CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-48513

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

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
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| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 10/19/2020 | 1.0 | Initial Draft | Tisha Mutreja |
| 12/07/2020 | 1.1 | Draft post review comments from BAs | Tisha Mutreja |
| 12/21/2020 | 1.2 | Updated Draft on further confirmations from BAs | Tisha Mutreja |
| 1/08/2021 | 1.3 | Added Examples to recommendations | Tisha Mutreja |
| 1/08/2021 | 1.4 | Added Flow Chart to Supporting Documents | Tisha Mutreja |
| 1/11/2021 | 1.5 | Added Automated Task Creation | Tisha Mutreja |
| 1/15/2021 | 1.6 | Updated Auto-reassignment logic | Tisha Mutreja |
| 1/19/2021 | 1.7 | Updated task settings and flow charts | Renee Gustafson |
| 1/22/2021 | 1.8 | Automation section added | William Baretsky |
| 1/26/2021 | 1.9 | Household record update added to the criteria | Tisha Mutreja |
| 02/03/2021 | 2.0 | Reviewed with FC and MC Committee:<br>1. Added task for CF program on Disc FC case.<br>2. Updated tasks to not generate if the worker on the other program is the FC worker.<br>3. Added recommendation to set the Application Source on FFY and ISP MC program block<br>4. Updated references to the "MC Worker" to instead be "the worker assigned to the MC Program" for clarity<br>5. Added assumption about Batch EDBC FFY MC auto-test.<br>6. Updated flow charts | Renee Gustafson |
| 02/16/2021 | 2.1 | Updated Worker reassignment to | Renee |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| | | stay with FC worker<br>Updated application source in MC program to ‘Other’ | Gustafson |
| 02/18/2021 | 2.2 | Added Assumptions 7 and 8.<br>Added criteria for Placement Authority | Renee Gustafson |
| 02/25/2021 | 2.3 | Updated task section to be in the format to add as new task logic, “Automated Action” | Justin Dobbs |
| 02/26/2021 | 2.4 | Corrected the existing FC to MC Auto-test reasons | Renee Gustafson |
| 03/01/2021 | 2.5 | Removed criteria for Placement Authority | Renee Gustafson |
| 03/02/2021 | 2.6 | Removed CF task | Renee Gustafson |
| 03/31/2021 | 2.7 | Added MC NOA Recommendation | Tiffany Huckaby |
| 04/19/2021 | 2.8 | Added FFY Packet Recommendation | Tiffany Huckaby |
| 04/23/2021 | 2.9 | Updated Assumption #1 and added note to 2.3.2.3.iii | Tisha Mutreja |
| 01/11/2022 | 3.0 | 1. Added Assumption #12 that all existing functionalities will not be changes unless it’s part of the Design Doc.<br>2. Added 2 new section (Section 2.1 and 2.2).<br>a. Section 2.1 “Position Detail page” to add a new value and update an existing value on the Aid Codes – Medi-Cal section.<br>b. Section 2.2 Update the Reassignment for Medi-Cal program section.<br>3. Updated Section 2.3.2 to check whether a county opted in or out in order to determine whether the MC program on the case need to be reassigned to a new worker | Erika Kusnadi |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 03/08/2022 | 3.1 | Edited and reformatted.<br>Moved Reassignment logic section below Eligibility Rules update | Renee Gustafson |
| 03/08/2022 | 3.2 | Edited and Peer Reviewed<br>Added Auto-journal logic to current design | Tisha Mutreja |
| 3/17/2022 | 3.3 | Added new Section 2.7 for the request to add FFY Auto-Test to existing positions | Erika Kusnadi |
| 3/30/2022 | 3.4 | Updated the wording on Section 2.3 to make it more clear on how the reassignment will work | Erika Kusnadi |
| 3/30/2022 | 3.5 | Reformatted and edited section 2.7 per new standards post migration | Rakan Ali |
| 3/30/2022 | 3.6 | Updated and edited the design post peer review | Tisha Mutreja |
| 4/11/2022 | 3.7 | Updated current design, assumption, section 2.6 and 2.7 post committee review | Tisha Mutreja |
| 6/9/2022 | 3.8 | Updated recommendation 2.2.2.1 to change Default Source and 7J budget | Tisha Mutreja |
| 6/24/2022 | 3.9 | Content Revision: Updated design to clarify auto-test SSI Exception | Tisha Mutreja |
| 7/7/2022 | 4.0 | Content Revision: Update the note on Section: 2.3.2 to be more specific in that reassignment will not occur when all position that can accept MC program already reached the maximum amount<br>Updated auto-reassignment logic to work irrespective of MC program status. | Erika Kusnadi |
| 8/10/2022 | 4.1 | Content Revision: Updated 'Impacted NOAs' attachment (Supporting Documents #2) to include 7J Approval NOA | Connor Gorry |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 8/22/2022 | 4.2 | Content Revision 2:<br>- Updated Current Design to remove auto-test disc reason<br>- Updated Assumption #4 and current design to remove OPA from auto-test rules<br>- Updated Assumption #3 to give more insight to current functionality<br>- Updated Journal # 2 to update Long Description to say FFY was created instead of FFY was approved<br>- Updated recommendation 2.2.2.1.b.7 to update Life Cycle Indicator to Yes instead of No<br>- Updated design throughout to state that Denied MC will also be created as part of this change. | Tisha Mutreja |
| 08/29/2022 | 4.3 | Content Revision 2: Added Assumption #15, updated Section 2.4 to clarify that Denial NOAs generated will not be moved with this change. | Connor Gorry |
| 9/13/2022 | 4.4 | Content Revision 2:<br>- Added Assumption #16<br>- Updated recommendation 2.2.2.1.b.7 to update Life Cycle Indicator back to 'No' for batch to not auto-reassign | Tisha Mutreja |
| 9/14/2022 | 4.5 | Content Revision 2:<br>- Added Assumption #17 | Tisha Mutreja |

# Table of Contents

# 1 OVERVIEW

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

## 1.1 Current Design

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

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

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

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

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

> **For Example:** If a Medi-Cal application on 02/05/2021 has only an FFY individual in the program block (FFY individual turns 26 on 08/28/2023), the System sets the RE Due Month to 08/2023.
>
> If there is any other non-FFY individual in the same MC program block, the System sets the RE Due Month to 01/2022.

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

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

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

## 1.2 Requests

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

## 1.3 Overview of Recommendations

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

## 1.4 Assumptions

1. The original LA County Change Control Request (CCR) received and linked to the SCR CA-48513 included additional requests for updates to individuals in FFY MC and individuals discontinued from FC as stated above in the Request section. All the other requests in the CCR will be implemented with future SCR CA-220233 and will follow the regular prioritization process.
2. There are no changes to how EDBC sets the Medi-Cal RE Due Date. It will follow current functionality.
3. ~~The auto-test logic will not be suppressed if the individual is out of state. The System will follow existing functionality to auto-test a Medi-Cal program and then discontinue the MC individual for 'Calif. Residence'.~~
    Medi-Cal auto-test logic is not suppressed if an individual lives out of state. A Residency record is not required to auto-test Medi-Cal.
    If a Residency record exists and indicates the individual is not a CA resident, auto-tested Medi-Cal will deny for 'Calif. Residence'. The physical address alone without a Residency record will not deny auto-tested Medi-Cal for 'Calif. Residence'.

4. The Medi-Cal EDBC rules will not auto-test MC if the discontinued FC individual is Pending or receiving Medi-Cal in a Medi-Cal program block~~, Other Program Assistance (OPA)~~ or cash-based Medi-Cal.
5. The auto-test logic will copy over the mailing/physical address from the discontinued Foster Care case to the newly created Medi-Cal case.
6. FC cases processed in Batch EDBC in 'All Programs' mode (or 'Partial Programs' with FC and MC) will follow the new FFY MC Auto-Test logic, if appropriate, and Batch EDBC will Accept and Save the FC program and the auto-tested MC program(s) using existing Batch EDBC logic.
7. Foster Care cases marked 'Confidential' will go through the new FFY auto-test process and the new MC case will NOT be marked 'Confidential'.
8. If the FFY individual returns to FC, when they are discontinued from FC again, the FFY Auto-Test logic will create another new MC case and will not reopen any existing FFY case.
9. Existing NOA generation/population logic will not be updated with this effort except for the Case ID.
10. CA-220233 will update the FFY Packet to generate for all counties.
11. The MC NOA will not be printed via the Preview NOA and will be printed locally only when the option to 'Print Locally' is available on Save and Continue on the new Case for Medi-Cal.
12. Medi-Cal NOAs that are 'Rejected' via the Preview NOA will also be moved to the new Medi-Cal case.
13. All existing online functionalities will remain unchanged, unless called out as part of the design document.
14. The New Worker Letter (CSF 163) will be sent out for a change in worker when the Foster Care case is moved to the new MC case and the counties opt-in for worker reassignment for FFY Auto Test. Only one CSF 163 will be generated at the end of the day with the last worker assigned to the program.
15. Medi-Cal Denial NOAs will not be moved to the newly created MC case as a part of this change. CA-249677 is created to move MC Denial NOAs or any additional NOAs identified in future to accommodate FFY Auto-Test change.
16. Currently, CalSAWS does not generate Medi-Cal Denial NOAs for the reasons of 'Calif. Residence' and 'Deceased'.CA-235011 is created to generate the Medi-Cal Denial NOAs targeted for release 23.01.
17. Medi-Cal Auto-Test does not require a Full Medi-Cal Hierarchy Customer Options record

# 2 RECOMMENDATIONS

## 2.1 Position Detail Page

### 2.1.1 Overview

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

### 2.1.2 Position Detail Page Mockups

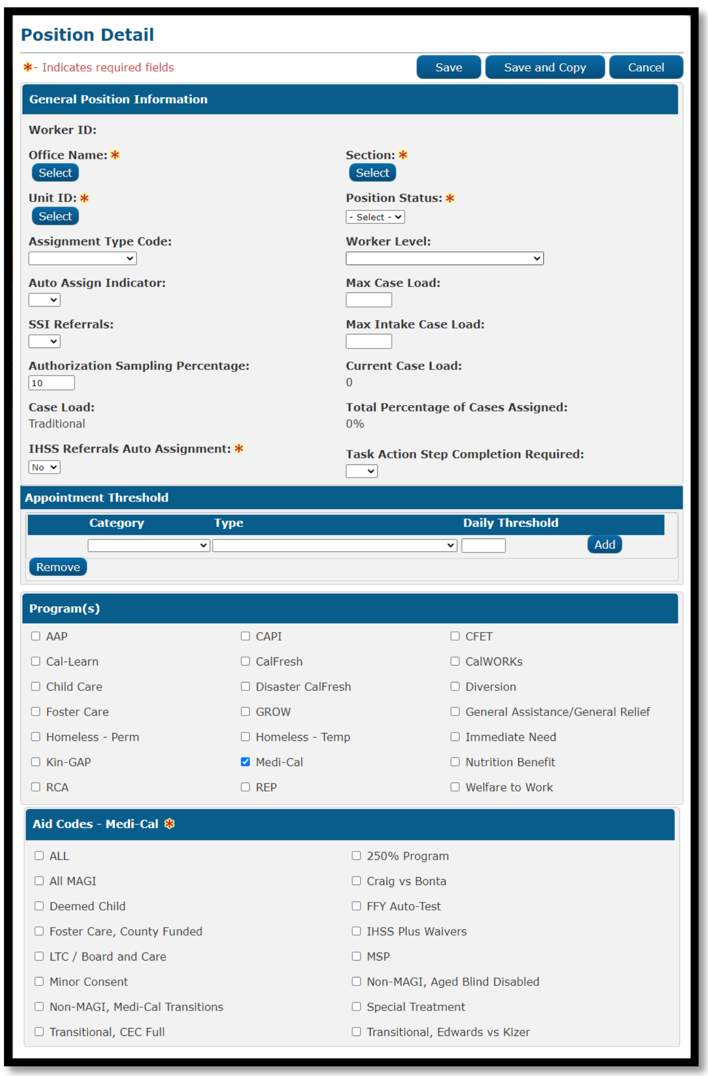



Figure 2.1.2.1 – Position Detail page (Create mode)

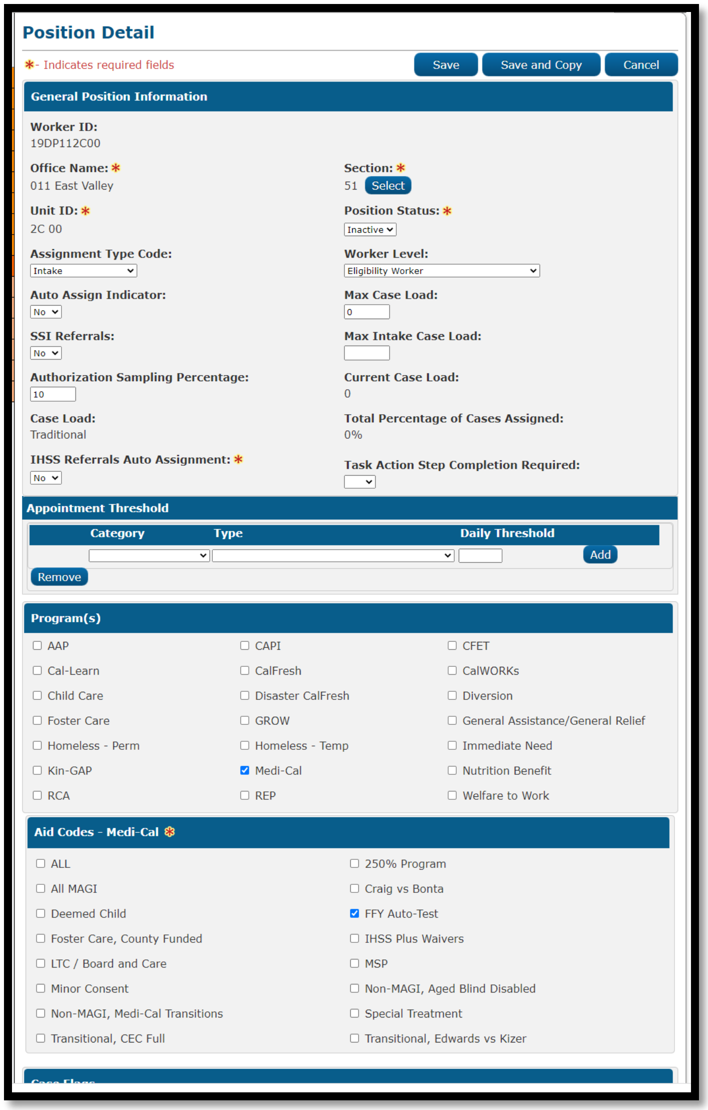
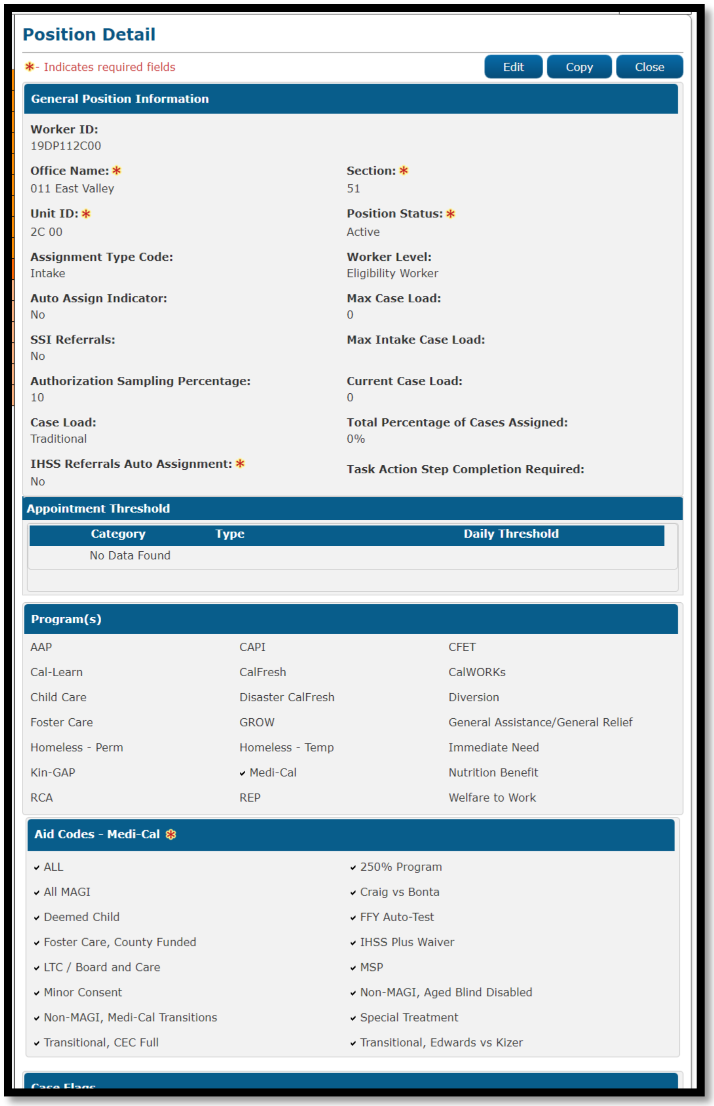



Figure 2.1.2.2 – Position Detail page (Edit mode)



**Position Detail**

*- Indicates required fields

Edit | Copy | Close

**General Position Information**

**Worker ID:**
19DP112C00

**Office Name:** *
011 East Valley

**Section:** *
51

**Unit ID:** *
2C 00

**Position Status:** *
Active

**Assignment Type Code:**
Intake

**Worker Level:**
Eligibility Worker

**Auto Assign Indicator:**
No

**Max Case Load:**
0

**SSI Referrals:**
No

**Max Intake Case Load:**

**Authorization Sampling Percentage:**
10

**Current Case Load:**
0

**Case Load:**
Traditional

**Total Percentage of Cases Assigned:**
0%

**IHSS Referrals Auto Assignment:** *
No

**Task Action Step Completion Required:**

**Appointment Threshold**

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

**Program(s)**

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

**Aid Codes - Medi-Cal**

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

Figure 2.1.2.3 – Position Detail page (View mode)

### 2.1.3 Description of Changes

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

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

### 2.1.4 Page Location

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

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

N/A

### 2.1.7 Page Usage/Data Volume Impacts

N/A

## 2.2 Eligibility Rules Updates

### 2.2.1 Overview

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

### 2.2.2 Description of Changes

1. Update Medi-Cal EDBC auto-test logic to identify if the discontinued FC individual aged 18 or older as of the discontinuance effective date will follow the new FFY auto-test logic.
   a. Create FFY auto-test logic with below details:
      i. Create a new MC program in the FC case with the discontinued FC individual.
         1. Assign the FC worker to the MC program
         2. Set the Requested MC Type to 'Former Foster Youth' for the FFY individual

            **Note:** The existing MC EDBC logic will grant the ~~Active~~ FFY individual the 4M aid code, 'Member' Role and a 'Former Foster Youth' budget when the FFY individual is auto-tested to Active Medi-Cal.
            If the FFY individual is denied Medi-Cal in the auto-tested MC program based on other factors – such as Gets SSI, Calif. Residence, Deceased, etc. then no eligibility will be provided.
         3. Set the FFY individual as the Primary Applicant
         4. Copy over the Cash Based program (FC Case) Application Source if exists,
            If the Application Source does not exist, set the default Application Source as 'Other'
         5. Set the Application Date for the MC program and program person to the system date (calendar date)
         6. Set the Beginning Date of Aid (BDA) to the first of the month of the FFY individual's discontinuance from FC.

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

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

ii. Create a separate MC program block with the FC MMO Infant Supplement Payment (ISP) child(ren), if any, with below details:
    1. Assign the FC worker to the MC program
    2. Set the Requested MC Type as 'Medi-Cal'
    3. Set the FFY individual as the primary applicant
       **Note**: The FFY individual will display as Active FRI Parent in the program block unless the FFY individual has SSI or SSI/SSP. See Supporting Document #5 'SSI Exception' for more details.
    4. Copy over the Cash Based program (FC Case) Application Source if exists,
       If the Application Source does not exist, set the default Application Source as 'Other'
    5. Set the Application Date for the MC program and program person(s) to the system date (calendar date)
    6. Set the BDA to the first of the month of the FFY individual's discontinuance from FC
        a. Update EDBC logic for FC MMO ISP child(ren) with a FFY parent, to create a budget as 'CEC' with Role as 'MEM' and aid code as '7J' when the ISP child becomes eligible when auto-tested to Active Medi-Cal.
           If the ISP child is denied Medi-Cal in the auto-tested MC program based on other factors – such as Gets SSI, Calif. Residence, Deceased, etc. then no eligibility will be provided.

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

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

program(s) will remain assigned to the existing FC worker.

b. For counties that opt in to the "FFY Auto-Test" worker reassignment, the MC program(s) on the new case will automatically be reassigned per recommendation 2.3.2.1.

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

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

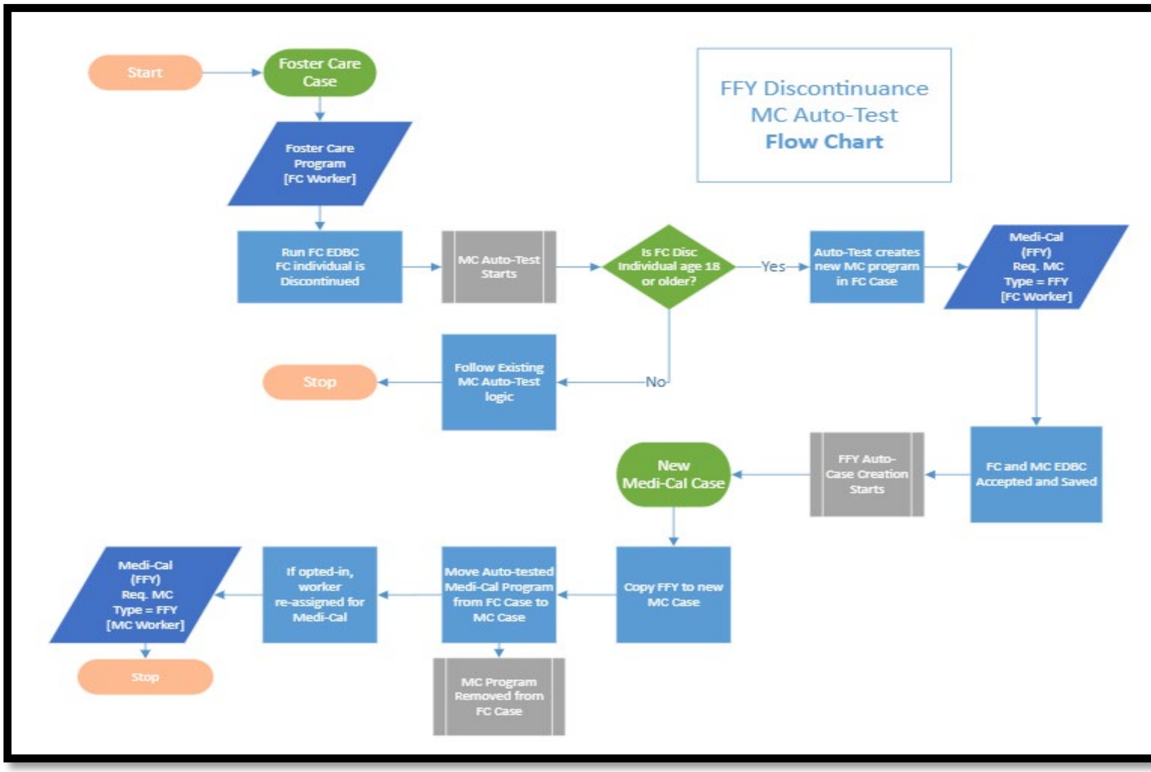



*Figure 2.1 - Example Flow Chart for FFY Auto-Discontinuance*

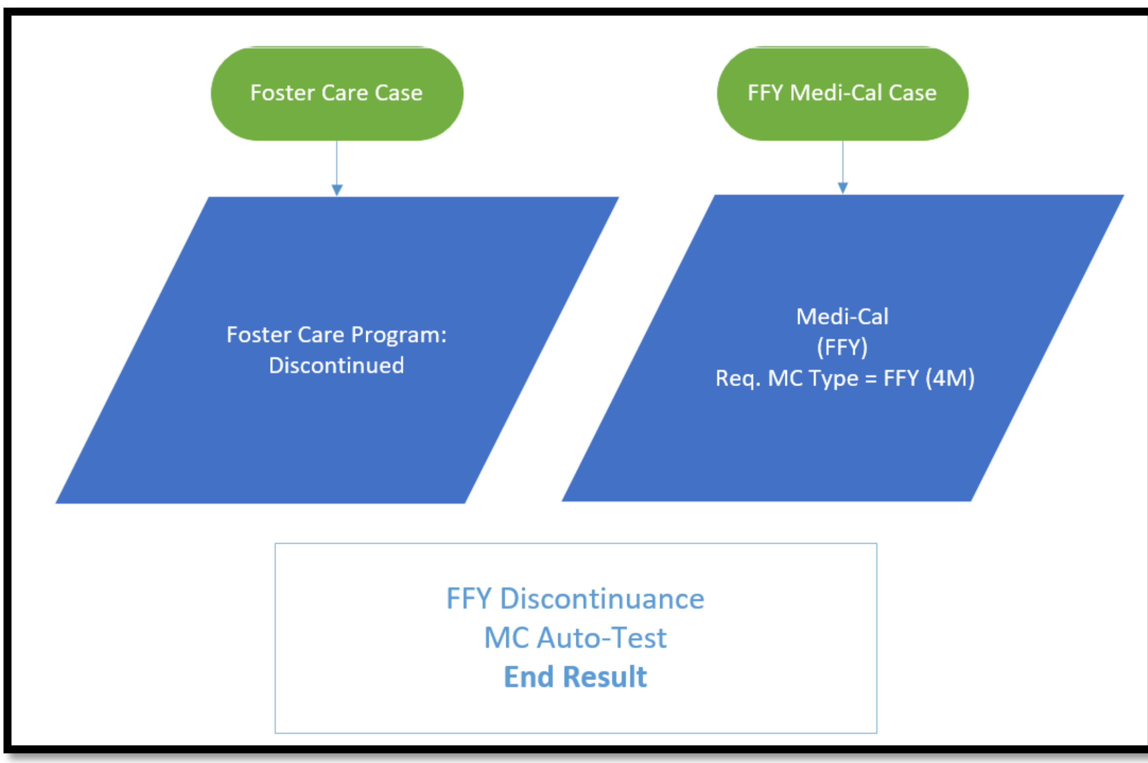



*Figure 2.2 - End Result of FFY Auto-Discontinuance*

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

2. Create a Journal entry in the new MC case created by the FFY auto-test logic.
   The Journal Entry will be displayed as follows on Journal Detail page:
      **Journal Category**: Eligibility
      **Journal Type**: Activity
      **Short Description:** MC Case created from FFY Discontinuance MC Auto-Test
      **Long Description**: Case created by Medi-Cal FFY Auto-Test when an individual, age 18 or older, was discontinued from the Foster Care program

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

3. Create a Journal entry for the existing FC case.
      The Journal Entry will be displayed as follows on Journal Detail page:

      **Journal Category**: Eligibility
      **Journal Type**: Activity

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

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

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

### 2.2.3 Programs Impacted

Medi-Cal, Foster Care

### 2.2.4 Performance Impacts

N/A

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

### 2.3.1 Overview

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

### 2.3.2 Description of Changes

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

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

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

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

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

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

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

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

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

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

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

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

**Note:** The reassignment logic will continue to use existing logic in determining the worker maximum case load. Once the maximum case load has been reached for all available workers in the county that can accept a Medi-Cal program, reassignment will not occur (in this case, it will remain with the FC worker).

### 2.3.3 Programs Impacted

Medi-Cal

### 2.3.4 Performance Impacts

N/A

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

### 2.4.1 Overview

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

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

**Note:** If a Denial NOA is generated from the FFY auto-test, it will not be moved to the new Medi-Cal case.

### 2.4.2 Description of Change

1. Add NOA logic at EDBC Save and Continue when generating a NOA from the FFY Auto-Test MC EDBC. If a newly created MC NOA (see list of NOAs from Supporting Document #2) has generated, check the associated EDBC's Case ID and if the Case ID differs from the Generated Document Case ID for the NOA:
    a. Update the Case ID for the Generated Document to match the EDBC Case ID.
    b. Update the Case Number NOA variable population in NOA_SNIPPET_VAR to match the new Medi-Cal Case Number (SERIAL_NUM_IDENTIF).
    c. Remove the previously created PDF of the NOA from the database (remove the ALF_FMS_NUM from Generate Documents). Note: This will allow the NOA to be generated with the new case variable population.

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

### 2.5.1 Overview

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

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

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

**Current Programs:** Medi-Cal

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

**Current Form Category:** Forms

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

**Existing Languages:** English

### 2.5.2 Description of Change

1. Update the FFY Aging Out Form (ID: 6027) to be visible to all counties in Template Repository (DOC_TEMPL.TEMPL_COUNTY_CATGRY_CODE = 'ALL').

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

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

### 2.6.1 Overview

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

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

**Current Programs**: All

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

**Current Form Category:** Forms

**Current Template Repository Visibility:** All County

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

### 2.6.2 Description of Change

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

## 2.7 Automated Task Creation

### 2.7.1 Overview

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

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

### 2.7.2 Description of Change

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

1. Create a “Medi-Cal Program: Exists on Discontinued Foster Care Case” Automated Action that will have the following attributes on the Automated Action Detail page:

    a. Action Information
        i. Name: Medi-Cal Program: Exists on Discontinued Foster Care Case
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): MC
        v. Run Date: Daily or Real Time
        vi. Source: Batch/Online
        vii. Scenario: Scenario: A Foster Care program was Discontinued with an open Medi-Cal program existing on the case.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 10 business days
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Medi-Cal Program Worker
        vii. Long Description: The FC individual was discontinued and auto-tested to FFY on a separate Medi-Cal case. Review the Medi-Cal individual(s) on this case to determine if they should also move to the new Medi-Cal case.

    c. Update the EDBC Save and Continue to invoke the above Automated Action when the FC discontinuance resulted in a new MC case from the FFY Auto-Test as described in Recommendation 2.2.2.1.b and there remains an open MC program on the FC case.

2. Create a “Former Foster Youth Auto-Test: Medi-Cal Worker Assigned” Automated Action that will have the following attributes on the Automated Action Detail page:

    a. Action Information
        i. Name: Former Foster Youth Auto-Test: Medi-Cal Worker Assigned
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): MC
        v. Run Date: Daily or Real Time
        vi. Source: Batch/Online

vii. Scenario: A Former Foster Youth has auto-tested into a Medi-Cal program which has been assigned to a worker.

b. Task Information
   i. Task Type: BLANK
   ii. Task Sub-Type: BLANK
   iii. Due Date: Default Due Date
   iv. Default Due Date: 10 business days
   v. Initial Assignment: Default Assignment
   vi. Default Assignment: Current Program Worker
   vii. Long Description: A Medi-Cal program that resulted from a Former Foster Youth auto-test has been assigned.

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

## 2.8 Automated Regression Test

### 2.8.1 Overview

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

### 2.8.2 Description of Change

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

1. No Medi-Cal program is present on the Foster Care case
2. No Medi-Cal EDBC results are visible on the Foster Care case
3. The auto-tested Medi-Cal program is present on a new second case:
   a. Requested Medi-Cal Type is "Former Foster Youth" for each applicant
   b. Program status is "Active"
   c. Person status is "Active" for each applicant
4. The auto-tested Medi-Cal EDBC result is visible on this second case:
   a. Status is "Active"
   b. Aid Code is "4M" for each applicant
5. The Medi-Cal program on the new second case is assigned to the same worker as the Foster Care program on the original case.

**Note:** This result will only be verified for counties that opt out of the "FFY Auto-Test" worker reassignment.

6. A Journal entry is present on the new second case with the following details:
    a. **Journal Category**: Eligibility
    b. **Journal Type**: Activity
    c. **Short Description:** MC Case created from FFY Discontinuance MC Auto-Test
    d. **Long Description**: Case created by Medi-Cal FFY Auto-Test when an individual, age 18 or older, was discontinued from the Foster Care program
7. A Journal entry is present on the Foster Care case with the following details:
    a. **Journal Category**: Eligibility
    b. **Journal Type**: Activity
    c. **Short Description:** FC Discontinued and Auto-Test MC FFY created
    d. **Long Description:** FFY program ~~approved~~ created, and a new MC case created

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | Eligibility Rules | Flow charts explaining the MC auto-test process from recommendation 2.2.2 | FFY Auto Test.pdf |
| 2 | NOA | Expected NOAs to generate from the auto-test MC EDBC | CA-48513 - Impacted NOAs.xlsx |
| 3 | Form | Former Foster Youth Aging Out Form | FFYAGINGOUT.pdf |
| 4 | CCR Request | Original Request from LA County | CCR Request.docx |
| 5 | Eligibility Rules | SSI Exception | SSI Exception.docx |

CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-205633

ACL 18-75 Phase IV-Long Term Funding for Emergency Caregivers with Placements Prior to RFA Approval

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
| | Prepared By | Tom Lazio |
| | Reviewed By | |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 07/06/2020 | 1.0 | Initial Draft | T. Lazio |
| 09/23/2020 | 2.0 | Removed FFA placement type | T.Lazio |
| 08/9/2021 | 2.1 | Design Clarification to correct fragment name | C. Gorry |
| 9/2/2022 | 2.2 | Content Revision 5: Updated NOA variable population | T. Huckaby |
| | | | |
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# Table of Contents

# 1 OVERVIEW

Per ACL 18-75, Emergency Caregiver (EC) funding can be applied to all Resource Family Homes (RFH) who have filed a resource family application (RFA).

Per ACL 19-84, EC funding can be paid to Tribal Specific Homes pending completion of the Tribally Approved Home (TAH) approval process, effective July 1, 2019.

This SCR will accommodate the need of extending EC payments to Tribal Specific Home placements with status of 'Emergency Approval' and all child relationship types for RFH placements with 'Emergency Approval' status.

## 1.1 Current Design

With the implementation of SCR CA-204665 / CIV-102237, the setting of 5K Sub Type Codes 'EC EA Eligible' and 'EC EA Ineligible' was automated for Relative Home, Non-Relative Extended Family Members (NREFM) and RFH placement types with Home Approval/Foster Care License status of 'Emergency Approval'. For RFH placement types, the 'Care Provider Relationship to Child' had to be either 'Relative Guardian', 'Relative Non-Guardian' or 'NREFM Non Guardian'.

## 1.2 Requests

1. Expand EC funding to pay 5K 'EC EA Eligible' aid code to the following facility types where License status is 'Emergency Approval':
   - Tribal Specific Homes
   - RFH with the following child relationship types:
     - NREFM Guardian
     - Non-Relative Guardian
     - Non-Relative Non-Guardian.

