y (C-IV Yourself) e-Application data from C-IV Read Only application into CalSAWS.

1.1 Current Design

When counties converted to CalSAWS, the historical C4Y application e-signature was not viewable because the C-IV tables containing the signature information were not targeted to move to CalSAWS, as part of the conversion effort. This data is needed as part of the Case record. Additionally, not all data was transferred to the case records and so the county workers have a need to review the e-Application for customer entered information.

The C-IV Read Only environment currently holds the C4Y data. This environment will be taken offline on 9/30/2022. The C4Y data will no longer be available for the county users to access.

1.2 Requests

Export C4Y tables and make them available in CalSAWS for future development.

1.3 Overview of Recommendations

1. Export C4Y tables from C-IV Read Only environment and make them available in CalSAWS in a new database schema.

1.4 Assumptions

1. Case purge logic was already applied in C-IV Read Only environment.
2. Exported tables contain PII (Personally Identifiable Information).
3. A future SCR CA-247516 will use this exported data to make the C4Y e-applications available to the workers in the CalSAWS application.
4. Counties would be able to request, through the consortia, on-request Ad-Hoc reports on the exported tables before the future SCR is implemented.

2 RECOMMENDATIONS

Export C4Y tables from C-IV Read Only environment and make them available in CalSAWS in a new database schema.

2.1 C4Y Table Export

2.1.1 Overview

Export C4Y tables from C-IV Read Only environment and make them available in CalSAWS in a new database schema.

2.1.2 Description of Change

1. Export C4Y tables from C-IV Read Only environment and make them available in CalSAWS in a new database schema. Make the constraints available between the exported tables. See the Supporting document for list of tables.

2.1.3 Estimated Number of Records Impacted/Performance

Estimated e-Applications available: 4,650,000

2.1.4 Counties Impacted

C-IV Counties Only

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	C4Y	Tables to Export	📊 C-IV%20C4Y%20Table%20Export%20List.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.2.3	The LRS shall collect demographic information for the applicant/head of the household, if different from the person who is making the application.	This SCR converts C-IV e-Application eSignatures into CalSAWS to be viewable as journal entries.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245061

Update CalSAWS to use the Primary Email Address as the user login name for CalWIN Counties.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Trevor Torres, Matthew Lower, Erika Kusnadi
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/8/2022	1.0	Initial Revision	Trevor Torres

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1   OVERVIEW

Currently, User Names are created in CalSAWS from the Security Assignment page, when a user pushes the "Add User Name" button and it generates a User Name based on their First Name, Last Name, County information, user type and the status. Along with this process, the user profile is also automatically generated in the ForgeRock system (this includes the User Name, First Name, Last Name, County information, user type and the status). This SCR will update the system generated User Name being created from the Security Assignment page from a generated name to the user's Primary E-mail address from the Staff Detail page.

1.1   Current Design

Currently in CalSAWS, when a new user is being added to the system, their User Name to log in to CalSAWS is created through the Security Assignment page. For staff from the 39 counties, their User Names are automatically created by the system using a combination of the staff last name, first name and the county that the user belongs too.

1.2   Requests

Allow CalWIN counties users to use their Primary Email as their User Name.

1.3   Overview of Recommendations

1. Update the "Add User Name" button function on the Security Assignment page to save the Primary Email from the Staff Detail page as the User Name.

1.4   Assumptions

1. Existing functionalities will remain unchanged unless called out as part of this SCR.
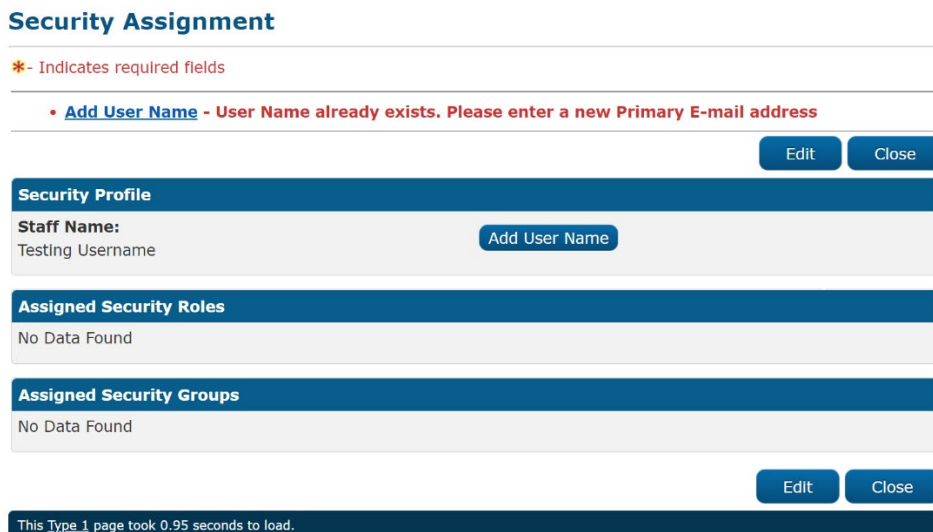
2 RECOMMENDATIONS

2.1 Security Assignment

2.1.1 Overview

The Security Assignment page is used for displaying Staff Name, User Name, Login Status, Assigned Security Roles, Assigned Security Groups and more if applicable. The page is also used for generating User Names for newly created staff, as well as resetting the temporary password that is created with the User Name. This SCR will update the generated User Name being created from the Security Assignment page to the user's Primary E-mail address from the Staff Detail page.

2.1.2 Security Assignment Mockups

Figure 1.1 – Security Assignment Validation Mockup

Figure 1.2 – Security Assignment Mockup Reference

2.1.3 Description of Changes

1. Update the existing logic used on the "Add User Name" button to use the staff Primary E-mail address as the staff User Name.

   Note: After the User Name is created, changing the Primary E-mail address on the Staff Detail page will not update the User Name.

   a. This change is for CalWIN counties only.

      Note: Non-CalWIN counties will continue using the generated User Name explained in Current Design when pressing the "Add User Name" button.

   b. The Primary E-mail address is pulled from the Staff Detail page.

2. Create a new validation with the following message: "Add User Name – User Name already exists. Please enter a new Primary E-mail address", as shown in Figure 1.1 above.

   a. The validation message will display when the user clicks on the "Add User Name" button when the primary email address is already being used as a User Name in the CalSAWS Identity Management System.

2.1.4 Page Location

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

2.2 Automated Regression Test

2.2.1 Overview

Update the existing automated regression test script(s) that click the "Add User Name" button on the Security Assignment page to verify the format of the generated user name based on the county in context.

2.2.2 Description of Changes

Update any existing regression scripts that click the "Add User Name" button on the Security Assignment page to verify the format of the generated username based on the county in context:

1. Los Angeles County: Not applicable
2. Former C-IV Counties: Based on the First Name and Last Name
3. Former CalWIN Counties: Matches the Primary E-mail Address

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.5	The LRS shall provide field-level and cross-field validation upon completion of data entry by User and immediately display appropriate corrective instructions for the related field.	This SCR is creating a new validation in the Security Assignment page when the user presses the "Add User Name" button and creates it based on the Primary E-mail Address from the Staff Detail page.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245594

Add General Assistance Program Code
Converted from CalWIN to Generate reports

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sophia Fernandez
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/31/2022	1.1	Initial Document	Sophia Fernandez

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1 OVERVIEW

The General Assistance Program has four different solutions:

Program Code	Program Name	Note
GA	General Assistance/General Relief	Los Angeles County is currently using this
GM	General Assistance (Managed)	Most counties that migrated from C-IV into CalSAWS are opted into this solution
GN	General Assistance (Non-Managed)	Only San Bernardino and El Dorado are using this solution
GR	GA/GR Automated Solution	Most counties that are migrating from CalWIN into CalSAWS are opting into this solution

This SCR aims to ensure that the following reports will generate for each of the four General Assistance Program solutions:

- a. Integrated Payroll Benefit Issuance Detail Claiming Report
- b. Integrated Payroll Benefit Issuance Detail Claiming Report By Case
- c. Integrated Payroll Summary Report
- d. Main Payroll Benefit Issuance Direct Deposit Register
- e. Main Payroll Benefit Issuance EBT Register
- f. Main Payroll Benefit Issuance Warrant Register

1.1 Current Design

Currently, the following reports are not generating for all of the General Assistance solutions:

- a. Integrated Payroll Benefit Issuance Detail Claiming Report
- b. Integrated Payroll Benefit Issuance Detail Claiming Report By Case
- c. Integrated Payroll Summary Report
- d. Main Payroll Benefit Issuance Direct Deposit Register
- e. Main Payroll Benefit Issuance EBT Register
- f. Main Payroll Benefit Issuance Warrant Register

The following reports are currently being generated for the respective program code as indicated by the X in the table below:

Table 1.1.1. Reports Generated for GA/GR Program Code

Report	GA	GM	GN	GR
Integrated Payroll Benefit Issuance Detail Claiming Report		X	X	
Integrated Payroll Benefit Issuance Detail Claiming Report By Case	X	X	X	
Integrated Payroll Summary Report	X	X	X	
Main Payroll Benefit Issuance Direct Deposit Register	X	X	X	
Main Payroll Benefit Issuance EBT Register	X	X	X	
Main Payroll Benefit Issuance Warrant Register	X	X	X	

Currently, most of the reports are generating for General Assistance (Managed) (GM), General Assistance (Non-Managed) (GN) solutions and General Assistance/General Relief solution (GA) except for the Integrated Payroll Benefit Issuance Detail Claiming Report. These reports are not generating for the GA/GR Automated Solution (GR) at all.

