

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207130 | DDID 2212

Updates to send Email Reminder for Customer
Appointments

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/30/2022	1.0	Initial revision	Jennifer Muna
9/30/2022	1.1	Updates per QA recommendations	Jennifer Muna

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1 OVERVIEW

This SCR outlines the necessary modifications to create a batch job that will send an email reminder to a customer reminding them of their upcoming appointment.

1.1 Current Design

Currently, there is no email reminder automatically sent to a customer to notify them of upcoming county appointments in CalSAWS. The BenefitsCal portal provides a unified experience where customers can apply for, view, and renew benefits. However, recipients who do not have a BenefitsCal portal account still depend on text notifications and email reminders from CalSAWS for case related updates. A customer will receive an appointment letter from their county with details of their appointment (Date, time, program, etc.) when an appointment is scheduled. There are various appointment letters that can be automatically created by the System or manually created by a case worker.

Per DDID 2212, an e-mail reminder will be sent to the customer (in addition to the existing paper notification/appointment letter) when an appointment is created or updated with details. The e-mail reminder will contain a message detailing the appointment date and time for the customer.

1.2 Requests

Create a new email reminder batch job that will notify the recipient of their upcoming appointment, three calendar days before their appointment date. The new auto-generated email reminder will be sent to a recipient who has a reported email address in CalSAWS.

1.3 Overview of Recommendations

1. Create a new batch job that will send an email reminder to the recipient informing them of their upcoming appointment.

1.4 Assumptions

1. This email reminder job will run for all Counties. This batch job is dependent on a customer's preferences of the 'Allow E-mail Reminder' checkbox on the Contact Detail page, which can be edited by a User in CalSAWS. Customers who wish to edit their preferences to opt in or opt out of email reminders must contact their county case worker.
2. Only customers in CalSAWS with a verified status for their email address will be able to receive this e-mail reminder. New e-mail addresses added into the CalSAWS system cannot be verified until the implementation of CA-241871 and CA-234545.
3. There is currently no process to verify e-mail addresses for E-mail reminders in CalSAWS. This e-mail verification functionality will be addressed in CA-241871.
4. CA-234545 will implement an e-mail verification process for BenefitsCal customers who opt-in for paperless correspondence from CalSAWS. The e-mail

Verification API will accept e-mail information and mark the 'E-mail Status' in CalSAWS as 'Verified' if the information received is correct. If the customer already has a verified e-mail address and opts in to e-mail reminders, the Customer Appointment e-mail reminder will be sent to the recipient.

5. There is no report that captures the email statuses for E-mail Reminders in CalSAWS. The existing report 'Unverified E-Notification Request Report' will be updated in CA-249611 to capture email statuses.

2 RECOMMENDATIONS

2.1 Create new Email Reminder Batch job for Customer Appointments

2.1.1 Overview

This section outlines the necessary modifications to create a new outbound email reminder batch job that will notify customers of upcoming appointments. This new auto-generated email reminder will be sent to a recipient who has a reported email address in CalSAWS.

2.1.2 Description of Change

1. Create a batch job to send a customer an email reminder about their upcoming appointments. The batch job will send the email reminder when the following conditions are met:
 - a. Customer has an appointment in any Appointment Category
 - b. The Appointment Status is 'Scheduled' or 'Rescheduled'
 - c. The appointment date is three calendar days from the batch date. If the batch date (3rd calendar day) falls on a Sunday or holiday, the batch job will trigger the email on the batch run date prior to the 3rd calendar day. (See Appendix for examples)
Note: Holiday dates will correspond to the County's reported holidays.
 - d. The 'Allow E-Mail Reminder' checkbox is selected on the Contact Detail page. This field indicates if the customer wishes to receive email reminders.
 - e. Customer has an E-mail address with 'Verified' status. This is the reported e-mail address of person with an appointment.
 - f. Exclude customers that have an assigned Confidentiality record and/or a Self-Service Portal Customer Privacy record where end date is greater than the batch date.
2. Insert the record into the CONTACT_LOG table to capture the status of the e-mail message. Set the following attributes:
 - a. Inbound/Outbound information = 'OB' – Outbound

- b. Reason code = 'AP' – Appointment Reminder
 - c. Type code = 'E-mail'
 - d. Status code = 'SE; - Sent. The status of the e-mail message will initially be set to 'Sent' by the new batch job. If the email address is 'Undeliverable' the status will be updated by PO00C437 (Undeliverable Email Reader)
 - e. Status reason = N/A. This field only captures the status reason for text messages
3. Create a BSCR to schedule the email reminder job to run daily on CalSAWS business days (Monday – Saturday).

4. Email Text Description

- a. Email Subject:
 - i. Reminder – Upcoming Appointment with {CountyName} County
- b. Email Body Text:

Greetings,

This is a friendly reminder that you have an upcoming appointment on {Date} at {Time}.

If you have any questions or if you are unable to attend your appointment, please contact your case worker or the CalSAWS Helpline at {Phone Number} for further assistance.

This e-mail was sent by an automated system. Please do not reply to this e-mail directly. If you wish to no longer receive email reminders, please contact your case worker to update your preferences.

- i. Date: Customer's Appointment date
 - 1. Format: MM/DD/YYYY
- ii. Time: Appointment scheduled begin time
 - 1. Format: HH:MM:AM/PM
- iii. Phone Number: 1-844-859-2100. This is the CalSAWS Helpline number that will prompt a recipient to enter their county/case information and follow the automated responses to the desired department.

2.1.3 Execution Frequency

This job will run daily CalSAWS business days (Monday – Saturday). If batch date falls on a Sunday or Holiday, batch job will run on the prior business day. (See Appendix for examples)

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

All CalSAWS Counties

2.1.6 Category

This job will send the customer email reminders of upcoming appointments. This is a Core job and will need to be completed by 6 a.m.

2.1.7 Data Volume/Performance

Approximately 500 – 10,000 email reminders will be sent daily by the batch job.

2.1.8 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2212	<p>Original: The CONTRACTOR shall update the Appointment Management solution to generate an email notification to the customer (in addition to the existing paper notification) when an appointment is created or updated with details of the appointment including date, time, and location, as well as a phone number to contact for rescheduling.</p> <p>Revised: The CONTRACTOR shall update the Appointment Management solution to generate an email notification to the customer (in addition to the existing paper notification) when an appointment is created or updated with details of the appointment including date, time, as well as a phone number to contact for rescheduling.</p>	<p>Original:</p> <ul style="list-style-type: none"> - Email notifications will be sent out at the end of the day (during batch) to account for the net changes to the appointment. - Existing customer emails can be used. - Includes opt out or unsubscribe feature on emails. <p>Revised:</p> <ul style="list-style-type: none"> - Email notifications will be sent out at the end of the day (during batch) to account for the net changes to the appointment. - Existing customer emails can be used. 	<p>The new Batch job will automatically send an email reminder to a customer notifying them of upcoming appointment.</p>

4 APPENDIX

Example 1: John Smith has an Intake Interview appointment on 01/05/2023 at 10:30 a.m. with County 24 (Merced). Per Mr. Smith's e-mail preferences, he has opted-in for e-mail reminders which is indicated in the 'Allow E-mail Reminder' field. The new batch job will send an E-mail reminder to Mr. Smith on 12/31/2022, as the 3rd calendar day prior to the appointment date falls on a Sunday.

December 2022/January 2023						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	31 Cust. Appt. E-mail reminder sent
1 New Year's Day	2 New Year's Day Observed (County 24 Closed)	3	4	5 Intake Interview @ 10:30 a.m.	6	7

Example 2: Elliot Juarez has an Intake Interview appointment on 01/06/2023 at 9:30 a.m. with County 06 (Colusa). Per Mr. Juarez's e-mail preferences, he has opted-in for e-mail reminders which is indicated in the 'Allow E-mail Reminder' field. The new batch job will send an E-mail reminder to Mr. Juarez on 01/02/2023, as the 3rd calendar day prior to the appointment date is not an observed holiday for County 06.

December 2022/January 2023						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	31
1 New Year's Day	2 New Year's Day Observed (County 06 Open) Cust. Appt. E- mail reminder sent	3	4	5	6 Intake Interview @ 9:30 a.m.	7

Example 3: Jane Doe has a Telephone Interview appointment on 1/23/2023 at 11:00 a.m. with County 19. Per Mrs. Doe's e-mail preferences, she has opted-in for e-mail reminders which is indicated in the 'Allow E-mail Reminder' field. The new batch job will send an E-mail reminder to Mrs. Doe on 01/19/2023.

January 2023						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
15	16	17	18	19 Cust. Appt. E-mail reminder sent	20	21
22	23 Telephone Interview @ 11:00 a.m.	23	24	25	26	27

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-209492

Refactor Medi-Cal NOA Regulations and Form
Names

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/01/2022	0.1	Initial Draft	Maria Jensen
08/12/2022	0.2	Corrected Requests #2, 3 to state Medi-Cal Removed Automated Regression Tests	Maria Jensen

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1 OVERVIEW

With this effort, Medi-CAL NOA Regulations and form names will be refactored in the CalSAWS system.

1.1 Current Design

CalSAWS Regulations are currently stored in CT662. MAGI NOA Regulations are stored per aid code for each MAGI NOA fragment. There are not enough columns in CT662 to handle threshold translations of regulations.

CalSAWS Regulations currently are merged in a way that prevents duplicated references. They are also inconsistent when referenced (for example, "CCR" vs "California Code of Regulations").

CalSAWS Form Names that generate on the NOA Templates are inconsistent when referenced (MC323 vs MC 323). Inconsistencies in the Form name can cause it to populate more than once on the bottom of the NOA.

1.2 Requests

1. MAGI NOA Regulations need to be available in threshold languages.
2. Medi-Cal NOA Regulations need to be consistent on a NOA.
3. Medi-Cal NOA Form Names need to be consistent on a NOA.

1.3 Overview of Recommendations

1. Move the MAGI NOA Regulations to a separate database table that can handle threshold.
2. Update the MC Regulations with standard references and add merging capabilities. Reformat Regulations section for MC_NOA_TEMPLATE.
3. Update the MC Form Names that populate on the bottom of the MC NOA Template to be consistent.

1.4 Assumptions

1. The Abbreviations table in Supporting Documents #3 also mentions MEPM. Currently this abbreviation is not used in the Regulations spreadsheet, therefore there is no need to test it at this point. This abbreviation has been included as it might be used in the future.

2 RECOMMENDATIONS

2.1 Move the MAGI NOA Regulations to new catgry and code_defl

2.1.1 Overview

CalSAWS Regulations are currently stored in CT662. MAGI NOA Regulations are stored per aid code for each MAGI NOA fragment. There are not enough columns in CT662 to handle threshold translations of regulations. This effort will move the MAGI NOA Regulations to a separate table that can handle threshold. This is similar to reasons from catgry id 73 which got moved to id 10548.