2. Create a batch job that checks if Emergency Assistance (EA) Not To Exceed (NTE) Date has passed on any active FC cases that use 5K aid code and run EDBC to update the aid code (Requirement # 723 on FCED Plan-SCRs with Requirements spreadsheet).

## 1.3 Overview of Recommendations

1. Update Foster Care License Page for 'Tribal Specific Home' placement types to add 'Emergency Approval' license status option.
2. Update FC EDBC to pay 5K 'EC EA Eligible' aid code to Tribal Specific Homes placement types with Foster Care License status of 'Emergency Approval'.

3. Update FC EDBC to pay 5K 'EC EA Eligible' aid code to remaining relationship types for RFH placement types with 'Emergency Approval' status.
4. Create a daily batch sweep job that checks EA NTE on all active FC cases that use 5K aid code (including 5K with subtype 'EC EA Eligible') and run EDBC on those cases where the NTE has passed since the last time the batch process completed.
5. Update verbiage on RFA 100A discontinuance fragment to match that of the state-provided RFA 100A.

### 1.4 Assumptions

1. Logic for 5L (FC EC-EA Ineligible) will be implemented in SCR CA-205913 currently scheduled for release 21.03.
2. Good Cause enhancements are planned for CalSAWS/LRS in SCR CA-218186 currently scheduled for release 21.11.
3. The fund codes for 5k aid code with placement types of 'Tribal Specific homes' and 'RFH' are already in the CalSAWS/LRS system.
4. Aid codes and license statuses on existing FC programs with 'Tribal Specific Home' placement types will not be updated by this SCR.
5. If NTE date has passed and the license/home approval status is 'Emergency Approval', the aid code will switch from '5K' with subtype 'EC EA Eligible' to the new aid code '5L' being implemented in SCR CA-205913 currently scheduled for release 21.03.
6. Batch job JB00A112 that generates a task for the worker to take appropriate action on any program that has a foster care child that is about to reach the NTE date on the emergency assistance program will continue to run as scheduled.
7. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
8. NOA generation logic will not be modified with this change. Updates to NOA generation logic pertaining to Aid Code '5L' will be addressed in SCR CA-205913 currently scheduled for release 21.03.
9. LA County DataMart interface will not be impacted with this SCR.
10. The new Batch sweep job will not trigger EDBC for Foster Care cases that have already passed the NTE date prior to implementation of this SCR.

# 2 RECOMMENDATIONS

## 2.1 Foster Care License Detail

### 2.1.1 Overview

The 'Foster Care License Detail' page is used in the CalSAWS/LRS system to store license information for care providers. This page will be updated for 'Tribal Specific Home' placement types to allow the user to specify a status of 'Emergency Approval' when TAH or RFA approval is pending.

### 2.1.2 Foster Care License Detail Mockup

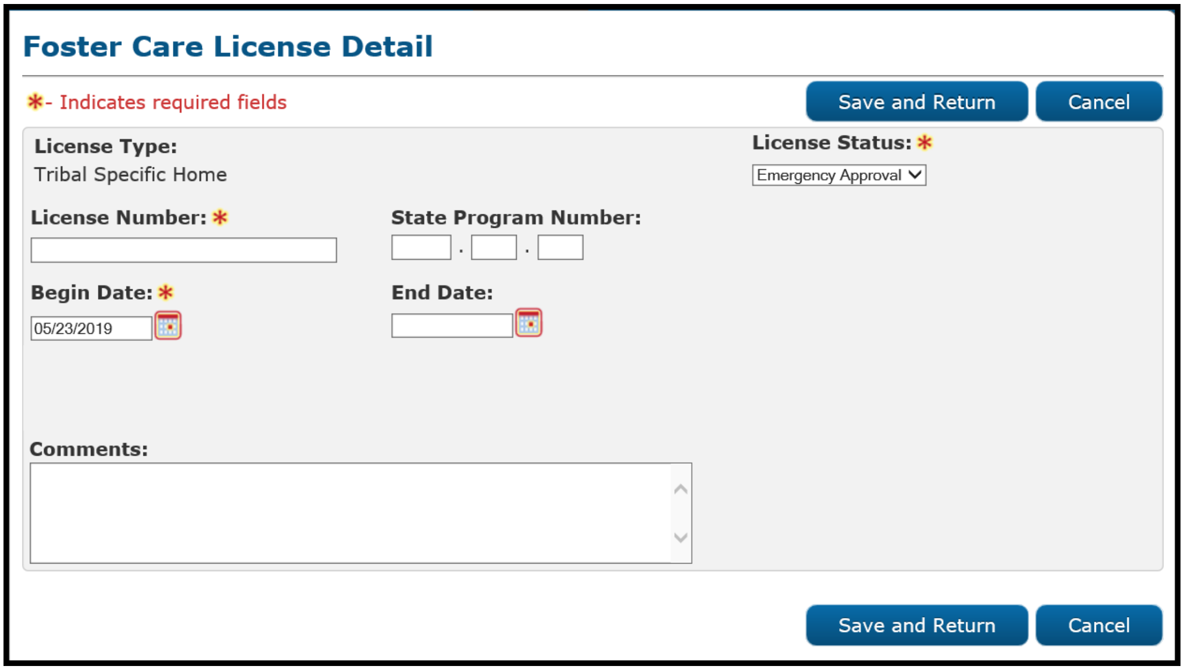


**Figure 2.2.2.1 –Foster Care License Detail Page Mockup -CalSAWS/LRS**

### 2.1.3 Description of Changes

1. Update 'Foster Care License Detail' page for 'Tribal Specific Home' placement types by adding 'Emergency Approval' status option in the License Status dropdown field.

### 2.1.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: License Information**

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

N/A

## 2.2 Update FC EDBC 5K with Sub Type Code 'EC EA Eligible' Logic

### 2.2.1 Overview

Update the FC EDBC logic which sets the 5K aid code with 'EC EA Eligible'subtype to include the additional sets of conditions detailed in the following section. All existing conditions that set 5K aid code with 'EC EA Eligible'subtype will remain unchanged.

### 2.2.2 Description of Changes

1. Update existing FC EDBC logic to add the following conditions for setting the Sub Type Code of 'EC EA Eligible' with aid code of 5K:

    a. For Resource Family Home (RFH) placement types with license status of 'Emergency Approval' include the following child relationship types:
        i. NREFM Guardian
        ii. Non-Relative Guardian
        iii. Non-Relative Non-Guardian

    b. The placement type, with a begin date on or after July 1, 2019, is one of the following combinations:

| Placement Type | License Status | Benefit period has not exceeded the EA Not to Exceed (NTE) date on the Placement Authority page* | 'Was the EA1 application approved?' on the Placement Authority page |
|---|---|---|---|
| Tribal Specific Home | Emergency Approval | Yes | Yes |

* If the EA NTE date ends in middle of the benefit month and license status is 'Emergency Approval', the system can create two aid code records in the same benefit month (5K with Sub Type Code 'EC EA Eligible' and 5L).

### 2.2.3 Programs Impacted

Foster Care

### 2.2.4 Performance Impacts

N/A

## 2.3 Create Batch Job That Checks EA NTE Date and Runs EDBC

### 2.3.1 Overview

Create a daily batch sweep job that triggers EDBC on any active Foster Care cases that use 5K aid code (including 5K with subtype 'EC EA Eligible') where the EA NTE Date has passed since the last time the batch job completed.

### 2.3.2 Description of Change

Create a new county configurable daily batch sweep job that triggers EDBC for the current and come-up months on any active Foster Care programs and create a journal entry ( refer to section 2.4) when all the following conditions are met-

a. FC program is 'Active' as of the batch date.
b. FC program person(s) is 'Active' as of the batch date
c. Aid code for the Foster Care program is '5K' as of the batch date.
d. The question 'Was the EA1 application approved?' in the Emergency Assistance(EA) section on the active Placement Authority is 'Yes'.
e. The 'Not To Exceed' Date in the Emergency Assistance(EA) section on the active Placement Authority has passed since the last time the batch job ran successfully.


**Note:** if the new batch sweep job is triggered on or after the ten day cut off batch EDBC will be triggered for the current month and following two months( come-up month and the month following the come-up month).

### 2.3.3 Execution Frequency

Daily (except batch holidays)

### 2.3.4 Key Scheduling Dependencies

This Job will run before EDBC is triggered

### 2.3.5 Counties Impacted

LA County only

CIV and CalWIN counties can opt-in to run this job at the time of migration.

## 2.4 Jounal Entry for the new batch sweep job

| Journal Entry | Description |
|---|---|
| New/Update | *New* |
| Journal Category | *All* |
| Journal Type | *Batch EDBC* |
| Short Description | *Batch EDBC ran for <Month Year>.* |
| Long Description | *Batch EDBC ran for <Month Year>. Batch EDBC processed for the Foster Care program for following reasons: Emergency Assistance 'Not To Exceed' date has passed.* |
| Trigger Condition | *When a FC EDBC runs on the case* |

## 2.5 Update RFA Home Approved Discontinuance NOA Reason

### 2.5.1 Overview

One of the Discontinuance Fragments that can generate with the RFA 100A (9/18) when it is generated via EDBC does not match the state-provided verbiage. This change will update the verbiage to match that of the state-provided RFA100A.

**Reason Fragment Name and ID:**

FC_TN_RFA_100A_VEND_OR_HOME_APPRD_T402

ID: 7544

**State Form/NOA:** RFA 100A (9/18)

**Current NOA Template:** FC_NOA_TEMPLATE (ID: 3030)

**Current Program(s):** Foster Care

**Current Action Type:** Discontinuance

**Current Fragment Level:** Person

**Currently Repeatable:** N

**Include NA Back 9:** Yes

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

**Existing Languages:**

English, Spanish Update Fragment XDP

### 2.5.2 Update Fragment XDP

**Updated Languages:**

English and Spanish (See Supporting Documents #2 for Spanish verbiage)

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

| Description | Existing Text | Updated Text | Formatting* |
|---|---|---|---|
| Static | The RFA Application was approved, and the child now may be eligible for either the Aid to Families with Dependent Children-Foster (AFDC-FC) or the Approved Relative Caregiver (ARC) Funding program payments. Contact [APPROPRIATE OFFICE] if you have any funding related questions. | The RFA Application was approved, and the child is now eligible for either the Aid to Families with Dependent Children-Foster (AFDC-FC) or the Approved Relative Caregiver (ARC) Funding program payments. **You should continue receiving funding without delay.**<br><br>Contact <OFFICE> immediately if you stopped receiving funding at the time the RFA Application was approved. | Arial, Size 10<br><br>The following should be in bold:<br><br>"You should continue receiving funding without delay" |

### 2.5.3 Update NOA Variable Population

**<u>Add/Update Fragment Variable Population</u>**

The updated NOA fragment will have the following variable population.

| Variable Name | Population | Formatting* |
|---|---|---|
| <OFFICE> | District office Name and Address of the worker on the Foster Care case.<br><br>Format: District Office Name, Address<br><br>Note: Office Name and address should be same as the one displayed on the NOA header. | Arial, Size 10 |

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

**Variables Requiring Translations:** None

## 2.6 Automated Regression Test

### 2.6.1 Overview

Create new automated regression test scripts to cover the new Emergency Approval option for the 'Tribal Specific Home' placement types, and positively test the associated 5K aid code changes.

### 2.6.2 Description of Changes

For Placement Type 'Tribal Specific Home':

i. Verify that a License Status of 'Emergency Approval' can be selected on the Foster Care License Detail page.
ii. Verify that Aid Code 5K with sub type code 'EC EA Eligible' is granted by Foster Care EDBC for a program with this Placement Type and License Status, and each of the following Relationship types:
    1. NREFM Guardian
    2. Non-Relative Guardian
    3. Non-Relative Non-Guardian

**Note:** Only the positive EDBC tests are in scope, where the 'Not to Exceed' date is not exceeded, and the EA1 application is approved.

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | NOA | NOA Example | RFA 100A Reason 2 Mockup.pdf |
| 2 | NOA | NOA Spanish Update | Spanish Translation of RFA Home Approved Discontinuance NOA Reason.pdf |

# 4 REQUIREMENTS

## 4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|---|---|---|
| 2.10.4.7 | The LRS shall be able to identify and pay for a substitute service if a Vendor's license is not valid for the selected service. | Expanding emergency caregiver funding to additional placement types with pending RFAs and Home Approval/Foster Care License status of 'Emergency Approval'. |

CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-220120

Update CF EDBC Allotment Logic for Households that received Disaster Supplements or Emergency Allotments in the Same Benefit Month

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
| | Prepared By | Sridhar Mullapudi, Sidhant Garg, Mayuri Srinivas |
| | Reviewed By | |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 11/10/2020 | 1.0 | Initial Draft | Sridhar Mullapudi, Sidhant Garg |
| 07/08/2022 | 1.2 | Content Revision 1 | Sridhar Mullapudi, Mayuri Srinivas |
| 08/29/2022 | 1.3 | Removed the word 'manually' from the Long Description in the following Sections:<br>2.5.2 Automated Action Detail Mockup<br>2.5.3 Description of Changes | Vallari Bathala |
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# 1 OVERVIEW

## 1.1 Current Design

When disaster CalFresh supplements are issued for EDBC with 'Disaster CF Supplements' run reason subsequent EDBCs run for that benefit month will result in a read only EDBC with reason 'Received Disaster Benefits' if the household size remains the same.

Issuances issued as ‘Emergency Allotment’ due to COVID-19 are not considered in the previous potential benefit calculation logic when EDBC is recalculated again for the same benefit month. When emergency allotments are issued for EDBC with run reason ‘Emergency Allotment’ run reason, households will receive up to max allotment for the household size. When regular CF EDBC is run after the emergency allotment issuance, it is possible for the household to receive additional CF supplemental benefits.

## 1.2 Requests

1. Update the EDBC logic to not make the household read only with reason ‘Received Disaster Benefits’
2. Update the previous potential benefit calculation logic for CalFresh program to include issuances that are categorized as Emergency allotment or disaster CalFresh supplements.
3. Update EDBC logic to not provide additional CF benefits or Overissuances for the household that have already received emergency allotments or disaster CalFresh supplements up to their max allotment.

## 1.3 Overview of Recommendations

1. Update EDBC summary page to include a new line item in allotment section to display the augmentation amount.
2. Update EDBC logic to not mark the household as read only with reason ‘Received Disaster Benefits’
4. Update EDBC logic to not provide additional CF benefits or Overissuances for the same household that have already received emergency allotments or disaster CalFresh supplements up to their max allotment.
3. Update the previous potential benefit calculation logic for CalFresh program to include issuances that are categorized as Emergency allotment or Supplemental Disaster Benefit.
4. Add new automated action daily batch job to alert the users when the CalFresh HH size changes since the emergency allotment issuance.

## 1.4 Assumptions

None

# 2 RECOMMENDATIONS

## 2.1 Update CalFresh EDBC Summary Page

### 2.1.1 Overview

Add new line item in CalFresh EDBC summary page in allotment section to display the augmentation amount when all the conditions are met for a household that received a disaster CalFresh supplement or EA allotment for the same benefit month.

### 2.1.2 CalFresh EDBC Summary Page Mockup

| **Allotment** | **Regular** | |
|---|---|---|
| Full Month Allotment | $ | 330.00 |
| Dates to Prorate | | 1-31 |
| Allotment | $ | 330.00 |
| Combined Allotment | $ | 330.00 |
| CFAP Amount | $ | 0.00 |
| Overridden CFAP Amount | $ | |
| Final Allotment | $ | 330.00 |
| Overridden Allotment | $ | |
| | | Override Allotment |
| Previous Potential Benefit Allotment | - | 430.00 |
| Augmentation (Previous Potential Benefit Allotment - Final Allotment) | + | 100.00 |
| Overissuance Adjustment Amount | - | 0.00 |
| **Authorized Amount** | = | **0.00** |

**Figure 2.1.1 – Mockup Name**

### 2.1.3 Description of Changes

1. Add new line item on CalFresh EDBC summary page that will display the 'Augmentation (Previous Potential Benefit Allotment – Final Allotment)' amount
2. This line item will only be displayed when all the conditions are satisfied:
    a. The CalFresh program is active/ineligible

b. The CalFresh program has a disaster supplement or EA allotment for the same benefit month the current EDBC summary page is displaying.
c. There is no change in HH size since the Disaster supplement or EA allotment were issued.

### 2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: EDBC Results**

### 2.1.5 Security Updates

None.

### 2.1.6 Page Mapping

Add page mapping for the new fields

### 2.1.7 Page Usage/Data Volume Impacts

No expected impacts to page usage or data volume impacts

## 2.2 Augmentation Calculation List Page

### 2.2.1 Overview

This new page will show how the Augmentation line item on the EDBC summary Page is calculated. The amount is calculated by subtracting Full Month Allotment from the Previous Potential Benefit for a benefit month.

### 2.2.2 Augmentation Calculation List Page Mockup

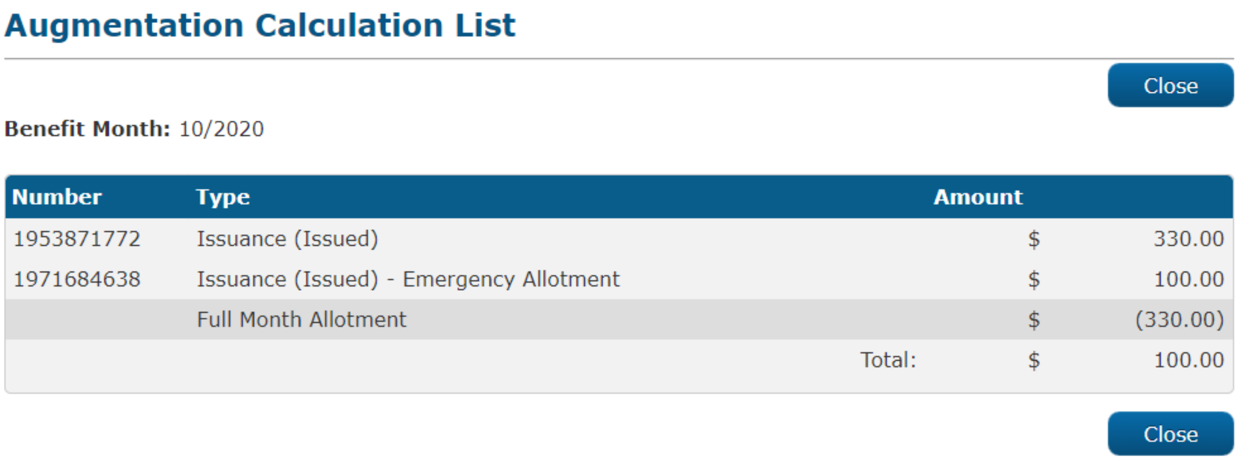


**Figure 2.1.1 – Mockup Name**

### 2.2.3 Description of Changes

1. Create a new Augmentation Calculation List page that will be visible to users with the "Augmentation Calculation List View" security group.
2. Users would be able to navigate to this page by clicking the hyperlink for the Augmentation line item on the EDBC Summary page.
3. This First section on this page will include the following fields:
   a. Benefit Month - This field be a read only field that will display the benefit month associated with the EDBC authorization.
4. This Second section on this page will include the following fields:
   a. Number - This will be a read only field that will display the Control Number Associated to the Issuance record that already exists for the benefit month.
      NOTE: In case of Full Month Allotment, this field will always be blank.
   b. Type – This will be a Read Only field that will display the type of line item.
   c. Amount – This will be a Read Only field that will display the amount associated to each line item.

   **NOTE:**
   a. Except the Full Month Allotment line item, the existing logic on the Previous Potential Benefit List page will be used to display other line items including, but not limited to, Issuances, Overpayments, Benefit Reduction/Offset transactions.
   b. Regression test the existing Previous Potential Benefit List page.
5. Close Button – On Click of this button the user will be navigated back to the EDBC Summary page.

### 2.2.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: EDBC Results**

### 2.2.5 Security Updates

1. Security Rights

| Security Right | Right Description | Right to Group Mapping |
|---|---|---|
| | | |

2. Security Groups

| Security Group | Group Description | Group to Role Mapping |
|---|---|---|
| | | |

### 2.2.6 Page Mapping

| Field | Table | Column | Comments |
|---|---|---|---|
| Benefit Month | EDBC | BEG_DATE | The first month for a given calculated budget. |
| Number | | | This is based on the request type like EDBC/Issuance/Over Payment/Over Payment Adjustment, this column displays the primary ID value of the record from EDBC_PERS_MISC.CALC_DESCR or ISSUANCE.ID or RECOV_ACCT_TRANSACT.ID or OVRPMT.ID |
| Type | | | This field displays different request type from which the amount is generated, like Issuance, Over Payment, Over Payment Adjustment etc. For EDBC, the data is retrieved from EDBC_PERS_MISC.CALC_DESCR |

| Field | Table | Column | Comments |
|---|---|---|---|
| Amount | | | This is based on request type either EDBC_PERS_MISC.COUNTBL_VAL_AMT, ISSUANCE.PMT_AMT, RECOV_ACCT_TRANSACT_DETL.DOLLAR_AMT, OVRPMT.OVRPMT_AMT is displayed. |
| Total | | | This field displays sum of the request type amounts. |

### 2.2.7 Page Usage/Data Volume Impacts

No expected impacts to page usage or data volume impacts.

## 2.3 Update CalFresh EDBC Read Only Rules

### 2.3.1 Overview

When regular CF EDBC is rerun for the same benefit month after a disaster supplement or EA allotment has been issued, remove the EDBC logic that results in a read only EDBC since the household received maximum allotment for the household.

### 2.3.2 Description of Changes

1. Update CalFresh EDBC rules to not make the EDBC read only with reason 'Received Disaster Supplement'

### 2.3.3 Programs Impacted

CalFresh

### 2.3.4 Performance Impacts

None

## 2.4 Update CalFresh EDBC determination Logic

### 2.4.1 Overview

Update CF EDBC logic to set indicator to identify if there was a household size change from the household that received a disaster supplements or emergency allotments. This indicator will be used by the Fiscal logic to determine the CalFresh allotments for households that received disaster supplements or emergency allotments for the same benefit month.

### 2.4.2 Description of Changes

1. Update CalFresh EDBC logic to set indicator if there is a change in household size from the time the household received disaster supplement or EA for the same benefit month EDBC is being run for.
2. Update the previous potential benefit calculation logic for CalFresh program to include issuances that are categorized as Emergency allotment or Supplemental Disaster Benefit.
3. Add the logic to calculate the new Augmentation field. This logic would only be called when there is **no change in the Household size.** This new field would be the sum of:
   a. Previous Potential Benefit for the benefit month (this includes EA or Disaster supplement Issuances in a month)
   b. Potential Benefit for the benefit month

**NOTE:**

1. No impacts/changes to existing functionality of CalSAWS system to create recovery account when a household becomes Ineligible.

| EA or Disaster Supplement | Household change | Changes to Rules |
|---|---|---|
| Yes | N | Include EA/DCF in Previous Potential, Show Augmentation calculation |
| Yes | Yes | Include EA/DCF in Previous Potential |

Please refer to the scenarios in Section 3 for few examples.

4. Add new column on the EDBC table to store the new augmentation line item value.
5. Update EDBC logic to store the augmentation line item value in the EDBC table when authorizing the EDBC
6. Update EDBC logic to retrieve the new augmentation value when retrieving EDBC information for CF EDBC.
7. ~~The following soft validation messages will be displayed to the user on the EDBC List page when the user is trying to 'Save and Continue' the accepted EDBC. These validations will not prevent the user from saving the EDBC.~~

   ~~Message:~~
   ~~The Household size changed after the household received the emergency allotment for the benefit month. Please review the~~

~~EDBC results and manually generate supplements/Overissuances as appropriate.~~

~~Condition:~~
~~When all the following conditions are met:~~

- ~~CalFresh program EDBC is being run~~
- ~~Household received emergency allotment for the benefit month.~~
- ~~The household size changed since the emergency allotment was issued.~~

~~NOTE: The validation will only be available to the user when saving the EDBC after accepting. The validation will not be available to supervisor if supervisor authorization is required.~~

### 2.4.3 Programs Impacted

CalFresh

### 2.4.4 Performance Impacts

None

## 2.5 Automated Action Detail

### 2.5.1 Overview

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

### 2.5.2 Automated Action Detail Mockup

## Automated Action Detail

Edit Close

**Action Information**

| | | |
|---|---|---|
| **Name:** CalFresh Program: HH Size Changed Since Emergency Allotment | **Type:** Create Task | **Status:** * Inactive |
| **Program(s):** CF | **Run Date:** Daily(Mon-Sat) | **Source:** Batch |

**Scenario:**
A change in household size has been identified through CalFresh EDBC since the household received emergency allotment.

**Task Information**

**Task Type:** *

| | |
|---|---|
| **Due Date:** Default Due Date | **Default Due Date:** * 7 days |
| **Initial Assignment:** Default Assignment | **Default Assignment:** Current Program Worker |

**Long Description:**
The Household size changed after the household received the emergency allotment for {Benefit Month} benefit month. Please review the CalFresh EDBC results for benefit month {Benefit Month} run on {Run Date} and generate supplements/overissuances as appropriate.

Edit Close

**Figure 2.5.2-1 – Automated Action Detail Page Mockup**

### 2.5.3 Description of Changes

Implement a CalFresh Program: HH Size Changed Since Emergency Allotment Automated Action as follows:

1. CalFresh Program: HH Size Changed Since Emergency Allotment Action Information
   i. Name: CalFresh Program: HH Size Changed Since Emergency Allotment
   ii. Type: Create Task
   iii. Status: Inactive
   iv. Program(s): CF
   v. Run Date: Daily(Mon-Sat)
   vi. Source: Batch
   vii. Scenario: A change in household size has been identified through CalFresh EDBC since the household received emergency allotment.

   b. Task Information

i. Task Type: BLANK
ii. Task Sub-Type: BLANK
iii. Due Date: Default Due Date
iv. Default Due Date: 7 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: The Household size changed after the household received the emergency allotment for {Benefit Month} benefit month. Please review the CalFresh EDBC results for benefit month {Benefit Month} run on {Run Date} and generate supplements/overissuances as appropriate.

### 2.5.4 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin

  Click on a hyperlink of the desired result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.

  The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

### 2.5.5 Security Updates

N/A.

### 2.5.6 Page Mapping

N/A

### 2.5.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

## 2.6 CalFresh Program: HH Size Changed Since Emergency Allotment Action Information Batch Process

### 2.6.1 Overview

This section describes recommendations for a new batch process that will invoke the "CalFresh Program: HH Size Changed Since Emergency Allotment Action Information" Automated Action.

### 2.6.2 Description of Change

Implement a new batch process to run daily and invoke the "CalFresh Program: HH Size Changed Since Emergency Allotment Action Information" Automated Action. This batch job will invoke the Automated Action when all the following conditions are met

a. There is a CalFresh Program EDBC
b. The Household previously received emergency allotment or disaster CalFresh supplement for the benefit month
c. The household size changed since the emergency allotment or disaster supplement was issued for that benefit month.
   Note: For EDBC with no Budgets (Manual EDBCs) HH size can be calculated by counting the total number of active members in the CF EDBC.

NOTE: The batch job will be invoked on the EDBCs that meet the above condition, run after the implementation of this SCR CA-220120.

### 2.6.3 Execution Frequency

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

### 2.6.4 Key Scheduling Dependencies

None

### 2.6.5 Counties Impacted

All CalSAWS Counties.

### 2.6.6 Category

Non-Core.

### 2.6.7 Data Volume/Performance

There are no expected data volume/performance concerns.

### 2.6.8 Failure Procedure/Operational Instructions

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

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | EDBC Allotment | Allotment section mockups detailing the different scenarios for allotment calculations | CA-220120 -Allotment Section Mockups.xlsx |

# 4 REQUIREMENTS

## 4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|---|---|---|
| 2.8.1.21 | The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes. | New eligibility logic for Disaster CalFresh program. |
| | | |

CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-226672: DDID 2222, 2284, 2169/2291, 2687, 2688, 2689, 2690, 2691, 2692, 2693, 2694, 2695, 2696, 2702

Administration Page for Contact Center

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
| | Prepared By | Kevin Hooke |
| | Reviewed By | |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 3/15/2021 | V0.1 | Draft | Kevin Hooke |
| 5/12/2022 | V2.0 | Content Revision 1:<br>- 2.13.2.4 Updated number of teams limit to 500 | Kevin Hooke |
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Table of Contents

# 1 OVERVIEW

This design document is for SCR CA-226672 and outlines the addition of a new page to the Contact Center Enhanced Contact Control Panel (ECCP) application (SCR CA-226844). This new page allows Contact Center administrators to configure Contact Center features for their County.

## 1.1 Current Design

This functionality does not currently exist - currently Administrators make support requests to the CalSAWS Contact Center Operations Team to make these changes on their behalf. The Operations Team makes these configuration changes by interacting with Amazon Web Services (AWS) Connect directly.

## 1.2 Requests

Develop a new Administration page that allows Contact Center administrators to configure the following features for their County:

- Emergency Open/Close
- Queue Hold Messages
- Courtesy Callback
- Scheduled Callback
- Queue Limits
- After Call Work
- Roll-on/off or Update Agent
- Emergency Message
- Informational Message
- Supervisor Email Notifications
- Create/Delete/Edit Team
- Quick Connects
- Display Hours of Operation

## 1.3 Overview of Recommendations

Add a new Administration page to the Enhanced CCP application to allow Contact Center Administrators to configure Contact Center features for their County.

1. Add a new Administration page to the Enhanced CCP application that allows configuration of the following.
   a) Emergency Open/Close
   b) Emergency Messages
   c) Queue Hold Messages
   d) Courtesy Callback

e) Scheduled Callback options
f) Queue Limits
g) After Call Work limits
h) Roll-on/Roll-off and update Agent details
i) Informational Messages
j) Supervisor Email Notifications
k) Create/delete Team(s)
l) Quick Connects
m) Display Hours of Operation

2. Integrate access to the Administration page with CalSAWS role-based security and Single Sign On (SSO). Access is restricted to only users who have the 'Contact Center Admin Page' role.
3. Implement a 'cool down' period that requires a 1minute delay between changes to the same configuration option.

### 1.4 Assumptions

1. All features on the Administration page are customizable by County. An Admin user with the required role to access the Admin Page can view and change the configuration options only for their County.
2. Access to the new Administration page will be via Single Sign On (SSO) using existing CalSAWS security functionality.
3. The following Administration page functions will be disabled for Regional Call Center only counties:
    a) Emergency Open/Close
    b) Emergency Messages
    c) Queue Hold Messages
    d) Courtesy Callback
    e) Scheduled Callback options
    f) Queue Limits
    g) Informational Messages
    h) Supervisor Email Notifications

# 2 RECOMMENDATIONS

This section outlines recommendations to add a new Administration page to the Enhanced CCP application.

## 2.1 Administration Page

### 2.1.1 Overview

Add a new Administration page to the Enhanced CCP application. This page allows the user to customize features of the Contact Center for their County.

### 2.1.2 Description of Changes

1. Add a new icon/menu item to the Enhanced CCP application, that when clicked, displays the new Administration page.
2. Add a new page to the new Enhanced CCP application that displays available configuration options as a navigation menu.
3. Clicking on items in this menu displays a panel with the configurable options for that selected item. Each of these options is described in the below sections.

#### 2.1.2.1 Administration page Mockup

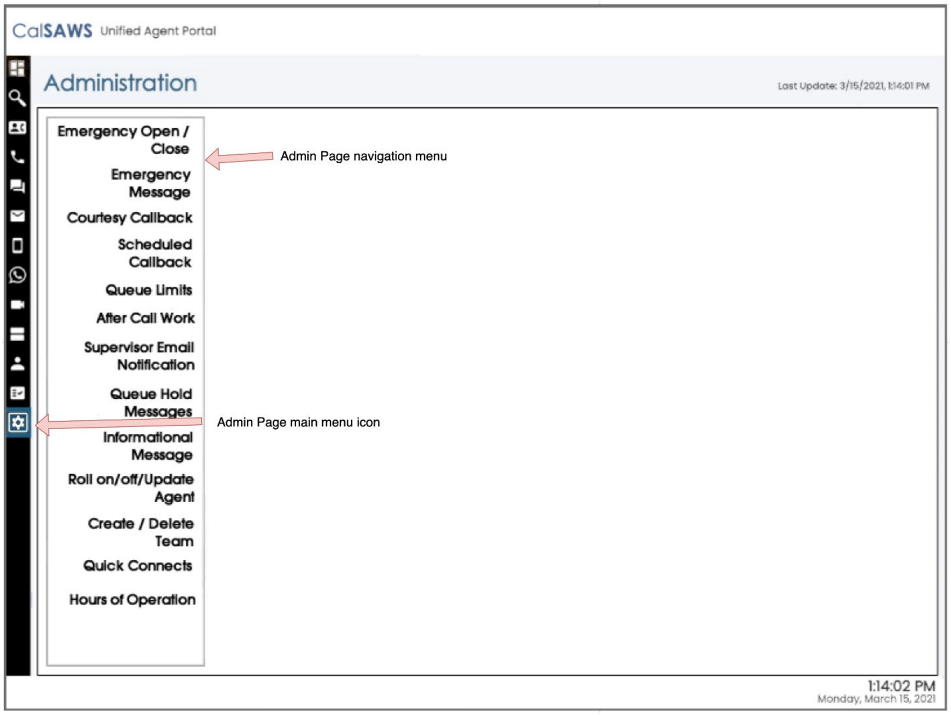



*Figure 1 Administration page menu options*

#### 2.1.2.2 Administration Page Security

The Administration page is a new page added to the Enhanced CCP application. Access to the Enhanced CCP is controlled using the CalSAWS Identify Provider.

Create a new CalSAWS role 'Contact Center Admin Page' in the CalSAWS system.

Access to the Administration page is restricted to CalSAWS users who have this new CalSAWS role assigned for their County.

There is only one level of security for the Administration page:

- If a user has the 'Contact Center Admin Page' role they are able to access the Administration page. A user that has access to the Administration page is allowed to perform all Admin actions on the page.

- If a user does not have the ‘Contact Center Admin Page’ role the menu icon for the Administration page does not display and the user is unable to access the page.

##### 2.1.2.3 Administration Page API Security

User actions on the Administration page result in API (Application Programming Interface) calls to background services within the Contact Center AWS account. These services are accessed using API Gateway. Access to these calls is protected by confirming that the user of the Administration page:

a) Is currently authenticated with their CalSAWS credentials
b) Is assigned the ‘Contact Center Administration page’ role

##### 2.1.2.4 Administration page Security – access without role

If a user does not have the required ‘Contact Center Administration page’ role, the Administration page icon is not displayed in the navigation menu.