All the reports are generated for the GM and GN solutions which are opted in by most counties migrating from the C-IV legacy solution.

The following reports contain the GA solution which is used by Los Angeles County:
   a. Integrated Payroll Benefit Issuance Detail Claiming Report By Case
   b. Integrated Payroll Summary Report
   c. Main Payroll Benefit Issuance Direct Deposit Register
   d. Main Payroll Benefit Issuance EBT Register
   e. Main Payroll Benefit Issuance Warrant Register

None of these reports currently generate for the GR solution which corresponds to counties migrating from the CalWIN legacy system.

1.2 Requests

Add the GR program code to generate reports for the General Assistance solution used by counties migrating from the CalWIN legacy system.

1.3 Overview of Recommendations

1. Add the GR program code for respective counties to the following reports:
   a. Integrated Payroll Benefit Issuance Detail Claiming Report
   b. Integrated Payroll Benefit Issuance Detail Claiming Report By Case
   c. Integrated Payroll Summary Report
   d. Main Payroll Benefit Issuance Direct Deposit Register

> e. Main Payroll Benefit Issuance EBT Register
> f. Main Payroll Benefit Issuance Warrant Register

2. Add the GA program code for the respective county to the following report:
   a. Integrated Payroll Benefit Issuance Detail Claiming Report

1.4 Assumptions

1. Counties may only have one active program with aid codes 90, 91, 92, 99. Any aid code outside of the ones listed in this SCR will need to be updated with an additional work item.
2. A GR/GM/GN/GA program code change for a county will require a separate work item to generate a report with their new program code.

2 RECOMMENDATIONS

2.1 Integrated Payroll Benefit Issuance Detail Claiming Report

2.1.1 Overview

The Integrated Payroll Benefit Issuance Detail Claiming Report provides detail issuance information and summary data. It is used to back up the Integrated Payroll Summary Report. It is a monthly scheduled report.

2.1.2 Integrated Payroll Benefit Issuance Detail Claiming Report Mockup

CalSAWS Integrated Payroll Benefit Issuance Detail Claiming Report					
[COUNTY NAME]					
Run Date: MON-DD-YY HH:MM AM/PM					
Date: MM/YYYY					
Aid Code: XX					
Program: General Assistance (Non-Managed)					
Totals by Aid Code and Pay Code					
Summary					
					Details
Totals:		$0.00	$0.00	$0.00	$0.00
Totals by Pay code					
Aid Code	Pay Code	Payment Total	Cancellation Total	Adjustment Total	Overall Total
-	-	$0.00	$0.00	$0.00	$0.00

Figure 2.1.2.1 – Summary Sheet (Base Population Update)

2.1.3 Description of Changes

1. Generate the Integrated Payroll Benefit Issuance Detail Claiming Report for the GR program code for the counties listed below per aid codes 90, 91, 92, 99.

Table 2.1.3.1 Counties with GR Program Code

County Name	County Code	Program Code
Alameda	01	GR
Contra Costa	07	GR
Fresno	10	GR
Orange	30	GR
Placer	31	GR
Sacramento	34	GR
San Diego	37	GR
San Francisco	38	GR
San Luis Obispo	40	GR
San Mateo	41	GR
Santa Barbara	42	GR
Santa Clara	43	GR
Santa Cruz	44	GR
Solano	48	GR
Sonoma	49	GR
Tulare	54	GR
Ventura	56	GR
Yolo	57	GR

2. Generate the Integrated Payroll Benefit Issuance Detail Claiming Report for the GA program code for Los Angeles County.

County Name	County Code	Program Code
Los Angeles	19	GA

2.1.4 Page Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Fiscal

2.1.5 Counties Impacted

All CalSAWS Counties.

2.1.6 Security Updates

N/A

2.1.7 Report Usage/Performance

N/A

2.2 Integrated Payroll Benefit Issuance Detail Claiming Report by Case

2.2.1 Overview

The Integrated Payroll Benefit Issuance Detail Claiming Report by Case provides detail issuance information and summary data by case. It is used to back up the Integrated Payroll Summary Report. It is a monthly scheduled report.

2.2.2 Integrated Payroll Benefit Issuance Detail Claiming Report by Case Mockup

CalSAWS	Integrated Payroll Benefit Issuance Detail Claiming Report by Case				
[COUNTY NAME]					
Run Date: MON-DD-YY HH:MM AM/PM					
Date: MM/YYYY					
Aid Code: XX					
Program: General Assistance (Non-Managed)					
				Details	
Totals By Pay Code					
Pay Code	Payment Total	Cancellation Total	Adjustment Total	Overall Total	
No Pay Code	$0.00	$0.00	($1,234.50)	($1,234.50)	
Totals:	$0.00	$0.00	($1,234.50)	($1,234.50)	

Figure 2.2.2.1 – Summary Sheet (Base Population Update)

2.2.3 Description of Changes

1. Generate the Integrated Payroll Benefit Issuance Detail Claiming Report by Case for the GR program code for the counties listed below per aid codes 90, 91, 92, 99.

Table 2.2.3.1 Counties with GR Program Code

County Name	County Code	Program Code
Alameda	01	GR
Contra Costa	07	GR
Fresno	10	GR
Orange	30	GR
Placer	31	GR
Sacramento	34	GR
San Diego	37	GR
San Francisco	38	GR
San Luis Obispo	40	GR
San Mateo	41	GR
Santa Barbara	42	GR
Santa Clara	43	GR
Santa Cruz	44	GR
Solano	48	GR
Sonoma	49	GR
Tulare	54	GR
Ventura	56	GR
Yolo	57	GR

2.2.4 Page Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Fiscal

2.2.5 Counties Impacted

All CalSAWS Counties.

2.2.6 Security Updates

N/A

2.2.7 Report Usage/Performance

N/A

2.3 Integrated Payroll Summary Report

2.3.1 Overview

The Integrated Payroll Summary Report provides detail issuance information and summary data. It is a monthly scheduled report.

2.3.2 Integrated Payroll Summary Report Mockup

CalSAWS	Integrated Payroll Summary Report											
[COUNTY NAME]												
Run Date: MON-DD-YY HH:MM AM/PM												
Date: MM/YYYY												
Aid Code: XX												
Program: General Assistance (Non-Managed)												
Payroll Code	Fed Adult	Fed Child	NonFed Adult	NonFed Child	Other Adult	Other Child	Total Cases	Fed Amount	NonFed Amount	Other Amount	Total	
Main Payroll	0	0	0	0	0	0	0	$0.00	$0.00	$0.00	$0.00	
Current Month Supplemental	0	0	0	0	0	0	0	$0.00	$0.00	$0.00	$0.00	
Current Month Cancellation	0	0	0	0	0	0	0	$0.00	$0.00	$0.00	$0.00	
Prior Month Supplemental	0	0	0	0	0	0	0	$0.00	$0.00	$0.00	$0.00	
Current Month Adjustment	0	0	0	0	0	0	0	$0.00	$0.00	$0.00	$0.00	
Subtotal	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	
Prior Month Cancellation	0	0	0	0	0	0	0	$0.00	$0.00	$0.00	$0.00	
Recoveries of Aid	0	0	0	0	0	0	0	$0.00	($1,234.50)	$0.00	($1,234.50)	
Prior Month Negative Adjustments	0	0	0	0	0	0	0	$0.00	$0.00	$0.00	$0.00	
Subtotal	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**$0.00**	**($1,234.50)**	**$0.00**	**($1,234.50)**	
Prior Month Positive Adjustment	0	0	0	0	0	0	0	$0.00	$0.00	$0.00	$0.00	
Total	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**$0.00**	**($1,234.50)**	**$0.00**	**($1,234.50)**	

Figure 2.3.2 – Summary Sheet (Base Population Update)

2.3.3 Description of Changes

1. Generate the Integrated Payroll Summary Report for the GR program code for the counties listed below per aid codes 90, 91, 92, 99.

