CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216900

Add CF RE, CW RE, and CW/CF RE Packets in Threshold Languages

Content Revision

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/18/2022	0.1	Initial Draft	Daniel Rosales
08/15/2022	.01	Content Revision: • Clarified section 2.4. CCP7 in CW RE Packet indeed does not match CDSS version. However, current design states to make displayed questionnaire on CCP7 all on one page. CDSS version has questionnaire on two pages. Section 2.4 was updated to clarify this. • Current Design says CW, CF, and CW/CF RE packets have a form category of 'Forms'. However, the packets have a form category of 'Application'. This category was updated for all 3 packets.	Daniel Rosales

Table of Contents

1 OVERVIEW

This effort will add the CF RE, CW RE, and CW/CF RE packets in all available threshold languages.

1.1 Current Design

The CF RE, CW RE, and CW/CF RE packets currently exists in English and Spanish.

1.2 Requests

Add the CF RE, CW RE, and CW/CF RE packets in all available threshold languages.

1.3 Overview of Recommendations

1. Add the CF RE packet in all available threshold languages.
2. Add the CW RE packet in all available threshold languages.
3. Add the CW/CF RE packet in all available threshold languages. The following forms will be implemented in English as the new revisions are not yet available in threshold languages: CW 2166, WTW 5, CW 2184, CW 52, PUB 183.
4. Update English CCP7 in CW RE Packet and CW/CF RE Packet to match state version.

1.4 Assumptions

1. Print options will remain the same for the CF RE, CW RE, and CW/CF RE for both existing packets (English & Spanish) and will also apply for the added threshold packets.

2. All Requirements for the new threshold packets will be the same as the existing packets.
3. CF RE, CW RE, and CW/CF RE packets will include GEN 1365 (system functionality adds GEN 1365 to every envelope).
4. Supporting Documents section references attachments found on Jira website.
5. These packets are used for Migration Counties only (non-LA).
6. CA-238818 is updating the CW & CW/CF RE Packets in English and Spanish with the most recent revisions for CW 2166, WTW 5, and CW 2184.
7. CA-242677 will add the missing threshold forms for the CW & CW/CF RE Packets.

2   RECOMMENDATIONS

2.1   Add the CF RE packet in available threshold languages

2.1.1   Overview

This section will cover the requirements for adding CF RE packet in available threshold languages. Each form within the existing packets (English & Spanish) are composed of individual page fragments. For instance, the NRVA (1 page total) references a separate fragment to represent page 1 for this form. Each page references a separate fragment within the CF RE Packet fragment.

State Form: CalFresh Recertification Packet

Current Programs: CalFresh

Current Attached Forms: CF RE Packet with Coversheet including BRM and NVRA, CF 29 (10/13), CF 37 (11/16), EBT 2216 (03/19), SAR 7A (12/14), PUB 13 (08/20), PUB 275 (04/07), PUB 388 (8/17).

Current Forms Category: <mark>Application</mark>

Current Template Repository Visibility: Migration Counties

Existing Languages: English, Spanish

2.1.2   Form/NOA Verbiage

Create Threshold Form XDPs
Add the CF RE packet in available threshold languages. Create individual fragments to represent each page within the CF RE packet. These page fragments will be referenced in the CF RE packet fragment.

*Note – The Coversheet Mockup includes the MC200 (NVRA) and was migrated from CIV; use for context of translations. The header used and BRM placement should be based on the English RE Packet.

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

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form/NOA Variable Population

The CF RE packet currently has the following static text prepopulated. Add the prepopulated generic text in all available threshold languages.

Description	Existing Text	Formatting*
ENGLISH_GENERIC_TEXT	"You will get a separate letter with an interview appointment date and time. Call your worker right away if you do not get the appointment letter within 10 days of this notice. Your appointment letter will tell you if you have a phone interview or if you have to come into the office for your interview."	Arial – Size 10
SPANISH_GENERIC_TEXT	"Usted recibirá una carta por separado con la fecha y tiempo de la cita de entrevista. Llame a su trabajador(a) inmediatamente si usted no recibe la carta de la cita dentro de 10 días de este aviso. Su carta de la cita le dirá si tiene una entrevista por teléfono o si tiene que venir a la oficina para su entrevista."	Arial – Size 10

Translations: See Supporting Documents #2

2.1.4 Form/NOA Generation Conditions

Update Dynamic Form generation batch jobs
Update Dynamic Form generation batch jobs (PB00R201- PB00R320) to generate the CF RE packet in newly added threshold languages.

Tech Note: Update CT942_CFR

2.2 Add the CW RE packet in available threshold languages

2.2.1 Overview

This section will cover the requirements for adding CW RE packet in available threshold languages. Each form within the existing packets (English & Spanish) are composed of individual page fragments. For instance, the NRVA (1 page total) references a separate fragment to represent page 1 for this form. Each page references a separate fragment within the CW RE Packet fragment. CW 2166, WTW 5, CW 2184, CW 52, & PUB 183 will be implemented in English as they are not yet available in threshold on CDSS website.

Note: CA-242677 will add the missing threshold forms for the CW & CW/CF RE Packets.

Note: SCR CA-238818 has been updated to add the TEMP 3022 to the RE packets and is schedule for the 22.03 release. Threshold packet will have the TEMP 3022 included.

State Form: CalWORKs Redetermination Packet

Current Programs: CalWORKs

Current Attached Forms: CW/CF Coversheet with BRM and NVRA, GEN 102 (09/20), CCP 7 (10/19), SAWS 2A SAR (4/15), CW 2166 (7/19), CW 2184 (8/16), WTW 5 (9/13), CW 101 (6/11), EBT 2216 (3/19), SAR 7A (12/14), PUB 13 (8/20), PUB 183 (1/04)/PUB 184 (1/04), PUB 388 (8/17), CW 52 (7/18).

Current Forms Category: Application

Current Template Repository Visibility: Migration Counties

Existing Languages: English, Spanish

2.2.2 Form/NOA Verbiage

Create Threshold Form XDPs
Add the CW RE packet in available threshold languages. Create individual fragments to represent each page within the CW RE packet. These page fragments will be referenced in the CW RE packet fragment.

*Note – The Coversheet Mockup includes the MC200 (NVRA) and was migrated from CIV; use for context of translations. The header used and BRM placement should be based on the English RE Packet.

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

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

Form Mockups/Examples: See Supporting Documents #3. Mock-ups are for context and formatting should match their English versions.

2.2.3 Form/NOA Variable Population

The CW RE packet currently has the following static text prepopulated. Add the prepopulated generic text in all available threshold languages.

Description	Existing Text	Formatting*
ENGLISH_GENERIC_TEXT	"You will get a separate letter with an interview appointment date and time. Call your worker right away if you do not get the appointment letter within 10 days of this notice. Your appointment letter will tell you if you have a phone interview or if you have to come into the office for your interview."	Arial – Size 10
SPANISH_GENERIC_TEXT	"Usted recibirá una carta por separado con la fecha y tiempo de la cita de entrevista. Llame a su trabajador(a) inmediatamente si usted no recibe la carta de la cita dentro de 10 días de este aviso. Su carta de la cita le dirá si tiene una entrevista por teléfono o si tiene que venir a la oficina para su entrevista."	Arial – Size 10

Translations: See Supporting Documents #2

2.2.4 Form/NOA Generation Conditions

Update Dynamic Form generation batch jobs
Update Dynamic Form generation batch jobs (PB00R201- PB00R320) to generate the CW RE packet in newly added threshold languages.

Tech Note: Update CT942_CWR

2.3 Add the CW/CF RE packet in available threshold languages

2.3.1 Overview

This section will cover the requirements for adding CW/CF RE packet in available threshold languages. Each form within the existing packets (English & Spanish) are composed of individual page fragments. For instance, the NRVA (1 page total) references a separate fragment to represent page 1 for this form. Each page references a separate fragment within the CW/CF RE Packet fragment. CW 2166, WTW 5, CW 2184, CW 52, & PUB 183 will be implemented in English as they are not yet available in threshold on CDSS website.

Note: CA-242677 will add the missing threshold forms for the CW & CW/CF RE Packets.

Note: SCR CA-238818 has been updated to add the TEMP 3022 to the RE packets and is schedule for the 22.03 release. Threshold packet will have the TEMP 3022 included.

State Form: CalWORKs/CalFresh RE Packet

Current Programs: CalWORKs, CalFresh

Current Attached Forms: CW/CF Coversheet with BRM and NVRA, GEN 102 (CCP 7 (10/19), SAWS 2A SAR (4/15), CW 2166 (7/19), CW 2184 (8/16), WTW 5 (9/13), CW 101 (6/11), EBT 2216 (3/19), SAR 7A (12/14), PUB 13 (8/20), PUB 275 (4/07), PUB 183 (1/04)/PUB 184 (1/04), PUB 388 (8/17), CW 52 (7/18).

Current Forms Category: Application

Current Template Repository Visibility: Migration Counties

Existing Languages: English, Spanish

2.3.2 Form/NOA Verbiage

Create Threshold Form XDPs
Add the CW/CF RE packet in available threshold languages. Create individual fragments to represent each page within the CW/CF RE packet. These page fragments will be referenced in the CW/CF RE packet fragment.