#### 2.1.3 Assumptions

1. User must be a CalSAWS user and must be signed on via the CalSAWS Identity Provider (Single Sign-on) to access the Enhanced CCP.
2. The user must have the ‘Contact Center Admin Page’ role to access the Administration page.

### 2.2 Administration Page Configuration Change ‘Cool-down’

#### 2.2.1 Overview

When the user changes any of the configurable options from the Administration page, there is a 1 minute ‘cool-down’ period before they can make an additional change. This is to prevent the user from making changes within a short period of time.

#### 2.2.2 Description of Changes

If the user attempts to change a configurable option less than 1 minute since the last change, a dialog is displayed, as shown in the following dialog mockup section (see section 2.2.3 figure 3).

The user is prevented from making the attempted change until 1 minute has elapsed since the last successful change.

### 2.2.3 Configuration Change ('Cool-down') Dialog Mockup

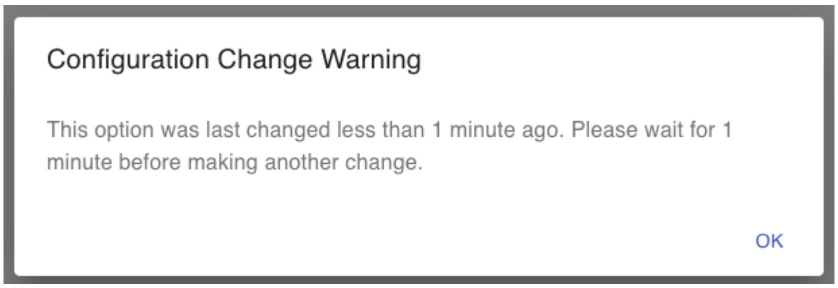



*Figure 2 Configuration Change Warning Page Mockup*

## 2.3 Emergency Open/Close

### 2.3.1 Overview

The Emergency Open/Close feature allows a user of the Administration page to temporarily close the Contact Center for their County in case of an emergency. While closed, all incoming calls to the Contact Center will play the currently selected Emergency Message to the caller (see section 2.9).

The Emergency Message only plays while the Contact Center is closed using this Emergency Open/Close feature. When the Contact Center is re-opened, the automatic message playback will discontinue.

The Emergency Open/Close does not change which Emergency Message is currently selected. The selected Emergency Message can only be changed by an Admin user (using the Emergency Message feature described in section 2.9.

### 2.3.2 Description of Changes

#### 2.3.2.1 Emergency Open/Close page mockup: Contact Center is open

This page displays when the Contact Center for the user's County is currently open and they click the 'Emergency Open/Close' menu option.

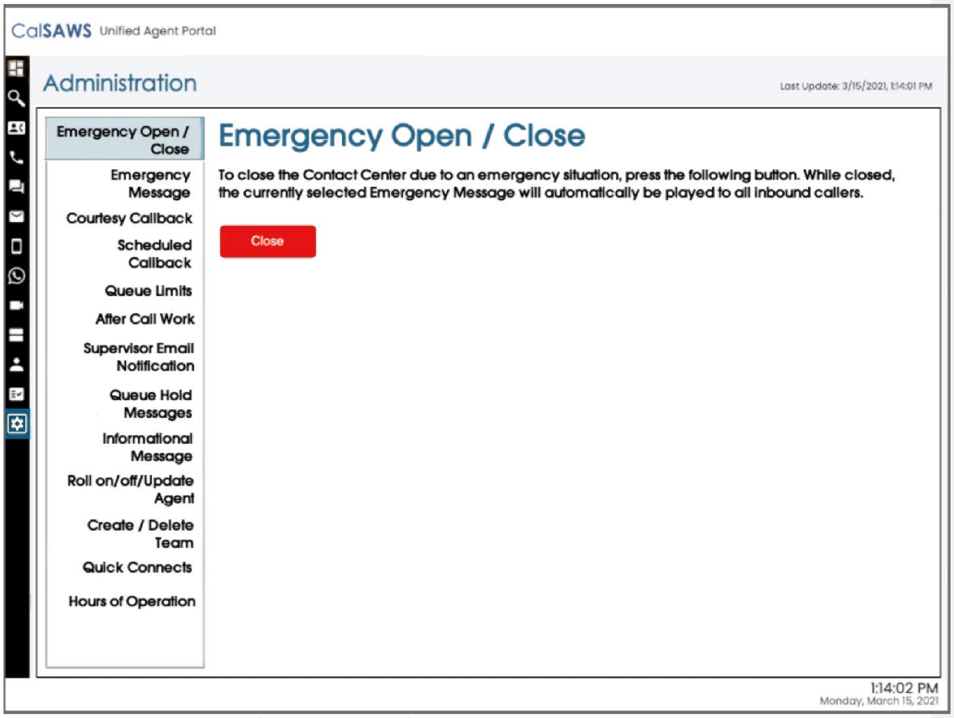



*Figure 3 Emergency Closure - Perform Closure Option*

#### 2.3.2.2 Emergency Open/Close page mockup: Contact Center is closed

This page displays when the Contact Center for the user's County is currently closed and they click the 'Emergency Open/Close' menu option.

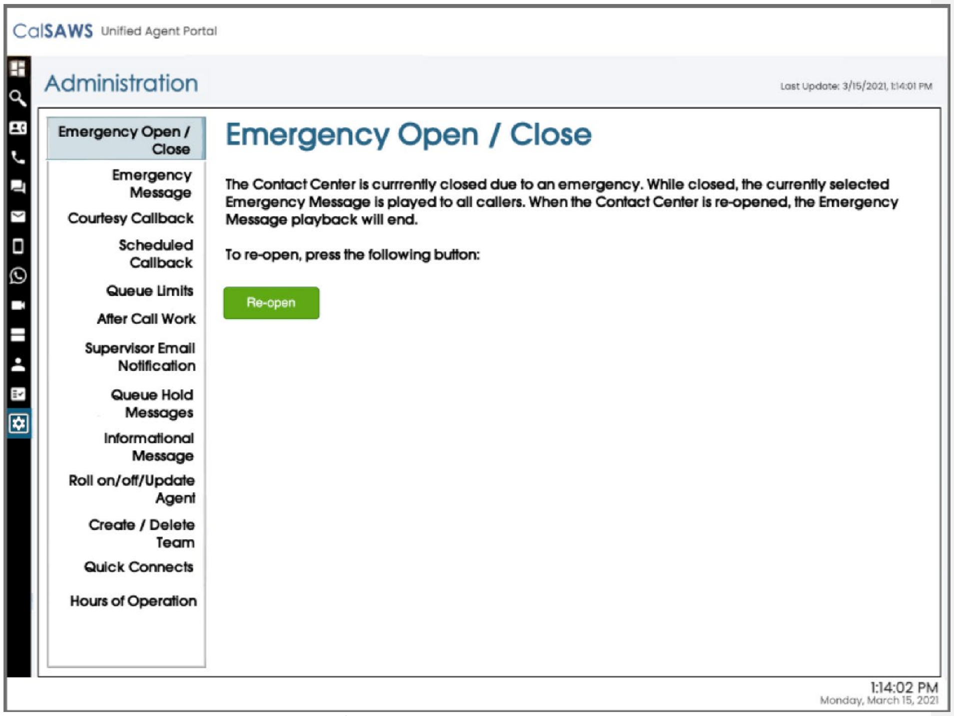



*Figure 4 Emergency Closure - Re-open Option*

#### 2.3.2.3 Emergency Open/Close – Contact Center closed warning mockup

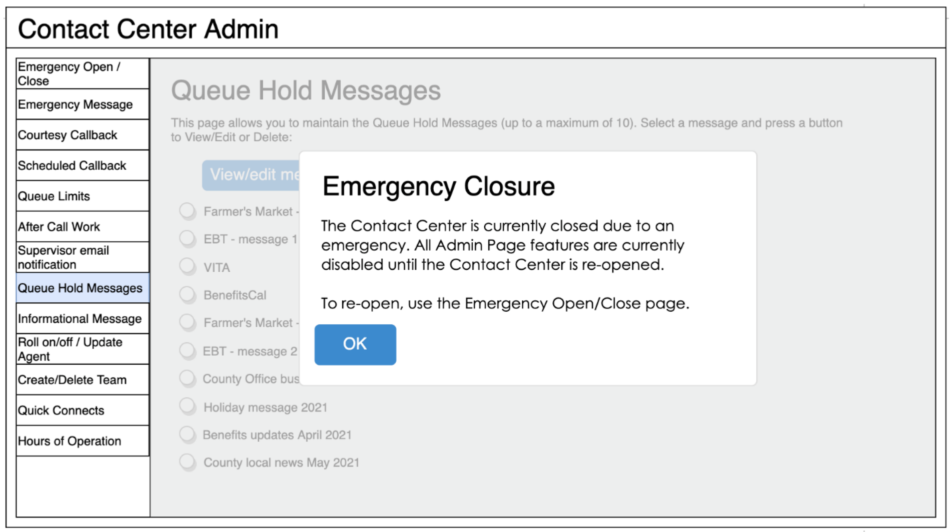



*Figure 5 Emergency Closure warning dialog*

#### 2.3.2.4 Emergency Open/Close – Contact Center closed warning

If the Contact Center is currently closed due to an emergency and the user clicks on any of the Administration page menu items other than 'Emergency Open/Close', a dialog in Figure 6 is shown to the user. The dialog shows the following message:

*"The Contact Center is currently closed due to an emergency. All Administration page features are currently disabled until the Contact Center is re-opened. To re-open, use the Emergency Open/Close page".*

If the user presses the "OK" button, the dialog is closed. Features on the current page are available in read-only mode. Any features that perform a create, edit or delete action are disabled until the Contact Center is re-opened.

#### 2.3.2.5 Emergency Open/Close – Contact Center is 'open'

This flow describes the Emergency Open/Close page if the Contact Center is currently in the 'open' state:

1. User selects 'Emergency Open/Close' option from the Administration page

2. System checks the date/time of last Emergency Open/Close. If last change was less than 1 minute ago, then continue, otherwise the "cool-down" dialog is displayed as described in Section 2.2.
3. If last change was more than 1 minute ago, user is prompted with a confirmation message to continue:

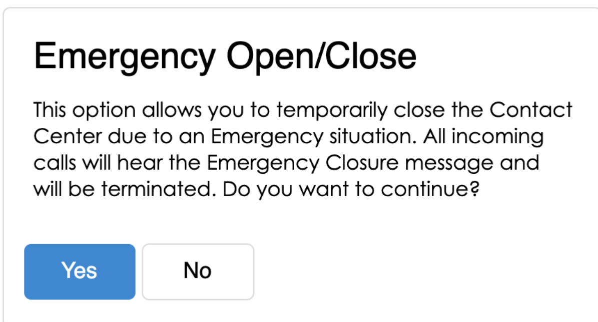



*Figure 6 Emergency Closure Confirmation dialog*

4. If user selects "No", the user is returned to the Administration page menu and no further action is taken.
5. If the user selects "Yes", the steps in the following section "Perform Emergency Open/Close Procedure" are executed.

#### 2.3.2.6 Emergency Open/Close – Contact Center is 'closed'

This describes the Emergency Open/Close page, if the Contact Center is currently in a 'closed' state:

1. User selects 'Emergency Open/Close option from Administration page
2. Administration page displays Emergency Open/Close re-open dialog:

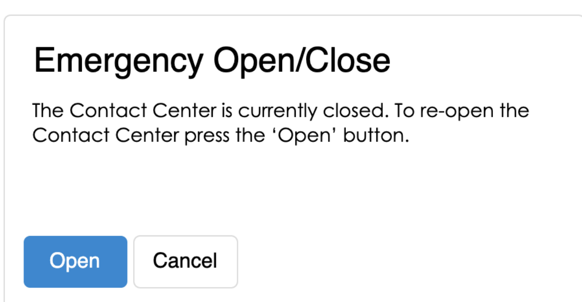



*Figure 7 Emergency Open/Close - Re-open dialog*

3. The ‘Open’ button is displayed on the page.
4. If the user presses “Cancel”, no action is taken.
5. If the user presses “Open”, the steps in the following section “Perform Emergency Open / Close – Re-open” are executed.

#### 2.3.2.7 Perform Emergency Open/Close - Re-Open via Phone

Update the existing Remote Admin by phone support to allow an authenticated user to perform the Emergency Open and Close process via phone.

This feature complements the performing of the Emergency Open and Close via the Administration page.

- If the closure is performed via the Administration page, the Contact Center can be re-opened using the Administration page or remotely by phone.
- If the closure is performed remotely by phone, the Contact Center can be re-opened remotely by phone or the Administration page.

#### 2.3.2.8 Perform Emergency Open/Close Procedure

When a user selects the ‘Emergency Open/Close option, the system performs the following steps:

1. Calls that are currently in progress with an Agent or are in a queue, continue until they are handled and/or completed.
2. Scheduled Callbacks during the period, when the Emergency Closure is in place will continue, but the callback message will play the Emergency Message and ask the customer to callback at another time.
3. Contact Center Emergency Open/Close status is updated to ‘closed’.
4. The Call Flow for incoming calls checks the Emergency Closure status. If the current status is ‘closed’, the Emergency Message is played to the caller and the call is ended.

#### 2.3.2.9 Perform Re-Open Procedure

1. When a user selects the ‘Re-open’ option, the system performs the following steps: Contact Center Emergency Open / Close status is updated to ‘open’ to indicate Contact Center is now open.
2. The Call Flow for incoming calls checks the Emergency Open/Close status. If the current status is ‘open’, the call flow will continue as normal.

### 2.3.3 Assumptions

1. All Administration page options will be disabled when Contact Center is closed under an Emergency Closure, apart from the Emergency Closure page and the button to re-open the Contact Center.
2. There is no additional reporting or monitoring to show caller activity during the Emergency Closure (e.g. incoming calls missed while the Contact Center is closed). This information can be retrieved if needed using reports in eGain.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

## 2.4 Queue Hold Messages

### 2.4.1 Overview

The Queue Hold Messages feature on the Administration page allows the Admin user to add, edit and delete up to 10 custom Queue Hold messages for their County. The content of the message is text, which is used to produce a voice message using text to voice.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

These messages are played while a caller is on hold and can be used to remind or inform the caller of upcoming events or other information relevant to the County.

Once a new message is added or an existing message is changed, it is available for playback during the next call waiting in a queue, there is no delay before it can be used.

### 2.4.2 Description of Changes

#### 2.4.2.1 Queue Hold Messages: No messages defined page mockup

When a user clicks the 'Queue Hold Messages' menu item, if there are no Queue Hold Messages defined, the following page is displayed:

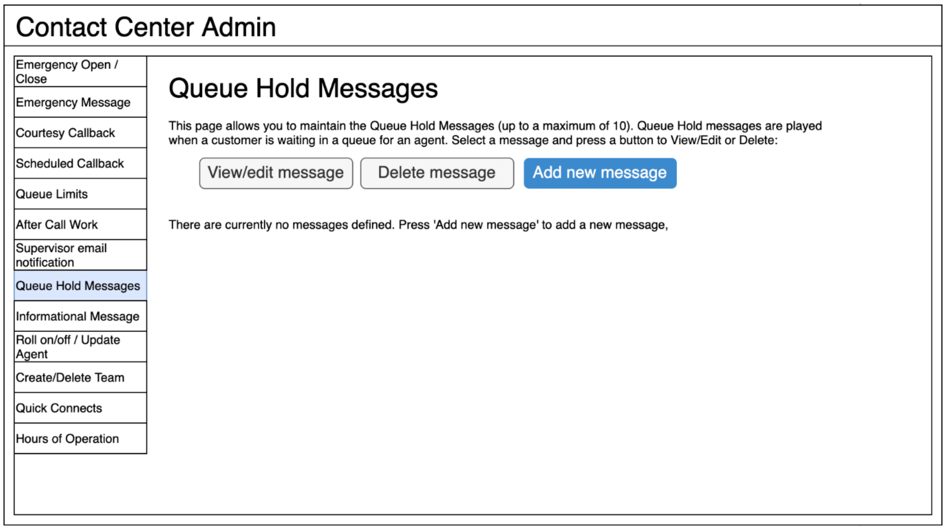



*Figure 8 Queue Hold Messages - no messages defined*

#### 2.4.2.2 No messages defined

When there are no Queue Hold messages defined, the only enabled option is 'Add new message'.

1. If the user presses 'Add new message', the 'Add new message' dialog appears (see section 2.4.2.4 for mockup)

#### 2.4.2.3 Queue Hold Messages: Messages defined page mockup

When a user clicks the 'Queue Hold Messages' menu item and there are Queue Hold Messages defined, the following page is displayed:

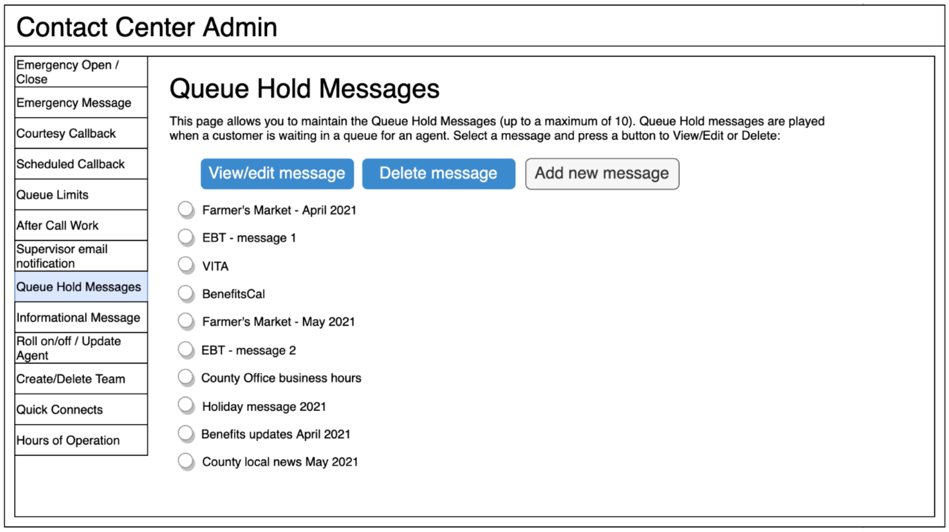



*Figure 9 Queue Hold Messages - message display*

#### 2.4.2.4 Queue Hold Messages: Add new message page mockup

If the user presses the 'Add new message' button, the following dialog is displayed:

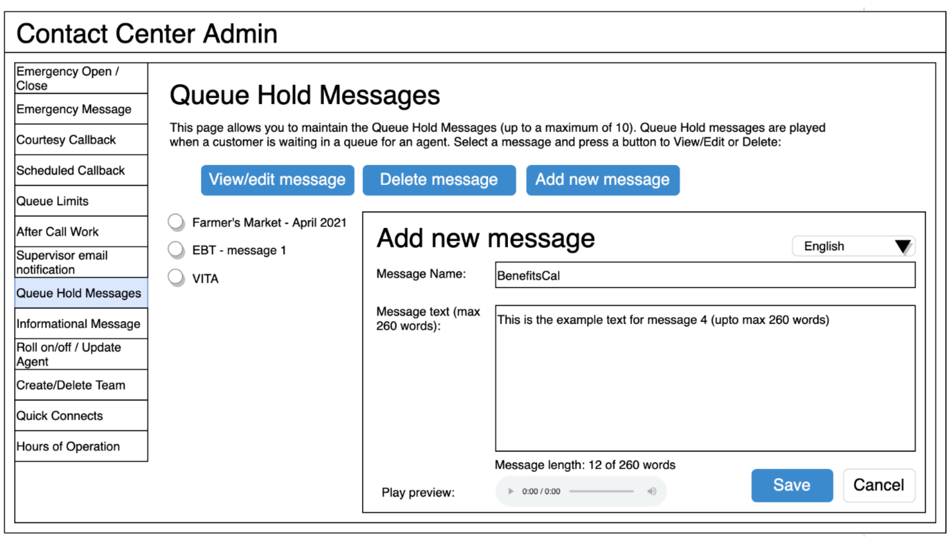



*Figure 10 Queue Hold Messages - Add New Message dialog*

#### 2.4.2.5 Queue Hold Messages: Language selection dropdown

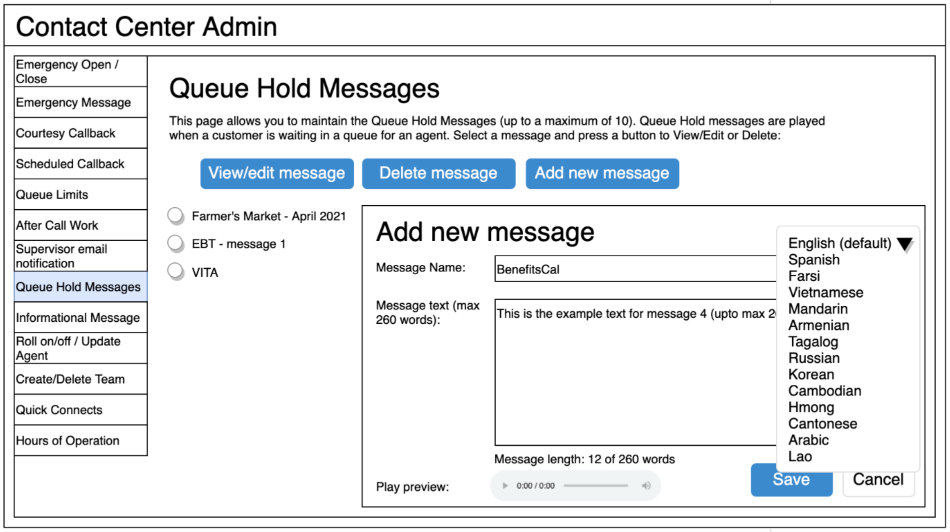



*Figure 11 Queue Hold Messages - Language selection dropdown*

#### 2.4.2.6 Add new message

1. The 'Add new message' button is only displayed if there are less than 10 defined messages. If the maximum of 10 messages is already defined, the 'Add new message' button is disabled.
2. If the user presses the 'Add new message' button, the 'Add new message' dialog is displayed.
3. User enters a unique message name, up to 60 alphanumeric characters.
4. User enters text for the message, up to a maximum of 260 words. The dialog displays a count of the currently entered number of words that updates as the user types, e.g., "12 of 260 words". The entry field does not accept any additional text entry beyond 260 words.
5. The English version of the message is required.
6. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog

h. Russian
i. Korean
j. Cambodian
k. Hmong
l. Cantonese
m. Arabic
n. Lao

7. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
8. If the user presses the 'Save' button, the message is saved, and the page is updated to show the new message in the list.
9. If the user presses 'Cancel' the dialog is closed and no action is taken.

#### 2.4.2.7 Queue Hold Messages: View/Edit message page mockup

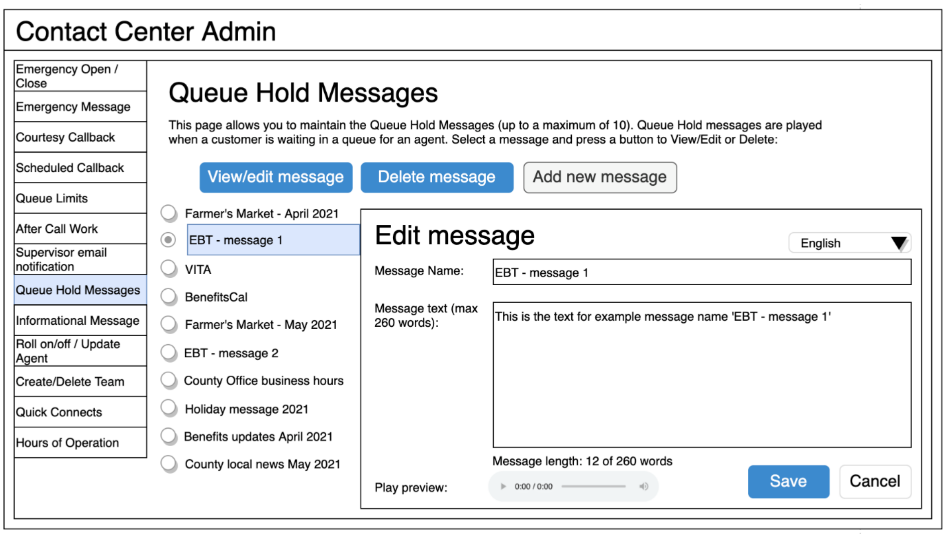



*Figure 12 Queue Hold Messages - Edit Message dialog*

#### 2.4.2.8 View/Edit message

1. User selects a message by pressing the radio button beside a message. Only one message can be selected.
2. User presses the 'View/Edit message' button, and the 'Edit message' panel is displayed with the 'Message Name' and the 'Message Text' fields populated with the current text of the selected message.

3. User updates the ‘Message Name’ and/or the ‘Message Text’ fields.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog
    h. Russian
    i. Korean
    j. Cambodian
    k. Hmong
    l. Cantonese
    m. Arabic
    n. Lao
6. If the user presses the ‘Save button’ the changes are saved and the dialog closes.
7. If the user presses the ‘Cancel’ button, no changes are made and the dialog closes.

#### 2.4.2.9 Queue Hold Messages: Delete Message page mockup

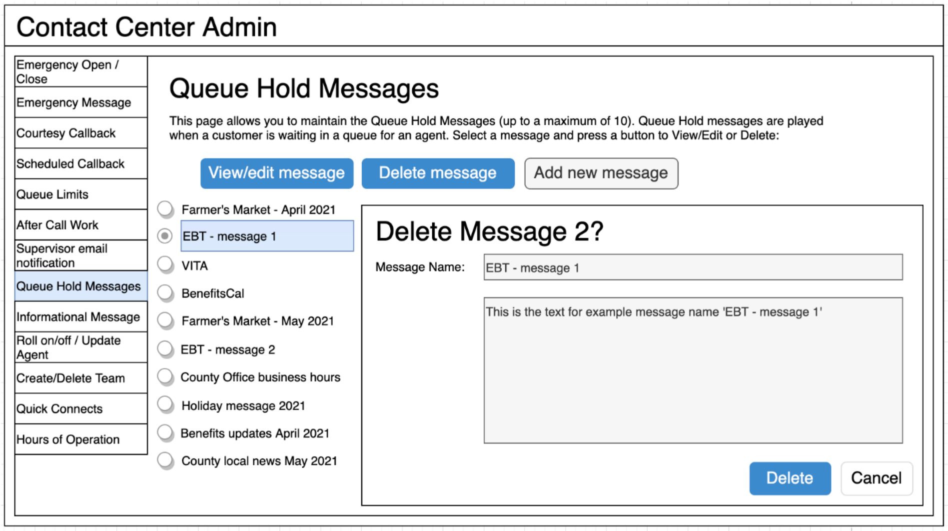



*Figure 13 Queue Hold Messages - Delete Message dialog*

#### 2.4.2.10 Delete message

1. To delete a message, the user selects the message to delete by pressing the radio button beside the message and presses the 'Delete Message' button.
8. The 'Message Name' and/or the 'Message Text' fields are displayed as read-only fields, and 'Delete' and 'Cancel' buttons are displayed.
2. If the user presses the 'Delete' button, the message is deleted. The dialog is closed. The list of messages is updated to display the remaining messages.
3. If the user presses the 'Cancel' button, the dialog is closed, and no action is taken.

### 2.4.3 Assumptions

1. Deleting a message is a permanent deletion and deleted messages are not recoverable. The user can add back a message manually as a new message if it is deleted in error or is needed again.
2. This functionality will be disabled for Regional Call Center (RCC) only Counties.

### 2.5 Courtesy Callback

#### 2.5.1 Overview

The Courtesy Callback configuration page allows the Admin user to turn this feature on or off for their County using the Administration page.

When enabled, the Admin user can configure:

- Number of minutes before the callback option is provided to the caller.
- Start and end time range for each day of the week during which the Courtesy Callback feature is enabled.

If Courtesy Callback is not offered for a specific day, the Start time and End time values are left blank.

#### 2.5.2 Description of Changes

##### 2.5.2.1 Courtesy Callback Disabled Page mockup

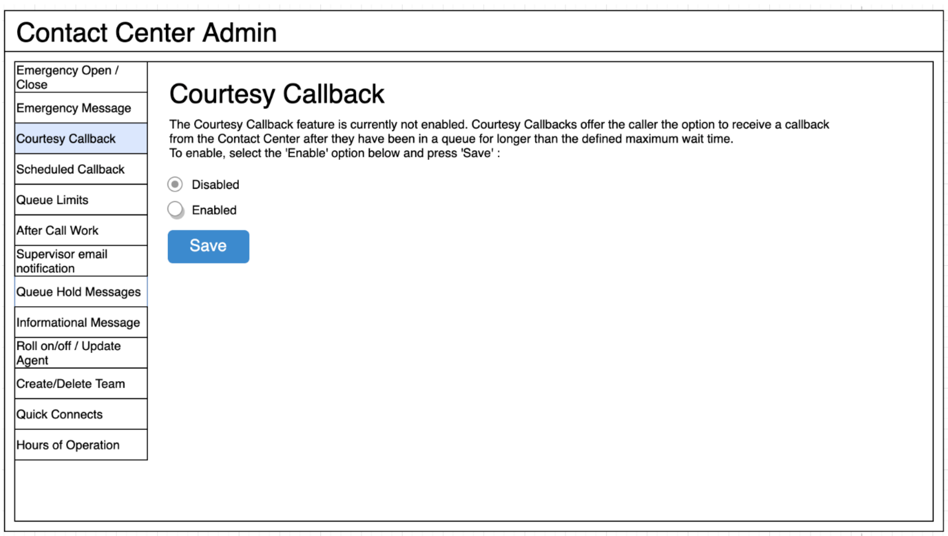



*Figure 14 Courtesy Callback feature currently disabled*

#### 2.5.2.2 Courtesy Callback Disabled

If the Courtesy Callback feature is currently disabled, the only option available is to Enable the feature.

1. User clicks the 'Enabled' radio button. The Cancel button is additionally displayed.
2. If the user presses Save, the Courtesy Callback feature is enabled, and the page is updated to show the Configuration options described in the next section.
3. If the user presses the Cancel button, the change is not saved and the Courtesy Callback feature remains disabled.

#### 2.5.2.3 Courtesy Callback Enabled: Page mockups

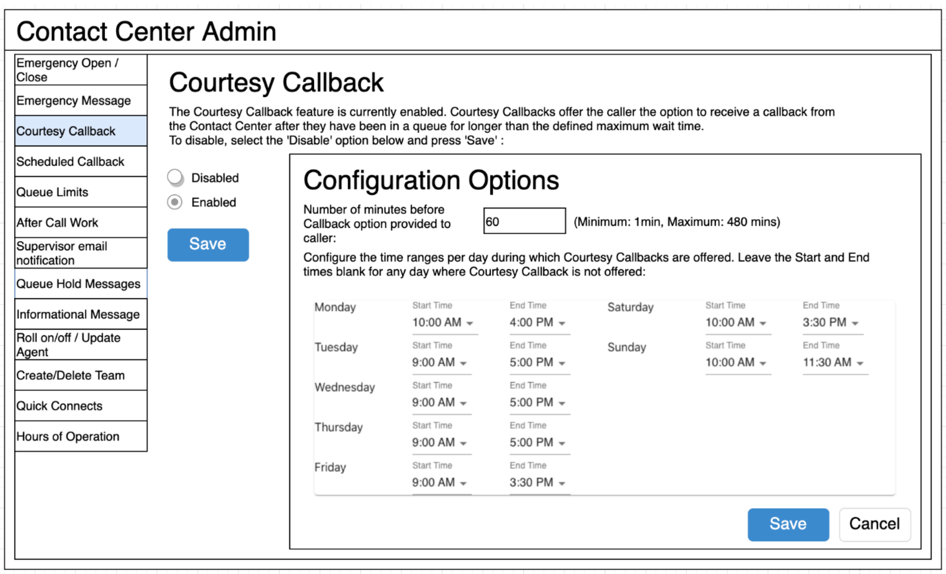



*Figure 15 Courtesy Callback Enabled Page Mockup*

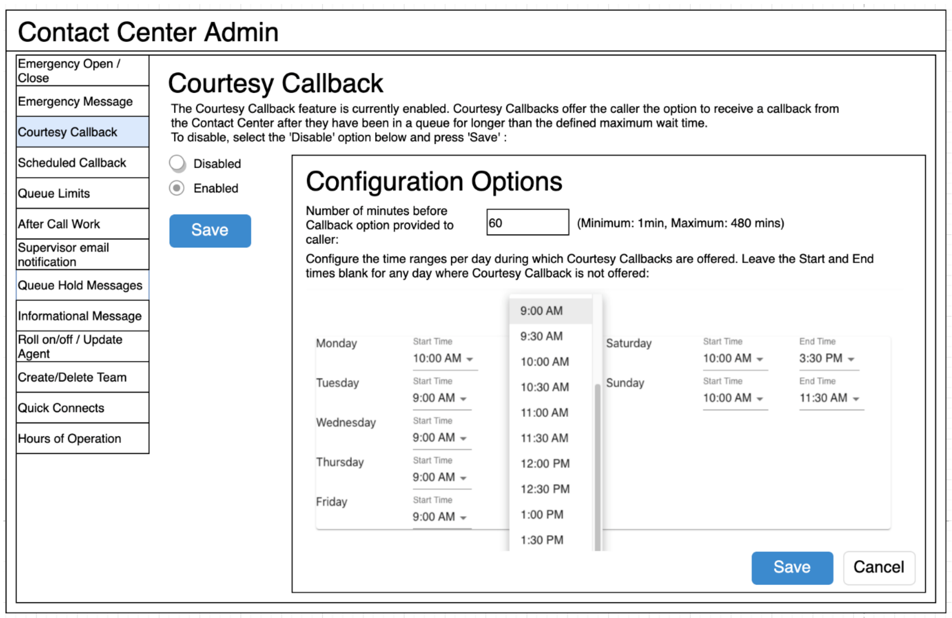



*Figure 16 Courtesy Callback Enabled Page Mockup showing time selection dropdown*

#### 2.5.2.4 Courtesy Callback Enabled

If the Courtesy Callback feature is enabled, the Configuration Options dialog for this feature is also displayed. When the feature is disabled, this dialog is not displayed.

1. If the Courtesy Callback feature was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User enters a positive integer value for number of minutes before a callback is offered to the caller. The minimum value is 1 minute, and the maximum valid value is 480 minutes (8 hours).
3. If the user attempts to enter a value less than the minimum value or greater than the maximum value, the following error message is displayed beside the entry field:

   "Enter a numeric value between 1 and 480 minutes."