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Table 2.3.3.1 Counties with GR Program Code

County Name	County Code	Program Code
Alameda	01	GR
Contra Costa	07	GR
Fresno	10	GR
Orange	30	GR
Placer	31	GR
Sacramento	34	GR
San Diego	37	GR
San Francisco	38	GR
San Luis Obispo	40	GR
San Mateo	41	GR
Santa Barbara	42	GR
Santa Clara	43	GR
Santa Cruz	44	GR
Solano	48	GR
Sonoma	49	GR
Tulare	54	GR
Ventura	56	GR
Yolo	57	GR

2.3.4 Page Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Fiscal

2.3.5 Counties Impacted

All CalSAWS Counties.

2.3.6 Security Updates

N/A

2.3.7 Report Usage/Performance

N/A

2.4 Main Payroll Benefit Issuance Direct Deposit Register

2.4.1 Overview

The Main Payroll Benefit Issuance Direct Deposit Register provides benefit issuance Direct Deposit transaction information.

2.4.2 Main Payroll Benefit Issuance Direct Deposit Register

CalSAWS **Main Payroll Benefit Issuance Direct Deposit Register**			
[COUNTY NAME]			
Run Date: MON-DD-YY HH:MM AM/PM			
Benefit Month: MM/YYYY			
Aid Code: 90 - GA General Relief Independent Living-CNTY			
		Details	
Summary by Aid Code			
Aid Code		**Transaction Count**	**Payment Amount**
-		0	$0.00
Grand Totals:		0	$0.00

Figure 2.4.2 – Summary Sheet (Base Population Update)

2.4.3 Description of Changes

1. Generate the Main Payroll Benefit Issuance Direct Deposit Register report for the GR program code for the counties listed below per aid codes 90, 91, 92, 99

Table 2.4.3.1 Counties with GR Program Code

County Name	County Code	Program Code
Alameda	01	GR
Contra Costa	07	GR
Fresno	10	GR
Orange	30	GR
Placer	31	GR
Sacramento	34	GR

San Diego	37	GR
San Francisco	38	GR
San Luis Obispo	40	GR
San Mateo	41	GR
Santa Barbara	42	GR
Santa Clara	43	GR
Santa Cruz	44	GR
Solano	48	GR
Sonoma	49	GR
Tulare	54	GR
Ventura	56	GR
Yolo	57	GR

2.4.4 Page Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Fiscal

2.4.5 Counties Impacted

All CalSAWS Counties.

2.4.6 Security Updates

N/A

2.4.7 Report Usage/Performance

N/A

2.5 Main Payroll Benefit Issuance EBT Register

2.5.1 Overview

The Main Payroll Benefit Issuance EBT Register provides a listing of all Electronic Benefit Transfer transaction information.

2.5.2 Main Payroll Benefit Issuance EBT Register Mockup

CalSAWS	Main Payroll Benefit Issuance EBT Register			
[COUNTY NAME]				
Run Date: MON-MM-YY HH:MM AM/PM				
Benefit Month: MM/YYYY				
Aid Code: 90 - GA General Relief Independent Living-CNTY				
			Details	
Grand Totals:		0	$0.00	
Available Date Summary				
Available Date	Transaction Count	Total		
-		0	$0.00	

Figure 2.5.2 – Summary Sheet (Base Population Update)

2.5.3 Description of Changes

1. Generate the Main Payroll Benefit Issuance EBT Register report for the GR program code for the counties listed below per aid codes 90, 91, 92, 99.

Table 2.5.3.1 Counties with GR Program Code

County Name	County Code	Program Code
Alameda	01	GR
Contra Costa	07	GR
Fresno	10	GR
Orange	30	GR
Placer	31	GR
Sacramento	34	GR
San Diego	37	GR
San Francisco	38	GR

San Luis Obispo	40	GR
San Mateo	41	GR
Santa Barbara	42	GR
Santa Clara	43	GR
Santa Cruz	44	GR
Solano	48	GR
Sonoma	49	GR
Tulare	54	GR
Ventura	56	GR
Yolo	57	GR

2.5.4 Page Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Fiscal

2.5.5 Counties Impacted

All CalSAWS Counties.

2.5.6 Security Updates

N/A

2.5.7 Report Usage/Performance

N/A

2.6 Main Payroll Benefit Issuance Warrant Register

2.6.1 Overview

The Main Payroll Benefit Issuance Warrant Register provides benefit issuance warrant transaction information. It is a monthly scheduled report.

2.6.2 Main Payroll Benefit Issuance Warrant Register Mockup

CalSAWS	Main Payroll Benefit Issuance Warrant Register																	
San Bernardino																		
Run Date: MON-DD-YY HH:MM AM/PM																		
Benefit Month: MM/YYYY																		
Aid Code: 91 - GA General Relief-B/C Non Independent Living-CNTY																		
Transaction Count:	1			Overall Totals:	0	0	0	0	0	0	0			$0.00	$0.00	$0.00	$0.00	
					Person Count													
					Fed		Non-Fed		Other									
Warrant Number	Program	Case Number	Case Name	Payee Name	A	C	A	C	A	C	FBU Count	Issue Date	Auth. Worker Id	Pay Code	Fed Amt.	Nfed Amt.	Other Amt.	Amount	Document Id	ACTG Line No.
					0	0	0	0	0	0	0				$0.00	$0.00	$0.00	$0.00	

Figure 2.1.1 – Details Sheet (Base Population Update)

2.6.3 Description of Changes

1. Generate the Main Payroll Benefit Issuance Warrant Register report for the GR program code for the counties listed below per aid codes 90, 91, 92, 99.

Table 2.6.3.1 Counties with GR Program Code

County Name	County Code	Program Code
Alameda	01	GR
Contra Costa	07	GR
Fresno	10	GR
Orange	30	GR
Placer	31	GR
Sacramento	34	GR
San Diego	37	GR
San Francisco	38	GR
San Luis Obispo	40	GR
San Mateo	41	GR
Santa Barbara	42	GR
Santa Clara	43	GR
Santa Cruz	44	GR
Solano	48	GR
Sonoma	49	GR
Tulare	54	GR
Ventura	56	GR
Yolo	57	GR

2.6.4 Page Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Fiscal

2.6.5 Counties Impacted

All CalSAWS Counties.

2.6.6 Security Updates

N/A

2.6.7 Report Usage/Performance

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Integrated Payroll Benefit Issuance Detail Claiming Report	Integrated Payroll Benefit Issuance Detai
2	Reports	Integrated Payroll Benefit Issuance Detail Claiming Report by Case	Integrated Payroll Benefit Issuance Detai
3	Reports	Integrated Payroll Summary Report	Integrated Payroll Summary Report
4	Reports	Main Payroll Benefit Issuance Direct Deposit Register	Main Payroll Benefit Issuance Direct Depos
5	Reports	Main Payroll Benefit Issuance EBT Register	Main Payroll Benefit Issuance EBT Register
6	Reports	Main Payroll Benefit Issuance Warrant Register	Main Payroll Benefit Issuance Warrant Reg

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.2	The LRS shall produce reports that provide the detail LRS Data that will be used to complete the reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	The reports shall be updated to properly generate for each of the four General Assistance Program codes.