*Note – The Coversheet Mockup includes the MC200 (NVRA) and was migrated from CIV; use for context of translations. The header used and BRM placement should be based on the English RE Packet.

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

Form Mockups/Examples: See Supporting Documents #4

2.3.3 Form/NOA Variable Population

The CW/CF RE packet currently has the following static text prepopulated. Add the prepopulated generic text in all available threshold languages.

Description	Existing Text	Formatting*
ENGLISH_GENERIC_TEXT	"You will get a separate letter with an interview appointment date and time. Call your worker right away if you do not get the appointment letter within 10 days of this notice. Your appointment letter will tell you if you have a phone interview or if you have to come into the office for your interview."	Arial – Size 10
SPANISH_GENERIC_TEXT	"Usted recibirá una carta por separado con la fecha y tiempo de la cita de entrevista. Llame a su trabajador(a) inmediatamente si usted no recibe la carta de la cita dentro de 10 días de este aviso. Su carta de la cita le dirá si tiene una entrevista por teléfono o si tiene que venir a la oficina para su entrevista."	Arial – Size 10

Translations: See Supporting Documents #2

2.3.4 Form/NOA Generation Conditions

Update Dynamic Form generation batch jobs

Update Dynamic Form generation batch jobs (PB00R201- PB00R320) to generate the CW/CF RE packet in newly added threshold languages.

Tech Note: Update CT942_CWF

2.4 Update the English CCP7 in CW RE Packet & CW/CF RE Packet to match state version.

2.4.1 Overview

Currently CCP7 in the CW RE Packet & CW/CF RE Packet has a questionnaire that is all on one page. This does not match the state version, as the questionnaire extends to a second page. Update CCP7 in both packets to match the state version.

2.4.2 Form/NOA Verbiage

Update CCP7

Update the English CCP7 in CW RE Packet & CW/CF RE Packet to match state version. The questionnaire should extend to a second page.

Languages: English

Form Mockups/Examples: See Supporting Documents #5

2.4.3 Form/NOA Variable Population

This effort will not be updating Variable Population for the CCP7 Form in English CW/CF RE Packets.

2.4.4 Form/NOA Generation Conditions

This effort will not be updating Generation Conditions for the CCP7 in English CW/CF RE Packets.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	CF RE Packet	
2	Form	Variable translations for CF RE Packet, CW RE Packet, CW/CF RE packet	
3	Form	CW RE Packet	
4	Form	CW/CF RE Packet	
5	Form	CCP7 English	

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.	CF RE, CW RE, and CW/CF RE packets are being added in Spanish and all available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219921

Update SAR 2 to Generate using EDBC Logic

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Connor Gorry
	Reviewed By	Priya Sridharan, Raj Devidi, Himanshu Jain, Shilpa Suddavanda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/5/21	1.0	Initial Creation	Connor Gorry
4/15/21	1.1	Revisions per CF/CW Committee Feedback	Connor Gorry
8/8/2021	1.2	Submitted for Committee Approval	Connor Gorry
9/1/2021	1.3	Updates per Committee Feedback	Connor Gorry
11/12/2021	2.0	Content Revision 1 Adds recommendation to turn off existing SAR 2 Batch Job. Added Assumption that SAR 2 ESAP Batch Job will not be affected.	Connor Gorry
06/02/2022	3.0	Content Revision 2 Adds assumptions that threshold languages and updates to the SAR 7/SAR 2/Addendum Packet will be implemented with CA-208670, and removes Recommendation 2.2.	Connor Gorry
08/02/2022	4.0	Content Revision #3 Added clarity around current vs. future functionality for Forms generated through multi-month EDBC runs in Assumption, Recommendation, and Appendix sections.	Connor Gorry

Table of Contents

1 OVERVIEW

1.1 Current Design

CalSAWS currently utilizes the 3/15 version of the SAR 2 in English and Spanish, and generates the form via batch for CalFresh, CalWORKs, and RCA programs. However, current batch logic has necessitated the use of additional manual DCR's when the SAR 2 is generated for COLA runs.

This change will update the SAR 2 to the latest state-published version (6/19) in English, Spanish, and all Threshold Languages. Per CRPC 2241, this update will also add verbiage and population for 'Effective Month' to better inform SAR 2 recipients of when changes take effect.

This change will also transition the SAR 2 from its current Batch logic to EDBC logic, allowing it to generate for COLA runs and when multiple changes occur across a multi-month window.

1.2 Requests

Update the SAR 2 to the latest state version and transition the SAR 2's generation to trigger via Run EDBC.

1.3 Overview of Recommendations

1. Update SAR 2 to the 6/19 version in the Template Repository, Add and Automate the SAR 2 to generate via Run EDBC
2. Update the SAR 2 in the SAR 7/SAR 7 Addendum/SAR 2 Template to the 6/19 version

1.4 Assumptions

1. In CalSAWS, the CW and CF IRT Amount(s) is/are also included on the SAR 7 Form.
2. The SAR 7 Addendum/SAR 2/SAR 7 bundle will maintain its current logic to generate via Batch for Migration counties. The SAR 2 within this bundle will maintain its current variable population logic.
3. Mentions of 'CalWORKs' throughout this document also apply to Refugee Cash Assistance (RCA) Program.
4. RCA does not have a Redetermination process; a SAR 2 will not be sent for Redetermination for RCA program only (but can be sent if the case also has CalFresh).
5. A SAR 2 triggered for one program will also display the information for the other program if the case has Active status. For example, if the SAR 2 is triggered for a CalFresh Redetermination, an Active RCA case will also populate income, AU size, and IRT amount in the CalWORKs column. For example, for PACF households the IRT will be the CalWORKs IRT for CalFresh. For Mixed CalWORKs/CalFresh Households, the IRT will be the 130% FPL, or N/A as appropriate for the CalFresh Program.

6. This change only effects the SAR 2's generation, variable population, and Form version; No Eligibility/EDBC changes will be made with this SCR.

7. Variables for Income, IRT Limit Amount, and Household/AU size for all programs will be dependent upon the Effective Date when the SAR 2 is generated via Run EDBC; i.e., a SAR 2 with an Effective Date of 10/2021 will populate with the IRT Limit Amount for 10/2021, Household Size as of 10/2021, and household income as of 10/2021.

8. If a SAR 2 is generated for a case with only one program - CalFresh or CalWORKs – information in the column for the other program (Income, Household/AU size, IRT Limit amount) will be left blank.

9. Like other forms generated by EDBC, the SAR 2 will include the enhanced functionality to only generate when fully authorized (functionality added with CA-223587), can be previewed, appear in the EDBC's NOA list page, and appear in Distributed Documents after it has been generated.

10. The SAR 2 will generate with the outlined triggers for cases with the new Semi-Annual Non-Reporting type, established for ESAP cases with CA-220040. A separate SAR 2 Batch Job was created as a part of that change to trigger the SAR 2 for ESAP cases in their 12th and 24th months.

11. A SAR 2 will only be generated once per EDBC run in a single-month EDBC scenario. If multiple SAR 2 triggers are met (for example, a new RE period begins and the CW IRT changes for the September 2021 Effective Month) only one SAR 2 will generate from EDBC.

12. Multi-month EDBC scenarios outlined in the Appendix, Section 5.2 will apply after the implementation of CA-224153, which will update NOA Suppression logic for Multi-Month EDBC runs. Prior to the implementation of this SCR, only the high-dated version of the Form will be generated in a multi-month EDBC where more than one instance of the Form may have been triggered. See Appendix, Section 5.1 for additional information.

13. The AR 2 and AR 2 SAR are both currently generated using Run EDBC. A port of their logic generates these Forms when the reporting type changes to their respective types. This logic will remain unchanged.

14. The SAR 2 ESAP Batch Job, created with CA-220040, will not be affected with this change.

15. Threshold Languages for the SAR 2 (6/19) will be added with CA-208670.

16. The SAR 7/SAR 2/Addendum Packet will be updated to include the updated SAR 2 (6/19) in all threshold languages with CA-208670.

2 RECOMMENDATIONS

2.1 Update SAR 2 to the 6/19 version, Update Trigger Conditions to generate via Run EDBC

2.1.1 Overview

Update the SAR 2 in the Template Repository to the latest 6/19 version. Per CRPC 2144, the updated SAR 2 will also contain a new variable for "Effective Month", which will populate upon form generation from the Template Repository.

State Form: SAR 2

Current Programs: CF, CW, RCA

Current Attached Form(s): N/A

Current Forms Category: Forms

Existing Languages: English, Spanish

Template Repository Visibility: All Counties

2.1.2 Updates to SAR 2 XDP

The SAR 2 will be updated to the two-impression 6/19 version in English, Spanish, and all threshold languages.