2.1.2 Description of Change

1. Move the MAGI NOA Regulations to a separate table that can handle threshold. This new table will be the next id in the 'catgry' table. See Supporting Documents #1.

2.2 Update MC Regulations to be consistent

2.2.1 Overview

MC Regulations are inconsistent when referenced (for example, "CCR" vs "California Code of Regulations"). This effort will remove these inconsistencies by updating the regulations with standard references.

2.2.2 Description of Change

1. Update the MC Regulations with standard references (see Supporting Documents #2) and add merging capabilities. Implement a standard hierarchy and group regulations per abbreviation (see Supporting Documents #3). When the reference contains the words Section or Sections, programmatically display § for only one section to be listed, and §§ for multiple sections to be listed.

Note: The Regulations without any reference are for CMSP fragments. These Regulations will not need to mention CMSP as they have a variable that populates before the numbers part. Only the hierarchy needs to be applied for these CMSP Regulations.

2. Reformat Regulations section for MC_NOA_TEMPLATE. See Supporting Documents #5.

2.3 Update MC Form Names to be consistent

2.3.1 Overview

CalSAWS MC Form Names that generate on the NOA Templates are inconsistent when referenced (MC323 vs MC 323). This can cause it to populate more than once on the bottom of the dynamic NOA. This effort will update the MC Form names populating at the bottom of the MC NOA Templates so that they are consistent.

Note: this would not affect the Template Repository forms.

2.3.2 Description of Change

1. Update the MC Form names populating at the bottom of the MC NOA Templates so that they are consistent (see Supporting Documents #4).

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Client Correspondence	New code_detl for Regulations	New_code_detl_for_Regulations.xlsx
2.	Client Correspondence	Table of Regulations	Table of Regulations.xlsx
3.	Client Correspondence	Regulations Recommendations	CA-209492 Recommendations and Examples.docx
4.	Client Correspondence	Table of Form Names	Table of Form Names.xlsx
5.	Client Correspondence	Reformat Regulations for MC_NOA_TEMPLATE	MC_NOA_TEMPLATE_EN - problem.pdf MC_NOA_TEMPLATE_EN - sol.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.1	<p>The LRS shall produce the NOA in a timely manner, in accordance with Turner waiver requirements, containing the following:</p> <ul style="list-style-type: none"> a. Case and applicant/participant identifying information and address; b. The proposed action(s) being taken by the COUNTY department; c. The effective date of the proposed action(s); d. The reason(s) for the proposed action(s); e. Time periods covered, including retroactive periods; f. Turner format requirements as appropriate; g. The complete federal, State, or COUNTY manual section(s), including subsection(s) supporting the proposed action(s); h. The budget calculations/computations by program, including gross income test and net income test; i. The overpayment/underpayment and/or overissuance/under-issuance amount and/or calculations; j. The worker s name, file number, addressee, mailing address, sending Local Office Site s address, telephone number, email address, and hours of availability; k. Instructions regarding the filing of an appeal and appeals-specific contact information; l. Date and time of notification; m. Variable individual/case LRS Data including the name(s) of individual(s) affected by the authorized action, 	<p>With SCR CA-209492, Medi-CAL NOA Regulations and form names will be refactored the CalSAWS system.</p>

	<p>income reporting threshold amounts, and time on aid information;</p> <p>n. Freeform text based on County-specified user that was added to clarify the NOA, unless prohibited by federal and State regulations and COUNTY policies.;</p> <p>and</p> <p>o. Collection calculation and amount, if applicable.</p>	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-220693

Enhancements to Child Care Administrator Portal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gerald Limbrick
	Reviewed By	Michael Wu, Aaron Fowler, William Baretzky; Thao Ta; Cristina Garcia; Naga Chinduluru

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/17/2022	1.0	Initial	G. Limbrick

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1 OVERVIEW

1.1 Current Design

The Child Care Administrator Portal contains data elements specified in ACL 19-110. The email address of the parent/caretaker does not show on the Summary page. The portal only displays 1 childcare Provider per child even when the child has current authorizations for multiple providers.

1.2 Requests

Add the email address of the parent/caretaker to the Summary page. Add tabs to support multiple providers per child.

1.3 Overview of Recommendations

1. Add the parent/caretaker email address to the Summary screen.
2. Update the Child Care Provider Info section to display tabs for each active Provider.
3. Update the Site Walkthrough to include information for the new 'e-mail' field and the new 'Provider' tab row.
4. Correct spacing and display errors, as noted.

1.4 Assumptions

1. Fields and functionality not mentioned will remain unchanged.

2 RECOMMENDATIONS

2.1 Summary page

2.1.1 Overview

Add the parent/caretaker email address to the Summary screen.
Update the Child Care Provider Info section with tabs for each active Provider. Correct spacing and display errors, as noted.

2.1.2 Summary page Mockup

The screenshot displays the CalSAWS interface for Parent/Caretaker Information. The header includes the CalSAWS logo and navigation links for 'REPORT AN ISSUE', 'HELP', and 'LOGOUT'. The main content area is titled 'Parent/Caretaker Information' and features two tabs: 'OLIVA KEVIN' (selected) and 'BARBARA BRISTED'. The form is organized into several sections:

- Personal Information:** Fields for First Name (OLIVA), Middle Initial (-), Last Name (KEVIN), Date of Birth (01/06/1983), Status (Active), Last Active Month of CalWORKS (February 2022), and Reasons for Needing Child Care (-).
- Telephone Numbers:** Fields for Cell (-), Fax (-), Home (-), Main ((916)727-3045), Message ((916)114-0275), TDD (-), Toll Free (-), and Work (-).
- E-mail:** A field containing 'johndoe@calaws.org'.
- Address:** Fields for Mailing and Physical, both containing '24 BERRYWOOD LANE Cincinnati CA 04812'.

Figure 2.1.2.1 – Parent/Caretaker Information

Children Information

Krystin Kevin Renetta Kevin Dannie Kevin Lise Kevin

First Name	Krystin	Date of Birth	04/06/2013
Middle Initial	-	Status	Active
Last Name	Kevin	Number of hours of Child Care authorized on the Stage One Child Care authorization	-

Child Care Provider Info:

WEEKDAY PROVIDER WEEKEND CENTER HOLIDAY PERSON

Name	-
Type	-

Address

Mailing	-
Physical	-

Telephone Numbers

Cell	-
Fax	-
Home	-
Main	-
Message	-
TDD	-
Toll Free	-
Work	-

Provider Rates List

Schedule Type	Care Type	Time	Age Group	Rate of Payment
-	-	-	-	-

Figure 2.1.2.2 – Children Information

2.1.3 Description of Changes

1. Add an 'E-mail' label and text field:
 - a. Lower the Address label and fields, in the Parent/Caretaker Information section
 - b. Add the 'E-Mail' label and field above the Address label and fields
 - c. Populate the E-mail text field with the parent/caretaker e-mail or "-" (dash) if not available
2. Update the 'Provider' label to a tab row:
 - a. Add a tab for the Provider on the most recent childcare authorization or certificate and any additional Provider with a current/ongoing authorization/certificate
 - i. Label each tab with the Provider Name
 - ii. If no Provider is active/current, display a tab labeled 'Provider'; continue to display dashes "-" holding the place of other empty data fields, as before this update
 - b. Order the tabs to show the most recent provider first, default to this tab
 - c. Update the 'Child Care Provider Info' section, with the Provider information, when a new tab is clicked
3. Populate the Provider 'Type' text field with "-" (dash) if not available, as what is populating other empty fields.

2.1.4 Page Location

- Child Care Administrator Portal > Dashboard > (Search button)

2.1.5 Security Updates

N/A

2.1.6 Page Usage/Data Volume Impacts

N/A

2.2 Site Walkthrough

2.2.1 Overview

The Site Walkthrough is located via the 'Help' button in the Header panel, at the top of each page of the portal. The site walkthrough points out how to access features of the portal. Update the Site Walkthrough to include information for the new 'e-mail' field and the new 'Provider' tab row. Correct spacing and display errors, as noted.

2.2.2 Site Walkthrough Mockup

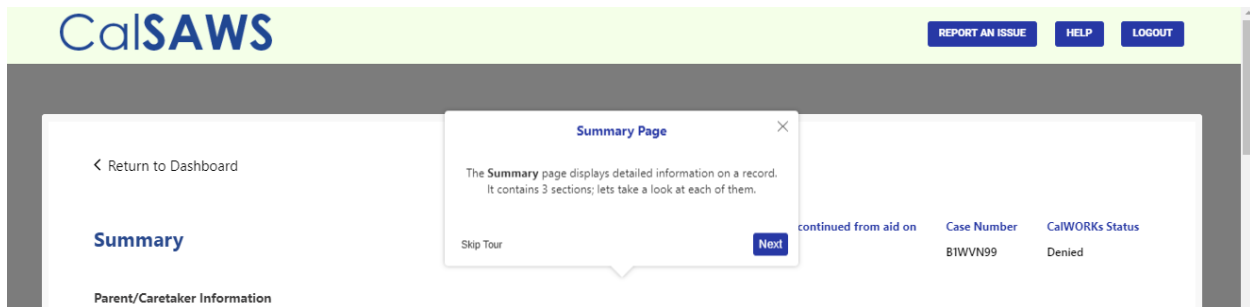


Figure 2.2.2.1 - 'Summary Page' site walkthrough text box

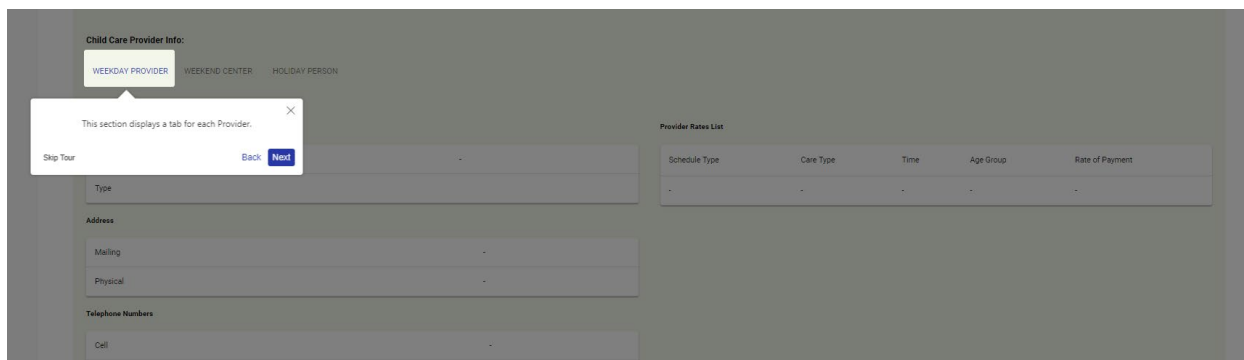


Figure 2.2.2.2- Spotlight on the Provider tab

2.2.3 Description of Changes

1. Update the 'Summary Page' site walkthrough text box so that the entire text including the title shows.
2. Update the **Parent/Caretaker Information** site walkthrough text box's text to: "The **Parent/Caretaker Information** section contains the Name, DOB, Status, Last Active Month of CalWORKs, Reason for Needing Child Care, Phone Numbers, E-mail, and Address Information for each parent or caretaker."
3. Add a new site walkthrough text box, to appear after the 'Next' button is pressed on the **Children Information / Child Care Provider** text box:
 - a. Add the text box so that it points to and highlights the first tab of the 'Provider' tab row
 - b. Add text: "This section displays a tab for each Provider."
 - c. The 'Next' button on the new text box will display the **Additional Information** site walkthrough text box and the 'Back' button will re-display the **Children Information / Child Care Provider** text box