4.2   Migration Requirements

N/A

5   MIGRATION IMPACTS

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

6   APPENDIX

The following table contains a list of all counties with their corresponding county codes and General Assistance program codes after the change:

Table 6.1 Counties with respective General Assistance program code

County Name	County Code	Program Code	County Legacy System
Alameda	01	GR	CalWIN
Alpine	02	GM	C-IV
Amador	03	GM	C-IV
Butte	04	GM	C-IV
Calaveras	05	GM	C-IV
Colusa	06	GM	C-IV
Contra Costa	07	GR	CalWIN
Del Norte	08	GM	C-IV
El Dorado	09	GN	C-IV
Fresno	10	GR	CalWIN
Glenn	11	GM	C-IV
Humboldt	12	GM	C-IV
Imperial	13	GM	C-IV
Inyo	14	GM	C-IV
Kern	15	GM	C-IV
Kings	16	GM	C-IV
Lake	17	GM	C-IV
Lassen	18	GM	C-IV
Los Angeles	19	GA	Los Angeles County
Madera	20	GM	C-IV
Marin	21	GM	C-IV
Mariposa	22	GM	C-IV
Mendocino	23	GM	C-IV
Merced	24	GM	C-IV

Modoc	25	GM	C-IV
Mono	26	GM	C-IV
Monterey	27	GM	C-IV
Napa	28	GM	C-IV
Nevada	29	GM	C-IV
Orange	30	GR	CalWIN
Placer	31	GR	CalWIN
Plumas	32	GM	C-IV
Riverside	33	GM	C-IV
Sacramento	34	GR	CalWIN
San Benito	35	GM	C-IV
San Bernadino	36	GN	C-IV
San Diego	37	GR	CalWIN
San Francisco	38	GR	CalWIN
San Joaquin	39	GM	C-IV
San Luis Obispo	40	GR	CalWIN
San Mateo	41	GR	CalWIN
Santa Barbara	42	GR	CalWIN
Santa Clara	43	GR	CalWIN
Santa Cruz	44	GR	CalWIN
Shasta	45	GM	C-IV
Sierra	46	GM	C-IV
Siskiyou	47	GM	C-IV
Solano	48	GR	CalWIN
Sonoma	49	GR	CalWIN
Stanislaus	50	GM	C-IV
Sutter	51	GM	C-IV

Tehama	52	GM	C-IV
Trinity	53	GM	C-IV
Tulare	54	GR	CalWIN
Tuolumne	55	GM	C-IV
Ventura	56	GR	CalWIN
Yolo	57	GR	CalWIN
Yuba	58	GM	C-IV

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245662

Add a Link to the Systems Status Dashboard to the CalSAWS System

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Matt Lower, Naga Chinduluru, Michael Wu, Himanshu Jain, Shilpa Suddavanda, William Baretsky, Mike Tombakian, Kristina Carter, Eric Gilmore, Greg FitzGerald

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/25/2022	1.0	Initial Revision	Vallari Bathala

Table of Contents

1 OVERVIEW

The System Status dashboard is a service tracking page available in the CalSAWS ServiceNow Service Portal. This dashboard monitors different services related to CalSAWS, such as the CalSAWS Application, BenefitsCal, Learning Management System (LMS), etc., and displays the current status of each service.

1.1 Current Design

Currently, the CalSAWS Application does not have a hyperlink to the System Status dashboard.

1.2 Requests

Create a link to the System Status dashboard. Make the link accessible from all pages in the CalSAWS System.

1.3 Overview of Recommendations

Add the link to the System Status dashboard in the Resource page.

1.4 Assumptions

ServiceNow ticket IDA0001619 - update service portal link from "System Status" to "Systems Status" will change the system monitoring dashboard name to 'System Status' in a future effort.

2 RECOMMENDATIONS

2.1 Resources

2.1.1 Overview

Updating the Resources page will allow Users to navigate to the System Status dashboard in Service Now from all pages in the System.

2.1.2 Resources Mockup
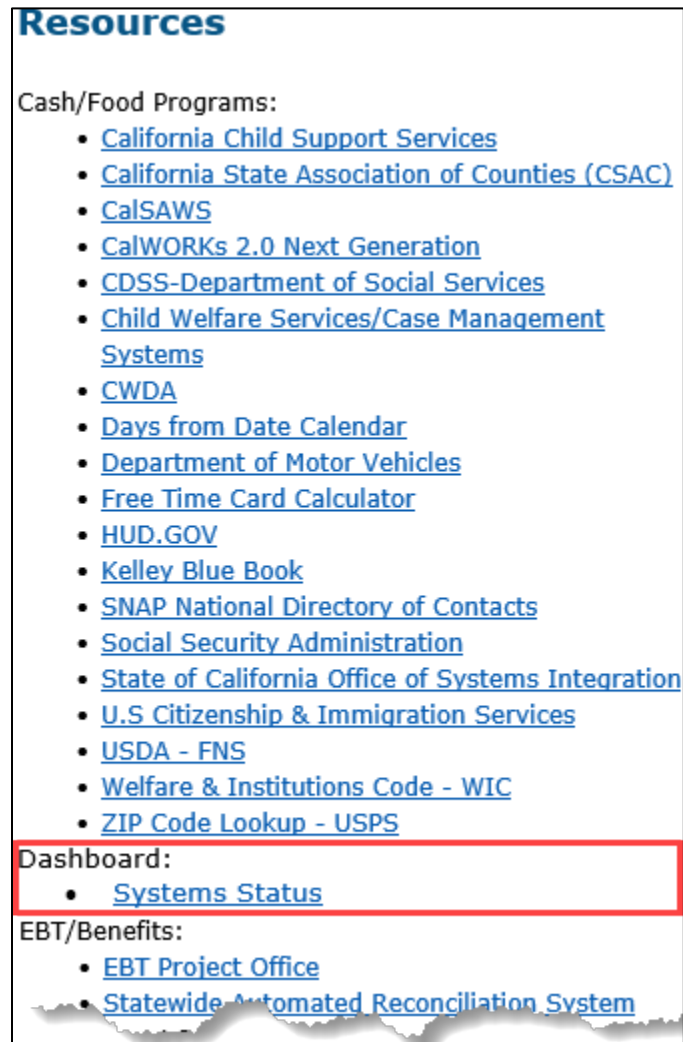
Figure 2.1.1 – Resources Page

2.1.3 Description of Changes

1. Add a link in the Resources page to the System Status:
   a. Category: Dashboard

b. Link Name: Systems Status
c. URL: https://calsawsprod.servicenowservices.com/sp?id=service_status_global
d. Sort the link by alphabetical order based on the links already existing for each County.
  i. If resources are not listed in alphabetical order for any county, the Category and Link will be listed as the very last item.
2. Make the Systems Status link available for all Counties.

2.1.4 Page Location

- **Global:** CalSAWS Ribbon > Resources
- **Local:** N/A
- **Task:** N/A

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
SystemsStatusDashboardView	The ability to view the Systems Status link in the Resources page which will link to Systems Status dashboard in ServiceNow	Systems Status Link View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Systems Status Link View	The ability to view the Systems Status link in the Resources page which will link to	Executive Help Desk Staff View Only

Security Group	Group Description	Group to Role Mapping
	Systems Status dashboard in ServiceNow	

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Automated Regression Test

2.2.1 Overview

Add verification of the new 'Systems Status' link to the existing automated regression test script(s) targeting the Resources page.

2.2.2 Description of Changes

1. Update the existing automated script(s) to verify that 'Systems Status' is listed in a 'Dashboard' section of the Resources page.
   Note: This verification applies to both the Los Angeles County-specific version of the page, and the non-county-specific version.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	Security Matrix	CA-245662 Systems Status Link Security

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.3.2.1.10	10. The LRS Component shall include the ability to predict LRS failures, including through integrated system monitoring software.	Add a link in the Resources page to the System Status dashboard which monitors the condition of different applications available in the CalSAWS system.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245787

Update Supportive Services Issuances Report to Expand Logic for All GA/GR Solutions

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Diana Bonilla
	Reviewed By	Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/09/2022	1.0	Initial Document	Diana Bonilla

Table of Contents

1 OVERVIEW

In CalSAWS, there are currently four GA/GR solutions with the following program codes:

Program Code	Program Name	Note
GA	General Assistance/ General Relief	Currently used by Los Angeles County
GM	General Assistance (Managed)	Most counties that migrated from C-IV into CalSAWS are opted into this solution
GN	General Assistance (Non-Managed)	Only San Bernardino and El Dorado are using this solution currently
GR	GA/GR Automated Solution	Most counties that are migrating from CalWIN into CalSAWS are opting into this

 (Please refer to Appendix 6.1 to see specifically which counties are opt-in to which program code as of this SCR.)

This SCR will update the Supportive Services Issuances Report to expand its reporting logic to account for the three additional program codes (GM, GN, GR). It currently has the program code GA for this report logic. This SCR will also be updated to enable the report to generate for all counties.

1.1 Current Design

Currently, the Supportive Services Issuances Report is only accounting for the GA program in its reporting logic and is being generated by the Los Angeles county only.

1.2 Requests

This SCR requests the addition of the GA/GR Automated Solution (GR), GA Non-Managed Program (GN), GA Managed Program (GM) to the Supportive Services Issuances Report, and to generate for all counties.