Updated Languages:

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

Form Title: Reporting Changes for Cash Aid and CalFresh

Form Number: SAR 2

Forms Category: Forms

Include NA Back 9: N

Form Mockups/Examples: See Supporting Documents #1

State of California – Health and Human Services Agency   California Department of Social Services

COUNTY OF

Date:	
Case Name:	
Case Number:	
Worker Name:	
Worker ID:	
Worker Phone Number:	
Customer ID:	

REPORTING CHANGES FOR CASH AID AND CALFRESH

Because you get ☐ Cash Aid ☐ CalFresh, you must report within 10 days when your TOTAL income reaches a certain level. You must report anytime your household's total monthly income is more than your current Income Reporting Threshold (IRT).

Effective Month: [   ]

Benefit Type	CalWORKs	CalFresh
Family Size		
Your Current Income		
Your IRT is		

Note: If your IRT for CalFresh is listed as "N/A", you are not required to report income changes for CalFresh until your next SAR 7 or recertification, whichever comes first. However, if you have an IRT amount listed for CalWORKs, you must report when your gross income goes over that amount.

How to report?

If your total income is over the IRT amount listed above, you must report this to the County **within 10 days**. You can report this information to the County by calling the county or reporting it in writing.

By "total monthly income" we mean:

⇨ Any money you get (both earned **and unearned**).

⇨ The amount *before* any deductions are taken out. (Examples of deductions are: taxes, Social Security or other retirement contributions, garnishments, etc.)

What will happen?

⇨ Your benefits may be lowered or stopped based on income over your IRT.

⇨ Your IRT may change when your income changes or when someone moves in or out of your home.

⇨ The County will let you know in writing each time your IRT changes.

⇨ You also need to report on your SAR 7 all income you get during the Report Month, even if you already reported that money.

...man Services Agency   California Department of Social Services

...come is more than your household's IRT limit you might get more ...ust repay any extra benefits you get. If you do not report on ...ts, this is fraud, and you may be charged with a crime and/or may no ...of time or life.

...ALSO report the things below within 10 days of when they

...r is in your household, who has been found by a court of law to be in ...probation or parole.

...r is in your household, who is running from the law (has a warrant

...ress change.

...ST ALSO report the following:

...Adult Without Dependents (ABAWD), you must report anytime your ...p to *less* than 20 hours a week or 80 hours a month.

...ation

...changes to the County anytime. *Reporting some changes may get*

...s down.

...ves out of your home.

...moves into your home.

...comes pregnant.

...Someone on cash aid has a special need, such as: a pregnancy, a special diet prescribed by a doctor, household emergency, etc.

• The birth of a child.

• For CalFresh, if someone disabled or age 60 or older has new or higher out of pocket medical costs.

Note: Some changes you report voluntarily may result in a decrease in your CalFresh benefits.

For this form in large print or another format, please call your county.

2.1.3 Update SAR 2 Variable Population

Create and populate a new variable for Effective Month that will populate with the EDBC month for which other variables will apply.

When generated from the Template Repository, this will be the month selected from the 'Effective Month' calendar menu (currently 'SAR Due Month', will be updated with Recommendation 2.1.5). When the SAR 2 is generated via Run EDBC, the Effective Month will be the

Variable Name	Population	Formatting	Editable*	Template Repository Population	Populates with Form Generation
Effective Month	Populate with the Effective Month selected from the SAR Document Parameters Page (when generated from the Template Repository) **OR** Populate with the EDBC begin date (when generated via Run EDBC) **OR** Populate with the Batch Month when generated via Batch for ESAP cases. Example: 09/2021	Arial, Size 10 mm/yyyy	Y	Y	Y
Cash Aid Checkbox	Checked if Case has Active CalWORKs or RCA	Standard Checkbox	Y	Y	Y

	program(s) for the Effective Month				
CalFresh Checkbox	Checked if case has Active CalFresh program for the Effective Month	Standard Checkbox	Y	Y	Y
CW AU Size	CW AU Size for the Effective Month Example: 4 **OR** Blank, if the case does not have CalWORKs or RCA	Arial, Size 10	Y	Y	Y
CW Income	Monthly income from the CalWORKs program budget for the Effective Month. Example: $2500.00 **OR** Blank, if the case does not have CalWORKs or RCA	Arial, size 10 $x,xxx.xx	Y	Y	Y
IRT_CW	The CalWORKs IRT Limit Amount for the Effective Month. (CW_Budget.NEW_IRT_Limit_AMT) **OR** Blank, if the case does not have CalWORKs or RCA	Unchanged from existing formatting.	Y	Y	Y

CF HH Size	Populate with the CalFresh Household Size for the Effective Month. Example: 4 OR Blank, if the case does not have CalFresh	Arial, Size 10	Y	Y	Y
CF Income	Monthly income from the CalFresh program budget for the Effective Month. Example: $2,500.00 OR Blank, if the case does not have CalFresh	Arial, Size 10 $x,xxx.xx	Y	Y	Y
IRT_CF	The CalFresh IRT Limit dollar value for the Effective Month. (FS_Budget. New_IRT_Limit_AMT) OR 'N/A' if the CalFresh household does not have an IRT Limit Amount for the Effective Month. (IRT_IND is 'N')	Unchanged from existing formatting.	Y	Y	Y

	OR Blank, if the case does not have CalFresh				

* 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: N/A

2.1.4 Add SAR 2 Generation Conditions to Trigger via Run EDBC

Generate the SAR 2 via Run EDBC when the following conditions apply:

- Case is Active CalFresh, CalWORKs, **and/or** RCA, with a Semi-Annual Reporting Type (SAR) or a Semi-Annual Reporting Annually (SARA), or Semi-Annual Non-Reporting (SARN) Reporting Type
  - A SAR 2 can be generated if a case is CalFresh only, CalWORKs only, or has both CalFresh and CalWORKs (or RCA)

AND

- At Intake EDBC where the program(s) has been Approved.
- Previous EDBC's Reporting Type was not SAR, SARA, or SARN.
- A successful Redetermination EDBC for the program(s).
- The CalFresh IRT Limit Amount* has changed from the previous successful EDBC **OR** the CalWORKs IRT Limit Amount has changed from the previous successful EDBC

   *Note: Current Batch processes generate the SAR 2 when the CalFresh IRT Indicator changes. New NOA logic will update the SAR 2 to trigger for CalFresh whenever the IRT Limit amount changes, aligning SAR 2 generation for CF with that of CalWORKs, and with policy.

Currently, only the high-dated version of the Form will be generated in a multi-month EDBC where more than one instance of the Form may have been triggered. See Appendix, Section 5.1 for additional information.

Contingent on SCR CA-224153: For multi-month EDBC runs, the SAR 2 can generate multiple times if there is/are more than one change in the IRT value(s), or if a new RE window begins and then there is a change in an IRT limit amount. These and other SAR 2 generation scenarios can be found in the Appendix.

Like other NOA Forms generated via EDBC, the SAR 2 will only generate via EDBC when fully authorized; It can be Previewed, appear in the EDBC's list of notices, and be saved to Distributed Documents (see CA-223587).

2.1.5 Turn off existing SAR 2 Batch Job

Turn off existing SAR 2 Batch Job (PB00R539).

Note: The SAR 2 will continue to be generated via Batch for ESAP households at their 12th and 24th months of their recertification period. This separate batch job was created with CA-220040, and will not be changed with this SCR.

2.1.6 Update the Document Parameters Page for the SAR 2

Update the Document Parameters Page to read "Effective Month" over the Date Selection calendar field when the SAR 2 is generated from the Template Repository (currently this field is labeled 'SAR Due Month').

Note: This change will only affect the Document Parameters when a SAR 2 is generated. Other Forms utilizing SARReporting.jsp will still show 'SAR Due Month' when generated from the Template Repository.

2.2 Update SAR 7 Addendum/SAR 2/SAR 7 bundle to include the revised SAR 2

2.2.1 Overview

Update the SAR 7 Addendum/SAR 2/SAR 7 bundle used by the Migration Counties to utilize the updated SAR 2 (6/19).

State Form: SAR 7 Addendum/SAR 2/SAR 7
Current Programs: CF, CW, RCA
Current Attached Form(s): N/A
Current Forms Category: Forms
Existing Languages: English, Spanish
Template Repository Visibility: Migration Counties

2.2.2 Updates to SAR 7 Addendum/SAR 2/SAR 7 XDP

The SAR 7 Addendum/SAR 2/SAR 7 will be updated to include the SAR 2 (6/19) in English and Spanish.

Updated Languages:

English, Spanish

Form Title: Reporting Changes for Cash Aid and CalFresh/Semi-Annual Eligibility Status Report
Form Number: SAR 7 Addendum/SAR 2/SAR 7
Forms Category: Forms
Include NA Back 9: N
Form Mockups/Examples: See Supporting Documents #2

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	SAR 2 (6/19) Mockups	SharePoint
2	Client Correspondence	SAR 7 Addendum/SAR 2/SAR 7 with SAR 2 (6/19) Mockups	SharePoint

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1208	The LRS shall accommodate and generate State-mandated forms, notices, and NOAs that cannot be changed.	Updates the SAR 2 to the latest state version.
CAR-1247	The LRS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	Updates SAR 2 Trigger Conditions to generate via NOA EDBC.

5 APPENDIX

5.1 Current Multi-Month SAR 2 EDBC Scenario

Current logic for multi-month EDBC runs will generate the SAR 2 for the latest/high-dated EDBC effective month for which the Form is triggered. If other changes that would generate a SAR 2 take place in the other months, current logic will delete earlier instances of the SAR 2.