4. The user selects a Start Time and End time for each day of the week to define the time ranges where Courtesy Callbacks are available. The values are selected from a dropdown list (see Figure 15) showing times in 30-minute increments (for example, 9:00 AM, 9:30 AM, 10:00 AM).
5. The selected Start Time must be before the End Time, otherwise a validation error message is displayed beside the field in error:

   *"The selected Start Time must be before the End Time."*

6. The End Time must be at least 30 minutes after the Start Time, and the End Time must not be the same as the Start Time, otherwise the following error message is display beside the field in error:

   *"The End Time must not be the same as the Start Time and must be at least 30 minutes after the Start Time."*

7. Only Start Time and End Time options that are within the defined open hours for the County are displayed. Times outside of the open hours are not displayed as valid options to the user.
8. If Courtesy Callbacks are not required for a specific day, the user can leave the Start Time and End Time blank for that day.
9. If Courtesy Callbacks are enabled, at least one day must have a valid Start time and End time configured.
10. If the user presses 'Cancel', any values entered or changed are discarded and no changes are saved. The Configuration Options dialog will revert to show the currently configured values.

### 2.5.3 Assumptions

1. The Courtesy Callback Start and End times must be within the same business day. For example:
   a. Start time of 9 AM and End time of 5 PM is valid
   b. Start time of 4 PM and End Time if 10 AM is not valid
2. The Start Time and End Time are configurable for each day of the week. If a day is not applicable for that County (e.g. Saturday or Sunday), the Start Time and End Time can be left blank.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

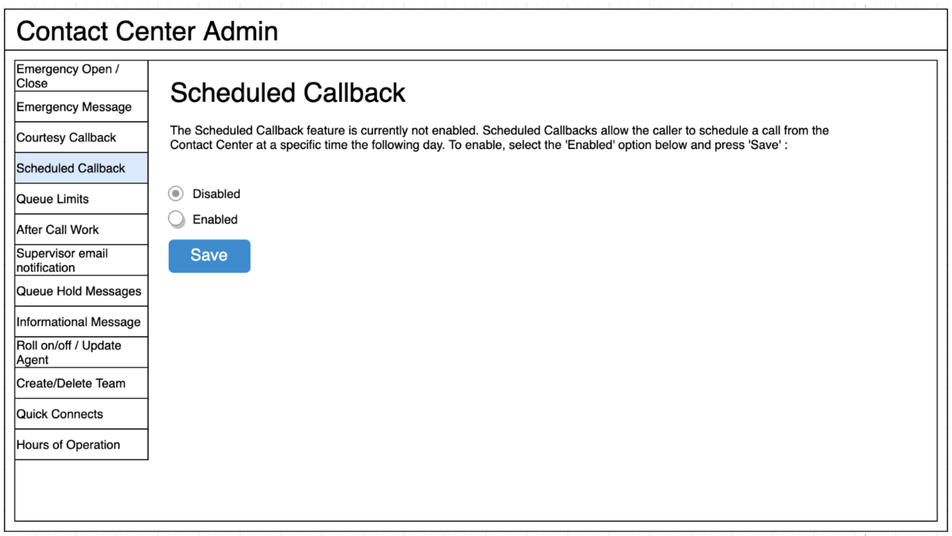
## 2.6 Scheduled Callback

### 2.6.1 Overview

The Scheduled Callback feature is enabled or disabled using the Administration page. When enabled, the Admin user can specify how many scheduled callbacks are allowed per each available timeslot. The Scheduled Callback functionality will be implemented with SCR CA-229573

### 2.6.2 Description of Changes

#### 2.6.2.1 Scheduled Callback – feature disabled page mockup




#### 2.6.2.2 Scheduled Callback – feature disabled

1. To enable the Scheduled Callback feature, user selects the ‘Enabled’ option and presses ‘Save’.
2. The Scheduled Callback feature is enabled. The page is updated to show the Configuration Options dialog showing in the following page mockup.

#### 2.6.2.3 Scheduled Callback – feature enabled page mockup

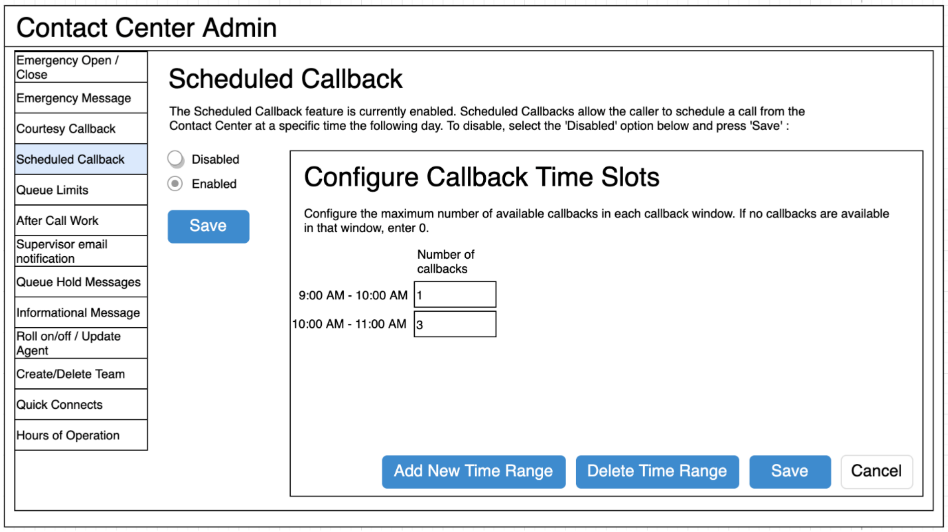



*Figure 17 Scheduled Callback - feature enabled, 2 example slots defined*

#### 2.6.2.4 Scheduled Callback – feature enabled

1. If the Scheduled Callback feature is enabled, the 'Configure Callback Time Slots' dialog is displayed, showing the currently configured maximum number of callbacks per time slot.
2. If the Scheduled Callback configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
3. User enters or changes the maximum number of callbacks available per defined timeslot.
4. If 0 is entered for a given timeslot, scheduled callbacks will not be offered to callers for that timeslot.
5. The maximum number of scheduled callbacks per 1 hour time slot is 3. Valid values are 0, 1, 2 and 3.
6. If the user presses 'Save' the system validates the entered values, and if there are no validation errors the values are saved.
7. If any field has an invalid value, it is highlighted in red and an error message is displayed: "One or more timeslots have an invalid value. Please correct the errors and press Save".

8. If the user presses 'Cancel' any changes are discarded and no actions are performed. The displayed callbacks per timeslot revert to the currently configured values.

#### 2.6.2.5 Scheduled Callback – Add new time slot page mockup

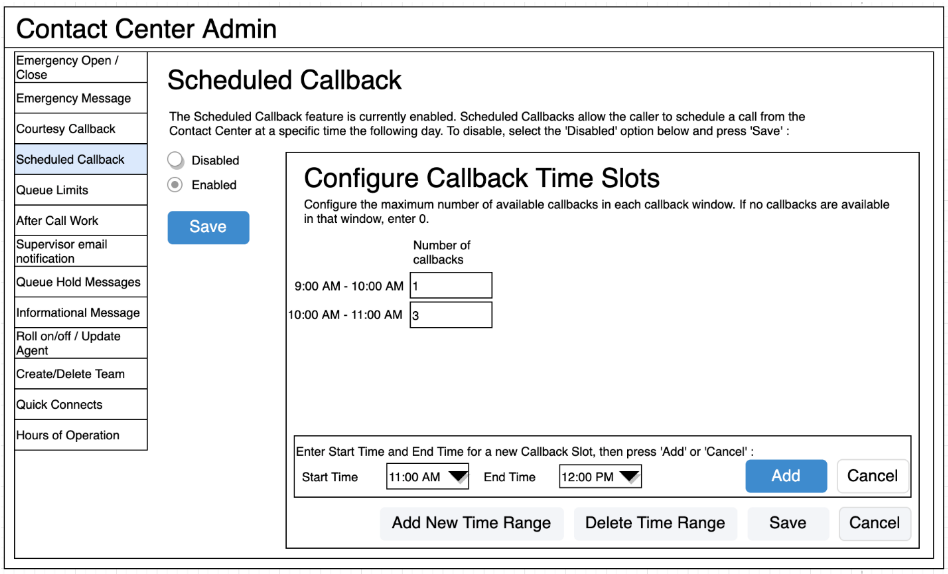



*Figure 18 Scheduled Callback - Add new time slot (11:00 AM to 12:00 PM)*

#### 2.6.2.6 Scheduled Callback – New time slot added page mockup

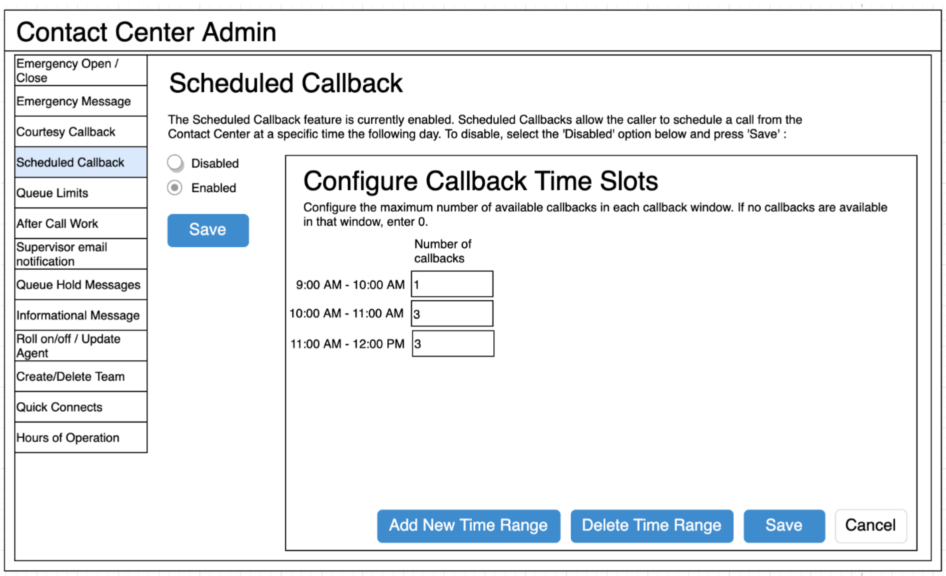



*Figure 19 Scheduled Callback - new time slot added (11:00 AM to 12:00 PM))*

#### 2.6.2.7 Scheduled Callback – Add new time slot

Figure 18 shows a page mockup with 2 time slots configured (9 AM – 10 AM, and 10 AM to 11 AM), before a new time slot is added.

Figure 19 shows a page mockup after a new time slot added, 11 AM to 12 PM.

1. If the user presses the 'Add new Callback Time Range' button, the dialog to add a new time slot is displayed (as shown in Figure 17).
2. The user selects a Start Time and End Time for the new time slot using the dropdowns. The dropdown lists display available start time and end times at 30-minute increments in 12 hour format (for example, 9:00 AM, 9:30 AM, 10:00 AM, 10:30 AM)
3. If the user presses the 'Add' button, the application validates that:
    a. the Start Time is on or after the County office opening time,
    b. the End Time is before the close of business time for this County,
    c. the new time slot Start Time and End Time does not overlap with any existing time range. For example, if 9:00 AM to 10:00 AM and 10:00 AM to 11:00 AM time slots already exist and the user attempts to add a new 9:30 AM to 10:30 AM time slot, the following error message is displayed:

*"The start time and end time (9:30 AM to 10:30 AM) overlaps with existing time slots. Update the start and end times to remove the overlap or press 'Cancel'"*

4. If the new time slot is valid, it is created in the system. The dialog closes, and the displayed list of time slots is updated to show the newly added time slot.
5. If the user presses 'Cancel', the dialog is closed, and no changes are saved.

#### 2.6.2.8 Scheduled Callback – Adding new time slot before existing slots - page mockup

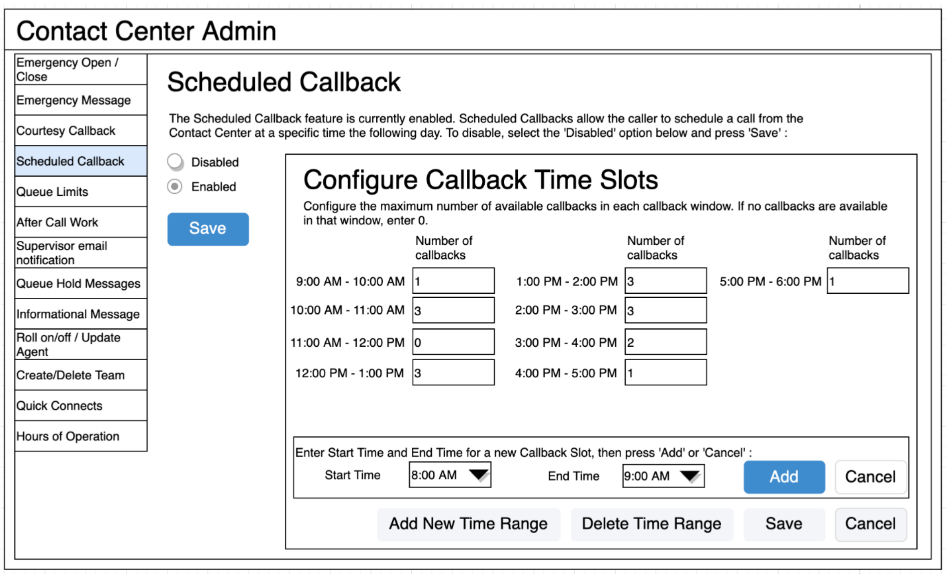



*Figure 20 Scheduled Callback - before adding new slot (8:00 AM to 9:00 AM) before existing slots*

#### 2.6.2.9 Scheduled Callback – Adding new time slot before existing slots -

1. User presses the 'Add New Callback Time Range' button and selects a start and end time before the existing timeslots, for example, 8:00 AM to 9:00 AM.
2. If user presses 'Save', the new time slot is added.

3. The displayed timeslots are rearranged to appear in ascending time order. In the above example, the new 8:00 AM to 9:00 AM time slot is displayed first, and the existing time slots are updated on the page to display following the new time slot.

#### 2.6.2.10 Scheduled Callback – New time slot added before existing slots - page mockup

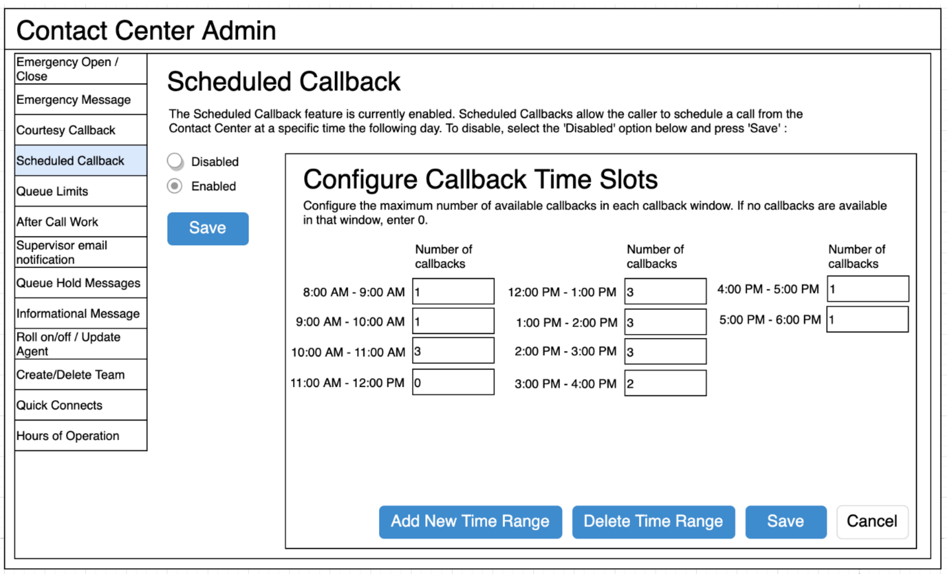



*Figure 21 Scheduled Callback - new slot (8:00 AM to 9:00 AM) added before existing slots*

#### 2.6.2.11 Scheduled Callback – New time slot added before existing slots

1. Figure 21 shows a new time slot added, 8:00 AM to 9:00 AM, before the existing time slots.
2. The existing time slots are updated to display in ascending time order following the newly added time slot.

#### 2.6.2.12 Scheduled Callback – Delete time slot - page mockup

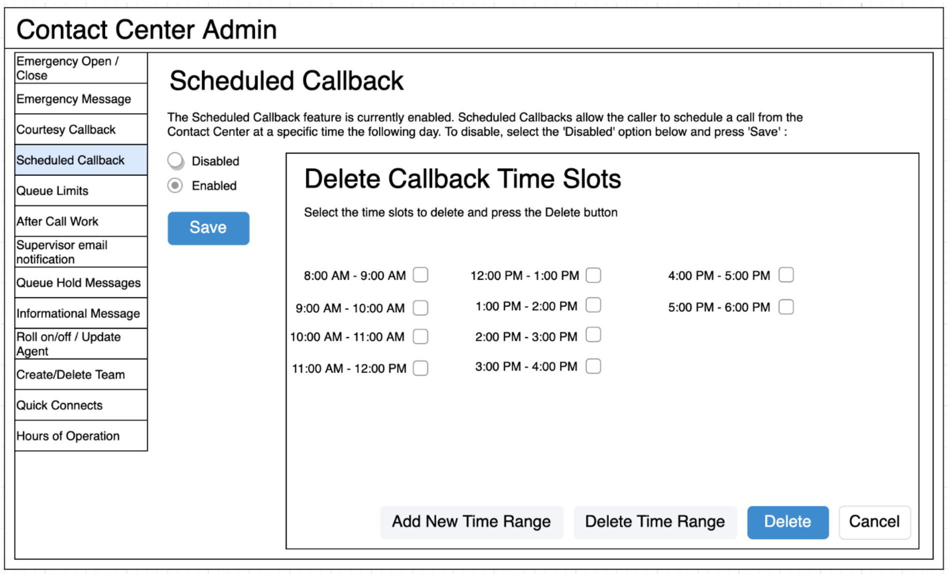



*Figure 22 Scheduled Callback - delete callback time slots*

#### 2.6.2.13 Scheduled Callback – Delete time slot

1. If the user presses the 'Delete Time Range' button, the 'Delete Callback Time Slots' dialog is displayed (see Figure 21).
2. Checkboxes are displayed beside the configured time slots. (in place of the text entry fields).
3. If the user presses 'Cancel' no changes are made and the configured time slots are displayed.
4. The page flow for selecting time slots is described in the following section.

#### 2.6.2.14 Scheduled Callback – Delete time slot, slots selected - page mockup

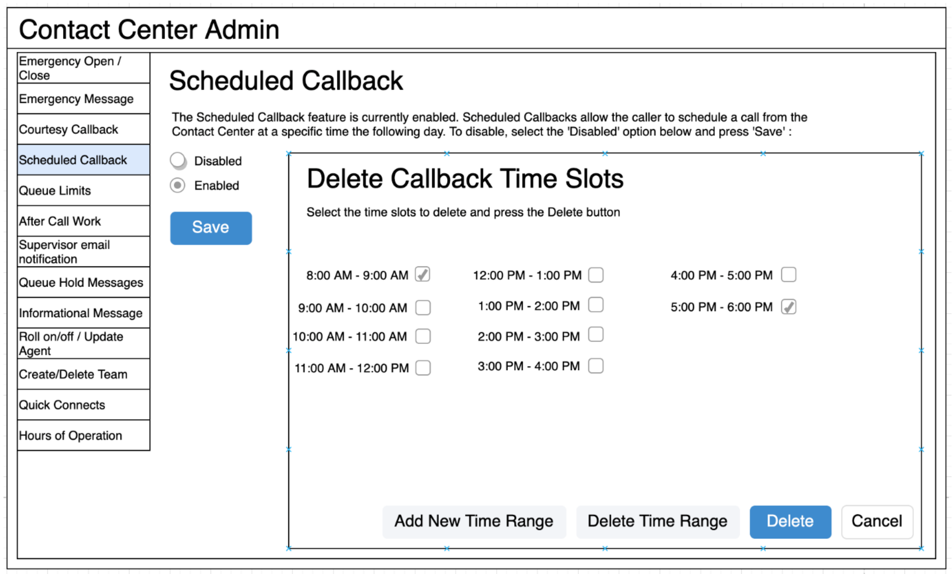



*Figure 23 Scheduled Callback - delete time slots, slots selected*

#### 2.6.2.15 Scheduled Callback – Delete time slot, slots selected

1. The user clicks the checkboxes to select the time range(s) to delete.
2. One or more time range(s) can be selected.
3. In Figure 23, the 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM time slots are selected.
4. If the user presses 'Cancel', no changes are saved, and the currently configured time slots are re-displayed.
5. If the user presses 'Delete', a confirmation dialog is displayed, as shown in the following section.

#### 2.6.2.16 Scheduled Callback – Delete time slot – delete confirmation page mockup

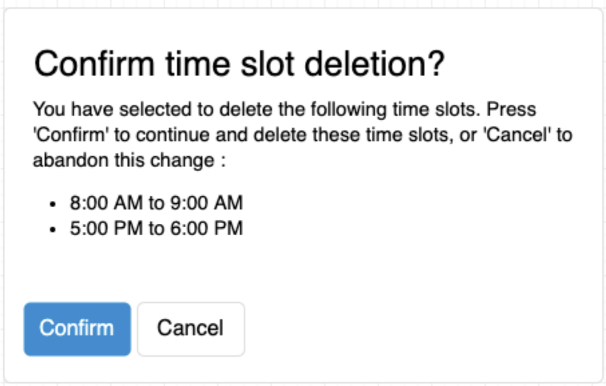



*Figure 24 Scheduled Callback - Confirm time slot deletion*

#### 2.6.2.17 Scheduled Callback – Delete time slot – delete confirmation

1. If the user has selected time ranges to be deleted and presses the 'Delete' button, the confirmation dialog in Figure 24 is displayed.
2. The dialog lists the selected time ranges (for example, 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM).
3. If the user presses the 'Cancel' button, no changes are made, and the user is returned to the 'Delete Callback Time Slots page'.
4. If the user presses 'Confirm' the selected Callback Time Slots are deleted from the system. The user is returned to the 'Configure Callback Time Slots' page, and the page is updated to display the changes (see the following section).
5. Deletion of configured time slots is permanent. If the same time slots are required again at some point in the future, they need to be manually added (following page flow steps in section 2.6.2.7).

#### 2.6.2.18 Scheduled Callback – After time slots deleted – page mockup

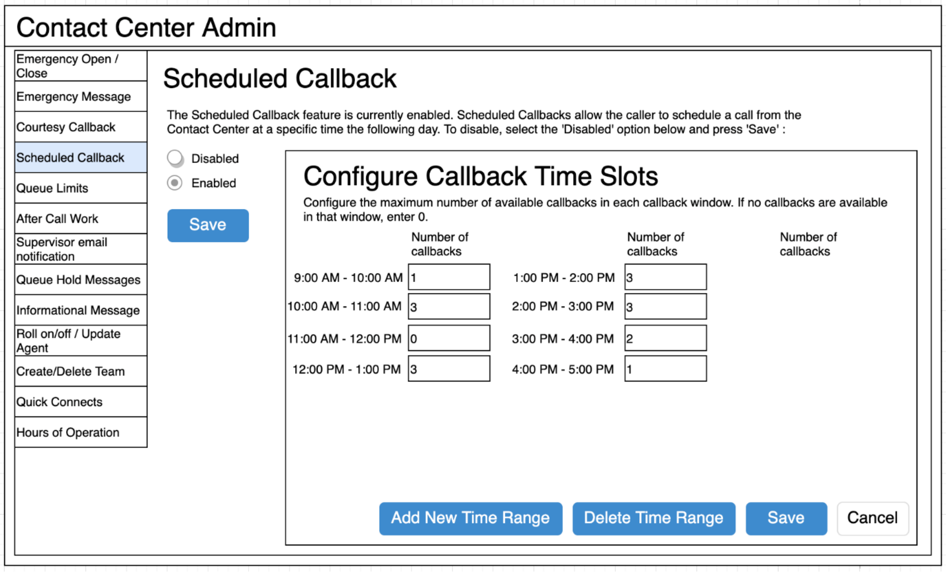



*Figure 25 Scheduled Callback - after time slots deleted*

#### 2.6.2.19 Scheduled Callback – After time slots deleted

1. After the user confirms deletion of the selected time slots, the 'Configure Callback Time Slots' page is re-displayed.
2. The page mockup in Figure 24 shows the results of deleting timeslots 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM. These time slots are now no longer displayed. The remaining timeslots are rearranged to fill the available space on the page.

### 2.6.3 Assumptions

1. Implementation of the Scheduled Callback feature will be in SCR CA-229573
2. If callbacks are already scheduled in a time slot that is deleted, those callbacks will remain scheduled.
3. No new callbacks can be scheduled in a time slot after it is deleted.
4. This functionality is disabled for Regional Call Center (RCC) only Counties.

## 2.7 Queue Limits

### 2.7.1 Overview

The Queue Limits feature allows an Admin user to define the maximum number of calls that are allowed in each configured call queue.

Queue names are displayed in ascending alphabetical order. The page displays the queue names and maximum queue lengths for the currently defined queues for the current County. If there are more queues that can be displayed on one page, 'Previous' and 'Next' links are displayed to allow the user to page through the defined queues.

If a queue limit is changed while there are more calls in that queue than the new queue limit, the remaining calls in queue will remain in the queue. Any additional incoming calls will not be added to the queue until the number of calls in the queue is less than the new queue limit.

The page only allows the user to change the maximum queue length for currently defined queues. Note: Counties will need to contact the CalSAWS Project Team to add or remove queues or change the queue names.

### 2.7.2 Description of Changes

#### 2.7.2.1 Queue Limits: Page mockup

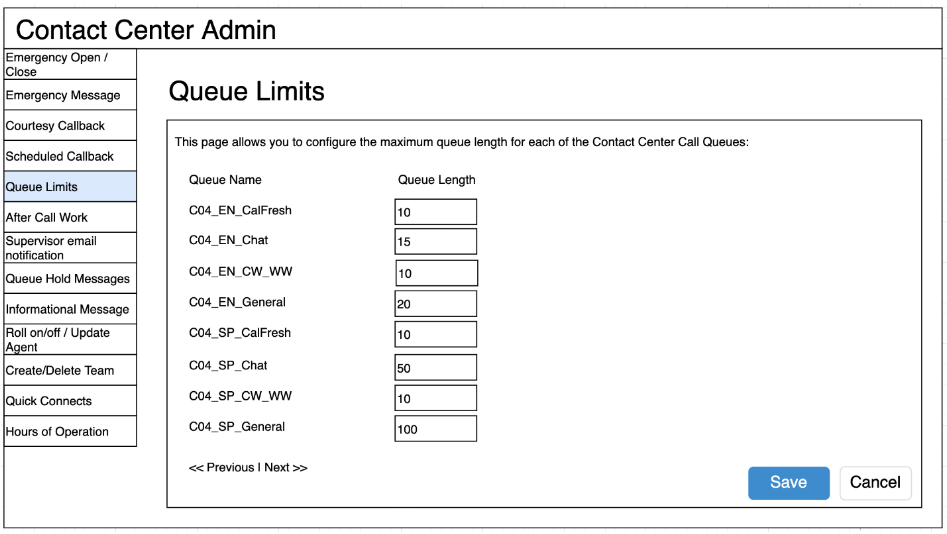



*Figure 26 Queue Limits*

#### 2.7.2.2 Queue Limits

The Queue Limits page allows the user to configure the maximum number of calls per queue currently defined in the Contact Center.

1. If the Queue Limits configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. Queue names are displayed in ascending alphabetical order.
3. If there are more queues than can be displayed on a single page, pagination links to page forward ("Next") and back ("previous") are displayed at the bottom of the list.
4. If the user is on the first page of queues, the "Previous" link is inactive.
5. If there are no more queues to display, the "Next" link is inactive.
6. User changes the queue limit for 1 or more number of queues currently displayed on the page. The entered value is an positive integer, less than 1000.

7. If no queue depth limit is required for a queue, the user can leave the value blank (this indicates no limit).
8. If the user attempts to navigate away from this page by paging forward/back or choosing another menu option, they are prompted to 'Save' or 'Cancel' their changes first – a dialog with the following message is displayed:

*"You have unsaved changes on this page. You must save or cancel your changes before leaving the page"*

9. If the user presses 'Save' any updated queue limit values are saved.
10. If the user presses 'Cancel' any changes are discarded and no actions are taken. The page is updated to show the original values.

## 2.8 After Call Work Limit

### 2.8.1 Overview

The After Call Work (ACW) Limit feature allows an Admin user to define the maximum number of minutes an Agent is allowed to perform After Call Work.

### 2.8.2 Description of Changes

#### 2.8.2.1 After Call Work Limit – page mockups

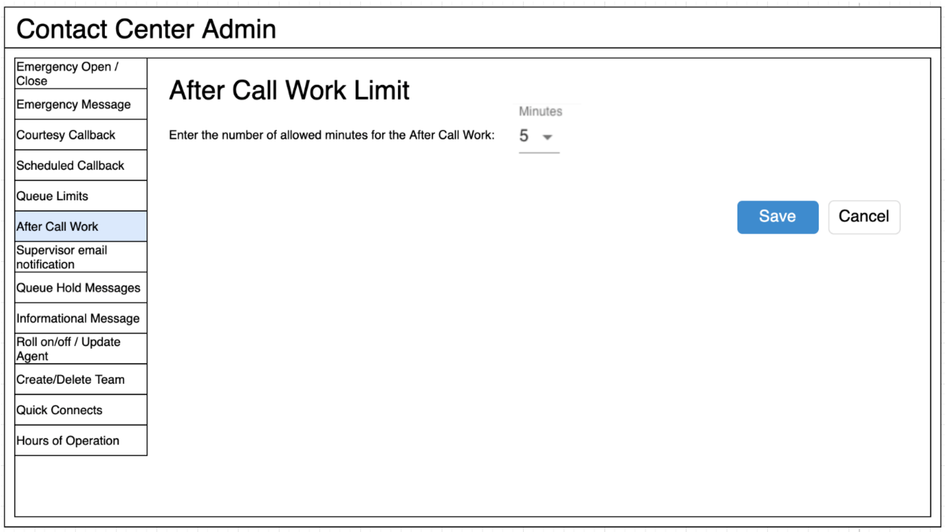



*Figure 27 After Call Work Limit*

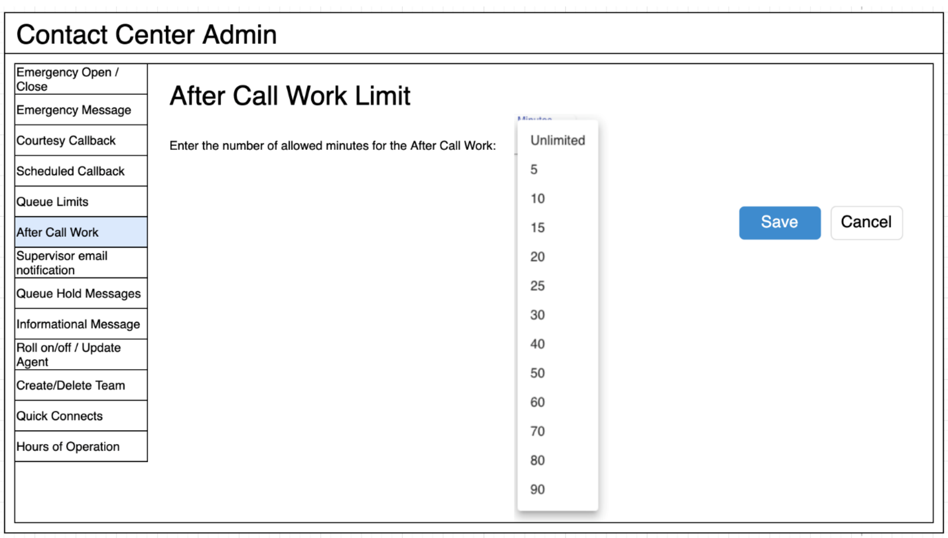



*Figure 28 After Call Work Limit – dropdown list to select minutes*

#### 2.8.2.2 After Call Work Limit

1. If the After Call Work Limit configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute as elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. The user selects a new value for the After Work Call Limit from a dropdown list. Valid options are displayed in the list from Unlimited to 90 minutes in the following increments:
    a. 5-minute increments from 5 to 30 minutes,
    b. 10 minute increments from 30 to 90 minutes.
3. If 'Unlimited' is selected, this means the After Call Work Limit check is disabled.
4. If user presses the 'Save' button, the changes are saved.
5. If the user presses the "Cancel' button, any change to the value is discarded, and the current configured value is displayed.

## 2.9 Roll-on/Roll-off / Update Agent

### 2.9.1 Overview

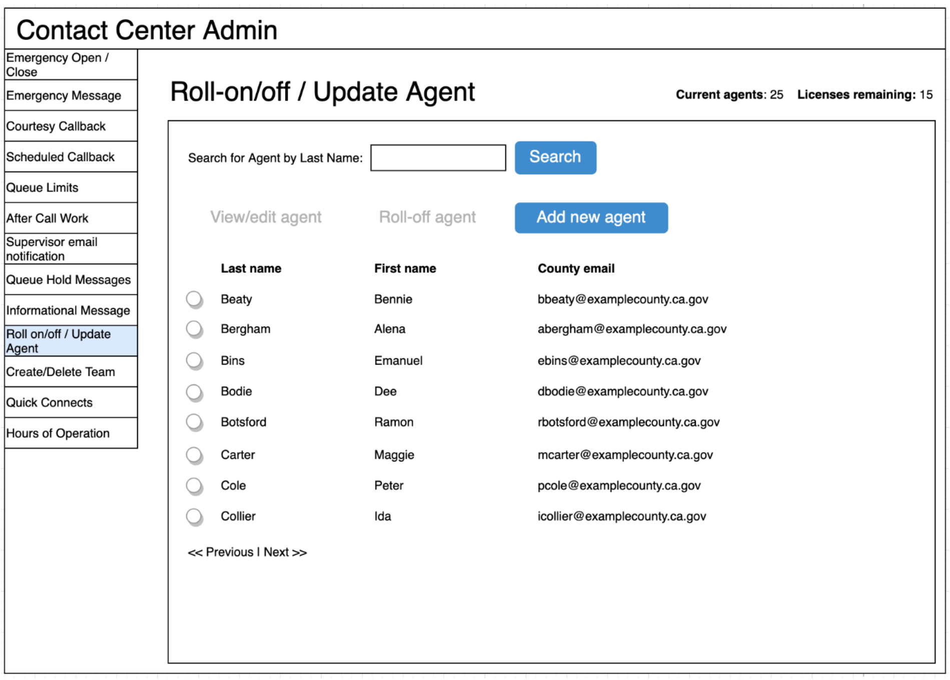
The Roll-on/Roll-off / Update Agent feature allows an Admin user to roll-on and roll-off Agents from the Contact Center. It also allows an Admin user to search for and update existing Agent details (for example, assigned Team and Routing Profile).