2.2.4 Page Location

- **Child Care Administrator Portal > Header Panel > (Help button)**

2.2.5 Security Updates

N/A

2.2.6 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 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.	This SCR updates the Summary Screen specified within ACL 19-110

3.2 Migration Requirements

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-233690

Update Reports for Customer Non-Benefit
Issuance Category

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Diana Bonilla
	Reviewed By	Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/29/2021	1.0	Initial Review	Diana Bonilla
8/23/2022	1.1	Adding Issuance Exception Report and updated technical notes for identifying customer non-benefits.	Thao Ta

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1 OVERVIEW

As part of ACL 21-23 for the Golden State Grant Program, the Fiscal SCR CA-226779 added a new issuance category of Customer Non-Benefit and was implemented in June 2021. This new category tracks issuances that should not count towards a customer's cash assistance. This has been followed by another Fiscal SCR CA-229461 to fully automate the Customer Non-Benefit Issuance Category for the online fiscal pages, fiscal batch jobs, fiscal interfaces, and claiming. Subsequently, this Reports SCR CA-233690 has been created to update selected reports to exclude or include the Customer Non-Benefit issuances appropriately.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:**
 - ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

1.1 Current Design

SCR CA-226779 added a new issuance category of Customer Non-Benefit. Reports have not been updated to take this new category into account.

1.2 Requests

1. Update the following reports to exclude Customer Non-Benefit issuances from their base population:
 - CA 237 HA
 - CA 237 CW
 - CA 237 CW Line 8 Backup Report
 - STAT 45
 - GR 237
 - Disaster CalFresh Daily Report
 - FC1- Continuum of Care Reform Facility Report
 - TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs
2. Update the following reports to include Customer Non-Benefit issuances:
 - Direct Deposit Production Reconciliation Report
 - Issuance Exception Report

1.3 Overview of Recommendations

1. Update the following reports below to exclude Customer Non-Benefit issuances in the base population:

- CA 237 HA
 - CA 237 CW
 - CA 237 CW Line 8 Backup Report
 - GR 237
 - TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs
 - STAT 45
 - Disaster CalFresh Daily Report
 - FC1- Continuum of Care Reform Facility Report
2. Update the following reports to include Customer Non-Benefit issuances:
 - Direct Deposit Production Reconciliation Report
 - Issuance Exception Report
 3. Update the following reports to cosmetically sync up with CalSAWS template standards:
 - CA 237 CW Line 8 Backup Report
 - GR 237

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 CA 237 HA

2.1.1 Overview

The CA 237 HA report provides county, state, and federal entities with information needed for budgeting staffing, program planning, and other purposes. This report contains statistical information on requests and net expenditures for CalWORKs Homeless Assistance during the report month. This section will feature only changes to the base population data. The base population of this report will exclude Customer Non-Benefit issuances. No cosmetic changes are needed, and the template will remain the same.

2.1.2 Description of Changes

1. Update the report logic base population to exclude the Customer Non-Benefit issuances.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

2.1.3 Report Location

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

2.1.4 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.1.5 Security Updates

No security updates will be made to the report.

2.1.6 Report Usage/Performance

No notable impact to the system's performance.

2.2 CA 237 CW Line 8 Backup Report

2.2.1 Overview

The CA 237 CW Line 8 Backup provides a detailed backup of line 8 from the CA 237 CW State Report. The base population of this report will exclude Customer Non-Benefit issuances. The report will be updated to align with CalSAWS template standards.

2.2.2 CA 237 CW Mockup

CalSAWS		CA 237 CW Line 8 Backup Report				
[COUNTY NAME]						
Run Date: MON-DD-YY HH:MM AM/PM						
Date: MM/YYYY						
Program: CalWORKs						
						Details
SUMMARY						
Additional Caseload Activity	Total	Two-Parent Families	Zero Parent Families	All Other Families	TANF Timed-Out Cases	LT Sanction/SN/FF
Cases Receiving Cash Grant (\$10 or more) Children:						
Cases Receiving Cash Grant (\$10 or more) Adults:						
Other Cases (Zero Grant, Less than \$10) Children:						
Other Cases (Zero Grant, Less than \$10) Adults:						

Figure 2.2.2.1 – CA 237 CW Line 8 Backup Report Mockup – Summary Sheet

CalSAWS		CA 237 CW Line 8 Backup Report									
[COUNTY NAME]											
Run Date: MON-DD-YY HH:MM AM/PM											
Date: MM/YYYY											
Program: CalWORKs											
									Summary		
Total Cases:		1			Total Persons Count:					0	0
Grant	Worker ID	Office	Unit	Aid Code	Case Number	Case Name	Primary Applicant	Child Count	Adult Count		
GRANT	WORKER ID	OFFICE	UNIT	AID_CODE	CASE_NUM	CASE_NAME	LAST_NAME, FIRST_NAME	0	0		

Figure 2.2.2.1 – CA 237 CW Line 8 Backup Report Mockup – Details Sheet

2.2.3 Description of Changes

1. Update the report logic to exclude Customer Non-Benefit issuances from the base population.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)

- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX"
(Auxiliary Benefit Issuance)

2. Update the tab name to sync up with CalSAWS cosmetic standards:
 - Sheet 1 will be renamed to "Summary"
 - Sheet 2 will be renamed to "Details".

2.2.4 Report Location

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

2.2.5 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.2.6 Security Updates

No security updates will be made to the report.

2.2.7 Report Usage/Performance

No notable impact to the system's performance.

2.3 TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs

2.3.1 Overview

The TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs is a scheduled, state report that lists information on the number of children, ages 5-17, in families receiving California Work Opportunity and Responsibility to Kids (CalWORKs) cash assistance above the federal poverty income level in the month of October each year. The base population of this report will exclude Customer Non-Benefit issuances.

2.3.2 Description of Changes

1. Update the report logic base population to exclude the Customer Non-Benefit issuances.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

2.3.3 Report Location

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

2.3.4 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.3.5 Security Updates

No security updates will be made to the report.

2.3.6 Report Usage/Performance

No notable impact to the system's performance.

2.4 CA 237 CW

2.4.1 Overview

The CA 237 CW report is a monthly state report that includes data on CalWORKs caseload movement for Two Parent Families, Zero Parent Families, All Other Families, TANF Timed-Out, Safety Net, Fleeing Felon and Long Term Sanction cases. This report includes data on applications requested or restored, the number of cases added during the month, the number of cases exiting during the month, and the number of cases transferred from other counties during the month. The base population of this report will exclude Customer Non-Benefit issuances.

2.4.2 Description of Changes

1. Update the report logic to exclude Customer Non-Benefit issuances from the Line 8 base population.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

2.4.3 Report Location

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

2.4.4 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.4.5 Security Updates

No security updates will be made to the report.

2.4.6 Report Usage/Performance

No notable impact to the system's performance.

2.5 GR 237

2.5.1 Overview

The GR 237 report contains statistical information on caseload movement and expenditure data for the GR program, and caseload data for the IA program under which applicants for SSI/SSP may be aided by counties while their applications for SSI/SSP are pending.

This SCR will update the base population of this report will exclude Customer Non-Benefit issuances. The cosmetic colors of the report will be updated to align with CalSAWS template standards.

2.5.2 GR 237 Report Mockup

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY		CALIFORNIA DEPARTMENT OF SOCIAL DATA SYSTEMS AND SURVEY DESIGN				
GENERAL RELIEF AND INTERIM ASSISTANCE TO APPLICANTS FOR SSI/SSP		SEND ONE COPY OF THIS REPORT TO: California Department of Social Services Data Systems and Survey Design Bureau, M.S. 9- P.O. Box 944243 Sacramento, CA 94244-2430 FAX: (916) 657-2074				
MONTHLY CASELOAD EXPENDITURE STATISTICAL REPORT		VERSION: (Initial/Revised)				
COUNTY		REPORT MONTH		REPORT YEAR		
COUNTY_NAME		MONTH		YEAR		
PART A. CASELOAD (GENERAL RELIEF AND INTERIM ASSISTANCE)						
CASES						
1. Cases brought forward from last month (Item 5 last month or explain).....					0	CDSS Use Only
2. Cases added during month.....					0	0
3. Total cases available during the month (Item 1 plus Item 2).....					0	0
4. Cases discontinued during month.....					0	0
5. Cases carried forward to next month (Item 3 minus Item 4 above).....					0	0
PART B. CASELOAD AND EXPENDITURES						
	Cases	A	Persons	B	Amount	C
6. Total General Relief [(1)+(2); also (a)+(b)]	0	0	0	0	0	0
(1) Amount in					0	0
(2) Amount in					0	0
a. Family Cases.....	0	0	0	0	0	0
b. One-Person	0	0	0	0	0	0
PART C. SSI/SSP INTERIM ASSISTANCE						
7. Cases added during	0	0				
8. Total SSA checks disposed of during	0	0				
a. Disposed of 1-10 working days of receipt from	0	0				
9. SSA sent to SSI/SSP check directly to	0	0				
10. Denial notices received.....	0	0				
11. Reimbursements during the month (a + b)	0	0			26	0
a. SSA checks	0	0			27	0
b. Repaid by recipient.....	0	0			28	0
PART D. (FOR USE ONLY UPON INSTRUCTIONS FROM DSS)						
12						
13						
PART E. NET GENERAL RELIEF EXPENDITURES						
14. Net General Relief expenditures (Item 6 minus Item					29	0
COMMENTS						
Contact Name	Telephone Number	Extension	Fax			
Title/Classification	E-Mail Address	Date				

Figure 2.5.2.1 – GR 237 Report Mockup – SUMMARY Sheet

*Note reporting logic changes and cosmetic changes to update the color. The full mockup is attached in the Supporting Documents, please refer there.