For example:

Effective Month	CF IRT Amount	CW IRT Amount
March	$500	$550
~~April~~	**$600**	$550
~~May~~	$600	$550
June	$600	**$650**

Although changes were made in the multi-month EDBC run that would trigger a SAR 2, only the high-dated effective month – June – will have a SAR 2 generated with current logic.

5.2 Multi-Month SAR 2 EDBC Generation Scenarios after CA-224153

The following scenarios outline potential SAR 2 generation instances when the EDBC is run across a multi-month window. **Multi-month scenarios are contingent upon CA-224153,** which updates the multi-month EDBC runs to amend existing suppression logic.

5.2.1 CalFresh IRT Limit Amount Changes, then CW IRT Limit Amount Changes

In the below scenario, the SAR 2 will be generated twice in a multi-month window for a mixed CW/CF case (non-PACF), where the IRT Values:

- For CalFresh change from March to April (from $500 to $600), causing the SAR 2 to generate for the **April** Effective Month
- For CalWORKs/RCA change from May to June (from $550 to $650), causing the SAR 2 to generate for the **June** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	$550
March	$500	$550
April	**$600**	$550
May	$600	$550

June	$600	**$650**
July	$600	$650

5.2.2   CalFresh or CalWORKs IRT Limit Amount Changes, then changes again

In the below scenario, the SAR 2 will be generated twice in a multi-month window for a mixed CW/CF case (non-PACF), where the IRT Values:

- For CalFresh change from March to April (from $500 to $600), causing the SAR 2 to generate for the **April** Effective Month
- For CalFresh change again from June to July (from $600 to $700), causing the SAR 2 to generate for the **July** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	$550
March	$500	$550
April	**$600**	$550
May	$600	$550
June	$600	$550
July	**$700**	$550

The same logic will be applied if the CW IRT Amount were to change twice in a multi-month window. In this example, the SAR 2 will be generated for **April** and **July**.

5.2.3   IRT Values do not change, but there is a new RE Period

In the below scenario, the SAR 2 will be generated once in the multi-month window for a mixed CW/CF case (non-PACF), where the IRT Values have not changed, but a new RE Period has begun in the **May** Effective Month.

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	$550
March	$500	$550
April	$500	$550
May	$500	$550

June	$500	$550
July	$500	$550

5.2.4 New RE Period Begins, then IRT Changes

In the below scenario, the SAR 2 will be generated twice in the multi-month window for a mixed CW/CF case (non-PACF), where:

- A new RE Period begins for the **April** Effective Month
- The CalWORKs IRT Amount changes from May to June, causing the SAR 2 to generate for the **June** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	$550
March	$500	$550
April	$500	$550
May	$500	$550
June	$500	**$650**
July	$500	$650

5.2.5 New RE Period Begins, CalFresh IRT Amount changes to N/A

In the below scenario, the SAR 2 will be generated twice in the multi-month window for a mixed CW/CF case (non-PACF), where:

- A new RE Period begins for the **March** Effective Month
- The CalFresh IRT Amount changes to N/A from April to May, causing the SAR 2 to generate for the **May** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	
March	$500	
April	$500	
May	**N/A**	
June	N/A	
July	N/A	

In this example, the Household reported and verified that their income was between 131% and at or below 200% FPL. The CalFresh IRT amount changes to 'N/A' between the April and May EDBC's, due to the case's income exceeding 130% FPL. This case does not have CalWORKs or RCA program.

5.2.6 Case has CF IRT and amount changes; Later Approved for CalWORKs with an IRT

In the below scenario, the SAR 2 will be generated three times in the multi-month window for a mixed CW/CF case (non-PACF), where:

- A new RE Period began in March, generating the SAR 2 for the **March** Effective Month
- Case has CalFresh, and the IRT Limit amount changes from March to April, generating the SAR 2 for the **April** Effective Month
- Case is Approved for CalWORKs with an IRT Limit for June, generating the SAR 2 for the **June** Effective Month

Effective Month	CF IRT Amount	CW IRT Amount
February	$500	
March	**$500**	
April	**$600**	
May	$600	
June	$600	**$550**
July	$600	$550

In this example, the case does not have CalWORKs or RCA program with an IRT Limit until the June Effective Month.

Here, a SAR 2 will be generated for the **March**, **April**, and **June** effective months.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-223587

Enhance functionality for forms generated during Run EDBC

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Connor Gorry
	Reviewed By	Maria Arceo, Priya Sridharan, Raj Devidi, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/12/21	1.0	Initial Creation	Connor Gorry
9/23/21	1.1	Updated per Committee Feedback	Connor Gorry
11/19/21	2.0	Content Revision 1 Removed AAP, FC 3, and FC 3A from list of affected Forms in Recommendation 2.1, as these Forms can only be printed locally.	Connor Gorry
7/20/22	3.0	Content Revision 2 Added #7 to recommendation 2.1.2 to clarify desired functionality when Forms are generated in separate EDBC Runs on different days. Added Assumption #8 on button and online message verbiage.	Connor Gorry

Table of Contents

1 OVERVIEW

1.1 Current Design

Currently, NOAs generated through Run EDBC processes can be previewed, authorized on a 1st (Worker) or 2nd (Supervisor) level, or rejected, halting their distribution.

There are nine Forms that are generated by the CalSAWS system via Run EDBC, which do not share these capabilities. At present, Forms generated via EDBC cannot be previewed and can be issued prior to 1st/2nd Level Authorization, or if the EDBC is Rejected.

1.2 Requests

Update EDBC generated Forms to only generate after EDBCs are fully authorized. Allow for Forms Generated via Run EDBC to only generate upon appropriate EDBC Authorization.

Update the Form Number of FC 3A. Currently the form number on the bottom displays FC 3 even though it is FC 3A.

1.3 Overview of Recommendations
1. Enhance Functionality for 9 Forms generated via Run EDBC
2. Update FC 3A Form Footer

1.4 Assumptions
1. The SAR 2 will be generated via EDBC after CA-219921; It will have the same functionalities as other Forms generated via EDBC and is included in the list of identified Forms below.
2. The individual trigger conditions for these Forms will not be altered with this change; This change will only update these Forms' abilities to be Previewed, Authorized, Rejected, etc.
3. No other changes will be made to the FC 3A Form, aside from the footer.
4. Other Forms are currently generated as full-form NOA Fragments, and already utilize these functionalities. Form Fragments other than those identified here will not be affected by this change.
5. Because these are Forms that are also generated via the Template Repository and Online Pages, we will not give the 'Reject/'Rejected' option and status for previewed Forms. Instead, they will use the existing Print Central Cancel functionality, shared by other Forms.
6. Based on existing logic, if a Form is generated through 'Save and Continue' via Run EDBC, then the EDBC is re-run on the same day, the Form will be deleted if there is a new instance of a Form created based on the re-run EDBC results. Based on the new EDBC results, if there are no new instances of the Form

generated, then the existing generation of the Form must be Central Print Canceled by the User.

7. GA/GR Forms generated via EDBC utilize part of the framework. These Forms will be regression tested with CA-225258.

8. Existing buttons and messages that appear on the Online page reading 'Preview NOA' or 'No NOAs were generated…" will remain unchanged with this SCR.

2 RECOMMENDATIONS

2.1 Update Functionality for Forms generated via Run EDBC

2.1.1 Overview

Forms generated via Run EDBC can currently be issued prior to 1st and 2nd level Authorization, or if the EDBC is rejected. These Forms will be updated to be generated after the EDBC is Fully Authorized.

The following Forms will be updated with additional functionalities, outlined in Section 2.1.2:

	Form Number (TEMPL_NUM_IDENTIF)	**Languages**
1	AR 2	EN, SP
2	AR 2 SAR	EN, SP
3	CW 2211	EN, SP, AE, CA, CH, KO, RU, TG, VI
4	CW 2212	EN, SP, AE, CA, CH, KO, RU, TG, VI
5	CW 2215	English
6	SAR 2*	EN, SP, Threshold

*The SAR 2 will be triggered via EDBC Logic with the implementation of CA-219921, scheduled for the same release as this change.

2.1.2 Add Functionality for Forms generated via Run EDBC

Update the EDBC logic surrounding Forms Generated via Run EDBC to:

1. Show Forms generated via EDBC in the 'Distributed Documents Search' Page after 'Save and Continue'
2. Allow identified Forms to be Previewed, as NOAs generated via EDBC currently can be
3. Allow Forms to be Authorized with existing levels of Authorization, chosen by the county
   a. 1st Level (Supervisor) Authorization
   b. 2nd Level Authorization
4. Set Forms generated via when the EDBC has been Accepted to existing 'Preview' status until actioned

5. After 'Save and Continue', the Form will be 'Pending Print Central' status
    a. The Form can then be set to 'Print Central Cancelled' (see below) or will be sent to Central Print at the end of the day based on the chosen option
6. If an EDBC has not been 'Accepted and Saved' or the EDBC is re-run while in a 'Preview' status, a Re-Run EDBC will display a new instance of the Form until 'Accepted and Saved'.
7. If EDBC is re-run on a following day, all existing Forms for a program that are in 'Preview' status will be deleted. If a new Form is created, a new iteration of the Form(s) will be set to 'Preview' status and be visible until actioned.