The Admin user can roll-on up to the maximum number of licenses available for the current county. The number of currently rolled-on Agents and the licenses remaining is displayed on the page.

When new Agents are created, existing integration with eGain and Calabrio will create new accounts in those systems when the new Agent logs on to the Contact Center for the first time.

### 2.9.2 Description of Changes

### 2.9.2.1 Roll-on/Roll-off page mockup




### 2.9.2.2 Roll-on/Roll-off

1. On entry to the Roll-on/Roll-off page, the list of current Agents is displayed in ascending alphabetical order by last name.
2. The number of currently rolled-on Agents is displayed in the top right of the page, along with the number of licenses remaining for the current County.
3. The page displays 10 Agents at a time. The user can paginate/browse through Agents by pressing the 'Previous' and 'Next' links.
4. If the user is already on the first page of Agents, the 'Previous' link is disabled.
5. If the user is on the last page of Agents, the 'Next' button is disabled.
6. If there are Agents before and after the current page, both 'Previous' and 'Next' links are enabled.
7. To search for a specific Agent, the user enters the Last Name of an Agent to search for and presses 'Search'.
8. Searching with 'like' criteria is supported, for example, if 'D' is entered, Agents with Last Name starting with 'D' are returned and displayed in ascending alphabetical order.

9. By default, no Agents are selected in the search results when the page is first displayed.
10. When an Agent is not selected, the 'View/Edit Agent' and 'Roll-off Agent' buttons are not enabled, only the 'Add new agent' button is enabled
11. If the user presses the 'Add New Agent' button, the 'Add New Agent' dialog is displayed – see the following page mockup and page flow.

### 2.9.2.3 Roll-on/Roll-off – Agent selected page mockup

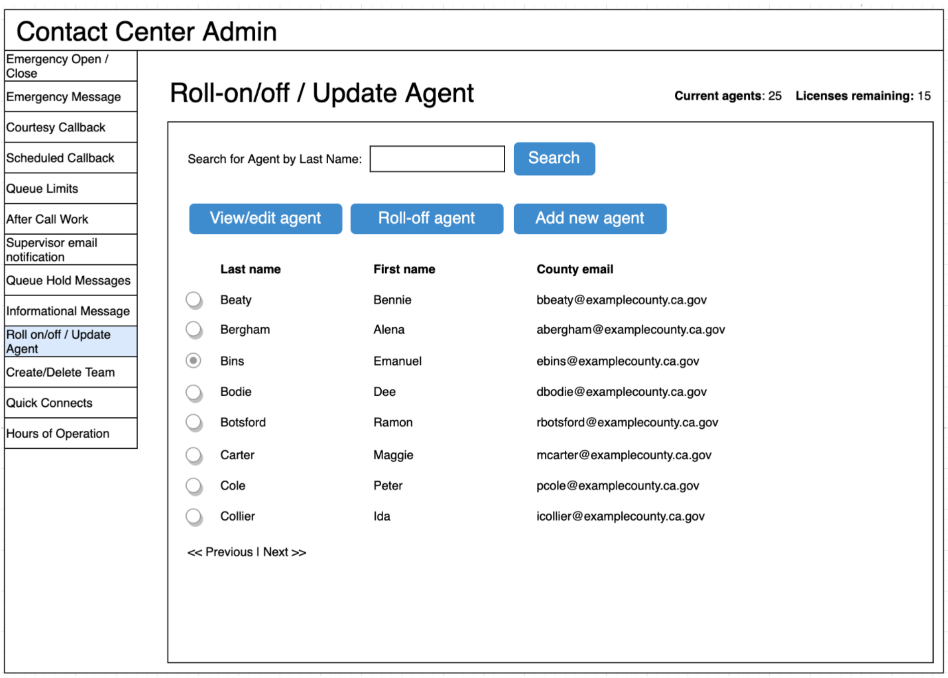


*Figure 29 Roll-on / Roll-off / Update Agent*

### 2.9.2.4 Roll-on/Roll-off – Agent selected

1. If the user selects an Agent by pressing the radio button beside an Agent Last Name, the 'View/Edit Agent' and 'Roll-off Agent' buttons are enabled.
2. If an Agent is selected and the user presses the 'View/Edit Agent' button, the 'View/Edit Agent' dialog is displayed – see the following page mockup and page flow.

3. If an Agent is selected and the user presses the ‘Roll-off Agent’ button, the ‘Roll-off Agent’ dialog is displayed – see the following page mockup and page flow.

### 2.9.2.5 Roll-on/Roll-off – View/Edit Agent page mockup

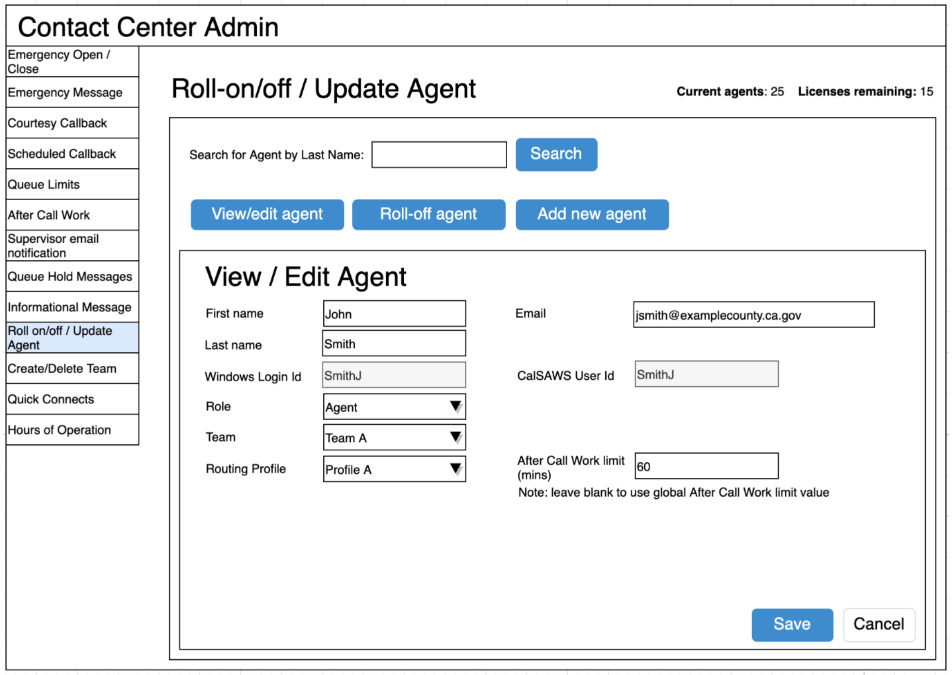



*Figure 30 Roll-on / Roll-off - View/Edit Agent*

### 2.9.2.6 Roll-on/Roll-off – View/Edit Agent

1. If the ‘View/Edit Agent’ button is pressed, the ‘View/Edit Agent’ dialog is displayed.
2. The user can edit the First Name, Last Name, Role, Team, Email, Routing Profile and After Call Work Limit fields.
3. The After Call Work Limit value specified here overrides the default/global value defined on the After Call Work page. If left blank the default/global value is used instead.
4. The Windows Login Id and CalSAWS User Id values cannot be changed, they are displayed as read-only fields. To change these values the Agent

must be rolled-off from the Contact Center, changed in the CalSAWS application, and then rolled-on to the Contact Center as a new user.

5. If the user presses the ‘Save’ button, the values are saved, and the ‘View/Edit Agent’ dialog is closed.
6. If the user presses the ‘Cancel’ button, the dialog is closed, and any changes are discarded.

#### 2.9.2.7 Roll-on/Roll-off – Add Agent page mockup

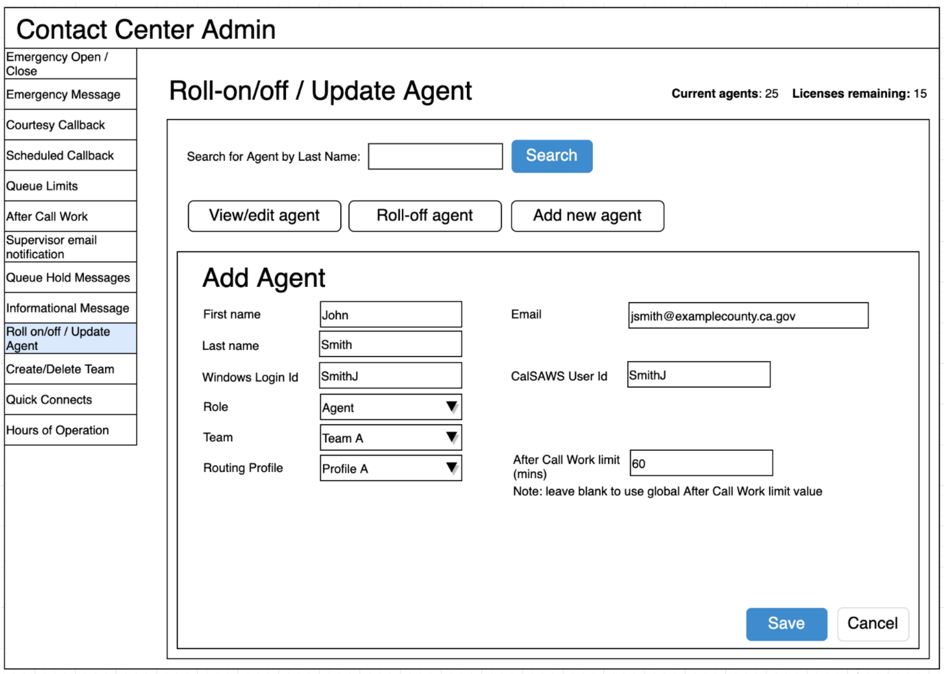



*Figure 31 Roll-on / Roll-off - Add Agent*

#### 2.9.2.8 Roll-on/Roll-off – Add Agent

1. If the ‘Add New Agent’ button is pressed, the ‘Add New Agent’ dialog is displayed.
2. This page allows the user to roll-on new Agents up to the maximum number of licenses configured. The number of currently rolled-on Agents

and the number of licenses remaining is displayed in the top right of the page.

3. The user enters values for First Name, Last Name, Role (from a dropdown showing ‘Admin’ and ‘Supervisor’ values), Team (from a dropdown showing currently configured Teams) and Email fields.
4. The user enters the Agent’s current Windows Login Id and CalSAWS User Id - these cannot be changed and must match their current User Id values.
5. The system validates that the entered CalSAWS User Id is an existing User Id and that this user has not already been rolled-on as a Contact Center Agent.
6. The user enters values for Routing Profile (from a dropdown showing currently configured Routing Profiles), and After Call Work limit (in minutes).
7. The After Call Work Limit value specified here overrides the default/global value defined on the After Call Work page. If left blank the default/global value is used.
8. If the user presses the ‘Save’ button, the new Agent is created in the following applications:
    a. Contact Center Cloud
    b. Contact Center WFM
    c. Contact Center QA
    d. Contact Center Reporting

#### 2.9.2.9 Roll-on/Roll-off – Roll-off Agent page mockup

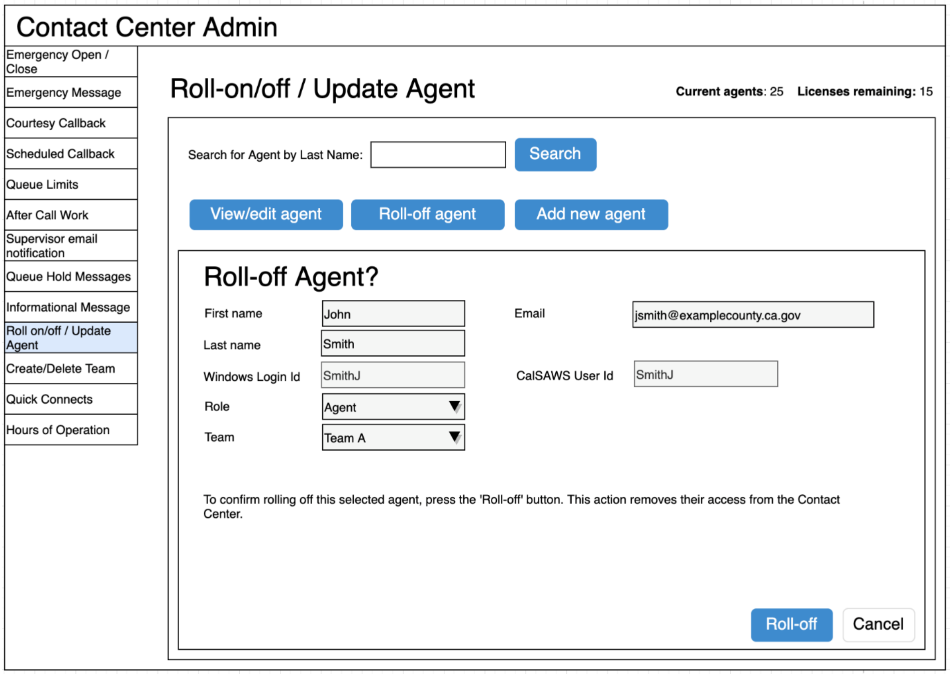



*Figure 32 Roll-on/Roll-off - Delete Agent*

#### 2.9.2.10 Roll-on/Roll-off – Roll-off Agent

1. If the user selects an Agent and presses the 'Roll-off Agent' button, the 'Roll-off Agent' dialog is displayed (Figure 28).
2. The following fields are displayed as read-only to identify the Agent:
    a. First name / Last Name
    b. Email
    c. Windows Logon Id
    d. CalSAWS User Id
    e. Role
    f. Team
3. If the user presses the 'Roll-off' button, the Agent is removed from the Contact Center. After this point the removed user will no longer have access to the Contact Center, but any prior access and roles within the CalSAWS system remain unchanged.
4. The Roll-off Agent change is permanent. If access for an Agent needs to be restored, the Admin needs to repeat the Roll-on Agent steps as

described in section 2.9.28. Additionally, the Roll-off Agent action has the following impacts to agent and call history data reporting:

   a. Agent data is no longer available for reporting in eGain by County users. The data can be restored by CalSAWS Contact Center operations team if needed.
   b. Agent is marked as inactive and data is no longer available to Calabrio. If data is required for an inactive agent, the agent can be moved back to Active status by CalSAWS Contact Center operations team if needed.

5. If the user presses the 'Cancel' button, no changes are made. The 'Roll-off Agent' dialog is closed, and the user is returned to the main 'Roll-on / Roll-off / Update Agent' page as shown in Figure 28.

## 2.10 Emergency Message

### 2.10.1 Overview

This page allows the user to create, edit, delete and select the current Emergency Message for their County. The user can define up to 10 Emergency Messages. The currently selected message is the chosen message that plays while the Contact Center is in Emergency Closure mode (see section 2.3).

If there is no currently selected Emergency Message, a default message will play.

The default message cannot be changed or deleted and is only used when no other Emergency Messages are defined, and/or none of the custom messages are currently selected as the current message for playback during an Emergency Closure.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

The following sections describe how the Emergency Messages are created and maintained.

## 2.10.2 Description of Changes

### 2.10.2.1 Emergency Message – page mockup

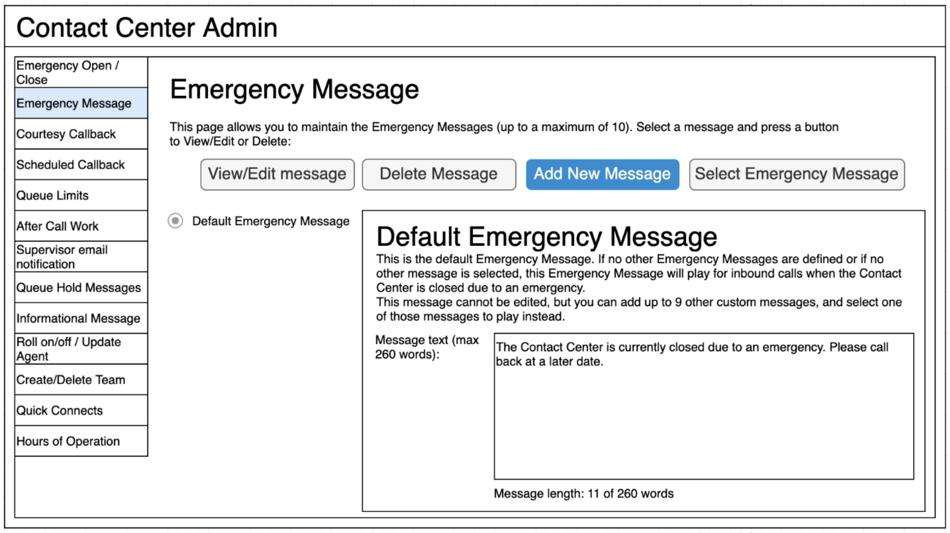



*Figure 33 Emergency Message - no messages defined*

### 2.10.2.2 Emergency Message – No messages defined

1. When there are no custom Emergency Messages defined, the only enabled button is ‘Add New Message’.
2. The default Emergency Message is selected and is shown as the current Emergency Message.
3. If the Contact Center is closed using the Emergency Open/Close feature when there are no other Emergency Messaged defined, the default message is played:

*“The Contact Center is currently closed due to an emergency. Please call back at a later date.”*

4. The default Emergency Message cannot be deleted or edited.
5. If user presses ‘Add New Message’, see following section for page mockup and page flow.

### 2.10.2.3 Emergency Message – Messages defined, no message selected page mockup


*Figure 34 Emergency Message - messages defined, no selected message*

### 2.10.2.4 Emergency Message – Messages defined

1. Up to a maximum of 10 messages can be defined. When less than 10 messages are currently defined, the ‘Add new message’ button is enabled.
2. The currently configured Emergency Message is highlighted.
3. When the user selects a message by pressing a radio button, the ‘Edit/View Message’, ‘Delete Message’, and ‘Select Emergency Message’ buttons are enabled.
4. If no message is selected, these buttons are not enabled.

#### 2.10.2.5 Emergency Message – Messages defined, message selected page mockup


*Figure 35 Emergency Message - messages defined and message selected*

#### 2.10.2.6 Emergency Message – Messages defined; message selected

In this example, a new message, 'This is a message name 3' is selected. When a message is selected the relevant buttons are enabled to show valid options.

To View/edit a message:

1. User selects a message by pressing the radio button next to the message name and presses the 'View/Edit Message' button. See next section for page mockup and flow.

To Delete a message:

1. User selects a message by pressing the radio button next to the message name and presses the 'Delete Message' button. See next section for page mockup and flow.

To Add a message:

1. User presses the 'Add New Message' button. See next section for page mockup and flow.

To select/change the currently configured Emergency Message:

1. User selects a message by pressing the radio button next to the message name and presses the 'Select Emergency Message' button. See next section for page mockup and flow.

### 2.10.2.7 Emergency Message – View/Edit Message page mockup : English selected language

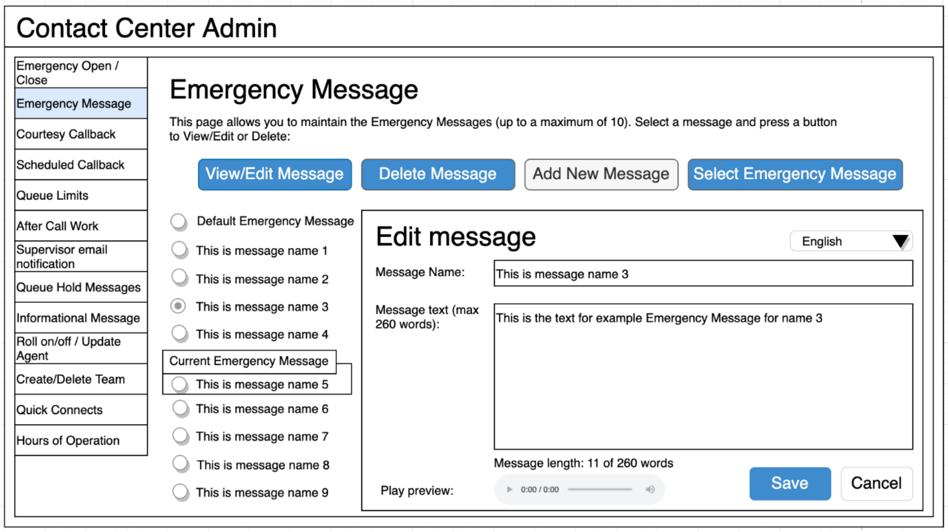



*Figure 36 Emergency Message - view/edit message*

### 2.10.2.8 Emergency Message – View/Edit Message page mockup : Language selection dropdown

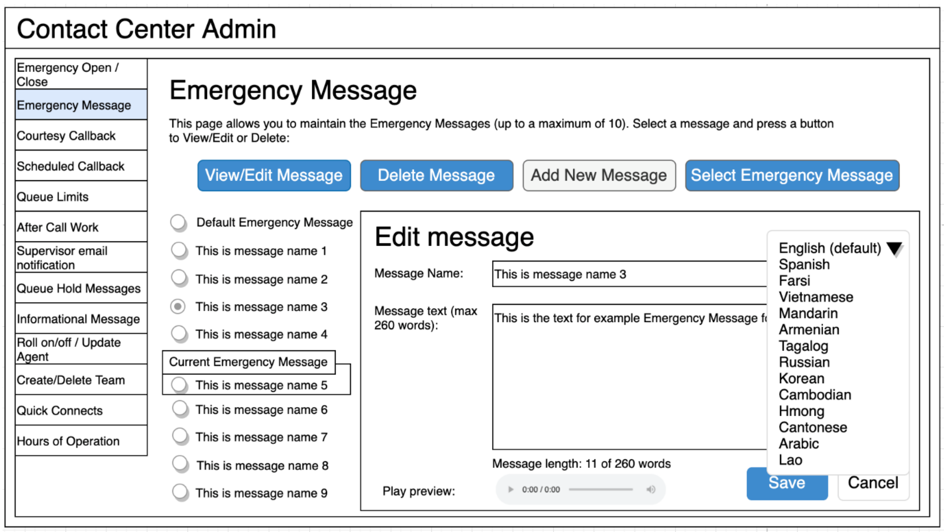



*Figure 37 Emergency Message - Language selection dropdown*

### 2.10.2.9 Emergency Message – View/Edit Message

1. User selects an Emergency Message by pressing the radio button next to the message they want to view or edit and presses the 'View/Edit Message' button. The Edit Message dialog is displayed.
2. User changes the Message Name, up to 60 alphanumeric characters.
3. User changes the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 11 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog
    h. Russian

i. Korean
j. Cambodian
k. Hmong
l. Cantonese
m. Arabic
n. Lao

6. Note that the 'Default Emergency Message' cannot be deleted or modified. If the user selects the 'Default Emergency Message' in the list and presses the 'View/Edit' button, the View/Edit dialog is display showing the default message text, but the 'Save' button is disabled.
7. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
8. If the user presses "Save", text changes for any of the selected languages are saved and the dialog closes.
9. If the user presses "Cancel", the changes are discarded and the dialog closes.

### 2.10.2.10 Emergency Message – Delete Message page mockup

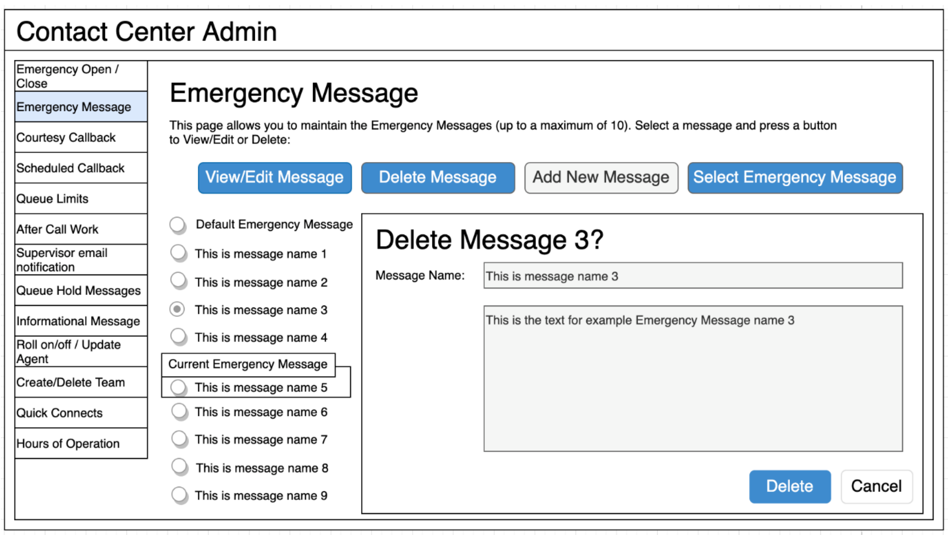



*Figure 38 Emergency Message - delete message*

#### 2.10.2.11 Emergency Message – Delete Message

1. User selects an Emergency Message by pressing the radio button next to the message they want to delete and presses the 'Delete Message' button. The Delete Message dialog is displayed.
2. If the user presses the 'Delete' button the selected message is deleted. The Delete Message dialog closes. The list of configured messages is updated to display the remaining messages.
3. Deleting an Emergency Message is permanent. To add back the same message, the Admin user adds a new message following the page flow in section 2.10.2.12.
4. When a message is deleted, all language translations for that selected message are deleted at the same time.
5. Note that the 'Default Emergency Message' cannot be deleted or modified. If the user selects the 'Default Emergency Message' in the list and presses the 'Delete message' button, a warning dialog is displayed with the following error message:

   *"The Default Emergency Message cannot be deleted or modified. Please select one of the other custom messages."*

6. If the user presses the 'Cancel' button the Delete Message dialog is closed and no action is taken.

### 2.10.2.12 Emergency Message – Add New Message page mockup

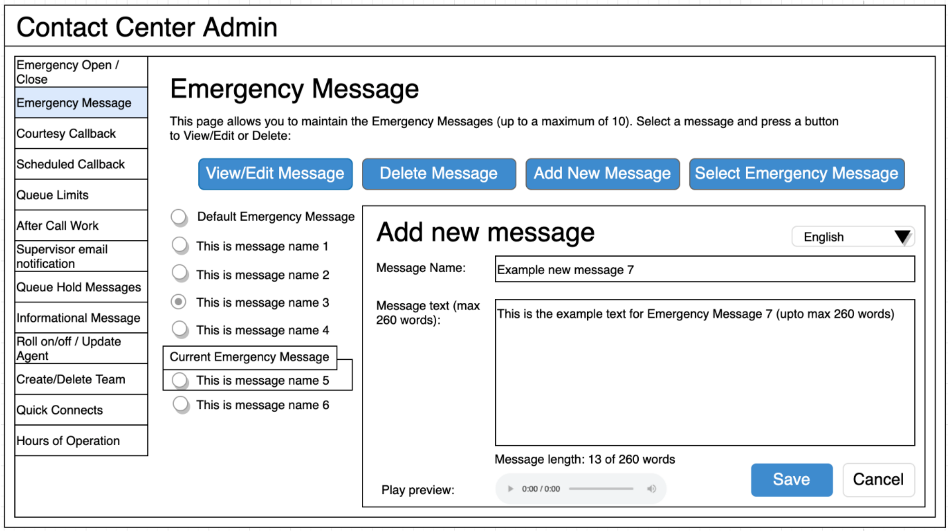



*Figure 39 Emergency Message - Add new message*

### 2.10.2.13 Emergency Message – Add New Message

If there are less than 10 Emergency Messages currently defined, the user can press the 'Add New Message' button to create a new message.

1. User presses the 'Add New Message' button. The Add New Message dialog is displayed.
2. The user enters the Message Name, up to 60 alphanumeric characters.
3. The user enters the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 13 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog

h. Russian
i. Korean
j. Cambodian
k. Hmong
l. Cantonese
m. Arabic
n. Lao

6. To hear an audio preview of the message text, the user can press the ‘play’ button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses “Save”, the new Message is saved and the dialog closes. The displayed list of messages is updated to show the new Message Name for the newly added message.
8. If the user presses “Cancel”, the changes are discarded and the dialog closes.

### 2.10.2.14 Emergency Message – Select Emergency Message page mockup


*Figure 40 Emergency Message - Select message*

#### 2.10.2.15 Emergency Message – Select Emergency Message

The user can only select a new Emergency Message if there is at least 1 message defined. The 'Select Emergency Message' button is enabled if there is at least 1 message defined.

If there are no Emergency Messages configured or if a message has not yet been selected as the current Emergency Message, a default message is played when the Contact Center is closed using the Emergency Open/Close feature:

*"The Contact Center is currently closed due to an emergency. Please call back later."*

This default message cannot be changed and is only used in the scenario as described above.

To select a current Emergency Message:

1. If the current Emergency Message was last changed more than 1 minute ago, the User is allowed to select a new message. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User selects one of the configured Emergency Messages by pressing the radio button beside a message.
3. If the user selects the currently configured Emergency Message, then 'Select Emergency Message' button is disabled.
4. If the user selects a different message than the currently configured Emergency Message, the 'Select Emergency Message' button is enabled.
5. User presses the 'Select Emergency Message' button and the Select Emergency Message dialog is displayed.
6. The dialog shows the currently configured Emergency Message and the new message selected by the user. The dialog shows two buttons, 'Confirm' and 'Cancel'.
7. If the user presses the 'Confirm' button, the selected message is configured as the new Emergency Message. The Select Emergency Message dialog is closed, the list of configured messages is updated to show the newly selected Emergency Message.
8. If the user presses the 'Cancel' button the Select Emergency Message dialog is closed and there is no change to the currently configured Emergency Message.

### 2.10.3 Assumptions

1. Only 1 message can be selected as the current Emergency Message.

2. The emergency message will play following the customer requesting to speak to a worker/agent when the call center is closed due to emergency. The customer will not be transferred into a queue.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

## 2.11 Informational Message

### 2.11.1 Overview

The Informational Message feature allows an Admin user to maintain the Informational Messages. This page allows the Admin user to view and edit messages, delete messages, add new messages, and select the current Informational Message.

The configuration page allows the Admin user to select one Informational Message as the currently enabled message.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

### 2.11.2 Description of Changes

#### 2.11.2.1 Informational Message – page mockup

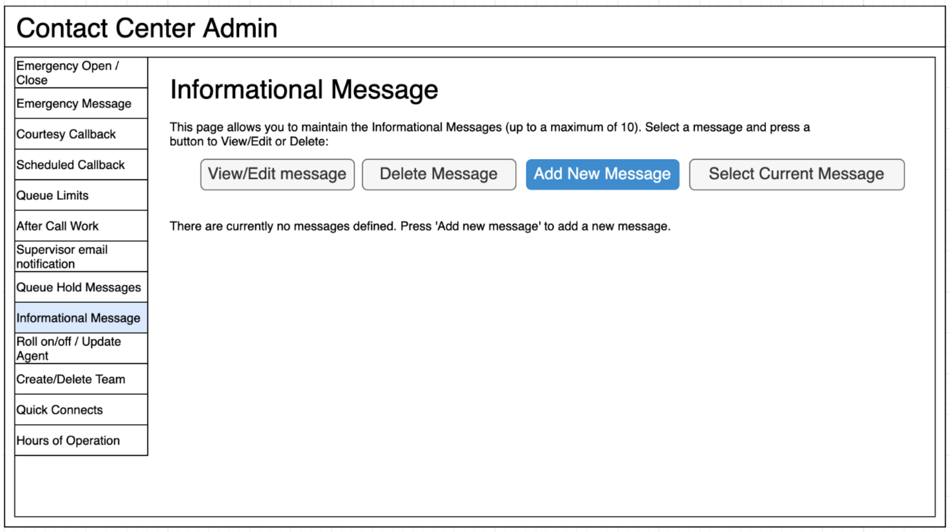



*Figure 41 Informational Message - no messages defined*

#### 2.11.2.2 Informational Message – No messages defined

1. When there are no Informational Messages defined, the only enabled button is ‘Add New Message’.
2. If user presses ‘Add New Message’, see following section for page mockup and page flow.

### 2.11.2.3 Informational Message – Messages defined, no message selected page mockup

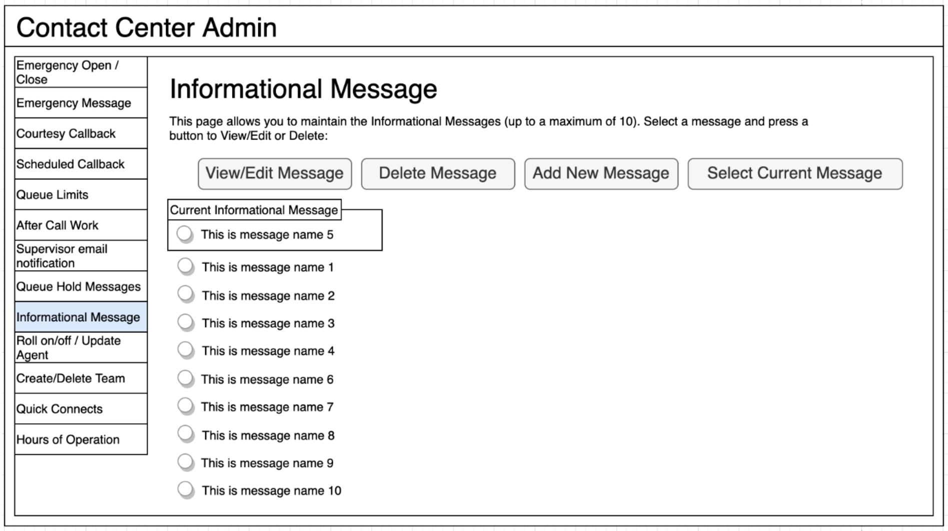



*Figure 42 Informational Message - no message selected*

### 2.11.2.4 Informational Message – Messages defined

1. Up to a maximum of 10 messages can be defined. When less than 10 messages are currently defined, the 'Add new message' button is enabled.
2. The currently configured Informational Message is highlighted.
3. When the user selects a message by pressing a radio button, the 'Edit/View Message', 'Delete Message', and 'Select Current Message' buttons are enabled.
4. If no message is selected, these buttons are not enabled.