2.5.3 Description of Changes

1. Update the report logic to exclude Customer Non-Benefit issuances from the Part B Line 6 base population.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

2. Update the report template color cosmetic appearance to align with CalSAWS standards.

2.5.4 Report Location

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

2.5.5 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.5.6 Security Updates

No security updates will be made to the report.

2.5.7 Report Usage/Performance

No notable impact to the system's performance.

2.6 STAT 45

2.6.1 Overview

The STAT 45 report is the Cal-Learn Program - Teen Parent Monthly Status Report. Cal-Learn is a statewide program for pregnant and parenting teens in the California Work Opportunity and Responsibility to Kids (CalWORKs) program. It is designed to encourage pregnant and parenting teens to graduate from high school or its equivalent, become independent, and form healthy families.

The base population of this report will exclude Customer Non-Benefit issuances.

2.6.2 Description of Changes

1. Update the report logic to exclude Customer Non-Benefit issuances from the Part D base population.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

2.6.3 Report Location

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

2.6.4 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.6.5 Security Updates

No security updates will be made to the report.

2.6.6 Report Usage/Performance

No notable impact to the system's performance.

2.7 Disaster CalFresh Daily Report

2.7.1 Overview

The Disaster CalFresh Daily Report provides Disaster CalFresh Application and benefit information. It runs daily. The base population of this report will exclude Customer Non-Benefit issuances.

2.7.2 Description of Changes

1. Update the report logic base population to exclude the Customer Non-Benefit issuances.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

2.7.3 Report Location

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

2.7.4 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.7.5 Security Updates

No security updates will be made to the report.

2.7.6 Report Usage/Performance

No notable impact to the system's performance.

2.8 FC1- Continuum of Care Reform Facility Report

2.8.1 Overview

The FC1- Continuum of Care Reform Facility Report provides Foster Care facility expenditure statistics every month. The base population of this report will exclude Customer Non-Benefit issuances.

2.8.2 Description of Changes

1. Update the report logic base population to exclude the Customer Non-Benefit issuances.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

2.8.3 Report Location

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

2.8.4 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.8.5 Security Updates

No security updates will be made to the report.

2.8.6 Report Usage/Performance

No notable impact to the system's performance.

2.9 Direct Deposit Production Reconciliation Report

2.9.1 Overview

The Direct Deposit Production Reconciliation Report provides a list of Direct Deposit transactions produced by Office and related detailed information. This fiscal report is available daily. The base population of this report will include Customer Non-Benefit issuances.

2.9.2 Description of Changes

1. Update the report logic base population to **include** the Customer Non-Benefit issuances.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

2.9.3 Report Location

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

2.9.4 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.9.5 Security Updates

No security updates will be made to the report.

2.9.6 Report Usage/Performance

No notable impact to the system's performance

2.10 Issuance Exception Report

2.10.1 Overview

The Issuance Exception Report provides the detail information on all warrant production exceptions where they did not go through the FAS interface successfully. This report is generated daily.

This SCR is updating the report to include exceptions from customer non-benefit issuances.

2.10.2 Description of Changes

1. Update the report logic base population to **include** the Customer Non-Benefit issuances.

The Customer Non-Benefit issuances can be identified in CalSAWS by having any of the following conditions:

- Issuance Category of "Customer Non-Benefit"
 - **Technical Note:** ISSUANCE.CAT_CODE = "CN" (Customer Non-Benefit)
- OR the Issuance was issued through the auxiliary authorization pages
 - **Technical Note:**
 - ISSUANCE.AUX_PMT_ID is populated
 - Or CLAIM_HIST.TRANS_TYPE_CODE = "AX" (Auxiliary Benefit Issuance)

2.10.3 Report Location

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

2.10.4 Counties Impacted

All counties will be impacted by the changes outlined in this section.



2.10.5 Security Updates

No security updates will be made to the report.

2.10.6 Report Usage/Performance

No notable impact to the system's performance

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	CA 237 CW Line 8 Backup Report Mockup for cosmetic updates	 CA 237 CW Line 8 Backup Report Mocku
2	Reports	GR 237 Report Mockup for cosmetic updates	 GR 237 Report Mockup.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.2	The CalSAWS/LRS shall produce reports that provide the detail CalSAWS/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.	We are updating a report to assist counties in their state and fiscal reporting.

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-234545

BenefitsCal – New API for e-Notification
Verification

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gillian Noelle Bendicio
	Reviewed By	Hisashi Horino, William Baretsky, Pandu Gupta, Nue Nelson

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/19/2022	.1	Initial Revision	Gillian Noelle Bendicio

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1 OVERVIEW

This System Change Request (SCR) documents the changes required to implement an e-mail verification process for BenefitsCal customers who opt-in for paperless correspondence from CalSAWS.

1.1 Current Design

Currently, BenefitsCal customers can only opt-in for paperless correspondence through the BenefitsCal portal. The BenefitsCal portal calls the CalSAWS Customer Contact Preferences Application Programming Interface (API) to send a verified e-mail address and store the customer's e-Notification preference in CalSAWS. A customer may opt to use a different e-mail address than their BenefitsCal account e-mail address. This new e-mail address will need to be verified to complete the e-Notification opt-in process. In CalSAWS, the e-Notification field on the Contact Detail page is disabled due to a lack of process to verify the e-mail address entered by the worker on the page and notify BenefitsCal regarding the verified e-mail. The previous e-mail verification process that exists in CalSAWS is only compatible to the decommissioned Your Benefits Now (YBN) portal.

1.2 Requests

Implement a process to verify the e-mail entered on the Contact Detail page and complete the e-Notification opt-in process when initiated in CalSAWS.

1.3 Overview of Recommendations

1. Enable the e-Notification field in Contact Detail page and disable the Domestic Violence specific validation messages that are associated to opting-in for e-Notifications.
2. Add a validation in the Contact Detail page when a customer is linked to an active Self-Service Customer Privacy record.
3. Update validation in the Contact Detail page to remove the reference to 'C4Yourself'.
4. Update the save logic of the Contact Detail page to generate an e-mail to verify the provided e-mail address with a unique verification link.
5. Create a new API that verifies the e-mail address and unique verification code combination.
6. Update the Customer Contact Preferences API to store the e-mail verification status when it is invoked to update the contact information.

1.4 Assumptions

1. Existing logic in CalSAWS not mentioned in this SCR will remain unchanged unless otherwise stated.
2. CA-247705 will address the data cleanup for customers who are opted-in for e-Notifications without a BenefitsCal account.

3. CA-207130 Updates to Send E-mail Reminders for Customer Appointments uses the E-Mail Reminder checkbox on the Contact Detail page. It is separate from the e-Notification field located on the same page.
4. CalSAWS supports English and Spanish translations for the e-mail verification message while BenefitsCal portal can have up to 20 language translations for the customer.

2 RECOMMENDATIONS

2.1 Contact Detail

2.1.1 Overview

The Contact Detail page allows the CalSAWS user to create, view, and edit a customer's contact information. This page allows the worker to opt-in/opt-out a case member for e-Notifications. When a case member is opted-in for e-Notifications, they will receive e-mail alerts and most of their paper correspondences are only made available electronically on the BenefitsCal portal. Currently, the e-Notification field is disabled due to a lack of process in verifying the case member's e-mail address. Additionally, there are Domestic Violence specific validation messages from the legacy system that will need to be disabled.

2.1.2 Contact Detail

Contact Detail

*- Indicates required fields

Save

Save and Return

Cancel

- **E-Notification - Cannot opt-in participant for electronic communications due to a Self-Service Portal Customer Privacy record.**

Name: * Phillips, Lenard 42F	IVR PIN: <input type="button" value="Reset PIN"/>	Voice Print No
E-mail Address: <input type="text" value="alex@gmail.com"/> <input type="checkbox"/> Allow E-Mail Reminder	E-Notification: <input type="text" value="Opt-In"/>	
E-mail Status:	Customer ID: 4013441108	

Phone Numbers

Figure 2.1.1 – Customer Privacy Validation and e-Notification Field Enabled

2.1.3 Description of Changes

1. Remove the following validation message:
 - a. 'E-Notification - Cannot opt-in participant for electronic communications due to a 'Domestic Violence' case flag and/or confidentiality.'
2. Update the E-Notification field to be editable in Create and Edit modes.
3. Update the existing validation message from 'E-Notification can only be selected if a C4Yourself account exists and is linked for this person.'

to 'E-Notification can only be selected if a Self-Service Portal account exists and is linked for this person.'

4. Add the validation message:
 - a. 'E-Notification - Cannot opt-in participant for electronic communications due to a Self-Service Portal Customer Privacy record.'
 - b. This validation message is displayed when the user clicks the 'Save' button or the 'Save and Return' button when opting-in a customer for e-Notifications and they have an active Self-Service Portal Customer Privacy record.
5. Update the logic in verifying the e-mail address:
 - a. When the E-Notification field is updated to 'Opt-In', the E-mail status is not 'Verified', and the user clicks the 'Save' button or the 'Save and Return' button, initiate an e-mail with the following information:
 - i. Subject: BenefitsCal E-mail Verification
 - ii. Body:

Thanks for signing up for E-Notifications. E-Notifications are e-mail alerts that let you know there is correspondence to be viewed in your BenefitsCal account. Before we can start sending e-mail alerts, we need to verify your e-mail address.

Please click the following link to verify your email address.
<BenefitsCal URL Verification Link>
 - iii. To: <e-mail address of the Customer>
 - iv. From: e-notification.noreply@app.calsaws.org
 1. Note: For Test environments, the e-mail address used is e-notification.noreply.dev@app.calsaws.org
 - v. When the customer's preferred language is Spanish, the e-mail subject and body is translated to Spanish. If their preferred language is anything other than English or Spanish, then the default language for the e-mail is in English.
 - vi. The BenefitsCal URL Verification Link is a unique hyperlink tied to the customer that is opting-in to e-Notifications, their e-mail address and the language the email is sent as. This link is only available for 5 days.
 - vii. When the verification e-mail is sent successfully, the E-mail status is set to 'Pending Verification'.
 - viii. If the verification e-mail did not get sent successfully, the E-mail status is set to 'Verification Not Sent'.
 - ix. In the occasion that a failure in the e-mail verification process occurred (example: link has expired) in which the E-mail status is not 'Verified', the user can click the 'Edit' button on the Contact Detail page and then click

the 'Save' button to restart the e-mail verification process.

- b. When the e-mail address is modified upon saving, the E-mail status is cleared. If the customer's E-Notification preference is 'Opt-In', the e-mail verification process is initiated as stated in the bullet above.

Note: Updates made to the customer's contact information is stored as a historical record and is viewable in the Transaction History which is accessible through the 'View History' button on the Contact List page.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Contact**

2.1.5 Security Updates

No impact to this section.

2.1.6 Page Mapping

No impact to this section.

2.1.7 Page Usage/Data Volume Impacts

No impact to this section.