2.2 Update FC 3A NOA Form Footer

2.2.1 Overview

Currently, the footer of NOA Form FC 3A reads 'FC 3'. This will correct FC 3A's footer in when generated as a NOA and in the Template Repository.

State Form: FC 3A (1/2004)

Programs: Foster Care

Attached Forms: N/A

Forms Category: Form

Template Repository Visibility: All Counties

Languages: English, Spanish

2.2.2 Update FC 3A XDP

The FC 3A will have its footer updated with the correct form number (Currently, it reads 'FC 3').

Form Header:

Form Title (Document List Page Displayed Name): AFDC-FG/U Worksheet

Form Number: FC 3A

Include NA Back 9: N

Imaging Form Name: AFDC-FG/U Worksheet

Imaging Document Type: Foster Care (FC)

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #1

Update the FC 3A XDP with the correct Form Number in the Footer.

AFDC-FG/U WORKSHEET

INSTRUCTIONS: *Complete the following to determine if the child would have received federal AFDC-FG/U in the month of petition based on the circumstances in the home of the parent or relative from whom the child was removed. The AFDC-FG/U linkage requirement is met when all items are answered YES.*

Child's Name	Month of Petition	Date Child Last Resided with Parent or Relative from whom Removed

FEDERAL AFDC-FG/U ELIGIBILITY REQUIREMENTS

VERIFICATION

Total Persons in AU/FU	Total 185% MBSAC + Special Needs	Total MBSAC + Non-recurring
	$ /person	Special Needs) $ /person

EARNINGS VERIFICATION ON FILE:

☐ YES ☐ NO

185% of MBSAC INCOME TEST	AMOUNT	B. FINANCIAL ELIGIBILITY TEST	
1. Gross Earnings	+	1. Gross Earnings	+
2. Current Child Support Received by DA or recipient	+	2. Work-Related Expenses ($90)	-
3. Other Unearned Income (Specify)	+	3. $30 and 1/3 Exemption (if applicable)	-
4. Exclude persons Gross Income	+	4. Dependent Care (Up to $200 each)	-
5.	+	5. NET EARNINGS	=
6.	+	6. Other Nonexempt Income	+
7.	+	7. Child Support collected by DA	+
8.	+	8. Court Ordered Child Support Paid	-
TOTAL INCOME	=	TOTAL NET NONEXEMPT INCOME	=

UNEARNED VERIFICATION ON FILE:

☐ YES ☐ NO

INCOME LINKAGE ESTABLISHED
(185% TEST AND FINANCIAL BIG TEST)

Gross Income Eligibility?	☐ YES ☐ NO	Financial Eligibility?	☐ YES ☐ NO

☐ YES ☐ NO

Is the property of all persons in the AU/FU in the month of the petition below the allowable limit? (COMPLETE BELOW.)   ☐ YES ☐ NO

RESOURCES VERIFIED:

☐ YES ☐ NO

ITEM	NET MARKET VALUE	ITEM	NET MARKET VALUE
a. Cash and Securities	+	f.	+
b. Cash Surrender Value of Life Insurance	+	g. Real Property (Specify)	+
c. Motor Vehicle	+	h.	+
d. Other Personal Property (Specify)	+	i.	+
e.	+	j. TOTAL PROPERTY	=

AFDC-FG U LINKAGE REDETERMINATION:	☐ **NOT ELIGIBLE FOR FEDERAL** AFDC-FG U in month of petition	☐ **INSUFFICIENT INFORMATION** Not eligible for federal AFDC-FG U	☐ **Eligible** for federal AFDC-FG U in month of petition

FC 3A (SUPPLEMENT) (1/2004)

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	FC 3A Mockups	FC3A_EN.pdf

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1233	The LRS shall replace any pending notice, NOA, or form triggered by a case action which is subsequently changed and authorized prior to the generation of the notice, NOA, or form.	LRS will generate Forms generated via EDBC to a 'Pending' Status and generate only after full authorization.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-235440

Update Population Logic for Forms for Migration Counties – Phase 3

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Jasmine Chen, Connor Gorry
	Reviewed By	Sheryl Eppler, Maria Arceo, Priya Sridharan, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/26/2021	1.0	Initial Document	Jasmine Chen
02/15/2022	1.1	Build & Test Review	Connor Gorry
05/25/2022	1.2	Final Build/Test Review, wording adjustments for population conditions	Connor Gorry
05/31/2022	1.3	QA Review	Connor Gorry
08/04/2022	2.0	Content Revision 1 Updates to correct documentation on variable population from Template Repository vs. when generated for all Forms. Updated documentation to better reflect current functionality of populating counties' 'Default' Office, Address, and address for header and body populations throughout. Updated wording for in-person physical address in Section 2.9.2.	Connor Gorry

Table of Contents

1 OVERVIEW

1.1 Current Design

Currently certain Recovery-related Forms are populating with the default District Office Address, rather than the Collection Mailing Address; Furthermore, on some of these Forms and their headers, this field is not editable, and cannot be changed by the worker after the Form is generated.

Currently, the GEN 102 populates a Mailing Address for in-person appointment types – this will be updated to a physical address.

1.2 Requests

1. Update the population logic to populate and make editable the Collection Mailing Address for the following Forms:
   - CW 2217
   - CF 377.7C
   - CF 377.7E1
   - CSF 102
   - CSF 131
   - CSF 132
   - CSF 133
   - CSF 134

2. Update the population for the GEN 102 Appointment Letter to populate the correct address for in-person interviews.

1.3 Overview of Recommendations

1. Update address population for CW 2217
2. Update address population for CF 377.7C
3. Update address population for CF 377.7E1
4. Update address population for CSF 102
5. Update address population for CSF 131
6. Update address population for CSF 132
7. Update address population for CSF 133
8. Update address population for CSF 134
9. Update population logic for GEN 102 In-Person Interviews

1.4 Assumptions

1. Generation conditions of these forms will not be changed with this SCR.
2. No additional Threshold Languages for any of the Forms will be added with this effort.

3. Header_1, which is shared by all the addressed Forms (except for CW 2217, which has no header) will be made editable with CA-234211, currently scheduled for a 22.03 release.
4. If there is not a Collections Mailing Address/Collections Worker Name for a particular county, default to populating the county's Default Office and worker information.

2   RECOMMENDATIONS

2.1   Updates to CW 2217

2.1.1   Overview

Update population logic for the CW 2217 to populate with the Collection worker's name and contact info, and the Collection Office's name and address.

State Forms: CW 2217

Current Programs: Multiple

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All

Existing Languages: English, Spanish

2.1.2   Form Variable Population

<u>Update population logic</u>

Update form body population logic to populate the Collections Mailing Address and make address variables editable when generated.

Form Body Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Collection Worker Name>	Name of the Collection Worker Contact name from the Collection Mail – Correspondence Detail Page **Note:** If there is no Collection Worker Name AND a <mark>Default Office</mark> and Address has been populated (see below), populate with the <mark>Default Office</mark>	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>

7

	Worker name. If there is no Collection Worker Name, but there is a Collection Office Name/Address, leave this field blank.				
<Collection Office Name>	The Collections Office Name Organization Name from the Collection Mail – Correspondence Detail Page For Example, "HS Auditing and Collections" for San Bernardino County **Note:** If there is no Collection Office Name available, populate the county's Default Office name.	Arial Font, Size 10	Y, Text Field	Y	N
<Collection Office Mailing Address>	The Collection Mailing Address Address Line 1 from the Collection Mail – Correspondence Detail Page For example, "825 E Hospitality Lane" for San Bernardino County. **Note:** If there is no Collection Address available, populate the county's Default Office address from the Correspondence List Page.	Arial Font Size 10	Y, Text Field	Y	N
<Collection Mailing Address City/State/ZIP Code>	The Collection Mailing Address's City, State, and ZIP code. Address Line 2 information from the	Arial Font Size 10	Y, Text Field	Y	N

	Collection Mail – Correspondence Detail Page For example, "San Bernardino, CA 92415-0914" for San Bernardino County. **Note:** If ==a Default Address== has been populated (see above), default to populating ==the county Default Address's== address information.				
<Collection Worker Name>	Name of the Collection Worker Contact name from the Collection Mail – Correspondence Detail Page **Note:** The same population as Collection Worker Name above.	Arial Font, Size 10	Y, Text Field	Y	==N==
<Collection Worker Phone #>	Collection Worker's Phone Number Primary Phone from the Collection Mail – Correspondence Detail Page **Note:** If a ==Default== name has been populated instead, populate the county ==Default Office Phone Number==, also from the Correspondence List Page entry.	Arial Font, Size 10	Y, Text Field	Y	==N==

2.2 Updates to CSF 102

2.2.1 Overview

Update population logic for the CSF 102 to populate with the Collection worker's name and contact info, and the Collection Office's address.