#### 2.11.2.5 Informational Message – Messages defined, message selected page mockup

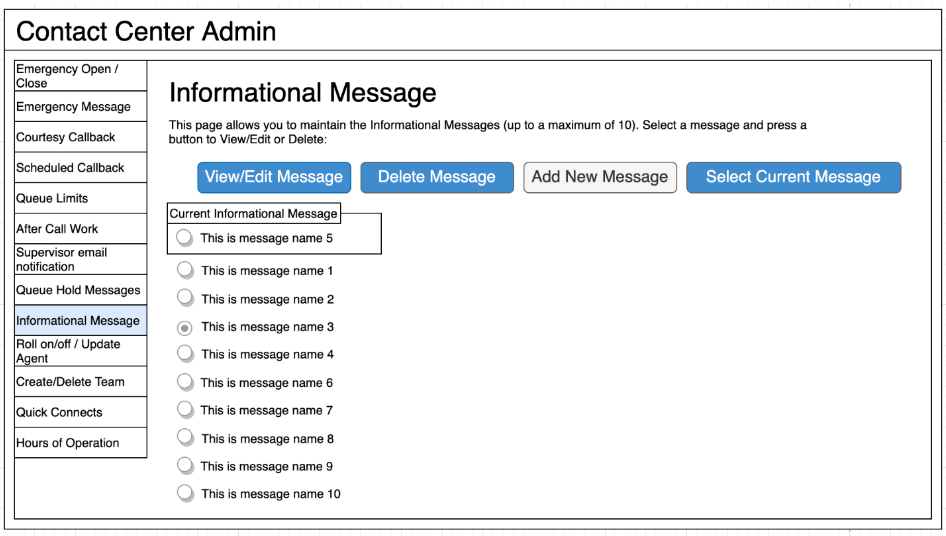


*Figure 43 Informational Message - message selected*

#### 2.11.2.6 Informational Message – Messages defined, message selected

In this example, a new message, 'This is a message name 3' is selected. When a message is selected the relevant buttons are enabled to show valid options.
To View/edit a message:

1. User selects a message by pressing the radio button next to the message, and presses the 'View/edit message' button. See next section for page mockup and flow.

To Delete a message:

1. User selects a message by pressing the radio button next to the message, and presses the 'Delete message' button. See next section for page mockup and flow.

To Add a message:

1. User presses the 'Add New Message' button. See next section for page mockup and flow.

To select/change the currently configured Informational Message:

1. User selects a message by pressing the radio button next to the message, and presses the 'Select Current Message' button. See next section for page mockup and flow.

### 2.11.2.7 Informational Message – View/Edit Message page mockup: selected language: English

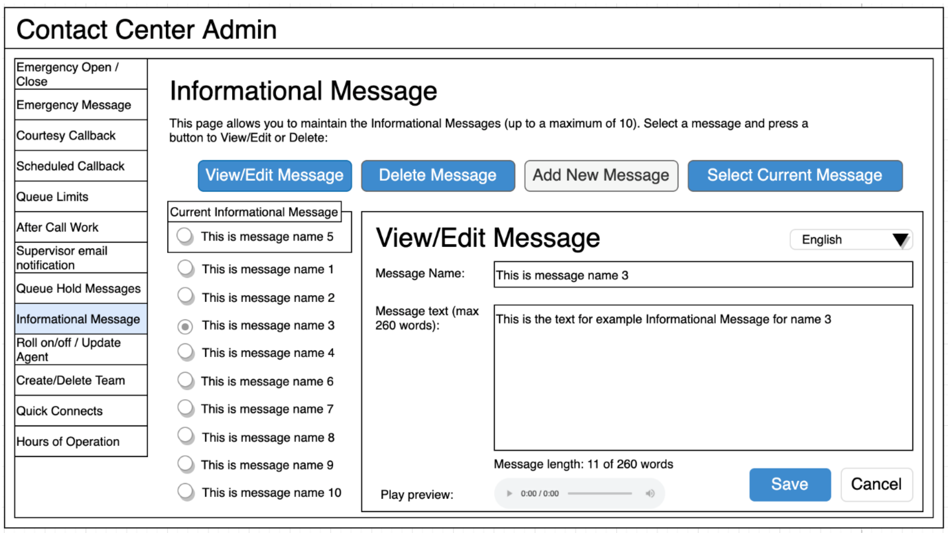



*Figure 44 Informational Message - View/Edit Message*

### 2.11.2.8 Informational Message – View/Edit Message page mockup: Language selection dropdown

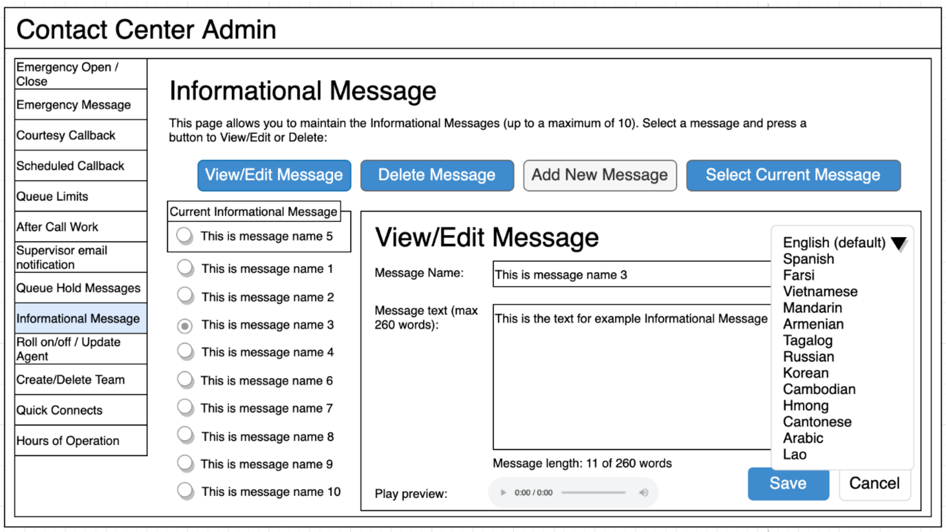


*Figure 45 Informational Message - Language selection*

#### 2.11.2.9 Informational Message – View/Edit Message page mockup: selected language: Spanish

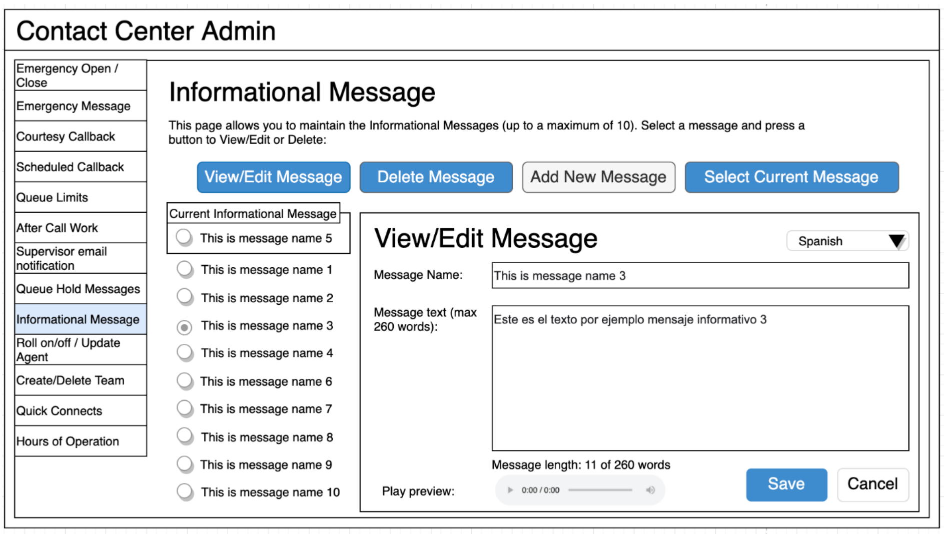



*Figure 46 Informational Message - Spanish language*

#### 2.11.2.10 Informational Message – View/Edit Message

1. User selects an Informational Message by pressing the radio button next to the message to view or edit and presses the 'View/Edit Message' button. The View/Edit Message dialog is displayed.
2. User changes the Message Name, up to 60 alphanumeric characters.
3. User changes the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 11 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog

h. Russian
i. Korean
j. Cambodian
k. Hmong
l. Cantonese
m. Arabic
n. Lao

6. To hear an audio preview of the message text, the user can press the ‘play’ button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses “Save”, changes to the text for any of the languages selected from the Languages dropdown are saved and the dialog closes.
8. If the user presses “Cancel”, all changes are discarded and the dialog closes.

#### 2.11.2.11 Informational Message – Delete Message page mockup

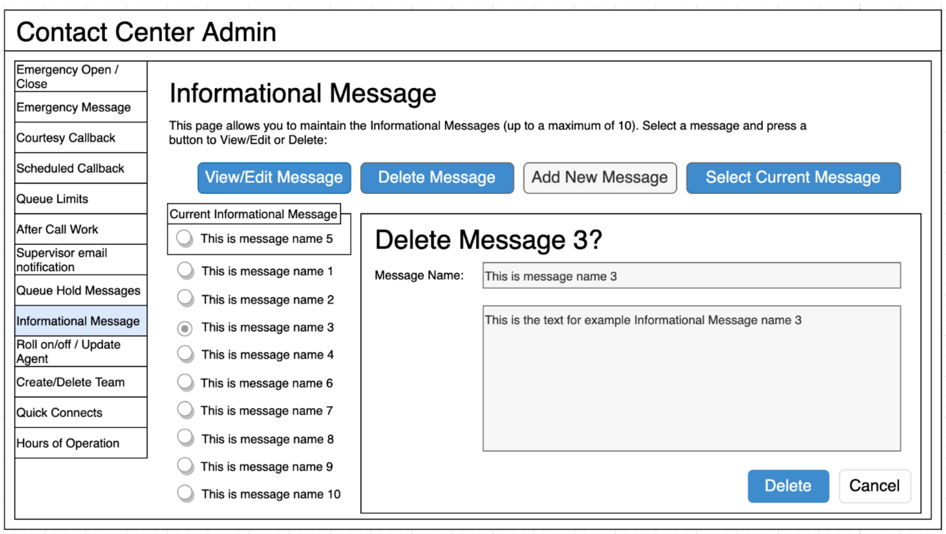



*Figure 47 Informational Message - Delete Message*

#### 2.11.2.12 Informational Message – Delete Message

1. User selects an Informational Message by pressing the radio button next to the message they want to delete and presses the ‘Delete Message’ button. The Delete Message dialog is displayed.

2. If the user presses the 'Delete' button the selected message is deleted. The Delete Message dialog closes. The list of configured messages is updated to display the remaining messages.
3. Deleting an Informational Message is permanent. To add back a message the Admin user creates a new message following the page flow in section 2.11.2.12.
4. If the user presses the 'Cancel' button the Delete Message dialog is closed and no action is taken.

#### 2.11.2.13 Informational Message – Add New Message page mockup

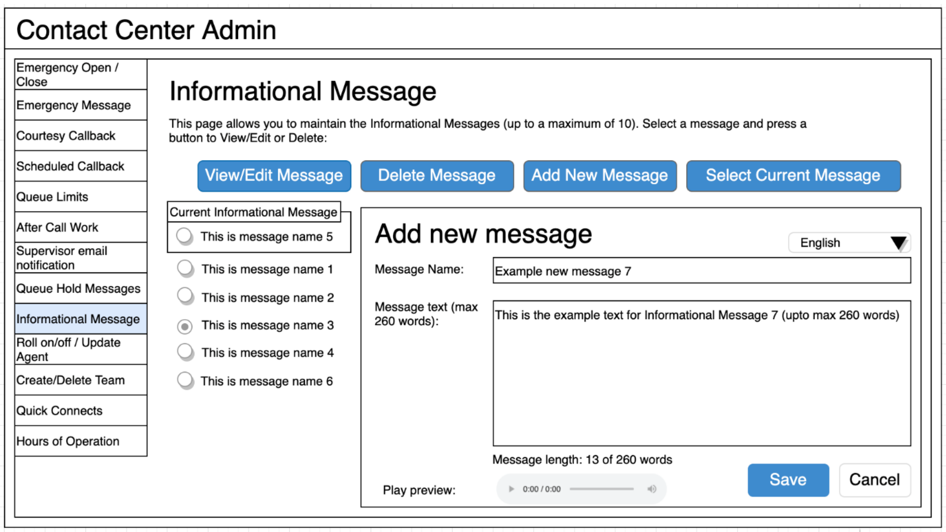



*Figure 48 Informational Message - Add New Message*

#### 2.11.2.14 Informational Message – Add New Message

If there are less than 10 Informational Messages currently defined, the user can press the 'Add New Message' button to create a new message.

1. User presses the 'Add New Message' button. The Add New Message dialog is displayed.
2. The user enters the Message Name, up to 60 alphanumeric characters.
3. The user enters the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 13 of 260 words". The user is not allowed to enter more than 260 words.

4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Armenian
    g. Tagalog
    h. Russian
    i. Korean
    j. Cambodian
    k. Hmong
    l. Cantonese
    m. Arabic
    n. Lao
6. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses "Save", the new Message is saved and the dialog closes. The displayed list of messages is updated to show the new Message Name for the newly added message.
8. If the user presses "Cancel", the changes are discarded and the dialog closes.

### 2.11.2.15 Informational Message – Select Informational Message page mockup

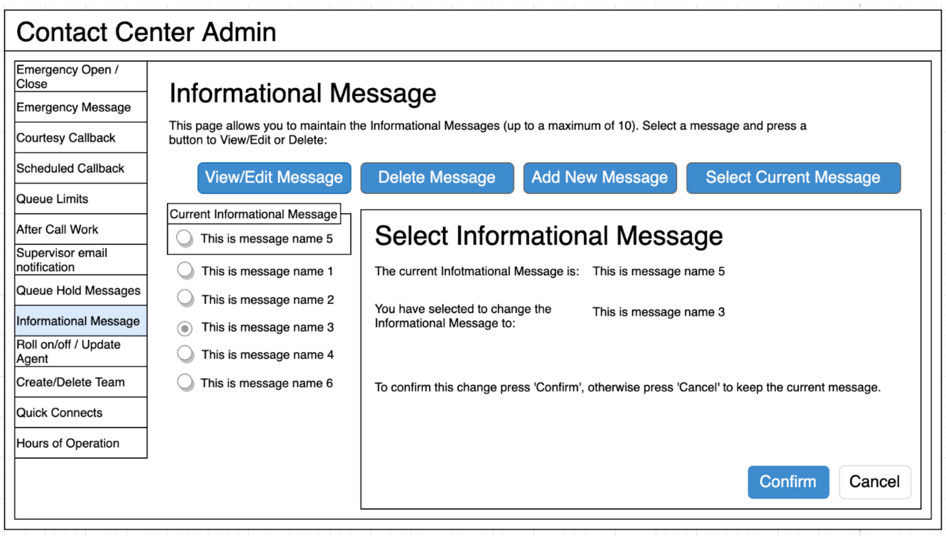



*Figure 49 Informational Message - Select Message*

### 2.11.2.16 Informational Message – Select Informational Message

The user can only select a new Informational Message if there is at least 1 configured message. The 'Select Current Message' button is only enabled if there is at least 1 message defined.

1. If the current Informational Message was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User selects one of the configured Informational Messages by pressing the radio button beside a message.
3. If the user selects the currently configured Informational Message, then 'Select Current Message' button is disabled.
4. If the user selects a different message than the currently configured Informational Message, the 'Select Informational Message' button is enabled.
5. User presses the 'Select Current Message' button and the Select Information Message dialog is displayed.

6. The dialog shows the currently configured Informational Message and the new message selected by the user. The dialog shows two buttons, 'Confirm' and 'Cancel'.
7. If the user presses the 'Confirm' button, the selected message is configured as the new Informational Message. The Select Informational Message dialog is closed, the list of configured messages is updated to show the newly selected Informational Message.
8. If the user presses the 'Cancel' button the Select Informational Message dialog is closed and there is no change to the currently configured Informational Message.

#### 2.11.2.17 Assumptions

1. The informational message will play following language selection in the counties inbound IVR.
2. If there are no informational messages defined and/or there is no currently selected message, no informational messages are played during calls.
3. If a message is deleted, all language versions of that message (e.g. English and Spanish) are deleted at the same time.
4. If an alternative language version for a message is not needed, leaving the message text blank means there is no version of the message in that language.
5. This functionality will be disabled for Regional Call Center (RCC) only Counties.

## 2.12 Supervisor Email Notification

### 2.12.1 Overview

The Supervisor Email notification page allows an Admin user to define thresholds and notifications for Contact Center metrics. If the threshold is exceeded for a specific metric, the system sends a notification email to the specified email address(es).

The Admin user can turn on or off all notifications, or enable any combination of the notifications that apply for their County.

Enabling or disabling any of the notifications is immediately changed within the system.

### 2.12.2 Description of Changes

#### 2.12.2.1 Supervisor Email Notification – all notifications off, page mockup

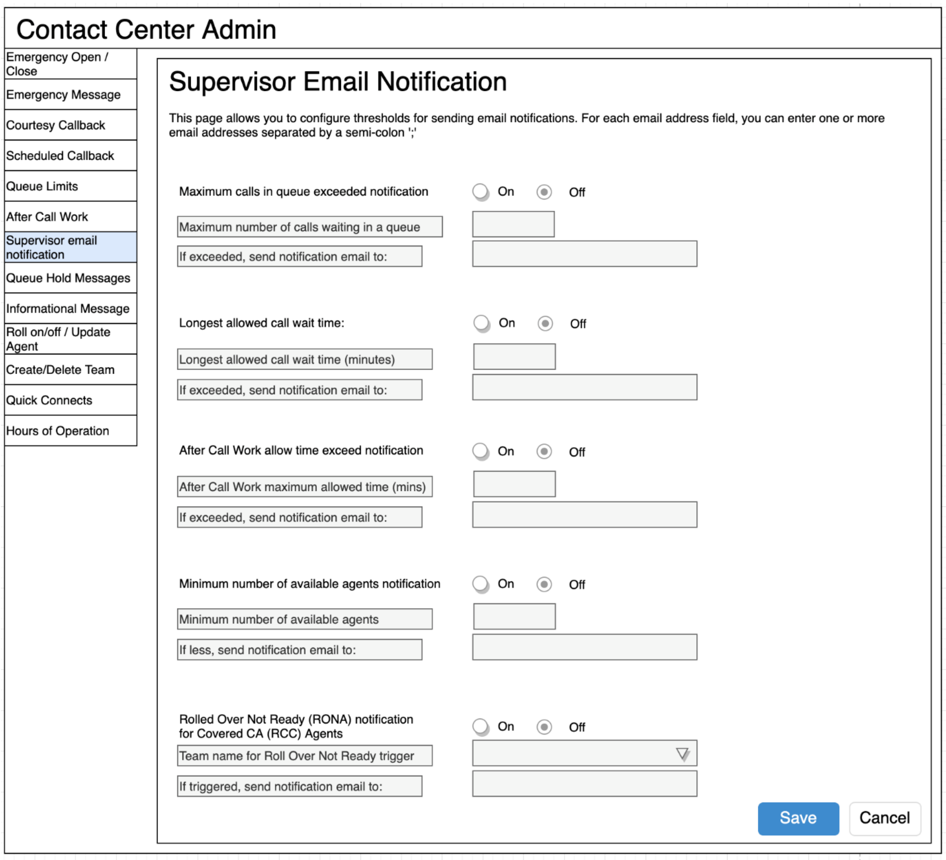


*Figure 50 Supervisor Email Notification - Notifications Off*

#### 2.12.2.2 Supervisor Email Notification – all notifications off

1. User opens the Supervisor Email Notification page.
2. Configurable values for each notification are disabled unless the notification is enabled.

3. If user turns 'on' a notification, the configurable values for that notification are enabled. See details in following page mock ups and page flows.

#### 2.12.2.3 Supervisor Email Notification – selective notifications on, page mockup

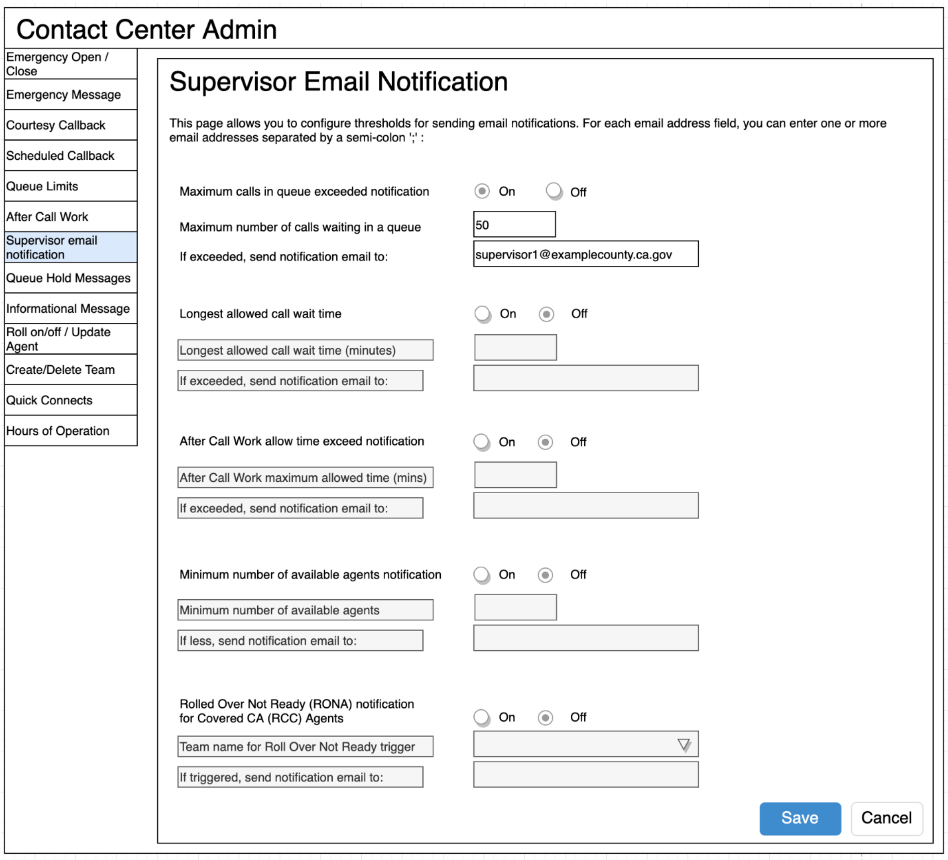



*Figure 51 Supervisor Email Notification - one enabled notification*

#### 2.12.2.4 Supervisor Email Notification – selective notifications on

1. When the user enables a notification option, the configurable values are enabled.

2. The page mockup shows the 'Maximum calls in queue' notification is enabled and the 'Maximum number of calls waiting in queue' and 'If exceeded, send notification to' entry fields are enabled.
3. User enters values for 'Maximum calls in queue' and 'If exceeded, send notification to' email field. The user can enter multiple email addresses separated by a semi-colon (';'). For example: *admin1@county1.ca.gov; admin2@county1.ca.gov*

4. If other notifications are enabled, valid values and ranges are defined in the following table "Valid values for notification options"
5. If user presses 'Save', the changed values are saved.
6. If the user presses 'Cancel', all changed values are discarded. The currently configured values for enabled notifications are displayed. No actions are taken.

#### 2.12.2.5 Supervisor Email Notification – Valid values for notification options

| **Configurable option / Email trigger threshold** | **Email trigger event** | **Unit type / value** | **Minimum valid value** | **Maximum valid value** |
|---|---|---|---|---|
| Maximum number of calls waiting in queue | Number of calls in queue exceeds the specified value | Integer | 1 | 500 |
| Longest allowed call wait time | Any queue waiting in queue exceeds the specified value | Integer, minutes | 1 | 480 |
| After Call Work maximum allowed time | Any agent spending longer than specified value on 'After Call Work' | Integer, minutes | 5 | 480 |
| Minimum number of available agents | When number of available agents is less than the | Integer | 1 | 500 |

| | | | | |
|---|---|---|---|---|
| | specified value | | | |
| Covered CA (RCC) Agents that is enabled for monitoring the ‘Rolled Over Not Ready’ state | If Covered CA agent in team becomes ‘Rolled Over Not Ready’ for then email notification is sent | Name of team | n/a | n/a |

### 2.12.2.6 Supervisor Email Notification – all notifications enabled, page mockup

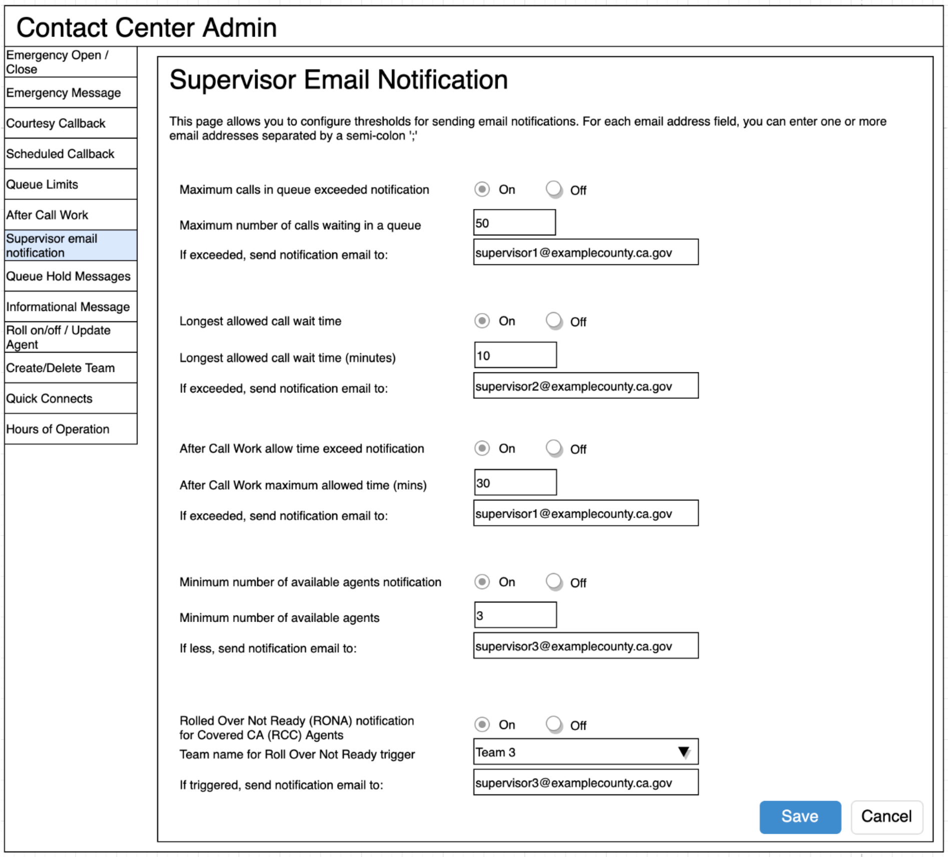



*Figure 52 Supervisor Email Notification - all notifications enabled*

### 2.12.2.7 Supervisor Email Notification – all notifications enabled

1. If all notification options are enabled, the user can enter and/or change all values for all listed notifications.
2. If user presses 'Save', changes are saved.
3. If the user presses 'Cancel' any changes are discarded. The displayed values are reverted back to their original saved values.

#### 2.12.2.8 Notification Email Template

When a threshold is exceeded, the system sends a notification email to each listed email address for that metric.

Each email notification template is customizable for each County by the CalSAWS Contact Center operations team.

The emails sent will use the following template:

*Email from: cc.support@calsaws.org*
*Email to: [list of contact emails for this notification type]*
*Subject: Contact Center Supervisor Notification: [Notification threshold name]*
*This is a system generated email to notify you that [Notification threshold name] was exceed at [date/time].*
*[Additional detail for specific threshold]*

Where applicable, each notification can include an additional line of detail. For example, for the 'Maximum calls in queue' notification, an additional line of detail is included:

*The Maximum Calls in Queue limit is currently 50. Queue name [example-queue-name] currently has 52 calls in queue.*

#### 2.12.2.9 Assumptions

1. The supported mechanism for sending the notification is via an email to the configured list of email addresses for each of the configured thresholds. There are no other supported alert mechanisms.
2. This functionality will be disabled for Regional Call Center (RCC) only Counties.

## 2.13 Create/Delete/Edit Team

### 2.13.1 Overview

The Create/Delete/Edit Team page allows an Admin user to create and delete teams (groups of Contact Center Agents and Admins).

Adding and removing Agents to/from teams is performed using the Roll-on/off Agent edit page (not using the Create/Delete/Edit Teams page).

### 2.13.2 Description of Changes

#### 2.13.2.1 Create/Delete/Edit Team – No teams defined page mockup

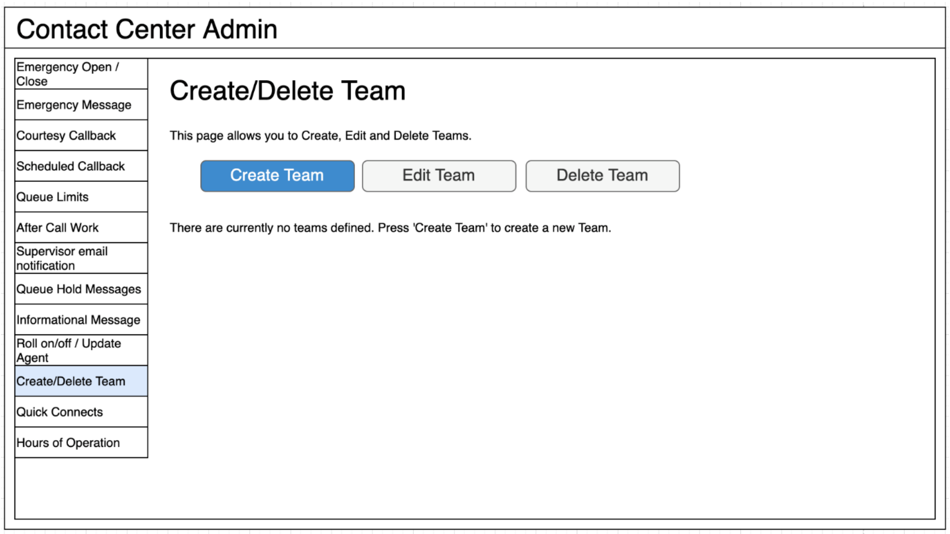



*Figure 53 Create/Delete Team = no teams defined*

#### 2.13.2.2 Create/Delete/Edit Team – No teams defined

1. If there are no teams currently defined, a message is displayed "There are currently no teams defined. Press 'Create Team' to create a new team".
2. The 'Create Team' button is enabled.
3. The 'Edit Team' button is disabled.
4. The 'Delete Team' button is disabled.
5. If the user presses the 'Create Team' button, the 'Create New Team' dialog is displayed. See following section for page mockup and page flow.

### 2.13.2.3 Create/Delete/Edit Team – Teams defined page mockup

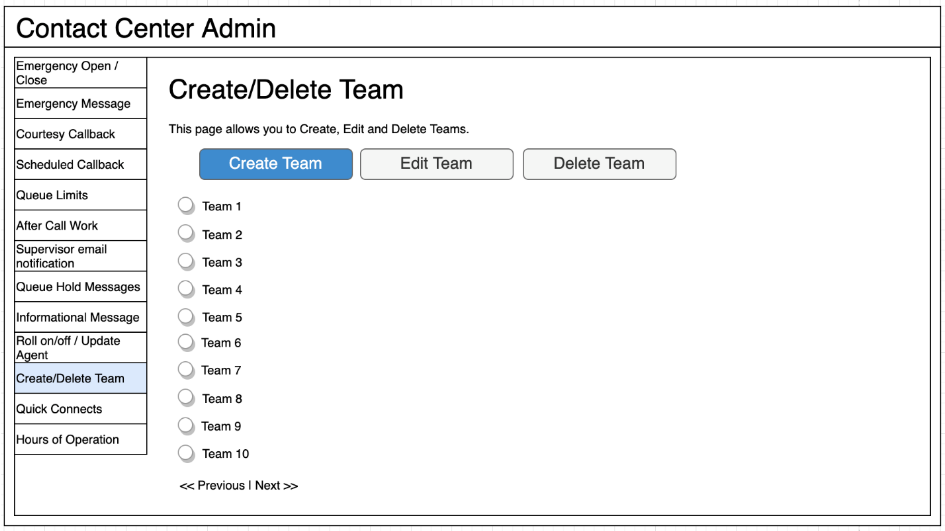



*Figure 54 Create/Delete Team = teams defined*

### 2.13.2.4 Create/Delete/Edit Team – Teams defined

1. Teams currently defined are listed on the page, up to 10 at a time.
2. The maximum number of teams per County is ~~250~~500.
3. If there are more than 10 teams to display, "<< Previous" and "Next >>" pagination buttons are displayed at the bottom of the page.
4. If the user is on the first page, the "<< Previous" link is disabled.
5. If the user is on the last page, the "Next >>" link is disabled.
6. If there are teams to show before and after the current page of Teams, both links are enabled.

### 2.13.2.5 Create/Delete/Edit Team – Create Team page mockup

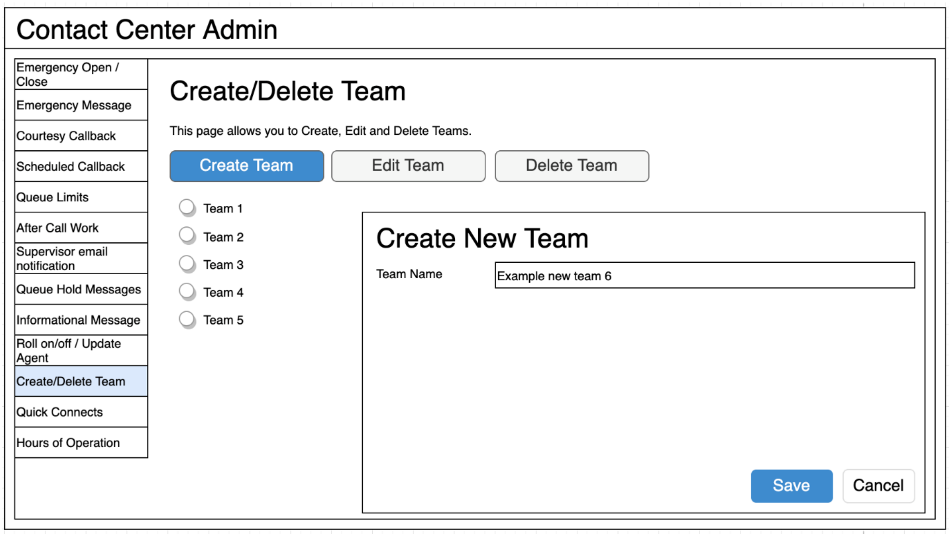



*Figure 55 Create/Delete Team - Create New Team*

### 2.13.2.6 Create/Delete/Edit Team – Create Team

1. User can add new teams up to a maximum of 250 per County.
2. If there are less than 250 teams defined for the current County and the user presses the 'Create Team' button, the Create New Team dialog is displayed,
3. User enters name for the new team, up to 60 alphanumeric characters.
4. If user presses the 'Save' button, the new team is created. The Create New Team dialog closes, and the displayed list of teams is updated to display the new team.
5. If the user pressed the 'Cancel' button, the Create New Team dialog is closed and no action is taken.