1.3 Overview of Recommendations

1. Update Supportive Services Issuances Report to expand the report logic where GA is used to include GM, GN, and GR program codes.
2. Update the report to generate for all counties.

1.4 Assumptions

1. No report other than the one mentioned in this document will be impacted by this SCR

2 RECOMMENDATIONS

2.1 Supportive Services Issuances Report

2.2 Overview

The Supportive Services Issuances Report displays summary information for all paid, cancelled, and voided transportation, and ancillary issuances with a breakout by need type and the corresponding issuance amounts. The report also displays detailed information on each affected case including the authorization date, need type, and issuance amount. This report is used by Program staff to monitor transportation and ancillary issuances and caseload projections.

This SCR will update the Supportive Services Issuances Report to expand its reporting logic to account for the three additional program codes (GM, GN, GR) and to generate for all counties in CalSAWS.

2.3 Supportive Services Issuances Report Mockup

*Note: There are no cosmetic changes. This is for reference only.

CalSAWS	Supportive Services Issuances Report									
COUNTY_NAME										
Run Date: MON-DD-YY HH:DD AM/PM										
Report Month: MM/YYYY										
Issued Summary										
								Total:	0	$0.00
Region Group ▾	Region ▾	Office ID ▾	Office Name ▾	Program ▾	Need Category ▾	Need Type ▾	Benefit Progra ▾	Issuance Method ▾	Issuance Count ▾	Issuance Amou ▾
REGION_GROUP	REGION	OFFICE_ID	OFFICE_NAME	PROGRAM	NEED_CAT	NEED_TYPE	BEN_PROG	ISS_METHOD	ISS_COUNT	$0.00

Figure 2.1.2.1 – Supportive Services Issuances Report Mockup – Issued Summary Sheet

*Note: The full version of this report can be found in the Supporting Documents section.

2.4 Description of Change

1. Update Supportive Services Issuances Report to expand the report logic where GA is used to include GM, GN, and GR program codes.

Program Codes to be Added (CT – 18)	
Program Code	**Program Name**
GM	General Assistance (Managed)
GN	General Assistance (Non-Managed)
GR	GA/GR Automated Solution

***Technical Note**: There are column transformation logic that looks at program code GA for looking up Benefit Program. This should be expanded to include all four program codes (GA, GM, GN, GR).

2. Update Supportive Services Issuances Report to generate for all counties.

2.5 Page Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Employment Services

2.6 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.7 Security Updates

No security updates.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Supportive Services Issuances Report	Supportive Services Issuances Report Moc

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.2	The CalSAWS shall produce reports that provide the detail CalSAWS Data that will be used to complete the reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	The addition of the GA/GR program codes will support the data expansion for this monthly scheduled report.

5 OUTREACH

N/A

6 APPENDIX

6.1 List of Counties by Their GA/GR Solution

The following table contains a list of all counties with their corresponding county codes and respective General Assistance program codes as of June 2022:

Table 6.1 Counties by Their GA/GR Solution Program Code

County Name	County Code	Program Code	County Legacy System
Alameda	01	GR	CalWIN
Alpine	02	GM	C-IV
Amador	03	GM	C-IV
Butte	04	GM	C-IV
Calaveras	05	GM	C-IV
Colusa	06	GM	C-IV

Contra Costa	07	GR	CalWIN
Del Norte	08	GM	C-IV
El Dorado	09	GN	C-IV
Fresno	10	GR	CalWIN
Glenn	11	GM	C-IV
Humboldt	12	GM	C-IV
Imperial	13	GM	C-IV
Inyo	14	GM	C-IV
Kern	15	GM	C-IV
Kings	16	GM	C-IV
Lake	17	GM	C-IV
Lassen	18	GM	C-IV
Los Angeles	19	GA	LRS
Madera	20	GM	C-IV
Marin	21	GM	C-IV
Mariposa	22	GM	C-IV
Mendocino	23	GM	C-IV
Merced	24	GM	C-IV
Modoc	25	GM	C-IV
Mono	26	GM	C-IV
Monterey	27	GM	C-IV
Napa	28	GM	C-IV
Nevada	29	GM	C-IV
Orange	30	GR	CalWIN
Placer	31	GR	CalWIN
Plumas	32	GM	C-IV
Riverside	33	GM	C-IV
Sacramento	34	GR	CalWIN
San Benito	35	GM	C-IV
San Bernadino	36	GN	C-IV
San Diego	37	GR	CalWIN
San Francisco	38	GR	CalWIN
San Joaquin	39	GM	C-IV
San Luis Obispo	40	GR	CalWIN
San Mateo	41	GR	CalWIN
Santa Barbara	42	GR	CalWIN
Santa Clara	43	GR	CalWIN
Santa Cruz	44	GR	CalWIN
Shasta	45	GM	C-IV
Sierra	46	GM	C-IV
Siskiyou	47	GM	C-IV
Solano	48	GR	CalWIN
Sonoma	49	GR	CalWIN
Stanislaus	50	GM	C-IV

Sutter	51	GM	C-IV
Tehama	52	GM	C-IV
Trinity	53	GM	C-IV
Tulare	54	GR	CalWIN
Tuolumne	55	GM	C-IV
Ventura	56	GR	CalWIN
Yolo	57	GR	CalWIN
Yuba	58	GM	C-IV

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-246012

Update the Existing Languages and Add Missing
Translations for NA 1275 Form

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Anil Ankad
	Reviewed By	Ravi Gupta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/01/2022	1.0	Initial Draft	Anil Ankad

Table of Contents

1   OVERVIEW

This effort will update the existing languages to match state version and add the NA 1275 in all available threshold languages.

1.1   Current Design

The system has English, Spanish, Armenian, Cambodian, Chinese, Russian, Korean, Vietnamese and Tagalog of the NA 1275.

1.2   Requests

Update English, Spanish, Armenian, Cambodian, Chinese, Russian, Korean, Vietnamese and Tagalog to match state version and add CDSS Threshold Languages to the CalSAWS for the NA 1275 (7/13) form Template Repository and system generated.

Languages include:

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

1.3   Overview of Recommendations

Update English, Spanish, Armenian, Cambodian, Chinese, Russian, Korean, Vietnamese and Tagalog and to add Threshold Languages to NA 1275.

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

1.4   Assumptions

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

2   RECOMMENDATIONS

2.1   Add Threshold Languages to NA 1275 Form

2.1.1   Overview

This section will cover the requirements for adding the NA 1275 forms in available threshold languages and update the existing languages.

State Form: NA 1275

Current Programs: CalFresh, CP, GA

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All counties

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

Template Description: This form is sent to the participant to inform them that they are being switched back to traditional paper correspondence for the provided reason. It informs them who to contact for questions and how to continue receiving electronic notices.

Imaging Form Name: Electronic Notification Cancellation

Imaging Document Type: E-Notification

2.1.2 Form Verbiage

Create NA 1275 XDP's for Threshold Languages

Threshold Languages: Arabic, Farsi, Hmong and Lao
Form Mockups/Examples: See Supporting Documents #1
Form Header: CalSAWS Standard Header #1
Include NA BACK 9: NO

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

Update batch job (PB00R1997) to generate the NA 1275 form in newly added threshold languages.

Tech Note: Update CT942_UN (NA 1275)

Form Print/Mailing Options

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

Print Options:

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

Mailing Options:

Mailing Options	Option for NA 1275 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for NA 1275 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	NA 1275 Threshold Languages	NA1275_Arabic.pdf NA1275_Farsi.pdf NA1275_Lao.pdf NA1275_Hmong.pdf NA1275_English.pdf NA1275_Spanish.pdf NA1275_Armenian.pdf NA1275_Cambodian.pdf NA1275_Chinese.pdf NA1275_Russian.pdf NA1275_Korean.pdf NA1275_Vietnamese.pdf NA1275_Tagalog.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	NA1275 is being added in all available threshold languages and Update the footer of the existing languages of NA 1275 to match with the newly added language footer.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-246043

Implement Partitioning for Performance Enhancements

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Eduardo Claro

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/2/2022	1.0	Initial Draft	Eduardo Claro

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1 OVERVIEW

This SCR describes the process to implement database partitioning to improve performance.

1.1 Current Design

Very few tables are currently partitioned under the database schema PR_LRS. As many application processes access the tables per COUNTY_ID, many tables will benefit from a partitioning strategy that splits the largest tables into per-county partitions. Some other tables will be partitioned using other keys, according to their use, as well as one table will be re-partitioned for better performance.