State Forms: CSF 102

Current Programs: Multiple

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: Migration Counties

Existing Languages: English, Spanish

2.2.2 Form Variable Population

Update population logic

Update form body population logic to populate the Collections Mailing Address and make address variables editable when generated.

Form Header Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Worker Name>	Name of the Collection Worker Contact name from the Collection Mail – Correspondence Detail Page **Note:** If there is no Collection Worker Name AND a Default Office and Address has been populated (see below), populate with the Default Office Worker name. If there is no Collection Worker Name, but there is a Collection Office Name/Address, leave this field blank.	Arial Font, Size 10	Y, Text Field	Y	Y

<Worker ID>	Populate with the Collection Worker's ID. **Note:** If a Collection Worker's name was populated, but their ID is unavailable, leave blank. If a ==Default Worker's== name was populated, populate the default Worker's ID.	Arial Font, Size 10	Y, Text Field	Y	Y
<Worker Phone Number>	Populate with the Collection Worker's Phone Number Primary Phone from the Collection Mail – Correspondence Detail Page **Note:** If a ==Default Worker's== name has been populated instead, populate the ==Default== Office Phone Number.	Arial Font, Size 10	Y, Text Field	Y	Y

Form Body Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Collection Office Name>	The Collections Office Name Organization Name from the Collection Mail – Correspondence Detail Page For Example, "HS Auditing and Collections" for San Bernardino County **Note:** If there is no Collection Office	Arial Font, Size 10	Y, Text Field	Y	Y

	Name available, populate <mark>the county's Default Office</mark> Name				

Add/Update Form Print/Mailing Options

Mailing Options:

Mail-To (Recipient): No change

Mailed From (Return): Collections Office Mailing Address (From the Correspondence List Page)

Mail-back-to Address: Collections Office Mailing Address

Outgoing Envelope Type: No change

Return Envelope Type: No change

2.3   Updates to CF 377.7C

2.3.1   Overview

Update population logic for the CF 377.7C. Update Header to populate Collection Worker's information and allow header elements to be edited. Update the Form body to populate the Collection Office's Phone Number, and the Collection Mailing address on the second page.

State Forms: CF 377.7C

Current Programs: CalFresh

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All

Existing Languages: English, Spanish

2.3.2   Form Variable Population

Update population logic

Update form body population logic to populate the Collections Mailing Address and make address variables editable when generated.

Form Header Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Worker Name>	Name of the Collection Worker Contact name from the Collection Mail – Correspondence Detail Page **Note:** If there is no Collection Worker Name AND a Default Office and Address has been populated (see below), populate with the Default Office Worker name. If there is no Collection Worker Name, but there is a Collection Office Name/Address, leave this field blank.	Arial Font, Size 10	Y, Text Field	Y	N
<Worker ID>	Populate with the Collection Worker's ID. **Note:** If a Collection Worker's name was populated, but their ID is unavailable, leave blank. If a Default Worker's name was populated, populate the default Worker's ID.	Arial Font, Size 10	Y, Text Field	Y	N
<Worker Phone Number>	Populate with the Collection Worker's Phone Number Primary Phone from the Collection Mail – Correspondence Detail Page **Note:** If a Default Worker's name has been populated instead, populate the Default Office Phone Number.	Arial Font, Size 10	Y, Text Field	Y	N

Form Body Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Collection Office Phone Number>	Populate with the Collection Worker's Phone Number Primary Phone from the Collection Mail – Correspondence Detail Page **Note:** As above, if a Collection Office Phone number is unavailable, populate with the Default Office phone.	Arial Font Size 10	Y, Text Field	Y	N
<Collection Mailing Address>	Full Collection Mailing Office Address Address Lines 1 and 2 from the Collection Mail – Correspondence Detail Page For Example: HS Auditing and Collections 825 E Hospitality Lane San Bernardino, CA 92415-0914 **Note:** If there is no Collection Address available, populate county's Default Office Address.	Arial Font Size 10	Y, Text Field	Y	N

Add/Update Form Print/Mailing Options

Mailing Options:

Mail-To (Recipient): No change

Mailed From (Return): Collections Office Mailing Address

Mail-back-to Address: Collections Office Mailing Address

Outgoing Envelope Type: No change

Return Envelope Type: No change

2.4   Updates to CF 377.7E1

2.4.1   Overview

Update population logic for the CF 377.7E1. Update Header to populate Collection Worker's information and allow header elements to be edited. Update the Form body to populate the Collection Office's Phone Number, and the Collection Mailing address on the second page.

State Forms: CF 377.7E1

Current Programs: CalFresh

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All

Existing Languages: English, Spanish

2.4.2   Form Variable Population

Update population logic

Update form body population logic to populate the Collections Mailing Address and make address variables editable when generated.

Form Header Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
\<Worker Name\>	Name of the Collection Worker Contact name from the Collection Mail – Correspondence Detail Page **Note:** If there is no Collection Worker Name AND a Default Office and Address has been populated (see below), populate with the Default Office Worker	Arial Font, Size 10	Y, Text Field	Y	N

15

	name. If there is no Collection Worker Name, but there is a Collection Office Name/Address, leave this field blank.				
<Worker ID>	Populate with the Collection Worker's ID. **Note:** If a Collection Worker's name was populated, but their ID is unavailable, leave blank. If a <mark>Default Worker's</mark> name was populated, populate the default Worker's ID.	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>
<Worker Phone Number>	Populate with the Collection Worker's Phone Number Primary Phone from the Collection Mail – Correspondence Detail Page **Note:** If a <mark>Default Worker's</mark> name has been populated instead, populate the <mark>Default</mark> Office Phone Number.	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>

Form Body Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Collection Office Phone Number>	Populate with the Collection Worker's Phone Number Primary Phone from the Collection Mail – Correspondence Detail Page **Note:** As above, if a Collection Office Phone number is unavailable,	Arial Font Size 10	Y, Text Field	Y	<mark>N</mark>

	populate with <mark>the Default Office</mark> phone.				
<Collection Mailing Address>	Full Collection Mailing Office Address Address Lines 1 and 2 from the Collection Mail – Correspondence Detail Page For Example: HS Auditing and Collections 825 E Hospitality Lane San Bernardino, CA 92415-0914 **Note:** If there is no Collection Address available, populate <mark>county's Default Office</mark> Address.	Arial Font Size 10	Y, Text Field	Y	<mark>N</mark>

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

Mailing Options:

Mail-To (Recipient): No change

Mailed From (Return): Collections Office Mailing Address

Mail-back-to Address: Collections Office Mailing Address

Outgoing Envelope Type: No change

Return Envelope Type: No change

2.5   Updates to CSF 131

2.5.1   Overview

Update population logic for the CSF 131. Update Header to populate Collection Worker's information and allow header elements to be edited. Update the Form body to populate the Collection Office's Phone Number, and the Collection Mailing address on the second page.

State Forms: CSF 131

Current Programs: Multiple

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All

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

2.5.2   Form Variable Population

Update population logic

Update form body population logic to populate the Collections Mailing Address and make address variables editable when generated.

Form Header Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Worker Name>	Name of the Collection Worker Contact name from the Collection Mail – Correspondence Detail Page **Note:** If there is no Collection Worker Name AND a <mark>Default Office</mark> and Address has been populated, populate with the <mark>Default Office Worker</mark> name. If there is no Collection Worker Name, but there is a	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>

	Collection Office Name/Address, leave this field blank.				
<Worker ID>	Populate with the Collection Worker's ID. **Note:** If a Collection Worker's name was populated, but their ID is unavailable, leave blank. If a <mark>Default Worker</mark> name was populated, populate the District Worker's ID.	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>
<Worker Phone Number>	Populate with the Collection Worker's Phone Number Primary Phone from the Collection Mail – Correspondence Detail Page **Note:** If a Default Worker name has been populated instead, populate <mark>the county's Default Phone Number</mark>.	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>

Add/Update Form Print/Mailing Options

Mailing Options:

Mail-To (Recipient): No change

Mailed From (Return): Collections Office Mailing Address

Mail-back-to Address: Collections Office Mailing Address

Outgoing Envelope Type: No change

Return Envelope Type: No change

2.6 Updates to CSF 132

2.6.1 Overview

Update population logic for the CSF 132. Update Header to populate Collection Worker's information and allow header elements to be edited.

Update the Form body to populate the Collection Office's Phone Number, and the Collection Mailing address on the second page.

State Forms: CSF 132

Current Programs: Multiple

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All

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

2.6.2 Form Variable Population

<u>Update population logic</u>

Update form body population logic to populate the Collections Mailing Address and make address variables editable when generated.