2.2 Customer Contact Preferences API

2.2.1 Overview

The Customer Contact Preferences API sends the BenefitsCal portal a customer's contact information and allows the BenefitsCal portal to update their contact preferences.

2.2.2 Description of Change

1. Update the PUT method to accept the following API field in the request:
 - a. emailVerificationStatus
 - i. type: string
 - ii. description: The e-mail address verification status. CT 465: VF – Verified, VN – Verification Not Sent. PV – Pending Verification, VC – Verification Cancelled, UD – Undeliverable, OP – Opted-Out, NR – No Response
 - iii. Not a required field.
2. Update the PUT method to trigger the following logic when the emailOptInStatus is set to true and the emailVerificationStatus is NOT set to VF in the request:
 - a. Initiate the e-mail verification process by sending the verification e-mail with the following information:
 - i. Subject: BenefitsCal E-mail Verification
 - ii. Body:
 - iii. Thanks for signing up for E-Notifications. E-Notifications are e-mail alerts that let you know there is correspondence to be viewed in your BenefitsCal account. Before we can start sending e-mail alerts, we need to verify your e-mail address.

Please click the following link to verify your email address.
<BenefitsCal URL Verification Link>

- iv. To: <e-mail address from the email field>
- v. From: e-notification.noreply@app.calsaws.org
 1. Note: For Test environments, the e-mail address used is e-notification.noreply.dev@app.calsaws.org
- vi. The BenefitsCal URL Verification Link is a unique hyperlink tied to the customer that is opting-in to e-Notifications, their e-mail address and the language the email is sent as. This link is only available for 5 days.
- vii. When the verification e-mail is sent successfully, the e-mail verification status is set to 'Pending Verification'.
- viii. If the verification e-mail did not get sent successfully, the e-mail verification status is set to 'Verification Not Sent'.

Note: Updates made to the customer's contact information is stored as a historical record and is viewable in the Transaction History which is accessible through the 'View History' button on the Contact List page.

2.2.3 Partner Integration Testing

BenefitsCal Portal – End to End testing required.

2.2.4 Execution Frequency

N/A

2.2.5 Key Scheduling Dependencies

N/A

2.2.6 Counties Impacted

BenefitsCal-supported Counties

2.2.7 Category

N/A

2.2.8 Data Volume/Performance

Estimated an increase from 2,000 to 3,000 hourly calls to this API.

2.2.9 Interface Partner

BenefitsCal

2.2.10 Failure Procedure/Operational Instructions

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

2.3 e-Mail Verification API

2.3.1 Overview

The e-Mail Verification API is a new API that will accept e-mail information and a unique pin in the request and mark the e-mail verification status in CalSAWS as verified if the information received is correct.

2.3.2 Description of Change

1. Create the new e-Mail Verification that accepts the following information in the request for its PUT method:

e-Mail Verification - Request			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
verificationCode	String (1 Char. Min, 30 Char. Max)	Verification code to verify the e-mail and person	Y
emailAddress	String (7 Char. Min, 100 Char. Max)	e-mail address to verify	Y
requestId	String (1 Char. Min, 100 Char. Max)	Request ID to return the business validation errors	Y

2. The PUT method will send the following response codes:
 - a. 200 – Successful Operation
 - i. The e-mail address is successfully verified. The response body will return:
 1. email – the e-mail address that is stored in CalSAWS for the person information received.
 2. emailVerificationStatus – the updated e-mail verification status in CalSAWS. This should return 'VF' for Verified.
 3. emailOptInStatus – the e-Notification opt-in status in CalSAWS for the person information received.
 - ii. The API updates the e-mail address verification status in CalSAWS to 'Verified'.
 - b. 400 – Bad Request
 - i. The request is erroneous. The update is not stored.
 - ii. This response code is returned for the following scenarios:
 1. Violation of minimum/maximum constraints

- 2. Missing mandatory fields
- c. 401 – Unauthorized.
 - i. The authentication token when the API is invoked is invalid. The update is not stored.
- d. 403 – Forbidden. The verification code has expired.
 - i. The verification code in the request is already expired. The update is not stored.
- e. 404 – Not found. The verification code and email combination is invalid.
- f. 422 – Business validation error. The update is not stored.
 - i. This response code is returned for the following scenarios. These scenarios are returned as the message field:
 1. <interface partner>-00001: The e-mail address does not exist in the system.
 2. <interface partner>-00002: The e-mail address format is invalid.
 3. <interface partner>-00003: The verification code does not exist in the system.
 4. <interface partner>-00004: The request has exceeded the maximum amount of retries (3).
 - a. If the same request is passed more than 3 times, this business validation will occur.
- g. 500 – Internal Server Error. The update is not stored.
- h. 503 – Service Unavailable. The update is not stored.

2.3.3 Partner Integration Testing

BenefitsCal Portal – End to End testing required.

2.3.4 Execution Frequency

N/A

2.3.5 Key Scheduling Dependencies

N/A

2.3.6 Counties Impacted

BenefitsCal-supported Counties

2.3.7 Category

N/A

2.3.8 Data Volume/Performance

Currently, there are about 900,000 active BenefitsCal accounts that may need to verify their e-mail address to opt-in for e-Notifications. Note that opting-in for e-Notifications will happen over time.

2.3.9 Interface Partner

BenefitsCal

2.3.10 Failure Procedure/Operational Instructions

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

2.4 Automated Regression Test

2.4.1 Overview

Create automated regression test scripts to verify that appropriate responses are returned from the e-Mail Verification API for requests matching the criteria of the following status codes: 200, 400, 403, 404.

2.4.2 Description of Change

Create one or more regression scripts to send a request of the following types to the e-Mail Verification API, and verify (1) the response code and (2) that the response content matches the specification:

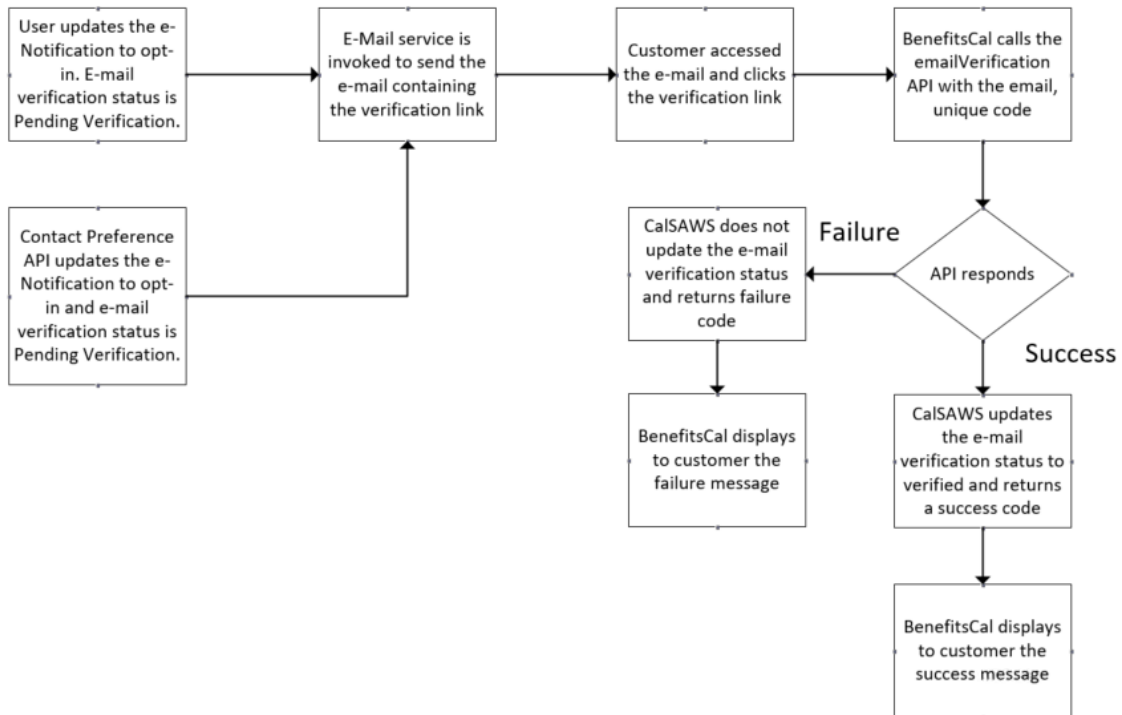
1. Valid request, including all required fields: Response code 200
2. Invalid request, with a missing required field or invalid value for a coded field: Response code 400
3. Cross-county request, with an authentication token that does not match the county scope of the matching record: Response code 403
4. 'Not Found' request, with an email address + verification code combination that does not match a record in the System: Response code 404

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interface	E-mail Verification API – HTML version	EmailVerification.html
2	Interface	E-mail Verification API – YAML version	EmailVerification.yaml
3	Interface	Customer Contact Preferences API – HTML version	CustomerContactPreferences.html
4	Interface	Customer Contact Preferences API – YAML version	CustomerContactPreferences.yaml

4 APPENDIX

Flowchart of the e-mail verification process:



CalSAWS

California Statewide Automated Welfare System

Design Document

CA-236542

Add the NA 213 in Spanish for the CW Denial
NOA Over Income

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/11/2022	0.1	Initial Draft	Ayman Hussein
08/17/2022	1.1	Updated per R6 feedback.	Ayman Hussein

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1 OVERVIEW

The budget NA 213 was implemented in CalSAWS with SCR CA-231970 in English only. This SCR is to add the budget NA 213 in Spanish and allow the CW Denial NOA for failing Applicant MBSAC Test to be available in Spanish.

1.1 Current Design

The CW Denial NOA for failing Applicant MBSAC Test is not available in Spanish due to the budget NA 213 not available in Spanish.

1.2 Requests

- 1) Add the CW Denial NOA (specifically the budget NA 213) for failing Applicant MBSAC Test in Spanish

1.3 Overview of Recommendations

- 1) Update NOA budget NA 213 Fragment

1.4 Assumptions

- 1) This effort will only add budget NA 213 in Spanish. other threshold languages for the budget fragment will not be part of this effort.
- 2) This effort will enable NOA 'NA 213 / M44-207J - CW Denial NOA for failing Applicant MBSAC Test' in Spanish.

2 RECOMMENDATIONS

2.1 Add NOA budget NA 213 Fragment in Spanish

2.1.1 Overview

This effort is adding the NA 213 budget fragment in Spanish.

State Form/NOA: This is based on State Form NA 213 (10/2021) Spanish

Current NOA Template ID(s):

CalWORKs - CW_NOA_TEMPLATE (Fragment ID: 3026)

RCA - RC_NOA_TEMPLATE (Fragment ID: 3036)

Budget Name: BUDGT_CW_NA213 (Fragment ID: 1298)

Current Program(s): CalWORKs, RCA

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Existing Languages: English

2.1.2 Budget Verbiage

Create Spanish BUDGT NA 213 Fragment XDP

Create a BUDGT_CW_NA213 Spanish fragment XDP. This Spanish Budget fragment will match the English 9 variables that populate from the values of EDBC.