1.2 Requests

N/A

1.3 Overview of Recommendations

The following tables will be partitioned:

    ISSUANCE
    ISSUANCE_DETL
    EDBC
    CLAIM_HIST
    ICT
    ICT_PERS
    ICT_DETL
    ICT_CIV_CASE
    CALL_LOG
    GENERATE_DOC
    PRINT_FILE

The following tables will be re-partitioned with a different method:

    BUDGET_PERS
    MESSG_LOG

All the details on how and why these tables should be partitioned, as well as the scope of the analysis, the tests, expected results and the supporting scripts, are in the supporting documentation created for the Partitioning.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

The scripts to partition the tables can be executed ONLINE or OFFLINE. It is recommended to execute them OFFLINE, with the applications not running.

After the partitioning is implemented in a Performance environment, all the relevant application processes must be executed and monitored to confirm performance improvements for many and no degradation for any of them.

After the tests, the partitioning should be implemented in the Production environment.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
		Supporting documentation for the Partitioning strategy	PRSAWS Partitioning Study v4.3.docx

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-246284

Update Application Source to be a Required Field

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala, Cynthia Ridley
	Reviewed By	Girish Chakkingal, Prashant Goel, Geetha Ramalingam, Akira Moriguchi, Renee Gustafson, Ritu Chinya, Naga Chinduluru, Michael Wu, Matt Lower, Himanshu Jain, Shilpa Suddavanda, William Baretsky, Elisa Miller

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/07/2022	1.0	Initial Revision	Vallari Bathala
6/8/2022	.01	Updated Design for Medi-Cal EBDC Auto-test Rules	Cynthia Ridley

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1 OVERVIEW

When creating a new application in CalSAWS, County Users will navigate to the New Application Detail which contains the option to list the application source. When adding a new program to an existing case, the Users will navigate to the New/Reapplication Detail pages which also contains the option to list the source. The Application Source on program applications is a needed component on state and federal reports. When Medi-Cal is auto-tested from a failed cash-based Medi-Cal program, the application source from the cash-based Medi-Cal program will copy over to the Medi-Cal program.

1.1 Current Design

Currently, the application source information is not required when manually creating a program application in CalSAWS.

Medi-Cal EDBC auto-test does not copy over the application source from the failed cash-based Medi-Cal program and instead sets the application source for the Medi-Cal program to 'Other'.

1.2 Requests

Update the New Programs Detail, New/Reapplication Detail and Application Registration Summary to make the application source dropdown a required field.

Update the application source for the auto-tested Medi-Cal program to copy the application source from the failed cash-based Medi-Cal program.

1.3 Overview of Recommendations

1. Update the New Programs Detail page to have the Application Source field as a required field.
2. Update the New/Reapplication Detail page to have the Application Source field as a required field.
3. Update the Application Registration Summary page to have the Application Source field as a required field.
4. Copy the Application Source from the failed cash-based Medi-Cal program to the auto-tested Medi-Cal program block.

1.4 Assumptions

N/A

2   RECOMMENDATIONS

2.1   New Programs Detail

2.1.1   Overview

When adding a new program to a new case, the User will select the application source in the New Programs Detail page. The New Programs Detail page will be updated to require the Source dropdown field.

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: ✱
Arthur Lester 43M ∨	06/01/2022	Self-Service Portal ∨	English ∨

Program Information

Name	DOB	Programs	Add/Remove Programs
Arthur Lester	02/20/1979	CalWORKs, CalFresh	Edit

| | Save and Continue | Cancel |

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Figure 2.1.2-1 – New Programs Detail

2.1.3   Description of Changes

1. Update the Source dropdown to be a required field.
2. If the Source dropdown is left blank, display the following validation message:
    a. Source - Field is Required. Please enter a value.

2.1.4   Page Location

- **Global:** Case Info
- **Local:** New Application
- **Task:** N/A

6

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 New/Reapplication Detail

2.2.1 Overview

When adding a new program to an existing case, the User will select the application source in the New/Reapplication Detail page. The New/Reapplication Detail page will be updated to require the Source dropdown field.

2.2.2 New/Reapplication Detail Mockup

New / Reapplication Detail

✱- Indicates required fields   [Save and Return] [Cancel]

View Date:	Program Type:		
06/07/2022	Medi-Cal		
Primary: ✱	Application Date: ✱	Requested BDA: ✱	Source: ✱
Arthur Lester 43M ▽	06/07/2022 📅	06/14/2022 📅	In Person ▽

Requested Medi-Cal Type: ✱
Medi-Cal ▽

Inter-County Transfer: ✱
No ▽

Assign To Medi-Cal Only:
▽

■	Name ✱	DOB	Role	Role Reason	Status	Status Reason
☐	Arthur Lester	02/20/1979				

[Save and Return] [Cancel]

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Figure 2.2.2-1 – New/Reapplication Detail

2.2.3 Description of Changes

1. Update the Source dropdown to be a required field.
2. If the Source dropdown is left blank, display the following validation message:
   a. Source - Field is Required. Please enter a value.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** New Program

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Application Registration Summary

2.3.1 Overview

When creating a new application, the User will select the application source in the Application Registration Summary page. The Application Registration Summary page will be updated to require the Source dropdown field.

2.3.2 Application Registration Summary Mockup

Application Registration Summary

✱- Indicates required fields

[Save and Return]

Source: ✱   App Date: ✱ 07/12/2022 📅   Case Number:
[Mail In Application ▼]

App Site:
[▼]

Application Number:

Last Name: ✱   First Name: ✱   MI: Social Security Number:
[   ]   [   ]   [   ]   [   ]

Other Names:
(Maiden, Nicknames, ETC.)   Gender: ✱   Date of Birth:
[   ]   [- Select - ▼]   [   ] 📅

Home Address:
Street Number and Name: Apt#:   City: County: State: ZIP Code:
[   ]   [   ] [   ]   [Los Angeles ▼] [CA ▼] [   ]

Mailing Address:
(If different from above.)
Street Number and Name: Apt#:   City: County: State: ZIP Code:

Figure 2.3.2-1 – Application Registration Summary

2.3.3 Description of Changes

1. Update the Source dropdown to be a required field.
2. If the Source dropdown is left blank, display the following validation message:
   a. Source - Field is Required. Please enter a value.

2.3.4 Page Location

- **Global:** Case Info
- **Local:** New Application
- **Task:** Application Registration Summary

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Medi-Cal EDBC Auto-Test Rules

2.4.1 Overview

The Medi-Cal EDBC Auto-Test Rules will be updated to copy over the application source from the failed cash-based Medi-Cal program to the newly created Medi-Cal program.

2.4.2 Description of Changes

1. Set the application source for the auto-tested Medi-Cal program to the same application source from the failed cash-based Medi-Cal program.
Note: The application source will only be copied over upon the transition from the failed cash-based Medi-Cal program to the newly created Medi-Cal program.

2.4.3 Programs Impacted

Medi-Cal

2.4.4 Performance Impacts

N/A

2.5 Automated Regression Test

2.5.1 Overview

Create (or expand the scope of existing) automated regression test scripts to verify that the application source value is copied over to the new Medi-Cal program during auto-test.

2.5.2 Description of Change

Create (or update) regression scripts to verify that the application source of the auto-tested Medi-Cal program matches the application source of the following program during an applicable EDBC denial or discontinuance:

1. CalWORKs
2. RCA

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-246998

Add Threshold Languages to CW 10 Form

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Singaram Manickam
	Reviewed By	Narendar Sabbani

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/15/2022	1.0	Initial Draft	Singaram Manickam

Table of Contents

1   OVERVIEW

This effort will add the CW 10 in all available threshold languages.

1.1   Current Design

The system only has English & Spanish of the CW 10.

1.2   Requests

Add CDSS Threshold Languages to the CalSAWS for the CW 10 (07/01) form Template Repository and system generated.

Languages include:

Cambodian, Chinese, Russian and Vietnamese.

1.3   Overview of Recommendations

Add the CW 10 form in available threshold languages.

Languages: Cambodian, Chinese, Russian and Vietnamese.

1.4   Assumptions

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

2   RECOMMENDATIONS

2.1   Add Threshold Languages to CW 10

2.1.1   Overview

This section will cover the requirements for adding the CW 10 forms in available threshold languages.

State Form: CW 10

Current Programs: General Assistance/General Relief, CalWORKs, CAPI, CalFresh & RCA

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

Template Description: This form is sent to the participant to inform them that the county has withdrawn their application as they had previously requested.