Form Header Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Worker Name>	Name of the Collection Worker Contact name from the Collection Mail – Correspondence Detail Page **Note:** If there is no Collection Worker Name AND a ==Default Office== and Address has been populated, populate with the ==Default Office Worker== name. If there is no Collection Worker Name, but there is a Collection Office Name/Address, leave this field blank.	Arial Font, Size 10	Y, Text Field	Y	==N==
<Worker ID>	Populate with the Collection Worker's ID.	Arial Font, Size 10	Y, Text Field	Y	==N==

20

	Note: If a Collection Worker's name was populated, but their ID is unavailable, leave blank. If a ==Default Worker== name was populated, populate the District Worker's ID.					
<Worker Phone Number>	Populate with the Collection Worker's Phone Number Primary Phone from the Collection Mail – Correspondence Detail Page **Note:** If a Default Worker name has been populated instead, populate ==the county's Default Phone Number==.	Arial Font, Size 10	Y, Text Field	Y	==N==	

Add/Update Form Print/Mailing Options

Mailing Options:

Mail-To (Recipient): No change

Mailed From (Return): Collections Office Mailing Address

Mail-back-to Address: Collections Office Mailing Address

Outgoing Envelope Type: No change

Return Envelope Type: No change

2.7   Updates to CSF 133

2.7.1   Overview

Update population logic for the CSF 133. Update Header to populate Collection Worker's information and allow header elements to be edited. Update the Form body to populate the Collection Office's Phone Number, and the Collection Mailing address on the second page.

State Forms: CSF 133

Current Programs: Multiple

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All

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

2.7.2 Form Variable Population

Update population logic

Update form body population logic to populate the Collections Mailing Address and make address variables editable when generated.

Form Header Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Worker Name>	Name of the Collection Worker Contact name from the Collection Mail – Correspondence Detail Page **Note:** If there is no Collection Worker Name AND a <mark>Default Office</mark> and Address has been populated, populate with the <mark>Default Office Worker</mark> name. If there is no Collection Worker Name, but there is a Collection Office Name/Address, leave this field blank.	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>
<Worker ID>	Populate with the Collection Worker's ID. **Note:** If a Collection Worker's name was populated, but their ID is unavailable, leave blank. If a <mark>Default Worker</mark> name was	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>

	populated, populate the District Worker's ID.				
\<Worker Phone Number\>	Populate with the Collection Worker's Phone Number Primary Phone from the Collection Mail – Correspondence Detail Page **Note:** If a Default Worker name has been populated instead, populate <mark>the county's Default Phone Number</mark>.	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>

Add/Update Form Print/Mailing Options

Mailing Options:

Mail-To (Recipient): No change

Mailed From (Return): Collections Office Mailing Address

Mail-back-to Address: Collections Office Mailing Address

Outgoing Envelope Type: No change

Return Envelope Type: No change

2.8   Updates to CSF 134

2.8.1   Overview

Update population logic for the CSF 134. Update Header to populate Collection Worker's information and allow header elements to be edited. Update the Form body to populate the Collection Office's Phone Number, and the Collection Mailing address on the second page.

State Forms: CSF 134

Current Programs: Multiple

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All

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

2.8.2 Form Variable Population

<u>Update population logic</u>

Update form body population logic to populate the Collections Mailing Address and make address variables editable when generated.

Form Header Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<Worker Name>	Name of the Collection Worker Contact name from the Collection Mail – Correspondence Detail Page **Note:** If there is no Collection Worker Name AND a <mark>Default Office</mark> and Address has been populated, populate with the <mark>Default Office Worker</mark> name. If there is no Collection Worker Name, but there is a Collection Office Name/Address, leave this field blank.	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>
<Worker ID>	Populate with the Collection Worker's ID. **Note:** If a Collection Worker's name was populated, but their ID is unavailable, leave blank. If a <mark>Default Worker</mark> name was populated, populate the District Worker's ID.	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>
<Worker Phone Number>	Populate with the Collection Worker's Phone Number Primary Phone from the Collection Mail –	Arial Font, Size 10	Y, Text Field	Y	<mark>N</mark>

	Correspondence Detail Page **Note:** If a Default Worker name has been populated instead, populate <mark>the county's Default Phone Number</mark>.				

Add/Update Form Print/Mailing Options

Mailing Options:

Mail-To (Recipient): No change

Mailed From (Return): Collections Office Mailing Address

Mail-back-to Address: Collections Office Mailing Address

Outgoing Envelope Type: No change

Return Envelope Type: No change

2.9 Updates to GEN 102

2.9.1 Overview

Update population logic for the GEN 102 Appointment Letter. Update the Body variables to populate the correct in-person Appointment address when the 'Face-to-face appointment' box is checked and section is populated.

State Forms: GEN 102

Current Programs: Multiple

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All

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

2.9.2 Form Variable Population

Update population logic

Update the GEN 102 to populate a Physical Office Address when the 'Face-to-Face Appointment' box is checked.

Form Body Variables:

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
<In-Person Appointment Location Name>	The name of the In-Person appointment's location. (Based on a Physical Address)	Arial Font, Size 10	Y, Text Field	N	Y
<In-Person Appointment Location Physical Address>	The in-person location's street address (first line only). (Based on a Physical Address) For example: 11290 Pyrites Way, Suite 150	Arial Font, Size 10	Y, Text Field	N	Y
<In-Person Appt. City>	The in-person location's city.	Arial Font, Size 10	Y, Text Field	N	Y

	For example: Rancho Cordova				
<In-Person Appt. State>	The in-person location's state. (Based on a Physical Address) For example: CA	Arial Font, Size 10	Y, Text Field	N	Y
<In-Person Appt. ZIP Code>	The in-person location's ZIP Code. (Based on a Physical Address) For example: 95670	Arial Font, Size 10	Y, Text Field	N	Y

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CW 2217 Population Mockup	CW2217_EN.pdf
2	Client Correspondence	CSF 102 Population Mockup	CSF102_EN.pdf
3	Client Correspondence	CF 377.7C Population Mockup	CF377.7C.pdf
4	Client Correspondence	CW 377.7E1 Population Mockup	CF 377_7E1_EN.pdf
5	Client Correspondence	CSF 131 Population Mockup	CSF131_EN.pdf
6	Client Correspondence	CSF 132 Population Mockup	CSF132_EN.pdf
7	Client Correspondence	CSF 133 Population Mockup	CSF133_EN.pdf
8	Client Correspondence	CSF 134 Population Mockup	CSF134_EN.pdf
9	Client Correspondence	GEN 102 Population Mockup	GEN102_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
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.	This list of forms will have its population logic updated to no longer populate static Los Angeles County references.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243640

Automated Action for Incoming CalHEERS Referrals

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/9/2022	1.0	Initial Version	Mayuri Srinivas
7/27/2022	1.1	Content Revision #1 • Updates to Automated Action and Task Type Specifications	Mayuri Srinivas

Table of Contents

1   OVERVIEW

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

1.1   Current Design

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

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

1.2   Requests

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

1.3   Overview of Recommendations

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

1.4   Assumptions

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

2 RECOMMENDATIONS

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

2.1 Update CalSAWS to Include a CalHEERS Referral Automated Action

2.1.1 Overview

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

2.1.2 Automated Action Detail – Reference Example

Automated Action Detail

| | Edit | Close |

Action Information

Name:	**Type:**	**Status:** ✱
Clearance: CalHEERS	Create Task	Inactive
Program(s):	**Run Date:**	**Source:**
MC	Daily(Mon-Sat)	Batch

Scenario:
A referral from Covered California has been received.

Task Information

Task Type: ✱
Clearance CalHEERS

Due Date:	**Default Due Date:**
Default Due Date	Next business day
Initial Assignment:	**Default Assignment:**
Default Assignment	Office Distribution

Guided Navigation: ✱
Yes

Long Description:
Clearance CalHEERS

| | Edit | Close |

Figure 2.1.2.1 – Automated Action Detail

2.1.3 Description of Changes

Implement at Clearance: CalHEERS Automated Action as follows:

1. Clearance: CalHEERS

a. Action Information
    i. Name: Clearance: CalHEERS
    ii. Type: Create Task
    iii. Status: Inactive
    iv. Program(s): MC
    v. Run Date: Daily (Mon-Sat)
    vi. Source: Batch
    vii. Scenario: A referral from Covered California has been received.

b. Task Information
    i. Task Type: Clearance CalHEERS
    ii. Task Sub-Type: N/A.
    iii. Due Date: Default Due Date
    iv. Default Due Date: <mark>Next business day</mark>
    v. Initial Assignment: Default Assignment
    vi. Default Assignment: Office Distribution
    vii. Guided Navigation: Yes
    viii. Long Description: Clearance CalHEERS
c. The only editable field on the Automated Action Detail page is the Status field.
d. The Guided Navigation functionality for these Tasks will navigate the User to the MAGI Referral Detail page in the context of the CalHEERS Referral when the Task Type hyperlink is clicked.
e. When these Tasks display on the Worklist page, the Task Type will have the Determination ID attribute value added to the end. The "Reference Number" attribute on the Task Pop-Up: Task Detail page will display the Determination ID attribute value.

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

Note: This Task Type already exists for LA County.

1. Clearance CalHEERS
    a. Task Type Information
        i. Name: Clearance CalHEERS
        ii. Category: CalHEERS
        iii. Priority: High
        iv. Available Online: No
        v. Available for Automation: No
        vi. Instructions: BLANK
        vii. Expire Tasks: <mark>No</mark>
        viii. Newly Assigned Indicator: Tasks display indicator for 5 day(s)

2.1.4 Page Validations

N/A.

2.1.5 Page Location

Automated Action Detail Page:

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

Task Type Detail Page:

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

2.1.6 Security Updates

N/A.