Descrip tion	Text	Format ting
Static	<p>Total de ingresos ganados de la familia (Unidad de asistencia + personas no miembros de la unidad de asistencia)</p> <p>..... \$<CwTotalEarned></p> <p>Deducción de \$<AppEID> por cada persona con empleo -\$<EID></p> <p>Otros ingresos no exentos (Unidad de asistencia + personas no miembros de la unidad de asistencia)</p> <p>.....+ \$<CwOtherNonexempt></p> <p>(A) Ingresos netos contables..... = \$<CwNetCountable></p>	Arial font size10

	<p>Necesidades familiares</p> <p>Necesidades básicas para <CwUnitSize> personas (Unidad de asistencia + personas no miembros de la unidad de asistencia)</p> <p>..... \$<MBSAC></p> <p>Necesidades especiales (Unidad de asistencia + personas no miembros de la unidad de asistencia)</p> <p>.....+ \$<CwSpecialNeeds></p> <p>(B) Necesidades familiares = \$<CwTotalNeeds></p>	
--	--	--

NOA Mockups/Examples: See Supporting Document # 1

2.1.3 Fragment Variable Population

There will be no new variables introduced with this effort and no change to the variable population on the budget for Spanish.

Technical note: The variables currently used on BUDGT_CW_NA213_EN.xdp (Fragment ID: 1298) will be used for the BUDGT_CW_NA213_SP.xdp.

2.1.4 NOA Fragment Generation

There will be no change to the generation condition of the BUDGT_CW_NA213 Spanish fragment.

This fragment will be tied with the reason fragments:

CW_DN_CNTBL_INC_EXCEED_STND_A233 (Fragment ID: 9601)

CW_DN_CNTBL_INC_EXCEED_STND_A233 (Fragment ID: 6136)

Location on NOA: Right column of the first page of the NOA

Technical Note: When generating the NA 213 / M44-207J NOA in Spanish, this will be the applicable budget visible in its associated NOA template.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	BUDGT_CW_NA213 Spanish fragment mockup	BUDGT_CW_NA213_SP_Mockup.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>The BUDGT_CW_NA213 Spanish fragment will be added into CalSAWS.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-241912

Add Missing Threshold Languages to
Template Repository - DHCS 0001

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Preetam Basti
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/15/2022	1.0	Initial Draft	Preetam Basti

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1 OVERVIEW

This effort will add the DHCS 0001 in all system supported threshold languages.

1.1 Current Design

The system only has English (05/09) and Spanish (07/09) languages of the DHCS 0001.

1.2 Requests

Add DHCS 001- U.S. Citizens and Nationals Applying for Medi-Cal Must Show Proof of Citizenship and Identity (01/08) in all system supported threshold languages.

Languages include:

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

1.3 Overview of Recommendations

Add DHCS 001- U.S. Citizens and Nationals Applying for Medi-Cal Must Show Proof of Citizenship and Identity (01/08) in all system supported threshold languages.

Languages include:

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 DHCS 0001 in all system supported Threshold Languages

2.1.1 Overview

This section will cover the requirements for adding the DHCS 0001 forms in system supported threshold languages.

State Form: DHCS 0001

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Brochure/Flyer

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

Template Description: Brochure to inform applicant/participant about Proof of Citizenship and Identity required for Medi-Cal program.

Imaging Form Name: US Cit/Natl Appl for MC Proof Citizen/Id

Imaging Document Type: Verification Requests

2.1.2 Form Verbiage

Create DHCS 0001 XDP's for Threshold Languages

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

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

Form Mockups/Examples: See Supporting Documents #1

Form Header: CalSAWS Standard Header #3

Include NA BACK 9: No

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

The CalSAWS will generate the DHCS 0001 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	N	Y	N

Mailing Options:

Mailing Options	Option for DHCS 0001 Form
Mail-To (Recipient)	N/A
Mailed From (Return)	N/A
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 DHCS 0001 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	DHCS 0001 Threshold Languages	DHCS_0001_Arabic.pdf DHCS_0001_Armenian.pdf DHCS_0001_Cambodian.pdf DHCS_0001_Chinese.pdf DHCS_0001_Farsi.pdf DHCS_0001_Hmong.pdf DHCS_0001_Korean.pdf DHCS_0001_Lao.pdf DHCS_0001_Russian.pdf DHCS_0001_Tagalog.pdf DHCS_0001_Vietnamese.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	DHCS 0001 is being added in all system supported threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243207

Remove Obsolete Forms from CalSAWS –
CW 2199 and TEMP WI 10072A

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ranjith Madeshwaran
	Reviewed By	M R Kavitha

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/12/2022	1.0	Initial Revision	Ranjith Madeshwaran

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1 OVERVIEW

The scope of this SCR is to remove the CW 2199 and WI 10072A forms. These forms are considered obsolete and can be removed from the CalSAWS Template Repository.

1.1 Current Design

Currently CW 2199 and WI 10072A forms are available in CalSAWS Template Repository.

1.2 Requests

1. Make the form CW 2199 obsolete and remove these forms from the Template Repository.
2. Make the form WI 10072A (01/2013) obsolete and remove these forms from the Template Repository.

1.3 Overview of Recommendations

Remove these CW 2199 and WI 10072A forms from the CalSAWS Template Repository.

1.4 Assumptions

Not Applicable

2 RECOMMENDATIONS

2.1 Remove CW 2199 & WI 10072A forms from the CalSAWS Template Repository

Remove the below forms from the CalSAWS Template Repository. These forms must be removed all languages which are mentioned below.

Form Number	Form Name	Language(s)
CW 2199	CalWORKs/WELFARE-TO-WORK DOMESTIC VIOLENCE WAIVER REQUEST	English, Spanish, Cambodian, Chinese, and Vietnamese
TEMP WI 10072A (01/2013)	EBT Replacement Review	English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog and Vietnamese

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR- 1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>CW 2199 and WI 10072A forms will be removed from CalSAWs Template Repository.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245147

Add Newest State versions of EBT 2259A, WI 10072A, and WI 10072B

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/09/2022	1.0	Initial Creation	Connor Gorry
07/18/2022	1.1	BA, Build & System Test Approved	Connor Gorry
08/23/2022	1.2	Updates per QA review, Region Feedback on variable population	Connor Gorry
09/14/2022	1.3	Further updates per LA County feedback	Connor Gorry
09/30/2022	1.4	Updates per QA comments	Connor Gorry

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1 OVERVIEW

ACL 21-133 revises the EBT 2259, EBT 2259A, WI 10072A, and WI 10072B to include a distinction between 'scammed' and 'skimmed' EBT theft, and to add additional information on stolen food benefits.

1.1 Current Design

CalSAWS has an outdated version of the WI 10072B in its template repository; And the system currently does not have the EBT 2259A, or the WI 10072A.

Note: Currently in the CalSAWS system, WI 10072B exists with the name 'WI 10072A'. As a part of this change, the current entries for existing Form number will be end-dated, and the appropriate Form numbers will be applied to match the state versions.

1.2 Requests

Add the new EBT 2259A to CalSAWS and create a packet with the EBT 2259 and EBT 2259A. Add WI 10072A and update WI 10072B.

1.3 Overview of Recommendations

1. Add new Form EBT 2259A (11/21)
2. Create new packet with updated EBT 2259 and new EBT 2259A (11/21)
3. Add new WI 10072A Form (11/21)
4. Update WI 10072B to the latest state version (11/21)
5. Update Document Parameters Programs for EBT 2259 (11/21)

1.4 Assumptions

1. No additional Form/NOA translations are needed as a part of this effort.
2. This SCR will not add or alter automated Form Generation for these Forms.
3. The existing standalone EBT 2259 Form, which was updated with SCR CA-239161, will not be altered with this change, with the exception of its selectable Programs.
4. The 'County Use Only' section of the EBT 2259A will populate with identical logic to the existing EBT 2259. These variables – both in the standalone EBT 2259A and in the packet with the EBT 2259 – will be editable when generated from the Template Repository.
5. When no worker is assigned to the case, variable and header population for worker and office information will follow existing functionality when these Form(s) are generated from the Template Repository. For Migration Counties, the logged-in worker's information will populate in the Form Header/Cover Letter

and 'County Use' fields when these form(s) are generated from the Template Repository. For Los Angeles County, these fields will be populated with generic 'Customer Rep' information.

6. The existing one-page NA Back 9 Template and Population will be attached to identified Forms.
7. CA-243207 will obsolete and end-date the existing TEMP WI 10072A (11/13) for its existing programs of CW, GA, CAPI, RCA. This SCR and CA-243207 two SCRs will be released together.

2 RECOMMENDATIONS

2.1 Add new Form EBT 2259A

2.1.1 Overview

Add the 11/21 version of the EBT 2259A Informing Notice to the Template Repository in all threshold languages.

State Forms: EBT 2259A (11/21)

Programs: Multiple (CalFresh, CalWORKs, GA, RCA, CAPI, WTW, REP, Cal-Learn)

Attached Forms: Mailing Cover Letter with Header 1

Forms Category: Forms

Editable: Yes

Visibility: All Counties

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

2.1.2 EBT 2259A Form Verbiage

Create EBT 2259A XDP

Create XDP for the EBT 2259A (11/21) Form.

Form Header: Mailing Cover Sheet

Form Title: EBT Scamming Acknowledgement

Form Number: EBT 2259A

Include NA Back 9: No

Imaging Form Name: EBT Scamming Acknowledgement

Imaging Document Type: Electronic Benefit Transfer (EBT)

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #1

Languages:

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

2.1.3 Add EBT 2259A Variable Population

Add variable population to the EBT 2259A to match that of the existing EBT 2259.

Form Header Variables:

Standard population for CalSAWS Header_1

Form Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
<Case Name>	Name of the Program Person, First and Last, selected from the Parameters Page. For example, "John Doe".	Arial Font Size 10	Y, Text Field	Y	N
<County>	The County in which the Form was generated.	Arial Font Size 10	Y, Text Field	Y	N
<Case ID>	The program person's case ID.	Arial Font Size 10	Y, Numeric Field	Y	N
<Date>	The system date.	Arial Font Size 10	Y, Date Field	Y	N
<Worker Name>	The County worker's name.	Arial Font Size 10	Y, Text Field	Y	N
<Worker Phone>	The County Worker's phone number.	Arial Font Size 10	Y, Phone Number	Y	N

2.1.4 EBT 2259A Generation Conditions

Add Form Control

Add an Imaging Barcode to the EBT 2259A.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Add Form Print and Mailing Requirements

The following Print Options will be included for the EBT 2259A:

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): Person Selected from the Parameters Drop-Down

Mailed From (Return): Sending Office

Mail-back-to Address: Sending Office

Outgoing Envelope Type: Standard

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: Yes

CW/CF Electronic Signature (IVR/Text): Yes

Check to Sign: Yes

Post to Self Service Portal: Yes

2.2 Create new packet with updated EBT 2259 and new EBT 2259A

2.2.1 Overview

Create a mailable packet with the most recent EBT 2259 and EBT 2259A for all threshold languages.