Imaging Form Name: Notice of Withdrawn Application

Imaging Document Type: Application, Intake, or Screening

2.1.2 Form Verbiage

Create CW 10 XDP's for Threshold Languages

Threshold Languages: Cambodian, Chinese*, Russian and Vietnamese.

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

Form Mockups/Examples: See Supporting Documents #1
Form Header: CalSAWS Standard Header #1
Include NA BACK 9: No

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

Form Print/Mailing Options

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

Print Options:

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

Mailing Options:

Mailing Options	Option for CW 10 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for CW 10 Form
Post to Self-Service Portal	N

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CW 10 Threshold Languages	CW10_CA.pdf CW10_CH.pdf CW10_RU.pdf CW10_VI.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	CW 10 is being added in all available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-247705

Opt Out Customers Opted into E-Notifications
Without BenefitsCal Account

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Phong Xiong
	Reviewed By	Priya Sridharan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/18/2022	1.0	Initial Draft	Phong Xiong

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1   OVERVIEW

This SCR will be identifying the cases that have opted in to E-notification but does not have a BenefitsCal account. These cases will be opted out of E-notification and reverted back to paper notifications.

1.1   Current Design

At cutover, E-Notification statuses were brought over. Not all customers who previously had a C4Yourself (C4Y) or YourBenefitsNow (YBN) accounts created a BenefitsCal account. Now we have customers who are opted into E-Notification without a BenefitsCal account.

1.2   Requests

Opt out customers who are currently opted into E-Notifications and do not have a BenefitsCal account. Send a NA 1275 notifying the customer that they have been switched back to paper. Add a special message under the other section regarding why they are getting opted out.

Create a one-time Journal Entry for cases that are going to be opted out of E-Notification.

1.3   Overview of Recommendations

1. Update the NA 1275 form
2. Mass mailer to send out the NA 1275 form to all primary applicants for active cases that are opted in to E-notification, with a verified email account, and no BenefitsCal account.
   a. Estimated total count of impacted cases = approx. 92,000
   b. See attached "Mass Mailer – E-Notification Count by County.xlsx" to see total count broken down by each county
3. DCR to PERS table for cases Opted In to E-Notification with no BenefitsCal Account, regardless of program status
   a. Flip EMAIL_NOTIF_IND from "Y" to "N"
   b. Flip MAIL_VERIF_STAT_CODE (CT465) to OP (Opted Out) regardless of current status
   c. Create a Journal Entry for population opted out of E-Notification

1.4   Assumptions

1. The mass mailer will be sent prior to the DCR. If the DCR is run first, cases affected cannot be identified for mass mailer.
2. The mass mailer will be sent to primary applicants on all active cases with verified email account status, while the DCR will run for primary applicants regardless of program status and email account status.

2 RECOMMENDATIONS

2.1 Updates to Existing NA 1275 Form Recommendation

2.1.1 Overview

The NA 1275 form is sent to the participant to inform them that they are being switched back to traditional paper correspondence for the provided reason. It informs them who to contact for questions and how to continue receiving electronic notices.

State Form: NA 1275 (7/13)

Current Programs: CalFresh, General Assistance/General Relief, CAPI

Current Attached Form(s): None

Current Forms Category: Form

Current Template Repository Visibility: All Counties

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

2.1.2 NA 1275 Form Verbiage

There are no changes to this section of the design.

2.1.3 NA 1275 Form Variable Population

Only one variable is updated with this effort called "OTHER". It currently populates with the following text,

> "If you would like more information on the reason for cancellation, please contact the DPSS Customer Service Center (CSC) at (866) 613-3777"

when the "Other" checkbox is checked. This effort will add an additional text to generate.

Only one message will display at a time when the "Other" checkbox is checked.

LA County will continue to use the existing text. Migration counties will use the new text as shown in the table below.

All other variables are not updated; therefore, are not displayed or mentioned here in the design document.

Variable Name	Population	Formatting	Editable*/Field Type	Template Repository Population	Populates with Form Generation

OTHER	Populate "If you would like more information on the reason for cancellation, please contact your county worker" for Migration Counties.	Arial Font Size 10	Yes/Text Field	Yes	Yes

*Note: The Editable column of the table above refers to if the variable will be editable when populated. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated.

Variables Requiring Translations: OTHER

Technical Note: *The variable updated in this section is populated from the form scripting of the XDP.*

2.1.4 NA 1275 Form Generation Conditions

There are no changes to the existing generation conditions of the form.

This form will be sent in a mass mailer (see section 2.2).

2.2 Mass Mailer to Send NA 1275 Form Recommendation

2.2.1 Overview

This effort will be to send out a mass mailer of the NA 1275 to the population that are opted in to E-notification, with verified e-mails, and do not have a BenefitsCal account.

2.2.2 Description of Changes

Generate the NA 1275 for a one-time mailing for all primary applicants for all active cases opted in to E-notification, E-mail has been verified, and does not have a BenefitsCal account.

Technical Note:

Opted in to E-Notification – EMAIL_NOTIF_IND = 'Y' in PERS table

E-Mail Verified – EMAIL_VERIF_STAT_CODE = 'VF' in PERS table

No BenefitsCal Account – GUID IS NULL in C4Y_LOGIN_INFO table

Please see supporting document #1 for query.

Please see supporting document #3 for impacted count by counties.

2.3 DCR for PERS Table Recommendation

2.3.1 Overview

This effort will be to opt out of E-notification for primary applicants that are currently opted in to E-notification and does not have a BenefitsCal account.

2.3.2 Description of Changes

Create a DCR to do the following:

1. Find cases that meet the following criteria, regardless of program status:
    a. The person is the primary applicant,
    b. The person is opted in to E-notification, and
    c. The person does not have a BenefitsCal account
2. For each record returned from the driving query, do the following actions, regardless of their current E-mail verification status:
    a. Flip EMAIL_NOTIF_IND from 'Y' to 'N'
    b. Update EMAIL_VERIF_STAT_CODE to 'OP'

Technical Note: *Please see supporting document #2 for query to find population that needs the DCR.*

Please see supporting document #4 for impacted count by counties.

Create a one-time Journal entry with the following information when the mass mailer is generated:

Field to Populate	Population for Opt Out of E-Notification
Case Id	The case associated to the Primary Applicant Opted Out
Type	Document
Short Description	Opt Out of E-Notification
Long Description	<Primary Applicant> has been opted out of E-notification. The account was migrated over from either C4Yourself or YourBenefitsNow, and a BenefitsCal account has not been created for <Primary Applicant>.
Created by	Batch or User
Updated by	Batch or User

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	SQL	Query to find count associated to recommendation 2.2.	Mass_Mailer_Query.sql
2	SQL	Query to find count associated to recommendation 2.3	DCR_Count_Query.sql
3	Count	Count by counties of impacted population.	Mass Mailer - E-Notification Count by County.xlsx
4	Count	Count by counties of impacted population.	DCR and Journal Entry - E-Notification Count by County.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.7 CAR-1243	The LRS shall identify case actions that require a notice, NOA, form, letter, stuffer, or flyer, and shall generate that appropriate notice, NOA, form, letter, stuffer, or flyer, using variable case-specific information.	Update the NA 1275 variable population logic.
2.18.3.19 CAR-1254	The LRS shall generate special mailings and mass notifications to specific programs, populations, or individuals, as specified by COUNTY.	Generate mass mailer for NA 1275.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-247889

ACL 22-XX Resource Limit Increase

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/19/2022	1.0	Initial Draft	Tom Lazio
07/22/2022	1.1	Added Client Correspondence recommendations.	Ayman Hussein

Table of Contents

1 OVERVIEW

This document identifies required changes to CalSAWS related to the asset limits for the CalWORKs (CW) and Refugee Cash Assistance (RCA) programs for the most recent fiscal year effective January 1, 2023, as informed by the All County Letter (ACL) 22-XX.

1.1 Current Design

The resource limits for CW/RCA were last updated for FFY 2021 in SCR CA-227118 with the following values:

- For CW/RCA Assistance Units (AUs) that do not contain a member who is 60 years of age or older or disabled, the property limit increased to $10,211.

- For CW/RCA AUs that do contain a member who is age 60 years of age or older or disabled, the property limit increased to $15,317.