2.1.7 Page Mapping

N/A.

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2. Clearance CalHEERS

2.2 Clearance CalHEERS Automated Action Batch Job

2.2.1 Overview

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

2.2.2 Description of Change

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

2.2.3 Execution Frequency

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

2.2.4 Key Scheduling Dependencies

None

2.2.5 Counties Impacted

All CalSAWS Counties.

2.2.6 Category

Non-Core.

2.2.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.2.8 Failure Procedure/Operational Instructions

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

3   SUPPORTING DOCUMENTS

N/A.

4 REQUIREMENTS

4.1 Project Requirements

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

5   MIGRATION IMPACTS

N/A.

6 OUTREACH

N/A.

7 APPENDIX

N/A.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245786

Report Updates to Expand the GA/GR Program Codes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Susanna Martinez
	Reviewed By	Thao Ta, Gokul Suresh, Parul Dhawan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/30/2022	1.0	Initial Document	Susanna Martinez
08/12/2022	2.0	Content Revision to remove the General Assistance (Managed) program requirement	Susanna Martinez

Table of Contents

1   OVERVIEW

The existing functionality for the GA/GR solution from the CalWIN system will be utilized in the CalSAWS system by the CalWIN counties once these counties are merged into CalSAWS. The former C-IV GA/GR solution functionality was introduced into the CalSAWS system via SCR CA-201377. Los Angeles County and the former C-IV counties utilize their own GA/GR solution currently in the CalSAWS system each with their respective GA/GR program(s). Once the GA/GR solution for the CalWIN counties is incorporated into the system, CalSAWS will be supporting the four separate GA/GR solutions' programs:

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	All counties that are migrating from CalWIN into CalSAWS are opting into this solution

Select reports will need to be updated to support the separate GA/GR Automated Solution program for the CalWIN counties ~~and the General Assistance (Managed) program for the former C-IV counties~~ in addition to the General Assistance/General Relief program it is already including for Los Angeles County.

1.1   Current Design

The Customer Reporting Progress Report and the Customer Reporting Progress Detail Report is providing information on the number of QR 7 (GA/GR) packets by status for a specified benefit month and organization for the General Assistance/General Relief program (GA program code used by LA County).

1.2 Requests

Update the customer reporting reports to expand the programs included by adding the GA/GR Automated Solution program code (GR) ~~and the General Assistance (Managed) program code (GM)~~ for the following reports:

- Customer Reporting Progress Report
- Customer Reporting Progress Detail Report

1.3 Overview of Recommendations

1. Update the Customer Reporting Progress Report to include the GA/GR Automated Solution program ~~and the General Assistance (Managed) program~~.
2. Update the Customer Reporting Progress Detail Report to include the GA/GR Automated Solution program ~~and the General Assistance (Managed) program~~.

1.4 Assumptions

1. The GA/GR Automated Solution program reporting data for these reports will not be available in the report until the migration and introduction of the CalWIN counties into the CalSAWS system.
2. The General Assistance (Non-Managed) program <mark>and the General Assistance (Managed) program</mark> reporting data is not utilized by these reports.

2 RECOMMENDATIONS

2.1 Customer Reporting Progress Report

2.1.1 Overview

The Customer Reporting Progress Report is an On Request report that provides the summary number of SAR 7s, QR 7s, TMC 176s, and MC 176s that are Sent, Received, Completed, and percentage of reports completed for both CW & CF Programs during a given benefit month for a requested organization.

This SCR will expand the program data populated on the 'QR 7 GA/GR' line of the 'Summary' sheet and the data populated in the 'QR 7 GA/GR' detail sheet to include the GA/GR Automated Solution <mark>program</mark> ~~and the General Assistance (Managed) programs~~.

2.1.2 Customer Reporting Progress Report Mockup

Figure 2.1.2.1 – Customer Reporting Progress Report – Report Filters

Note: No cosmetic updates are required. The full mockup can be found in the Supporting Documents section.

Figure 2.1.2.2 – Customer Reporting Progress Report – Summary Sheet

Note: No cosmetic updates are required. The full mockup can be found in the Supporting Documents section.

Figure 2.1.2.3 – Customer Reporting Progress Report – QR 7 GA/GR Sheet Before Change

Note: Cosmetic update required for this sheet. The full mockup can be found in the Supporting Documents section.

Figure 2.1.2.4 – Customer Reporting Progress Report – QR 7 GA/GR Sheet After Change

Note: Cosmetic update required for this sheet. The full mockup can be found in the Supporting Documents section.

2.1.3 Description of Change

1. Update the Customer Reporting Progress Report logic to include the GA/GR Automated Solution program ~~and the General Assistance (Managed) program~~.

Category ID	Code Value	Short Decode Value
18	GR	GA/GR Automated Solution
~~18~~	~~GM~~	~~General Assistance (Managed)~~

a. The logic update will expand the program data populated on the 'QR 7 GA/GR' line of the 'Summary' sheet and the data populated in the 'QR 7 GA/GR' detail sheet.

i. QR 7 GA/GR packets will be categorized by the following program criteria:

1. The Customer Reporting program is General Assistance/General Relief, ~~General Assistance (Managed),~~ or GA/GR Automated Solution
   a. **Tech Note:** CUST_RPT_PGM_TYPE.PGM_CODE IN ('GA', ~~'GM',~~ 'GR')
2. Update the 'QR 7 GA/GR' detail sheet headers from 'Q7 GA/GR' to 'QR 7 GA/GR'. See figure 2.1.2.4 for reference

2.1.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Administrative**

2.1.5 Counties Impacted

All counties will be impacted with respect to their opted in GA/GR solution.

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
N/A	N/A	N/A

2. Security Groups

Security Group	Group Description	Group to Role Mapping
N/A	N/A	N/A

2.1.7 Report Usage/Performance

At the time of the CalWIN counties migration into the CalSAWS system we anticipate an increase in the usage of this report. No significant performance impact is expected.

2.2 Customer Reporting Progress Detail Report

2.2.1 Overview

The Customer Reporting Progress Detail Report is an On Request report that provides detailed information on the SAR 7s, QR 7s, TMC 176s, and MC 176s that are in Sent, Received, Reviewed-Ready to Run EDBC, Incomplete, and Complete status during a given benefit month for a requested organization.

This SCR will expand the program data populated on the 'QR7 GA/GR' line of the 'Summary' sheet and the data populated in the 'SAR 7 & TMC 176 S & QR (GA/GR)' detail sheet for the QR 7 GA/GR records to include the GA/GR Automated Solution program and the General Assistance (Managed) programs.

2.2.2 Customer Reporting Progress Detail Report Mockup

Figure 2.2.2.1 – Customer Reporting Progress Detail Report – Report Filters

Note: No cosmetic updates are required. The full mockup can be found in the Supporting Documents section.

Figure 2.2.2.2 Customer Reporting Progress Detail Report – Summary Sheet

Note: No cosmetic updates are required. The full mockup can be found in the Supporting Documents section.

Figure 2.2.2.3 Customer Reporting Progress Detail Report – SAR 7 & TMC 176 S & QR (GA/GR) Sheet

Note: No cosmetic updates are required. The full mockup can be found in the Supporting Documents section.

2.2.3 Description of Change

1. Update the Customer Reporting Progress Detail Report logic to include the GA/GR Automated Solution program ~~and the General Assistance (Managed) program~~.

Category ID	Code Value	Short Decode Value
18	GR	GA/GR Automated Solution

18	~~GM~~	~~General Assistance~~ ~~(Managed)~~

    a. The logic update will expand the program data populated on the 'QR 7 GA/GR' line of the 'Summary' sheet and the data populated in the 'SAR 7 & TMC 176 S & QR (GA/GR)' detail sheet for the QR 7 GA/GR records.

        i. QR 7 GA/GR packets will be categorized by the following program criteria:

            1. The Customer Reporting program is General Assistance/General Relief, ~~General Assistance~~ ~~(Managed),~~ or GA/GR Automated Solution

                a. **Tech Note:** CUST_RPT_PGM_TYPE.PGM_CODE IN ('GA', ~~'GM',~~ 'GR')

2.2.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Administrative**

2.2.5 Counties Impacted

All counties will be impacted with respect to their opted in GA/GR solution.

2.2.6 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
N/A	N/A	N/A

4. Security Groups

Security Group	Group Description	Group to Role Mapping
N/A	N/A	N/A

2.2.7 Report Usage/Performance

At the time of the CalWIN counties migration into the CalSAWS system we anticipate an increase in the usage of this report. No significant performance impact is expected.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Customer Reporting Progress Report	Customer Reporting Progress
2	Reports	Customer Reporting Progress Detail Report	Customer Reporting Progress

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.1	The CalSAWS shall produce reports daily, weekly, monthly, quarterly, semi-annually, annually, and as needed, as specified by COUNTY.	The report will satisfy the need to produce a report that provides QR 7 (GA/GR) packet information for all GA/GR solutions as is to be supported in the CalSAWS system.

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 APPENDIX

The following table contains a list of all counties with their corresponding county codes and General Assistance program code they are opted into:

Table 6.1 Full list of counties with corresponding General Assistance program code classification.

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