State Forms: EBT 2259 (11/21) and EBT 2259A (11/21)

Programs: Multiple (CalFresh, CalWORKs, GA, RCA, CAPI, WTW, REP, Cal-Learn)

Attached Forms: Mailing Cover Letter with Header 1

Forms Category: Forms

Editable: Yes

Visibility: All Counties

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

2.2.2 EBT 2259 and EBT 2259A Packet Verbiage

Create EBT 2259 / EBT 2259A XDP

Create a packet with six impressions containing the following Forms:

1. **Mailing Cover Sheet** (already exists on current EBT 2259)
2. **EBT 2259 (11/21)** – Instructions for Reporting Electronic Theft of Benefits*
3. **EBT 2259A (11/21)** – EBT Scamming Acknowledgement

***Note:** The EBT 2259's title currently reads "Instructions for Reporting Electronic Theft of Cash Aid". Its title will be updated to match the state's published title as a part of recommendation 2.5 of this design.

Form Header: Mailing Cover Sheet

Form Title: Instructions to Report Electronic Theft of Cash Aid and EBT Scamming Acknowledgement

Form Number: EBT 2259 / EBT 2259A

Include NA Back 9: No

Imaging Form Name: EBT 2259 and EBT 2259A Packet

Imaging Document Type: Electronic Benefit Transfer (EBT)

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #2

Languages:

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

2.2.3 EBT 2259 / EBT 2259A Generation Conditions

Add Form Control

Add an Imaging Barcode to the EBT 2259 / EBT 2259A.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Add Form Print and Mailing Requirements

The following Print Options will be included for the EBT 2259 / EBT 2259A:

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): Person Selected from the Parameters Drop-Down

Mailed From (Return): Sending Office

Mail-back-to Address: Sending Office

Outgoing Envelope Type: Standard

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: Yes

CW/CF Electronic Signature (IVR/Text): Yes

Check to Sign: Yes

Post to Self Service Portal: Yes

2.3 Add new WI 10072A Form

2.3.1 Overview

WI 10072A is the EBT Replacement Approval. It contains fields for the date and amount of replacement should a request for stolen EBT funds be approved. The new WI 10072A contains checkbox fields to indicate whether benefits were skimmed or scammed, and if benefits were replaced in a cash or food account.

State Form: WI 10072A

Programs: Multiple (CalFresh, CalWORKs, GA, RCA, CAPI, WTW, REP, Cal-Learn)

Attached Form(s): N/A

Forms Category: NOA

Visibility: All Counties

Existing Languages:

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

2.3.2 WI 10072A Verbiage

Add WI-10072A XDP

Add a two-impression XDP for the WI 10072A Form. The first impression will be the notice itself, and the second the NA Back 9.

Languages:

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

Form Title: EBT Replacement Approval

Form Number: WI 10072A (11/21)

Forms Category: NOA

Include NA Back 9: Yes

Imaging Form Name: EBT Notice of Replacement Approval

Imaging Document Type: Electronic Benefit Transfer (EBT)

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #3

2.3.3 WI 10072A Generation Conditions

Add Form Control

Add an Imaging Barcode to the WI 10072A.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Add Form Print and Mailing Requirements

The following Print Options will be included for the WI 10072A:

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): Person Selected from the Parameters Drop-Down

Mailed From (Return): Sending Office

Mail-back-to Address: Sending Office

Outgoing Envelope Type: Standard

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

Post to Self Service Portal: Yes

2.3.4 DCR to add the new WI 10072A

Add a new table entry for the updated WI 10072A.

Note: Current WI 10072A is being end-dated with [Recommendation 2.4.3](#)

2.4 Update WI 10072B NOA Form

2.4.1 Overview

WI 10072B (currently labeled 'WI 10072A') is the Electronic Replacement Review notice. Per Assumption #7, the existing WI 10072A will be end-dated with CA-243207, which will be released together with this change.

WI 10072B is used in cases of EBT Theft that must undergo county review, as described in ACL 18-148. The new WI 10072B will contain editable fields for the value of EBT funds under replacement review.

State Form: WI 10072B (11/21)

Updated Programs: Multiple (CalFresh, CalWORKs, GA, RCA, CAPI, WTW, REP, Cal-Learn)

Attached Form: N/A

Forms Category: NOA

Editable: Yes

Visibility: All Counties

Languages:

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

2.4.2 Update WI 10072B Form Verbiage

Update WI-10072B XDP

Update the two-impression XDP for the WI 10072B Form. The first impression will be the notice itself, and the second the NA Back 9.

Form Header: Standard Header

Form Title: EBT Replacement Review

Form Number: WI 10072B (11/21)

Include NA Back 9: Yes

Imaging Form Name: EBT Replacement Review

Imaging Document Type: Electronic Benefit Transfer (EBT)

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #4

2.5 Update EBT 2259 Title and Programs

Update the EBT 2259's title and programs for which it can be generated from the template repository.

Current Title: Instructions for Reporting Electronic Theft of Cash Aid

Updated Title: Instructions for Reporting Electronic Theft of Benefits

Current Programs: CW, GA, CAPI, RCA

Updated Programs: CalFresh, CalWORKs, GA, CAPI, RCA, WTW, REP, Cal-Learn

3 SUPPORTING DOCUMENTS

Attached mockups are in English only. Threshold language translations will use the same formatting as provided by the state, or, in the case of WI 10072A and WI 10072B, the formatting that is currently used in the CalSAWS.

Ref #	Document	Functional Area	Description	Attachment
1	EBT 2259A (11/21)	Client Correspondence	New Form EBT 2259A (11/21) with mailing cover letter.	EBT2259A_Mockup_EN.pdf EBT2259A_Mockup_EN.xdp
2	EBT 2259 (11/21) and EBT 2259A (11/21) Packet	Client Correspondence	Packet containing Mailing Cover Sheet, updated EBT 2259 (11/21), and EBT 2259A (11/21), with a single cover letter.	EBT2259_Packet_Mockup_EN.pdf EBT2259_Packet_Mockup_EN.xdp
3	WI 10072A (11/21)	Client Correspondence	Approval NOA granting replacement of Cash Aid in the case that the victim was skimmed or scammed.	WI 10072A_Mockup_EN.pdf WI 10072A_Mockup_EN.xdp
4	WI 10072B (11/21)	Client Correspondence	Notice informing the recipient that their request for EBT aid replacement is under review.	WI 10072B_Mockup_EN.pdf WI 10072B_Mockup_EN.xdp

4 REQUIREMENTS

Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1208	The CalSAWS shall accommodate and generate State-mandated forms, notices, and NOAs that cannot be changed.	Adds and updates Forms/NOAs to the latest state versions.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-248416

Update AAP3 Form to New Revision

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/01/2022	0.1	Initial Draft	Daniel Rosales
8/16/2022	0.2	Updating Revision date to 6/22	Daniel Rosales
10/04/2022	0.3	Updated design per SCRB/QA comments	Jasmine Chen

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1 OVERVIEW

1. Update AAP 3 with the most recent revision (6/22) as generated by Template Repository in English & turn off the form generation in Spanish. SCR CA-249461 will implement the AAP3 form in Spanish as the new revision is not currently available on the CDSS website.

1.1 Current Design

CalSAWS is currently using the AAP 3 Form revision (7/11) in Template Repository.

Form Number	Description	Current Languages	Current Version Date
AAP 3	Reassessment Information-Adoption Assistance Program	EN, SP	07/2011

1.2 Requests

Update AAP 3 with the most recent State revision (6/22) in English & turn off the form generation in Spanish. This is currently only available via Template Repository.

1.3 Overview of Recommendations

1. Update the Template Repository AAP 3 with the most recent State revision (6/22) in English & turn off the Form generation in Spanish.

1.4 Assumptions

1. Potential generation conditions for the AAP 3 form are a part of SCR CA-48379 and will not be included in this effort.
2. SCR CA-249461 will implement the AAP3 form in Spanish as the new revision is not currently available on the CDSS website.

2 RECOMMENDATIONS

2.1 Update the Template Repository AAP 3 with new revision 6/22 in English & Turn off the Form Generation in Spanish.

2.1.1 Overview

Update AAP 3 with the most recent State revision (6/22) in English & turn off Form generation in Spanish. This form is currently only available via Template Repository.

State Form: AAP 3 (6/22) - Reassessment Information - Adoption Assistance Program

Current Programs: Adoptions Assistance Program (AAP)

Current Attached Form(s): None

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

2.1.2 Form/NOA Verbiage

This update includes the addition of clarifying verbiage throughout the document, removal of the 'Next Reassessment Date' and 'Child SSN#' fields, and addition of the 'Supplement Rate' field. The updated form should retain the existing Mailing Cover Letter as pages 1 & 2. Form generation for Spanish should be turned off.

Update Form XDP

Updated Languages: English

Form Header: Header_1 (as part of mailing cover letter)

Form Number: AAP 3 (6/22)

Forms Category: Form

Include NA Back 9: N

Form Mockups/Examples: See Supporting Documents #1

Turn off Form Generation for Spanish AAP 3

Turn off Form Generation for Spanish AAP 3.

2.1.3 Form/NOA Variable Population

Remove the 'Next Reassessment Date' and 'Child SSN#' fields and add the 'Supplement Rate' field.

Remove Fields: 'Next Reassessment Date', 'Child SSN#'

Variable Name	Population	Formatting	Editable*/Field Type	Template Repository Population	Populates with form Generation
REASSESSMENT_DATE	No population	Arial – size 9	Y	N	N
Child SSN#	No population	Arial – size 8	Y	N	N

Add Field: 'Supplement Rate'

Variable Name	Population	Formatting	Editable*/Field Type	Template Repository Population	Populates with form Generation
SUPPLEMENT_RATE	No population	Arial – size 9	Y	N	N

2.1.4 Form/NOA Generation Conditions

This effort will not be updating Generation Conditions.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	AAP 3 Form with Mailing Cover Letter, English	AAP3_6.22 with Mailing CoverLetter (noCustID).pdf
2	Form	AAP 3 Form, English	AAP3_6.22.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>AAP 3 Form Verbiage is being updated per the new (6/22) Revision.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-248649

Update MAGI Change NOAs for '\$0 Premium'
aid codes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Priya S., Raj D., Geetha R.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/16/2022	1.0	Initial Document	Jasmine Chen
09/19/2022	1.1	Updated per CC Build/ST design review	Jasmine Chen

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1 OVERVIEW

1.1 Current Design

Currently the MAGI 'No Premium to Premium' Change NOA generates after checking conditions for EDBC's latest aid code as one of the following: T1, T3, T6, T8, whose values are stored within a constant-list categorized as 'MAGI Aid Codes Premium'.