1.2 Requests

Per ACL 22-XX effective January 1, 2023, the resource threshold will increase by 6.63 percent in accordance with the California Necessities Index for the most recent fiscal year (2023) to the following values:

a. When a CW/RCA AU does not include a member who is 60 years of age or older or disabled, the maximum asset limit will be increased from $10,211 to $10,888.

b. When a CW/RCA AU includes a member, who is 60 years of age or older or disabled, the maximum asset limit will be increased from $15,317 to $16,333.

1.3 Overview of Recommendations

1. Update CW Property Limit and CW Elderly and Disabled Property Limit amounts to the new limit values.
2. Regression test impacted NOAs and Forms that populate the CalWORKs Property Limits Disregard.

1.4 Assumptions

1. The Federal AFDC eligibility determination for Foster Care (FC) is made based on current property CW property limit. SCR CA-213138 has been drafted to update the EDBC logic to determine federal AFCD determination based on Foster Care property limit.
2. The M44-316C (7/22) version updates will be completed as part of SCR CA-232182. This effort will not be updating form M44-316C.

2   RECOMMENDATIONS

CW/RCA EDBC: Property Limit and Elderly and Disabled Property Limit

2.1.1   Overview

Update CW Property Limit and CW Elderly and Disabled Property Limit amounts to the new limit values detailed in ACL 22-<mark>XX</mark>.

2.1.2   Description of Changes

1. Effective January 1, 2023, the property limit will increase from $10,211 to $10,888 for CW/RCA AUs that do not contain a member who is 60 years of age or older or disabled (CT 335-84 CalWORKs Property Limit) and from $15,317 to $16,333 for CW/RCA AUs that do contain a member who is age 60 years of age or older or disabled (CT 335-03 CW Elderly and Disabled Property Limit).

2.1.3   Programs Impacted

CW

RCA

2.2 Regression Test Impacted CalWORKs NOA Variable Population

2.2.1 Overview

CW NOAs populate with the property limits for the program in CalSAWS.

2.2.2 Description of Changes

The following NOA Fragments populate the property limits for CalWORKs. These Fragments need to be regression tested to confirm that they populate with the newest values as detailed in ACL 22-XX.

ID	Fragment Name	Fragment Text	Languages
6132	CW_DN_PROP_CNT_EXCD_A104	You can not get cash aid if your total countable property is more than <PROP_LIMIT>. If the County figured your car or other vehicle was worth more than you think it's worth, you can give the County proof that it is worth less. Ask the County how. If you can prove it is worth less you may get cash aid.	EN, SP
6200	CW_TN_RES_AMT_LMT_A104	You can not get cash aid if your total countable property is more than <PROP_LIMIT>. If the County figured your car or other vehicle was worth more than you think it's worth, you can give the County proof that it is worth less. Ask the County how. If you can prove it is worth less you may get cash aid.	EN, SP
7333	CW_CH_ARCO_MID_PERIOD_PROPERTY_CHANGE_A996	You recently told the County about a change in property. Normally, the amount of property you reported would make you ineligible for cash aid. The rules say that the County only looks at your property once a year. This means that we will not change your cash aid at this time. Your next report is at your annual redetermination. All information must be	EN, SP

		reported and verified on your redetermination form.	
		The property limit is <LIMIT> or <LIMIT2> if some on the grant is 60 or disabled.	
		To stay eligible for cash aid, you must sell the property for a fair price, and then spend the money to below the property limit or put it into a restricted bank account. You cannot give it away or get a price lower than what is fair.	
		A restricted bank account protects savings for education, housing, or to start a business. You must call your worker and get the CalWORKs paperwork filled out and approved and then open a special (separate) bank account for these savings.	
7799	CW_CH_OVERPAY_ RSN_PROP_GOOD_ FAITH_A404	You owned property worth more than the <PROP_LIMIT> property limit from to . We found that you believed in "good faith" that you were not over the property limit. When you believe in "good faith" that your property was below the limit, we limit the amount of the overpayment as follows: we look at the total amount of aid paid while you were over the limit and we look at how much your property was over the limit in the one month your property had the highest value. Your overpayment is the smaller of the above two amounts.	EN
		The month of your highest property was . In that month, you were over the limit. The total amount of aid you got while you were over the limit was . Your total overpayment is , the smaller of the above two amounts.	
6133	CW_DN_VEH_VAL_E XCEED_LMT_A128	You can not get cash aid if your total countable property is more than <PROP_LIMIT>.	EN, SP
		If the County figured your car or other vehicle was worth more than you think it's worth, you can give the County proof	

		that it is worth less. Ask the County how. If you can prove it is worth less you may get cash aid. Your countable property is figured on this page.	

2.3 Regression Test CalWORKs Form Variable Population

2.3.1 Overview

The following Forms auto-populate the property limits for CalWORKs. These Forms will be tested to ensure that they are populating the new values ongoing.

Impacted Forms:

- CW 2218
- SAWS 2A SAR (when generated as part of the CW RE and CW/CF RE packets)
- CW 86 – LA
- M44-350F

2.3.2 Description of Change

1. **Regression Test Form Variable Population**

Regression test the following Forms to verify that the correct property limit is populating for CalWORKs.

Fragment Name	Fragment Text	Languages
CW 2218	Located on Page 6: "There is a $<LIMIT> limit on the value of the property (e.g. bank accounts, stocks, etc.) that the child can own and be eligible to receive CalWORKs benefits. That limit increases to $<LIMIT2> if the child has a disability. A child under age 18 can own a vehicle (for example a car, truck, van, motorcycle, etc.) to drive to work, school, job training or to look for work. This also applies during temporary periods of unemployment for the child who customarily drives to and	AE, CA, CH, EN, KO, RU, SP, VI

	from work. Any motor vehicle with an equity value of $<LIMIT_VD> or less will not count against the $<LIMIT>. For each motor vehicle with an equity value of more than $<LIMIT_VD>, the value that exceeds $<LIMIT_VD> counts against the child's property. If it was given to the child as a gift, a donation, or a family member transferred it to the child, we also do not count it. You will be asked to give the county proof from the Department of Motor Vehicles that it was a gift, donation or transfer from a family member."	
SAWS 2A SAR	Located on Page 9: "There is a $<LIMIT> limit on the value of the property (e.g. bank accounts, stocks, etc.) that your family can own and be eligible to receive CalWORKs benefits. If someone in your family is at least 60 years of age or disabled the limit is $<LIMIT2>. Your residence and furniture are not part of the limit. You can own a vehicle (for example a car, truck, van, motorcycle, etc.) as long as what it's worth minus what you owe is less than $<LIMIT_VD>. If it was given to you as a gift, a donation, or a family member transferred it to you, we do not count it. You will be asked to give the County proof from the Department of Motor Vehicles that it was a gift, donation or transfer from a family member. The vehicle will not count if used by your family for certain special reasons. Ask your worker what those reasons are. Your worker can explain to you how to figure the value of any vehicle."	AE, AR, CA, CH, EN, FA, HM, KO, LA, RU, SP, TG, VI
CW 86 – LA	Located on Page 3: "Money in your restricted account(s) DO NOT count against the property limit you can have and keep getting cash aid. (The property limit is $<LIMIT> or	AE, CA, CH, EN, KO, RU, SP, TG, VI

	$<LIMIT2> if there is at least one person in the household who is age 60 or older.) But money in a restricted account DOES count against your property limit if you are applying for cash aid. So if your cash aid stops and you reapply for cash aid, your total countable personal property including any money in your restricted account(s), cannot be more than the property limit." Located on Page 5. "I have read the coversheet. I understand the rules and my responsibilities for starting and keeping a restricted account; the rules for a period of ineligibility; and the need to have resources close to my $<LIMIT> property limit ($<LIMIT2> if there is at least one household member who is age 60 or older) for emergencies or other expenses before I start a restricted account. I understand and agree that: " "If my cash aid stops for any reason, and if I reapply for cash aid, my total countable personal property, including any money in the restricted account(s), cannot be more than the $<LIMIT> property limit (or $<LIMIT2> if there is at least one household member who is age 60 or older)."	
M44-350F	Located on Page 1: "You owned property worth more than the <Property_Limit> property limit from <BEG_DATE> to < ENDDATE>.This property was available for you to use to support your family while you were on aid."	EN

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.1.2	The LRS shall include an automated method for implementing mass updates triggered by policy changes or mass participant financial changes, including Social Security or Veterans benefits cost of living adjustments (COLAs).	The maximum property limit for CalWORKs AUs will be increased to $10,888 and $16,333 for Assistant Units (AU) that include at least one member who is aged 60 or older or disabled.