### 2.13.2.7 Create/Delete/Edit Team – Edit Team page mockup

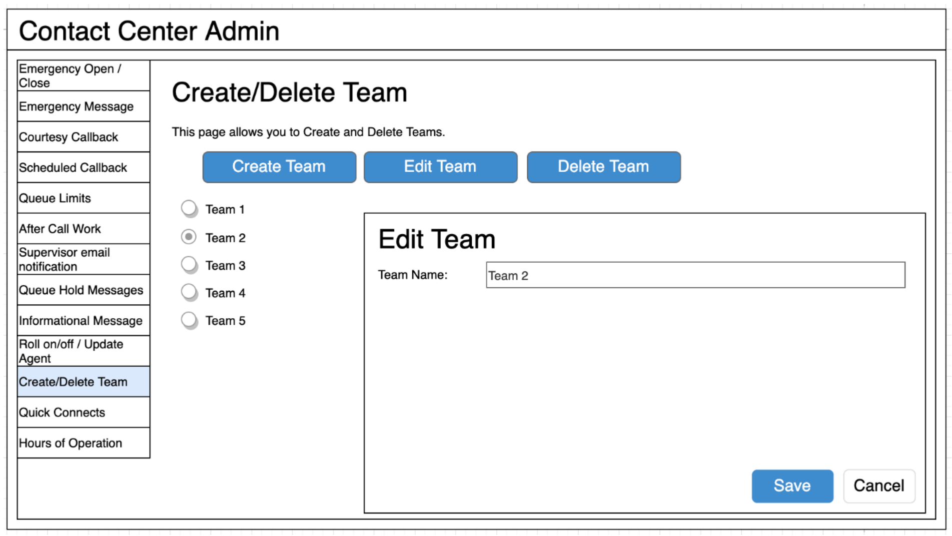



*Figure 56 Create/Edit/Delete Team - Edit Team page*

### 2.13.2.8 Create/Delete/Edit Team – Edit Team

1. If the user selects a team from the displayed list of teams and presses the 'Edit Team' button, the 'Edit Team' dialog is displayed.
2. The user can edit and change the current name for this team.
3. If the user presses the 'Save' button, any changes are saved and the dialog is closed.
4. If the user presses the 'Cancel' button, any changes are discarded and the dialog is closed.

#### 2.13.2.9 Create/Delete/Edit Team – Delete Team page mockup

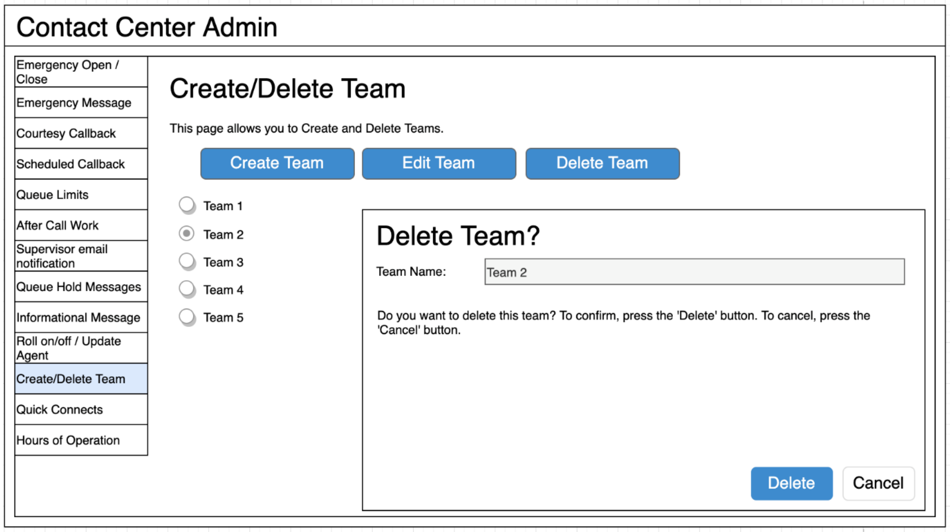



*Figure 57 Create/Delete Team - Delete Team*

#### 2.13.2.10 Create/Delete/Edit Team – Delete Team

1. User selects a team to delete by pressing the radio button next to the team, and presses the 'Delete Team' button. The Delete Team dialog is displayed.
2. The Delete Team dialog asks the user to confirm deletion of the selected team.
3. If the user presses 'Delete':
    a. The team is deleted. The dialog closes and the displayed team list is updated to remove the deleted team.
    b. County staff that were assigned to the team are unassigned from the deleted team.
4. Deleting a team is permanent. To add back a team, the Admin user creates a new team following the page flow in section 2.13.2.6.

## 2.14 Quick Connects

### 2.14.1 Overview

The Quick Connects page allows the Admin user to maintain the list of available Quick Connects for their County.

To use a Quick Connect, it must be associated with a queue. This page also allows the user to assign and remove Quick Connects from one or more queues.

### 2.14.2 Description of Changes

Add a new panel to the Administration page that allows the Admin user to list, add, edit and delete available Quick Connects.

#### 2.14.2.1 Quick Connects – no Quick Connects defined mockup

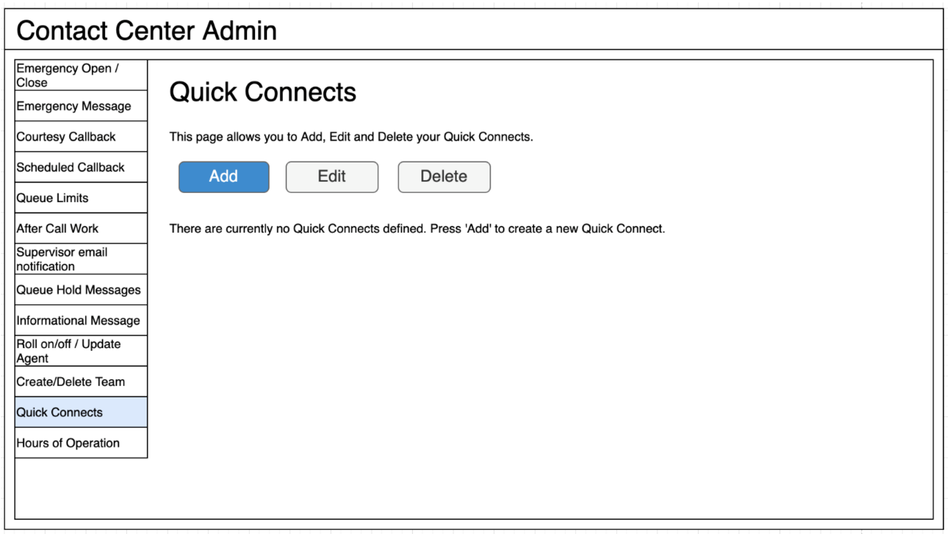



*Figure 58 Quick Connects: No connects defined mockup*

#### 2.14.2.2 Quick Connects – No Quick Connects defined

1. If there are no Quick Connects currently defined, a message is displayed "There are currently no Quick Connects defined. Press 'Add' to create a new Quick Connect".
2. The 'Add' button is enabled.
3. The 'Edit' button is disabled.
4. The 'Delete' button is disabled.
5. If the user presses the 'Add' button, the 'Add New Quick Connect' dialog is displayed. See following sections for page mockup and page flow.

### 2.14.2.3 Quick Connects – Quick Connects defined mockup

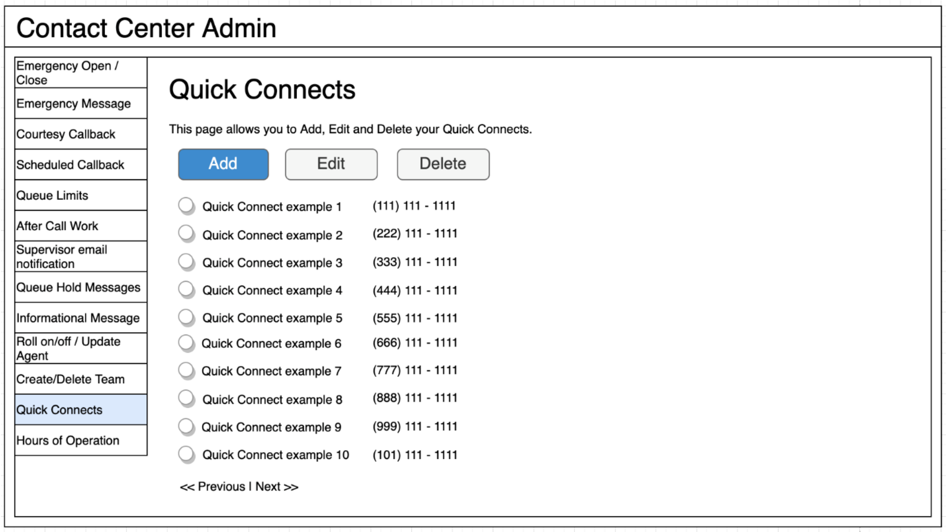



*Figure 59 Quick Connects: Quick Connects defined mockup*

### 2.14.2.4 Quick Connects – Quick Connects defined

1. Currently defined Quick Connects are listed on the page, up to 10 at a time.
2. Quick Connects are displayed in alphabetical ascending order by the Name.
3. The maximum number of Quick Connects per County is 100.
4. If there are more than 10 Quick Connects to display, "<< Previous" and "Next >>" pagination buttons are displayed at the bottom of the page.
5. If the user is on the first page, the "<< Previous" link is disabled.
6. If the user is on the last page, the "Next >>" link is disabled.
7. If there are Quick Connects to show before and after the current page of Teams, both links are enabled.

### 2.14.2.5 Quick Connects – add new Quick Connect mockup showing Quick Connect type

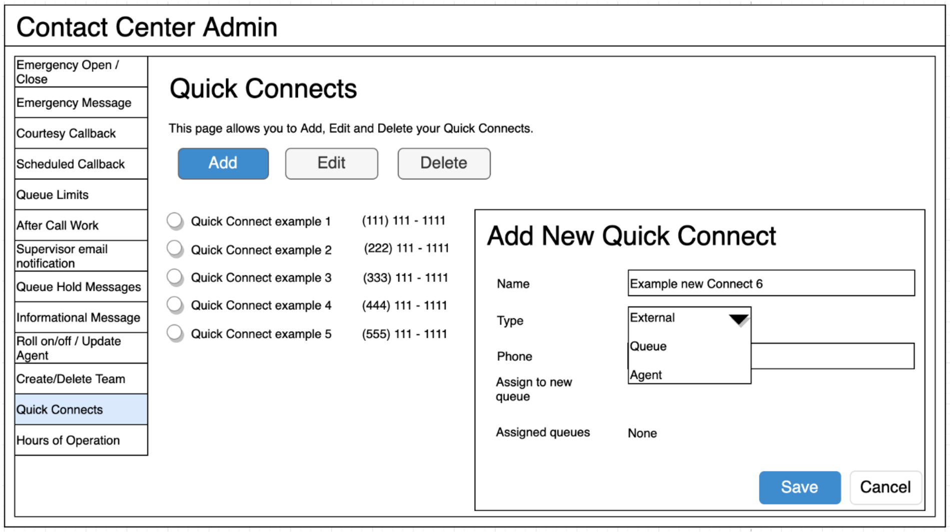



*Figure 60 Quick Connects: Add new Quick Connect type dropdown menu*

### 2.14.2.6 Quick Connects – add new Quick Connect - External type mockup

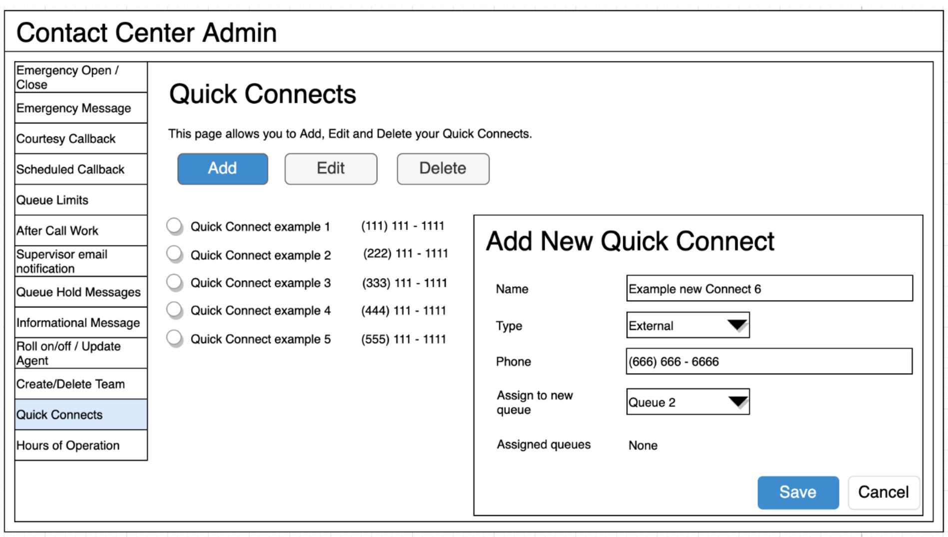



*Figure 61 Quick Connects: Add new Quick Connect - External type*

### 2.14.2.7 Quick Connects – add new Quick Connect - Queue type mockup

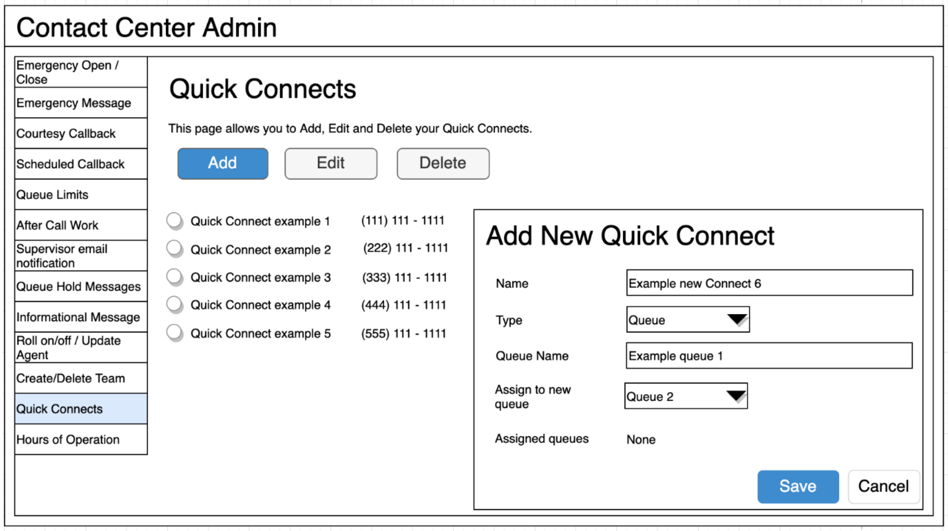



*Figure 62 Quick Connects: Add new Quick Connect - Queue type*

### 2.14.2.7 Quick Connects – add new Quick Connect - Agent type mockup

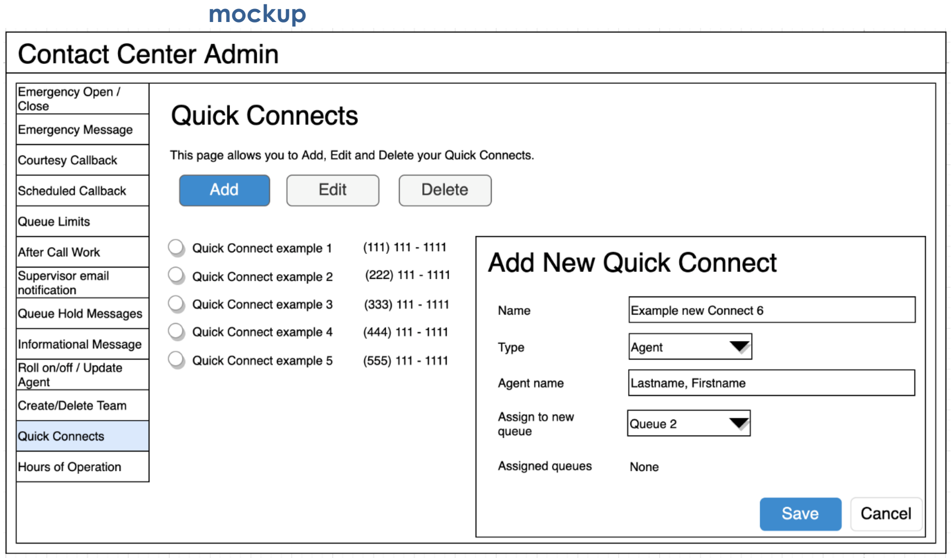



*Figure 63 Quick Connects: Add new Quck Connect - Agent type*

#### 2.14.2.8 Quick Connects – add new Quick Connect – assign to new queue mockup

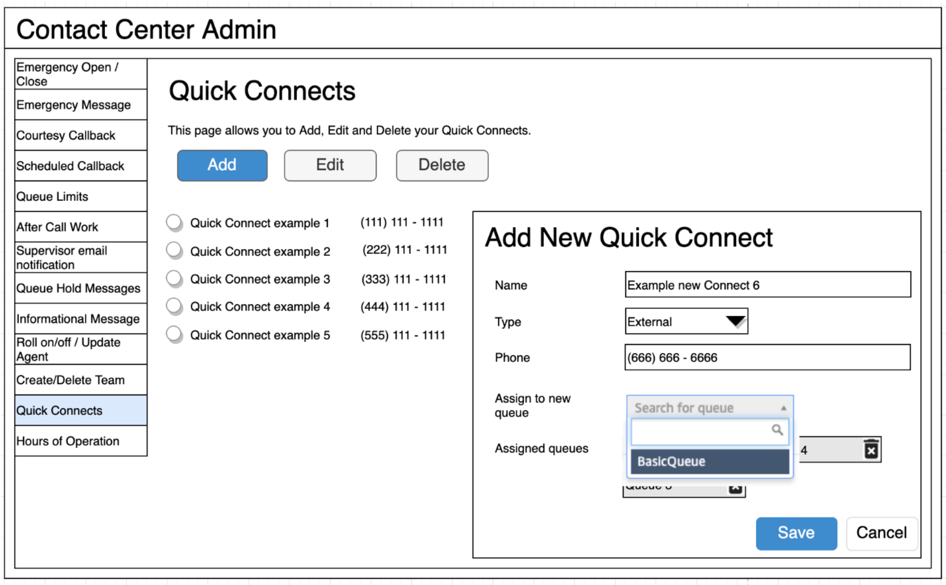



*Figure 64 Quick Connects - assign to new queue mockup*

#### 2.14.2.9 Quick Connects – add new Quick Connect

1. User can add new Quick Connects up to a maximum of 100 per County.
2. If there are less than 100 Quick Connects defined for the current County and the user presses the 'Add' button, the Add New Quick Connect dialog is displayed.
3. User enters name for the new Quick Connect, up to 60 alphanumeric characters.
4. There are 3 types of Quick Connect that can be defined. The Admin user selects the Quick Connect type with the 'Type' dropdown that shows the 3 options:
   a. External: to transfer a caller to another phone number
   b. Agent: to call another Agent within the Contact Center
   c. Queue: to transfer the caller to a specific queue.
5. If the user selects 'External' type, the following input options are displayed (shown in Figure 61)
   a. Phone – the phone number to transfer the caller to

   b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
6. If the user selects 'Queue' type, the following input options are displayed (shown in Figure 62)
   a. Queue Name – the Queue Name callers are transferred to when this Quick Connect is used
   b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
7. If the user selects 'Agent' type, the following input options are displayed (shown in Figure 63)
   a. Agent Name – the Agent the caller is transferred to when this Quick Connect is used
   b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
8. The 'Assign to new Queue' field is a searchable dropdown list. The displayed list of queues is filtered by the characters typed into the field. For example, if the user types 'A' the displayed list is updated to list Queue Names beginning with 'A'.
9. When a Queue Name is selected from the list it is displayed in the list of associated queue names underneath the field.
10. If user presses the 'Save' button, the new Quick Connect is created. The Add New Quick Connect dialog closes, and the displayed list of Quick Connects is updated to display the newly added Quick Connect.
11. If the user pressed the 'Cancel' button, the Add New Quick Connect dialog is closed and no action is taken.

Each Quick Connect must be assigned to a queue. When Agents using the Enhanced CCP select to transfer a call using a Quick Connect, they are shown a list of Quick Connects assigned to the current queue they are working. Selecting the Quick Connect will then transfer the caller to either the external number, a queue, or another Agent, depending on the Quick Connect type.

### 2.14.2.9 Quick Connects – edit Quick Connect mockup

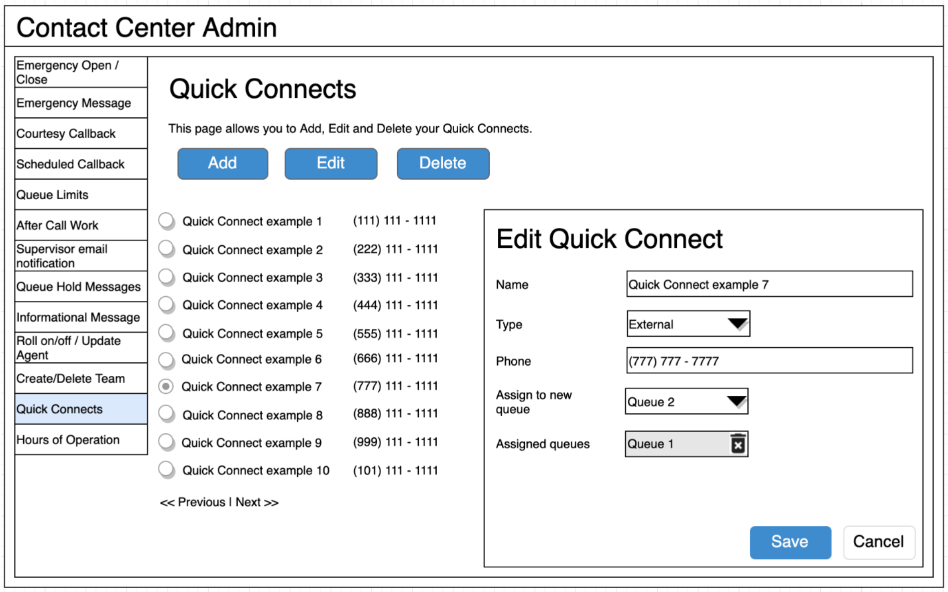



*Figure 65 Quick Connects: Edit Quick Connect mockup*

### 2.14.2.11 Quick Connects – edit Quick Connect

1. If the user selects a Quick Connect from the displayed list of Quick Connects and presses the 'Edit' button, the 'Edit Quick Connect' dialog is displayed.
2. The user can edit and change the current name and the Quick Connect type. If the Quick Connect type is changed, the displayed fields are updated to display the relevant fields for that type (as described in the Add New Quick Connect section).
3. The user can add and remove the Queues this Quick Connect is assigned to by selecting new Queues from the dropdown. To remove the association with a queue, the user presses the 'X' icon beside the queue name to delete the association to that queue.
4. If the user presses the 'Save' button, any changes are saved and the dialog is closed.
5. If the user presses the 'Cancel' button, any changes are discarded and the dialog is closed.

### 2.14.2.10 Quick Connects – delete Quick Connect mockup

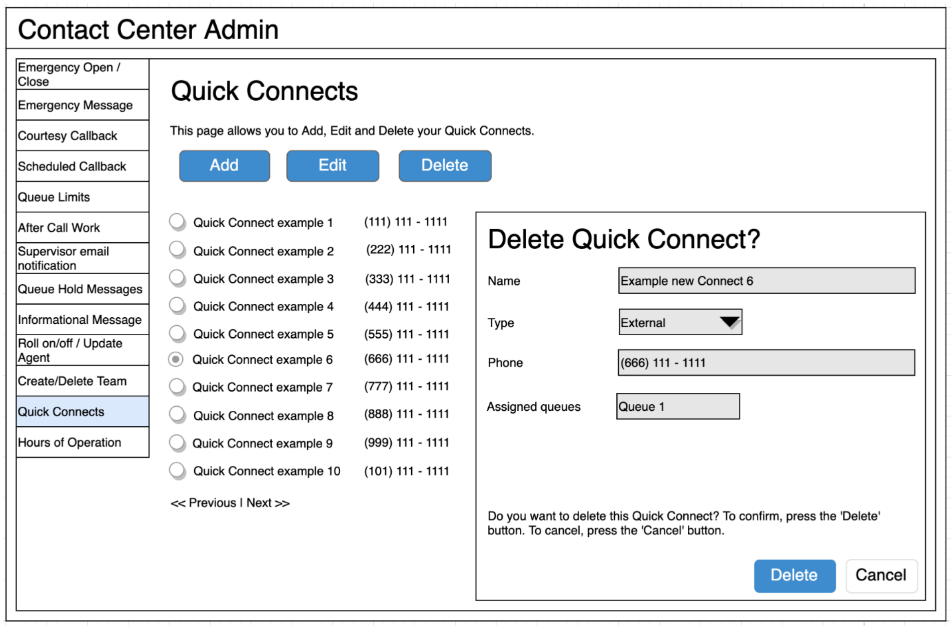



*Figure 66 Quick Connects: delete Quick Connect mockup*

### 2.14.2.13 Quick Connects – delete Quick Connect

1. User selects a Quick Connect to delete by pressing the radio button next to the name, and presses the ‘Delete’ button. The Delete Quick Connect dialog is displayed.
2. The Delete Quick Connect dialog asks the user to confirm deletion of the selected Quick Connect.
3. If the user presses ‘Delete’:
   a) The Quick Connect is deleted. The dialog closes and the displayed list is updated to remove the deleted Quick Connect.
4. Deleting a Quick Connect is permanent. To add back a Quick Connect, the Admin user can add a new Quick Connect following the page flow in section 2.14.2.6.

### 2.14.3 Assumptions

1. The maximum number of Quick Connects per County (per AWS Connect instance) is currently limited to a maximum of 100. This is an AWS Connect limitation.
2. This functionality will be enabled for RCC

## 2.15 Display Office Hours

### 2.15.2 Overview

This page displays the currently configured Hours of Operation for the current user's County. The page displays four tabs the include times and dates for:

- Contact Center office hours
- Holidays
- RCC office hours
- RCC holidays

### 2.15.3 Description of Changes

Add a new panel to the Admin Page that displays the currently configured Hours of Operation.

This page is display only; the values cannot be changed.

### 2.15.3.9 Hours of Operation mockup: Office hours

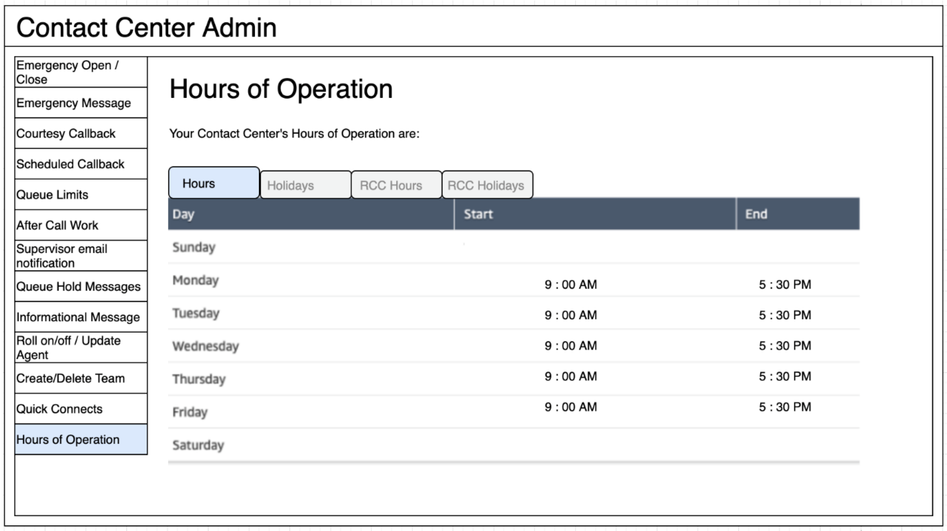



*Figure 67 Hours of Operation mockup*

### 2.15.3.10 Hours of Operation

The Hours of Operation panel on the Admin page displays currently configured Hours of Operation for each day of the week.

If the Contact Center is closed for a specific day, the Start and End times are shown as blank.

### 2.15.3.11 Hours of Operation mockup: Holidays

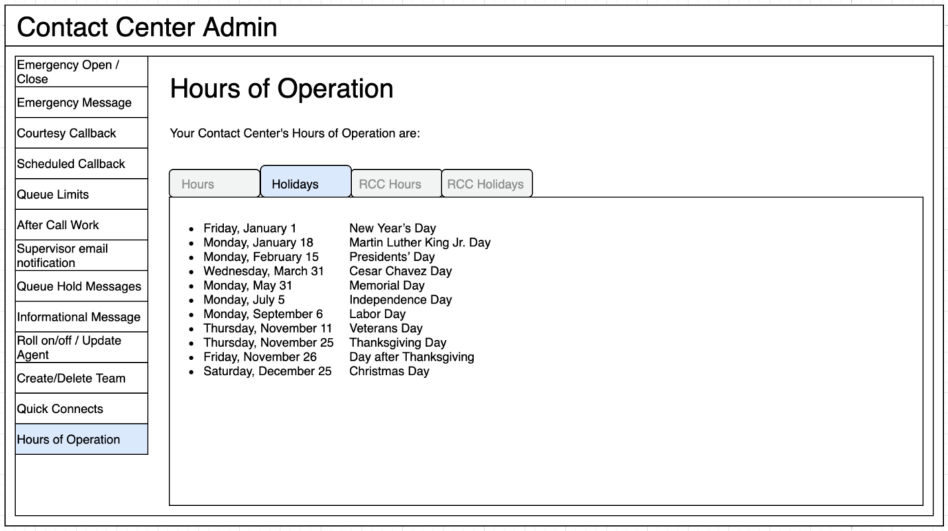



*Figure 68 Hours of Operation: Holidays*

### 2.15.3.12 Hours of Operation: Holidays

The holidays tab shows the county holiday dates observed for the current calendar year.

### 2.15.3.13 Hours of Operation mockup: RCC Hours

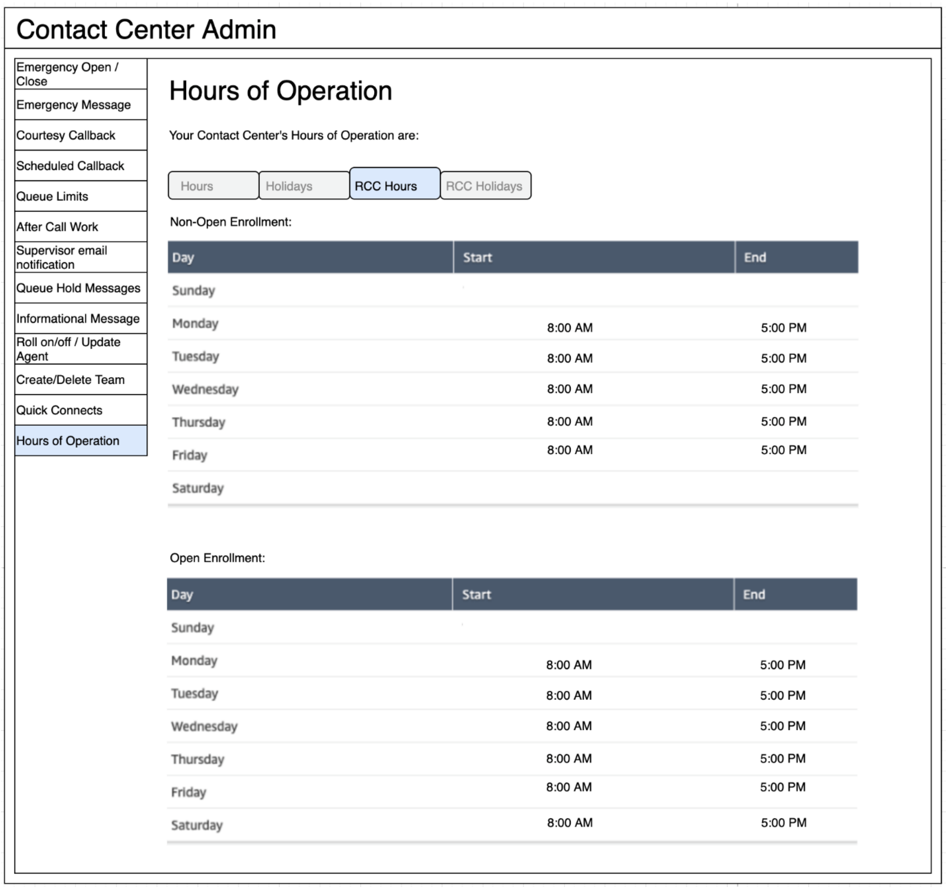



*Figure 69 Hours of Operation: RCC Hours*

### 2.15.3.14 Hours of Operation: RCC Hours

The RCC hours tab shows the office hours for Regional Call Centers, for during Open Enrollment and non-Open Enrollment.

### 2.15.3.15 Hours of Operation mockup: RCC Holidays

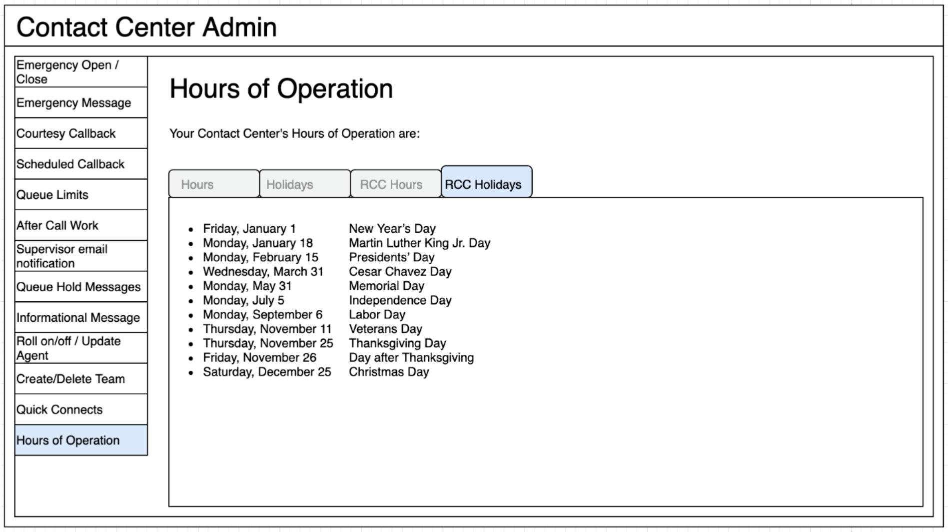



*Figure 70Hours of Operation: RCC Holidays*

### 2.15.3.16 Hours of Operation: RCC Holidays

The RCC Holidays tab shows holiday dates for the Regional Call Centers.

### 2.15.4 Assumptions

1. AWS Connect currently only supports APIs to retrieve Hours of Operation but not to update, therefore this page is only display only. Normal Contact Center Operations processes will be used to request a change to the current hours.
2. This page is enabled for RCC

## 2.16 Configuration Change Audit

### 2.16.2 Overview

The Administration pages allow an Admin user to change important configuration options for the Contact Center. Each time any of these features are changed, the changes are logged to an Audit database to ensure there is an audit trail.