1.2 Requests

Per ACWDL 22-14 effective 07/01/2022, aid codes T1, T3 as part of the Optional Targeted Low-Income Children's Program (OTLICP) has been classified as one of the programs where their monthly premiums are reduced to \$0 - so these are now '\$0 Premium' aid codes.

As T1, T3 remained as trigger conditions in the MAGI 'No Premium to Premium' NOA generation conditions, its NOA verbiage of '...Monthly premiums are from \$13 up to \$39 per family.' conflicted with the policy-effective, \$0 premium of aid codes T1, T3.

1.3 Overview of Recommendations

1. Remove T1, T3 aid codes from the existing 'MAGI Aid Codes Premium' constant-list.
2. Regression Test 'No Premium to Premium' and 'Premium to No Premium' NOAs to no longer generate for T1, T3 aid codes with \$0 premiums.

1.4 Assumptions

1. DHCS will send out notifications for impacted cases with aid codes: T1, T3, 0E, E7, 2C, 6G of their \$0 premiums prior to this SCR.
2. Other aid codes of the ACWDL 22-14 policy (0E, E7, 6G) currently do not trigger any NOAs that have conflicting-premium verbiages. No correspondence changes will be done with the 0E, E7, 6G aid codes in this effort.
3. CalSAWS currently does not have aid code, 2C of the County Children's Health Initiative Program (CCHIP) program which exists in San Mateo, San Francisco, and Santa Clara counties.
4. CA-240914 has updated OTLICP Full Scope Approval NOAs to no longer display premium-related verbiage when generated on or after benefit month 07/2022.
5. Updates to reasons of Restricted Scope OTLICP will not be included in this effort as the impacted aid codes are all considered Full Scope.
6. CA-250176 will add remaining threshold languages for certain MAGI approval and change reasons.

2 RECOMMENDATIONS

2.1 Remove \$0 Premium Aid Codes from impacted NOA constants

2.1.1 Overview

Per ACWDL 22-14, the policy reduces monthly premiums to \$0 dollars for aid codes: T1, T3, 0E, E7, 6G. An update to the generation logic's 'MAGI Aid Codes Premium' constant is needed to prevent generating the MAGI Change NOAs with 'premium' verbiage for these aid codes.

2.1.2 Description of Changes

1. Update the existing constant-list, CT184_MAGI_AID_CODES_PREMIUM_NOA to remove T1, T3 aid codes from the MAGI Change NOAs' triggering conditions.

Note: T6, T8 aid codes will still remain active in this existing constant-list.

2.2 Regression Test 'No Premium to Premium', 'Premium to No Premium' NOAs

2.2.1 Description

Two existing MAGI Medi-Cal Change NOA reasons will no longer generate after Recommendation 2.1 removed T1, T3 aid codes from existing constant, 'MAGI Aid Codes Premium'.

Reason Fragment(s) Name and ID:

H_CH_NO_PREMIUM_TO_PREMIUM_H806 (ID: 7033)

H_CH_PREMIUM_TO_NO_PREMIUM_H805 (ID: 7032)

Known County NOA: This reason currently exists in CalSAWS.

Current NOA Template: H_NOA_TEMPLATE (Fragment ID = 3033)

Current Program(s): Medi-Cal (MAGI)

Current Action Type: Change

Current Fragment Level: Person

Currently Repeatable: No

Includes NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages (9): English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

Regression test the 2 MAGI Change NOAs of 'No Premium to Premium' and 'Premium to No Premium' to no longer generate when EDBC determines a benefit change to and from aid codes of T1, T3.

Note: There are no changes to the existing generation logics of above reason fragment(s).

3 REQUIREMENTS

3.1 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.	This SCR will cause the MAGI 'No Premium to Premium' and 'Premium to No Premium' Change NOAs to no longer generate for aid codes with \$0 premium.

4 APPENDIX

4.1 Existing Reason Verbiage:

Reason Fragment (ID)	Existing Verbiage
H_CH_NO_PREMIUME_TO_PREMIUM_H806 (ID: 7033)	<p>Important change to your benefits. Your Medi-Cal is changing to Medi-Cal with a premium on <MonthDayYear> because your income and/or household size changed. That means you have to pay a small fee each month to keep your Medi-Cal. Your Medi-Cal coverage will continue unless you are found no longer eligible or stop paying your premium. This could happen at the time your eligibility is renewed or when your situation changes.</p> <p>We counted your household size and income to make our decision.</p> <p>For Medi-Cal, your household size is <MAGISize> and your monthly household income is <MAGIIncome>. The monthly Medi-Cal income limit for your household size is <MAGIIncomeLimit>. Your income is below this limit, so you qualify for Medi-Cal.</p>

	<p>Your household size and income requires that you pay a monthly premium to remain eligible for Medi-Cal.</p> <p>You will receive a separate billing statement from the Medi-Cal Premium Payment Section. It will tell you the monthly premium amount you must pay and your payment options. Monthly premiums are from \$13 up to \$39 per family. Please allow up to 60 days to receive this information.</p> <p>Your first premium payment is not due until you receive the first billing statement. You must pay the monthly premium to be eligible for this program. Until you receive this information, if you have questions on your premium, you can visit:</p> <p>http://www.dhcs.ca.gov/services/Pages/Medi-CalPremiumPayments.aspx</p> <p><MAGIReg> is the regulation or law we relied on for this decision.</p>
<p>H_CH_PREMIUME_TO_NO_PREMIUM_H805 (ID: 7032)</p>	<p>Good news! You will no longer have to pay a premium for Medi-Cal because your income and/or household size changed. Your Medi-Cal coverage will continue unless you are found no longer eligible. This could happen at the time your eligibility is renewed or when your situation changes.</p> <p>We counted your household size and income to make our decision.</p> <p>For Medi-Cal, your household size is <MAGISize> and your household income is <MAGIIncome>. The Medi-Cal income limit for your household size is <MAGIIncomeLimit>. Your income is below this limit, so you qualify for Medi-Cal without a premium.</p> <p><MAGIRegulation> is the regulation or law we relied on for this decision.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-249759

Add budget to CF Recertification Approval
NOA

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Priya S., Himanshu J.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/31/2022	1.0	Initial Draft	Jasmine Chen
10/03/2022	1.1	Updated per SCRB/QA comments	Jasmine Chen

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1 OVERVIEW

1.1 Current Design

Currently the CF Recertification Approval CF 377.1 (02/13) NOA is generated without a budget.

1.2 Requests

Generate the existing CF Recertification Approval NOA with a budget.

1.3 Overview of Recommendations

1. Update CF Recertification Approval NOA's regulations.
2. Update the CF Approval budget to be generated on the CF Recertification Approval NOA.

1.4 Assumptions

1. CA-246157 will add the CF Recertification Approval NOA and other NOA reason verbiages in system-supported threshold languages.
2. CA-200863 will update the CF Recertification Approval NOA with CF 377.1 (05/20) verbiage.
3. CA-236226 will update the CF 377.1 (06/19) form version of the Template Repository in English to the latest State CF 377.1 (05/20) version.
4. CA-241120 will add the latest State CF 377.1 (05/20) form version of the Template Repository in system-supported threshold languages.
5. CA-234731 will be updating the budget lines of the CF Approval budget to match EDBC's budget lines.
6. This CF Approval budget will be added to the CF Recertification Approval (CF 377.1) NOA. Currently the Expedited CalFresh Approval (CF 377.1) NOA already has this approval budget.
7. NOAs in threshold languages will generate if all fragments on a NOA are available in that language (existing framework in CalSAWS).
8. CA-250188 is scoped to remove the 'Customer ID' field from all NOA template's headers.

2 RECOMMENDATIONS

2.1 Update CF Recertification Approval NOA Reason Fragment

2.1.1 Overview

Update the existing CalFresh Recertification Approval NOA with updated regulations. Also, per Section 2.2 a budget will now be added to the CF Recertification Approval NOA.

Existing Reason Fragment ID: CF_AP_CF_APPROVED_F281 (ID: 7239)

Known State NOA: This is an existing CalSAWS NOA CF 377.1 (02/13)

Current NOA Template: CF_NOA_TEMPLATE (ID = 3027)

Current Programs: CalFresh

Current Action Type: Approval

Current Fragment Level: Person

Currently Repeatable: Yes

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages (2): English, Spanish

2.1.2 NOA Verbiage

The reason fragment's verbiage will have no changes.

2.1.3 NOA Variable Population

1. Variable Population

N/A

2. Fragment Regulations

Existing regulations: CDSS CalFresh MPP Section 63-504.61(g)(1)

Update the existing regulations of the CF Recertification Approval NOA to the following new regulations for English and Spanish:

MPP 63-300.4, 63-504.1, 63-504.22, 63-504.6

3. NOA Title and Footer References

There are no changes to the existing NOA Title, References, and Footer.

2.1.4 NOA Generation Conditions

Fragment Generation

1. There are no changes to the existing generation conditions for this reason fragment.
2. There are no changes to the existing action, message configurations with this reason fragment.

Note: The CF Recertification Approval NOA overall will look different from its current version also due to adding a CF Approval budget on the right-hand column of the NOA, per Recommendation 2.2.

NOA Mockups/Examples: See Supporting Document #1

2.2 Update the CF Approval Budget Fragment

2.2.1 Overview

Update the existing CalFresh Approval budget fragment to be generated on the CF Recertification Approval NOA.

Known Form/NOA: This is an existing CalSAWS CF approval budget

Current NOA Template (ID): CF_NOA_TEMPLATE (ID = 3027)

Budget Name (ID): BUDGT_CF_APPROVAL_SAR (ID: 1285)

Current Programs: CalFresh

Current Action Type: Approval

Current Fragment Level: Person

Currently Repeatable: Yes

Existing Languages (11): English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

2.2.2 NOA Verbiage

Fragment XDP

No changes to the verbiage of the budget.

2.2.3 NOA Variable Population

Variable Population

No changes to the budget's variable population.

2.2.4 NOA Generation Conditions

Update Fragment Generation

Update the budget's fragment generation logic to have the budget also generate with the following reason fragments:

- CF Recertification Approval (ID: 7239)

Location on NOA: This budget fragment will be located on the right-hand column of the first page of the NOA.

NOA Mockups/Examples: See Supporting Document #1

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	CF Recertification Approval NOA mockup with added budget	CA 249759 - CF Recertification Approval wbudget.pdf

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.	This SCR will add the CF Approval budget onto the CF Recertification Approval NOA.