This feature is included for each of the Administration page features described in the previous sections.

### 2.16.3 Description of Changes

1. Build a shared service that logs Administration page configuration changes to a single database.
2. Each time a user makes a change, for example, uses the Emergency Open/Close page to perform an Emergency Close or Open, the following fields are logged to the Audit database:
    a. CalSAWS User Id for user who made the change
    b. Date/timestamp of change
    c. Type of Change
    d. Changed value

Valid combinations of Type of Change and Changed Value are:

| Type of Change | Changed Value – valid options | Additional values |
|---|---|---|
| Emergency Open/Close | Open<br>Close | None |
| Queue Hold Message | Message added<br>Message deleted<br>Message edited | Message id |
| Courtesy Callback | Enabled<br>Disabled<br>Minutes changed<br>Time slot range changed | None |
| Scheduled Callback | Enabled<br>Disabled<br>Time slot added<br>Time slot deleted<br>Callbacks changed | None |
| Queue Limits | Queue length changed | None |
| After Call Work Limit | Limit changed | None |
| Roll-on / Roll-off | Search performed<br>Agent updated<br>Roll-on agent<br>Roll-off agent | Search value<br>Agent id |
| Emergency Message | Message added<br>Message deleted | Message id |

| | | |
|---|---|---|
| | Message edited<br>Current message changed | |
| Informational Message | Message added<br>Message deleted<br>Message edited<br>Current message changed | Message id |
| Supervisor Email Notification | Notification enabled<br>Notification disabled<br>Notification email changed | Changed email address |
| Create/Delete Team | Create new team<br>Edit team name<br>Delete team | Team id |
| **Quick Connects** | Add new Quick Connection<br>Edit Quick Connect<br>Delete Quick Connect | Quick Connect id / name |

## 3. SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |

## 4. REQUIREMENTS

### 4.14 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|---|---|---|
| 2222 | The CONTRACTOR shall configure the Customer Service Center solution to allow supervisors to configure triggers which send them an email notification when certain supervisor-specified conditions (e.g., ten calls waiting) are met. Supervisor-specified conditions are as follows:<br>- Number of calls waiting in queue<br>- Longest wait time for a call in a queue<br>- After Call Work state time limit for an agent<br>- Number of agents available to take calls<br>- Agent Rolled Over Not Ready (RONA) state<br>This is County configurable through the administration page. | Section 2.12:<br>Supervisor Email Notification configuration through Administration page |
| 2284 | The CONTRACTOR shall configure the Customer Service Center solution to allow a customer to request a scheduled callback if calling outside of the counties configured hours of operation or if the max queue limit has been reached in the queue. This is County configurable through the administration page. | Section 2.6:<br>Scheduled Callback configuration through Administration page<br><br>Section 2.7:<br>Queue Limit configuration through Administration page |
| 2169/2291 | The CONTRACTOR shall provide operational configurability, multi-tenant access to Counties for additional support of functionality within CalSAWS. Multi-tenant access is defined in the following:<br>The Counties will be responsible for the management of the following: | Agent Routing Profiles:<br>- Section 2.9: Routing profile is configured for an Agent as part of Roll-on<br><br>Resource roll-on/roll-off<br>- Section 2.9 |

| | | |
|---|---|---|
| | - Work force management<br>- Agent routing profiles<br>- Use of the reporting solution<br>- Resource roll-on/roll-off<br>- Create/Delete/Edit Teams<br>CalSAWS will be responsible for the management of the following:<br>- IVR changes<br>- Direct database access<br>- IVR build<br>- Adding/removing queues<br>The Counties and CalSAWS will both have the ability to independently access the following:<br>- Emergency closure<br>- Queue hold messages<br>- Office hour changes<br>- Queue limits<br>- After call work time limit<br>- Informational messages<br>- Emergency messages<br>- Supervisor email notifications<br>- Remote closure of the county Customer Service Center<br>- Amazon Quick Connects | Create/Delete/Edit Teams<br>- Section 2.13 Create / Delete Team<br><br>Independently access the following:<br>Emergency closure<br>- Section 2.3<br><br>Queue hold messages<br>- Section 2.4<br><br>Office hour changes<br>- Section 2.15Administration page<br><br>Queue limits<br>- Section 2.7<br><br>After call work time limit<br>- Section 2.8<br><br>Informational messages<br>- Section 2.11<br><br>Emergency messages<br>- Section 2.10<br><br>Supervisor email notifications<br>- Section 2.12<br><br>Remote closure of the county<br>- Section 2.3<br><br>Amazon Quick Connects<br>- Section 2.14Administration page |
| 2687 | The CONTRACTOR shall configure the CalSAWS Application to have a Customer Service Center Administration Page. This page will | Sections 2.1.2.2 – 2.1.2.4: Administration page Security |

| | | |
|---|---|---|
| | have a separate security right associated to it. There is one level of security permissions to the administration page. | |
| 2688 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to roll on and roll off Customer Service Center workers and change the following fields of a Customer Service Center worker:<br>- First Name<br>- Last Name<br>- County Email Address<br>- Windows Login ID<br>- Team<br>- Role | Section 2.9:<br>Roll-on/off / Update Agent through Administration page |
| 2689 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to close and open due to an emergency. | Section 2.3:<br>Emergency Closure through Administration page |
| 2690 | The CONTRACTOR shall configure a call center administration page within CalSAWS to give call center staff members the ability to insert their own custom queue hold messages (messages that are played to the customer as they wait in a queue to speak with an agent) into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved and played. The following languages will be supported through this functionality:<br>- English<br>- Spanish | Custom Queue Hold Messages<br>- Section 2.4 |

| | | |
|---|---|---|
| | - Farsi<br>- Vietnamese<br>- Mandarin<br>- Armenian<br>- Tagalog<br>- Russian<br>- Korean<br>- Cambodian<br>- Hmong<br>- Cantonese<br>- Arabic<br>- Lao | |
| 2691 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to change the hours that Courtesy Call Back is offered to the customer. | Section 2.5:<br>Courtesy Callback configuration through Administration page |
| 2692 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to change the number of minutes a customer needs to wait in queue before Courtesy Call Back is offered to the customer. | Section 2.5:<br>Courtesy Callback configuration through Administration page |
| 2693 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to adjust the limit on the number of calls allowed per queue at the Customer Service Center. Different queues can have different limits. | Section 2.7:<br>Queue Limits configuration through Administration page |
| 2694 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center | Section 2.8:<br>After Call Work Limit configuration through Administration page |

| | | |
|---|---|---|
| | staff members the ability to control the amount of time an agent can be in the "After Call Work" state after ending a call before being automatically put back in to the "Ready" state to receive a new call. | |
| 2695 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give staff members with the appropriate security the ability to insert a custom emergency message into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved. Only one message can be enabled to play from the bank of saved messages at a time. The following languages will be supported through this functionality:<br>- English<br>- Spanish<br>- Farsi<br>- Vietnamese<br>- Mandarin<br>- Armenian<br>- Tagalog<br>- Russian<br>- Korean<br>- Cambodian<br>- Hmong<br>- Cantonese<br>- Arabic<br>- Lao<br>This message plays when the customer selects to speak to a worker during normal operating hours and the Customer Service Center is closed. | Section 2.10: Emergency Message configuration through Administration page |

| | | |
|---|---|---|
| 2696 | The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give staff members with the appropriate security the ability to insert a custom informational message into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved. Only one message can be enabled to play from the bank of saved messages at a time. The following languages will be supported through this functionality:<br>- English<br>- Spanish<br>- Farsi<br>- Vietnamese<br>- Mandarin<br>- Armenian<br>- Tagalog<br>- Russian<br>- Korean<br>- Cambodian<br>- Hmong<br>- Cantonese<br>- Arabic<br>- Lao<br>This message plays after language selection in the IVR. | Section 2.11: Informational Message configuration through Administration page |
| 2702 | The CONTRACTOR shall configure the Customer Service Center solution to allow a customer to select a Courtesy Callback. Courtesy Callback is offered if the queue is over a certain threshold which is set by the County on the administration page. | 2.5 |

## 5. APPENDIX

### 5.14 Emergency Open/Close Status – Data Model

| Data element | Type | Example values |
|---|---|---|
| County Code | Number | 19 |
| Emergency Closure Status | String | Open, Closed |
| Last Update | Date | 2021-03-01T09:00:00 |

### 5.15 Queue Hold Message Data Model

| Data Element Name | Type | Example Values |
|---|---|---|
| countyId | Integer | 19 |
| messageId | Integer | 1 … 10 |
| messageName | String | Name of the message |
| messageText | String | The text for the Queue Hold message |

### 5.16 Courtesy Callback Data Model

| Data Element Name | Type | Example Value |
|---|---|---|
| countyId | Integer | 19 |
| courtesyCallbackEnabled | Boolean | True \| false |

### 5.17 Courtesy Callback Configuration Data Model

| Data Element Name | Type | Example Value |
|---|---|---|
| countyId | Integer | 19 |
| minutesBeforeCallbackOffered | Integer | 30 |
| mondayStartTime | String | 09:00:00 |
| mondayEndTime | String | 17:00:00 |
| tuesdayStartTime | String | 09:00:00 |
| tuesdayEndTime | String | 17:00:00 |
| wednesdayStartTime | String | 09:00:00 |
| wednesdayEndTime | String | 17:00:00 |
| thursdayStartTime | String | 09:00:00 |

| | | |
|---|---|---|
| thursdayEndTime | String | 17:00:00 |
| fridayStartTime | String | 09:00:00 |
| fridayEndTime | String | 12:00:00 |

CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-226837 | DDID 2699, 2210, 2705, 2706, 2707, 2708, 2709, 2710, 2711, 2712, 2713, 2714, 2715, 2719, 2720, 2721

CalSAWS Inbound IVR

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
| | Prepared By | Dheeraj Muralidara |
| | Reviewed By | |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 03/18/2021 | V0.1 | Draft | |
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# Table of Contents

# 1 OVERVIEW

The CalSAWS Interactive Voice Response (IVR) system will use the Amazon Connect platform for customers to call in to the County Contact Center. Currently, a customer can call into the IVR and obtain general information. Unauthenticated customers or non-primary applicants are routed to an agent. Meanwhile customers that are successfully authenticated and are primary applicants, can perform the following actions: obtain benefit program information, select a form to request, check on the status for a submitted documentation, and change their IVR PIN.

## 1.1 Current Design

The existing C-IV functionality migrated to CalSAWS with (SCR CA-207026). The CalSAWS Amazon Connect Contact Center Solution communicates with the CalSAWS application Database for self-service information.

## 1.2 Requests

Create Los Angeles and CalWIN counties individual call flows in the Amazon Connect environment.

## 1.3 Overview of Recommendations

1. Inbound IVR to include a customized call flow for each county that includes prompts, menus, queues, program selection, and call transfers supported for supported languages listed below:
    a. English
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Tagalog
    g. Russian
    h. Korean
    i. Cambodian
    j. Hmong
    k. Arabic
    l. Lao
    m. Cantonese
    n. Armenian
    o. Portuguese
2. Inbound IVR to include customer authentication via phone number and SSN, phone number and DOB, and voice print authentication.
3. Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts.
4. Inbound IVR self-service information for the CalWORKs and CalFresh programs.
5. Inbound IVR self-service information for the Medi-Cal program.
6. Inbound IVR self-service information for the Welfare-to-Work (WTW) programs.

7. Inbound IVR to allow the customer to select previously generated/sent forms to be re mailed.
8. Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case.
9. Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.
10. Inbound IVR to allow the customer to enter their zip code and request office hours and address.
11. Route calls to workers based on language and program selected by the customer in the IVR

### 1.4 Assumptions

1. Any re-mailing of documents will go to the same address as the original documents were mailed to.
2. Individual county call flows will be determined during individual county sessions
3. LA County and CalWIN county Inbound IVRs will go live with their individual county SCRs at a later date.

# 2 RECOMMENDATIONS

## 2.1 Inbound IVR Call Flow

### 2.1.1 Overview

The inbound IVR call flow is customized for all contact center counties including Los Angeles and the CalWIN counties. All inbound IVR call flows contain self-service menu options and the ability to speak to a worker/agent. Self-service menus are limited to customers that complete the authentication process.

### 2.1.2 Description of Changes

The verbiage for different languages supported in the inbound IVR will be translated and recorded by professional voice talent. Supported Languages:

- English (default)
- Spanish
- Farsi
- Vietnamese
- Mandarin
- Tagalog
- Russian
- Korean
- Cambodian
- Hmong
- Arabic

- Lao
- Cantonese
- Armenian
- Portuguese

Create self-service options, menus and prompts for Los Angeles and the CalWIN counties.

Note: Individual call flows will be customized including queues and call transfer options during the individual county sessions.

For callers who are successfully authenticated in the IVR, the system plays the self-service options if the caller is a primary applicant. One of the self-service options included provides benefit information for CalWORKs, CalFresh, Medi-Cal and Welfare to Work (WTW) programs. This information is provided dynamically based on the customers active programs.

#### 2.1.2.1 Self-Service Option for CalWORKs and CalFresh Programs

For the CalWORKs Program and CalFresh Program, the IVR will play back the following:

- Program Status
- Total Amount issued for this month and next month.
- The system will notify the customer if benefits are on hold.
- IVR plays back both the current and upcoming benefits for CalWORKs and CalFresh programs.
- The Held status is only set when a worker manually updates an issuance and selects the 'Held' status.
- It means the customer hasn't received the benefit because the county is holding on to the warrant/check.

Callers can also check the document status of their CalWORKs status report, CalFresh Status Report, CalWORKs, and CalFresh Redetermination Packet.

**Commented [DA1]:** Please make sure the bullet points and text line up with bullet points and text shown below so formatting is the same.

#### 2.1.2.2 Self-Service Option for the Medi-Cal Program

For the Medi-Cal program, the IVR will play back the following:

- Program Type (Medi-Cal Service Benefit)
- Program Status
- Share of cost information for each eligible member aided

Callers can also check the document status of their Medi-Cal Redetermination Packet

#### 2.1.2.3 Self-Service Option for Welfare-to-Work (WTW) Program

For the Welfare to Work program, the IVR will play back the following:

- Program Status
- WTW reimbursement amount for each person participating in the program
- Sanction Status/Reason

#### 2.1.2.4 Self-Service Option for Forms

The system gives the caller a dynamic set of options based on which forms are relevant to their case. They may select a form to request, based on the options available in this dynamic menu: Semi-annual report (SAR7), Transitional Medi-Cal Status report, or Verification of Benefits. The forms can be re-sent to the originally mailed address.

#### 2.1.2.5 Self-Service Option to Request New IVR PIN

The system gives the customer the ability to change their IVR PIN. IVR PINs, such as 111111 or 123456, or non-numeric IVR PINs are not acceptable. Customers must input the same IVR PIN twice and they must match. Changes to the IVR PIN immediately take effect.

In the existing C-IV functionality, customers have a 4-digit IVR PIN that will be migrated to CalSAWS. When a new IVR PIN number is requested or generated, the system will mail a letter to the customer with a new 6-digit IVR PIN number.

#### 2.1.2.6 Self-Service Option to Request Office Information

Callers will be prompted to enter their zip code into the IVR and the IVR will play back their County office hours and address.

## 2.2 Inbound IVR Authentication

### 2.2.1 Overview

Customers use authentication methods in the inbound IVR to access self service features. SSN/DOB/Phone Number combinations are some of the more widely used authentication methods. Additional methods of authentication include the use of an IVR PIN and/or Voice Print Authentication.

1. Phone number and SSN or DOB and IVR PIN
2. Voice print authentication

### 2.2.2 Description of Changes

During voice print authentication, the system asks the caller to speak their passphrase, “my voice is my password, please verify me.” The passphrase is streamed to a Voice Biometric Security server to compare the passphrase with previously enrolled voice prints. On a successful match, the caller will be routed to the self-service options. Voice Authenticate is included in SCR CA-226843.

New Cases generated in CalSAWS will contain letters as well as numbers. Customers will no longer be able to enter their case number if it contains letters, so the IVR will no longer prompt them to enter it.

The IVR will now prompt the customer to enter their phone number and their social security number. If the customer does not have or doesn’t know their social security number they will be prompted for their date of birth, and/or their IVR PIN. A customer will only be prompted for their date of birth or IVR PIN if the IVR is unable to narrow down the customer to a single person in the CalSAWS database.

Note: Customers issued a 4-digit IVR PIN in C-IV will be able to authenticate using their existing PIN. All IVR PINs generated in CalSAWS will be 6 digits. When a customer resets their existing 4-digit PIN migrated from C-IV the new PIN will be 6 digits.

If a caller selects to login with their social security number (SSN) and Date of Birth (DOB), the system matches the SSN and DOB combination before routing to the self-service options. Unauthenticated callers will be routed to the program menu.

## 2.3 Route to An Agent

### 2.3.1 Overview

If the caller decides to speak to a worker, the call is routed to a worker based on the program and language selected in the IVR.

### 2.3.2 Description of Changes

Calls are routed based on routing profiles and queues available in the county. Customers may be offered Courtesy Callback or Scheduled Callback based on the county administration of these features. Administration page features are included in SCR CA-226672

#### 2.3.2.1 Courtesy Callback

The Courtesy Callback feature reduces the time callers must wait in queue. The feature allows the system to offer callers the option to be called back by the system when it is the caller's turn to speak to an available agent.

This option can be limited to callers who meet certain criteria. For example, callers with the possibility of being in queue for more than X minutes.

If the caller decides to be called back by the system, they will input their phone number. When the system determines that an agent is available, then a call is placed back to the caller.

#### 2.3.2.2 Scheduled Callback

The "Scheduled Callback" feature is one where a customer will call the CalSAWS Call Center for a specific county and be placed into a queue. The system will then check if the call center is either closed or if it has reached the maximum limit of customers waiting in queue. In these cases, the customer will be offered callbacks for the next day at specified times. The Scheduled Callback functionality will be implemented with SCR CA-229573

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | AWS Inbound IVR Detailed Call Flow | Visio diagram represents inbound call flow, AWS inbound IVR Detailed Call Flow.pdf | |

# 4 REQUIREMENTS

## 4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|---|---|---|
| 2699 | The CONTRACTOR shall configure the Customer Service Center solution to route calls to workers based on language and program selected by the customer in the IVR. | Section 2.3 |
| 2210 | The CONTRACTOR shall configure the Customer Service Center solution to utilize call routing to | Section 2.3 |

| | | |
|---|---|---|
| | queue calls to agents specifically by language and program. | |
| 2705 | The CONTRACTOR shall configure the CalSAWS inbound IVR to have a customized call flow for each county including the following:<br> - prompts<br> - menus<br> - queues<br> - program selection<br> - call transfers<br>All flows include all self-service features.<br>The following languages will be supported in the CalSAWS inbound IVR:<br> - English<br> - Spanish<br> - Farsi<br> - Vietnamese<br> - Mandarin<br> - Armenian<br> - Tagalog<br> - Russian<br> - Korean<br> - Cambodian<br> - Hmong<br> - Cantonese<br> - Arabic<br> - Lao | Section 2.1.2 |
| 2706 | The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to authenticate themselves in the IVR using one of the following options:<br> - Social Security Number and date of birth<br> - case number and PIN<br> - voice print authentication | Section 2.2 |
| 2707 | The CONTRACTOR shall configure the CalSAWS Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts for the following programs:<br>- CalWORKs<br>- CalFresh<br>- Welfare to Work<br><br>The CONTRACTOR shall configure the self-service program menu to give customers the | Section 2.1.2 |

| | | |
|---|---|---|
| | ability to receive active or inactive status for Medi-Cal. | |
| 2708 | The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the CalWORKs and CalFresh programs as stated below:<br>- Program Status<br>- Total Amount received for this month<br>- If benefits are on hold, the system will notify the customer<br>- If benefits are not on hold, the customer will be notified for what they are eligible to receive in the upcoming month. | Section 2.1.2.1 |
| 2709 | The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Medi-Cal program as stated below:<br>- Medi-Cal Program Type<br>- Status<br>- Share of Cost<br>- Medi-Cal Service Benefit | Section 2.1.2.2 |
| 2710 | The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Welfare-to-Work (WTW) programs as stated below:<br>- Upcoming Activities<br>- WTW Reimbursement Amount<br>- Sanction Status/Reason | Section 2.1.2.3 |
| 2711 | The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to select previously generated/sent forms to be mailed. The form list will be dynamically provided to the customer based on forms relevant to their case. The following forms can be re-sent:<br>-Semi-annual report<br>-Transitional Medi-Cal Status report<br>-Passport to services form | Section 2.1.2.4 |
| 2712 | The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case. They may select a form to get the status of the form based on the options available in this dynamic menu: | Section 2.1.2.1 and 2.1.2.2 |

| | | |
|---|---|---|
| | - CalWORKs status report<br>- CalWORKs or CalFresh Redetermination packet<br>- CalFresh status report<br>- CalFresh Redetermination packet<br>- Transitional Medi-Cal status report<br>- Medi-Cal Redetermination packet | |
| 2713 | The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to change their IVR PIN. Changing the IVR PIN is real-time. | Section 2.1.2.5 |
| 2714 | The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them. | Section 2.1.2.5 |
| 2715 | The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to enter their zip code and request office hours and address. | Section 2.1.2.6 |
| 2719 | The CONTRACTOR shall configure the Covered California Inbound IVR for the Covered California Quick Sort Transfers to route calls to the appropriate county queues. The IVR will:<br>- Capture the tracker ID, county code, and language code<br>- Offer Courtesy Callback<br>- Have a voicemail option for transfers outside of regular hours of operation and holidays | 2.3 |
| 2720 | The CONTRACTOR shall configure the Covered California Inbound IVR to automatically route calls between counties in the event the intended county is unavailable due to the following reasons:<br>- Holiday<br>- Logged Out<br>- Close for Emergency<br>- Technical Issues | 2.3 |
| 2721 | The CONTRACTOR shall configure the Customer Service Center solution to allow Counties to call into a unique and specific phone number provided to the County and accessed through a PIN assigned to the County by CalSAWS to:<br>- Close their contact center remotely | 2.3 |

| | | |
|---|---|---|
| | - Record an emergency and/or informational message to play in the IVR. The messages can be up to 120 seconds. | |

# CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-229461

Customer Non-Benefit Issuance Category
(Phase II)

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
| | Prepared By | Alexander Neilson; Esequiel Herrera-Ortiz |
| | Reviewed By | Sidhant Garg, Duke Vang, Naresh Barsagade, Kapil Santosh, Sheryl Eppler, Claudia Pinto |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 06/21/2021 | 1.0 | Initial Version | Alexander Neilson |
| 09/30/2021 | 1.1 | Updated Assumption 8.1.4 to include additional Fiscal and State reports.<br>Update to assumption #10 to reference CA-233690 Update Reports for Customer Non-Benefit Issuance Category. | Esequiel Herrera-Ortiz |
| 07/28/2022 | 2.1 | Updated list of reports for Assumption 8.1.4.<br>Add 2.2 and 2.10 recommendations | Esequiel Herrera-Ortiz, Eric Wu |
| 08/05/2022 | 2.2 | Updated Page Mapping 2.2.6 to include Customer Non-Benefit Page Mapping. | Anusha Gangishetty |
| | | | |
| | | | |
| | | | |
| | | | |

# Table of Contents

# 1 OVERVIEW

## 1.1 Current Design

A new Issuance Category of Customer Non-Benefit was added with CA-226779 in the 21.05 release. Customer Non-Benefit issuances will not be counted as a Customer Benefit and thus will no count towards a customer's food or cash assistance and Time Limit Aid Summary.

## 1.2 Requests

Fully automate the Customer Non-Benefit Issuance Category for the online fiscal pages, fiscal issuance batch jobs, fiscal interfaces, and claiming.

Note: Fiscal Reports will be addressed with a separate SCR.

## 1.3 Overview of Recommendations

1. Update Issuance Detail to disallow editing for Customer Non-Benefit issuances.
2. Update the Auxiliary Authorization Detail to allow users with special rights to select Customer Non-Benefit Type value.
3. Update Issuance Batch to assign the new Customer Non-Benefit issuance category to issuances with one of the two new Customer Non-Benefit pay codes.
4. Update Daily Direct Deposit Writer jobs to include the new Customer Non-Benefit issuances.
5. Update the EBT Benefit Writer interface to include the new Customer Non-Benefit issuances.
6. Update the Daily SWR Writer jobs to include the new Customer Non-Benefit issuances.
7. Update the Migration Warrant Print Writer to include the new Customer Non-Benefit issuances.
8. Update the San Bernardino Daily Warrant Print Writer to include the new Customer Non-Benefit issuances.
9. Update the Merced Warrant Print Writer to include the new Customer Non-Benefit issuances.
10. Update the Riverside Daily Warrant Print Writer to include the new Customer Non-Benefit issuances.
11. Update the QCIS Interface CalFresh Secondary Universe job to exclude issuance transactions of category type' Customer Non- Benefit'.
12. Update the QCIS Interface CalFresh Negative Universe job to exclude issuance transactions of category type' Customer Non- Benefit'.

## 1.4 Assumptions

1. The EBT Benefit Type will still follow the existing program and aid code mapping from CT 2055.
2. Customer Non-Benefit issuances will not be considered in the Previous Potential Benefit calculations on EDBC.
3. Customer Non-Benefit issuances will not be Collectible.
4. On EBT Repayment Detail page, the system will not be able to determine if benefits are from Customer Non-Benefit issuance.
5. There will be no new Claiming Transaction Type Codes for Customer Non-Benefit Issuances. The new Customer Non-Benefit pay codes will be used to identify Customer Non-Benefit Issuances for claiming and reports purposes.
6. Interface partner testing with CalWIN Counties will be handled with a separate DDID.
7. Existing Customer Non-Benefit issuances (Pandemic Emergency Assistance Fund and Golden State Grant payments) will not be updated with the new Customer Non-Benefit Pay Codes.
8. All issued Customer Non-Benefit issuances will display on the following reports depending on the program or issuance method of the payment:

1.1.
- 1.1.1. CalFresh over 399 with Earned Income Report
- 1.1.2. DCFS New Placement Report
- 1.1.3. PRUCOL Case Tracking Report

1.2. Administrative Reports:
- 1.2.1. Supervisor Authorization Report
- 1.2.2. AB109 LRS Financial Summary Report

1.3. Employment Services Reports:
- 1.3.1. Assessment and Learning Disability Evaluation Provider Payments Report

1.4. Fiscal Reports:
- 1.4.1. 1099 Monthly Control Report
- 1.4.2. 1099 Reconciliation Report
- 1.4.3. 1099 Reconciliation Detail Report
- 1.4.4. Cash EBT Production Reconciliation Report
- 1.4.5. Child Care Manual Issuance Register
- 1.4.6. Claim Grand Totals Detail Report
- 1.4.7. Claim Grand Totals Summary Report
- 1.4.8. Community Treatment Facility Report
- 1.4.9. DCFS Claim Data Report
- 1.4.10. Foster Care Facility - GH and FFA Report
- 1.4.11. Foster Care Transitional Housing Payment Report
- 1.4.12. Integrated CalFresh Issuance Detail Claiming Report – Incomplete information
- 1.4.13. Integrated Nutrition Benefit Issuance Detail Claiming Report
- 1.4.14. Integrated Payroll Benefit Issuance Detail Claiming Report
- 1.4.15. Integrated Payroll Benefit Issuance Detail Claiming Report By Case
- 1.4.16. JVW Daily Details Report

1.4.17. JVW Month-End Details Report
1.4.18. MTFC-ITFC Payment Report
1.4.19. Month-End JVW Cancellations and Expungement Report
1.4.20. Out of State Facility Report
1.4.21. Retroactive Aid Code Adjustment Detail Report
1.4.22. Rush Child Care Warrant Register
1.4.23. Warrant Production Reconciliation Report
1.4.24. CalFresh EBT Production Reconciliation Report
1.4.25. Nutrition Benefit EBT Production Reconciliation Report
1.4.26. Skipped Issuance Report
1.4.27. Daily Journal Voucher Warrant Report
1.4.28. Daily Interface Payment Status Report

9. All claimed Customer Non-Benefit issuances will display on the Auxiliary Authorization Registers.
10. All Customer Non-Benefit issuances will be included in the State reports listed below depending on the program they were issued for. With **CA-233690 Update Reports for Customer Non-Benefit Issuance Category** the reports will be updated to exclude Customer Non-Benefit information. Until the implementation of CA-233690, counties will need to manually adjust for the customer Non-Benefit information.
    a. State/CA 237 HA
    b. State/CA 237 CW
    c. State/GA 237
    d. State/STAT 45
    e. Disaster CalFresh Daily
    f. FC1 - Continuum of Care Reform Facility Report
    g. TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs
11. Customer Non-Benefit issuances will not be sent in the Child Support Interface.
12. Customer Non-Benefit issuances will not be sent in the CalFresh Primary and Secondary Sampling Interface.
13. Customer Non-Benefit issuance will not be sent in the TANF Primary and Secondary Sampling Interface.
14. Cancelled Customer Non-Benefit issuance will not be sent in the CalFresh Negative Review interfaces (Quality and Negative Action (QNA)).

# 2 RECOMMENDATIONS

## 2.1 Issuance Detail

### 2.1.1 Overview

The Issuance Detail page allows the user to view and edit the issuance details for a program and benefit month. In addition, this page also allows the user to replace EBT benefits.

### 2.1.2 Description of Changes

1. Update the Issuance Detail page to disallow editing for Customer Non-Benefit issuances.
2. Update the Issuance Detail Page to **not display** the following buttons for Customer Non-Benefit issuances.
   - Reissue
   - External Reissue
   - Replace
   - Collect
   - Edit
   - Affidavit

   NOTE: Any lost or recovered funds must be created through another authorization.
3. Update the Issuance Detail Page to **display** the following buttons for Customer Non-Benefit issuances.
   - Cancel
   - Close
   - Print

### 2.1.3 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Issuance History

### 2.1.4 Security Updates

No changes.

### 2.1.5 Page Mapping

No Changes.

### 2.1.6 Page Usage/Data Volume Impacts

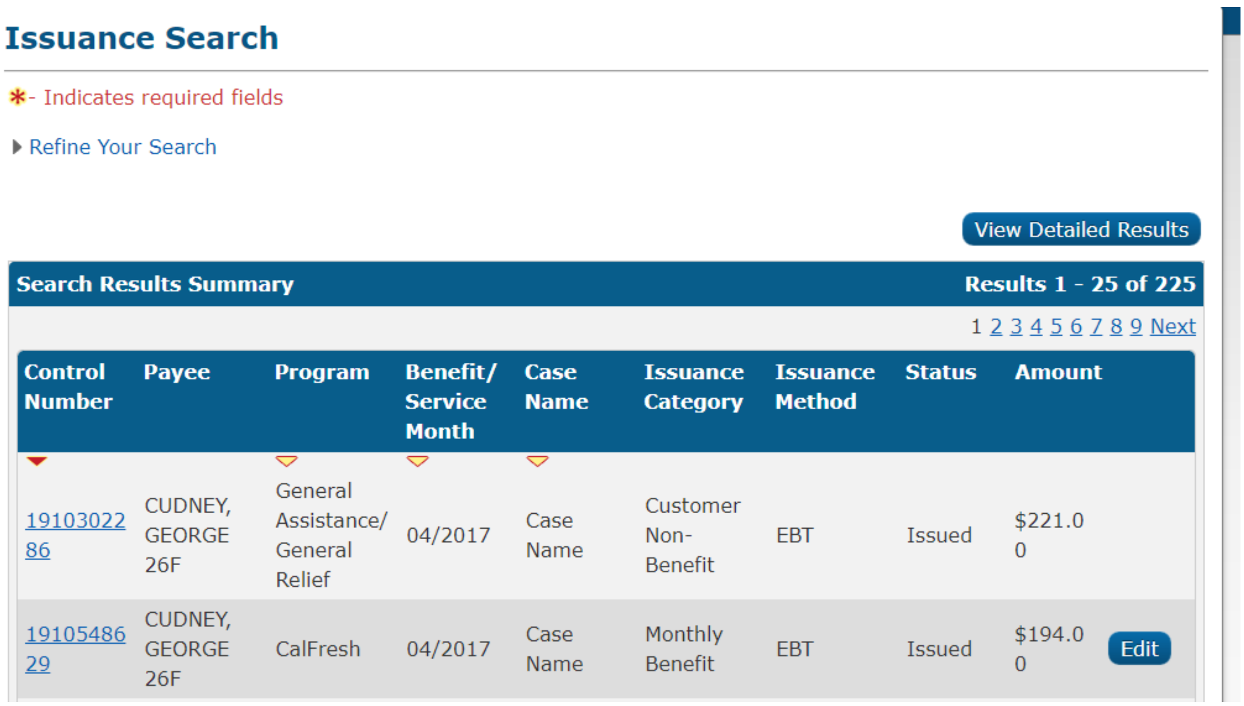
No changes.

## 2.2 Issuance search

### 2.2.1 Overview

The Issuance Search page allows the user to search for benefit issuance records.

### 2.2.2 Issuance Search Page Mockup



**Issuance Search**

*- Indicates required fields

Refine Your Search

View Detailed Results

**Search Results Summary** — **Results 1 - 25 of 225**

1 2 3 4 5 6 7 8 9 Next

| Control Number | Payee | Program | Benefit/ Service Month | Case Name | Issuance Category | Issuance Method | Status | Amount | |
|---|---|---|---|---|---|---|---|---|---|
| 1910302286 | CUDNEY, GEORGE 26F | General Assistance/ General Relief | 04/2017 | Case Name | Customer Non-Benefit | EBT | Issued | $221.00 | |
| 1910548629 | CUDNEY, GEORGE 26F | CalFresh | 04/2017 | Case Name | Monthly Benefit | EBT | Issued | $194.00 | Edit |

**Figure 2.2.1 – Issuance Search Page – Hide 'Edit' button for the CNB issuance**

### 2.2.3 Description of Changes

- Update the Issuance Search page to disallow editing for Customer Non-Benefit issuances by hiding the 'Edit' button.

### 2.2.4 Page Location

- **Global:** Fiscal
- **Local:** Issuances
- **Task:** Issuance Search

### 2.2.5 Security Updates

No changes.

### 2.2.6 Page Mapping

No Changes.

### 2.2.7 Page Usage/Data Volume Impacts

No changes.

## 2.3 Auxiliary Authorization Detail

### 2.3.1 Overview

The Auxiliary Authorization Detail page allows the users to create and authorize auxiliary authorization requests without requiring any eligibility determination. This update will allow workers with the correct security right to select Customer Non-Benefit type value which will then determine the appropriate pay code that mark an issuance as belonging to the new Customer Non-Benefit issuance category.

### 2.3.2 Auxiliary Authorization Detail Page Mockup

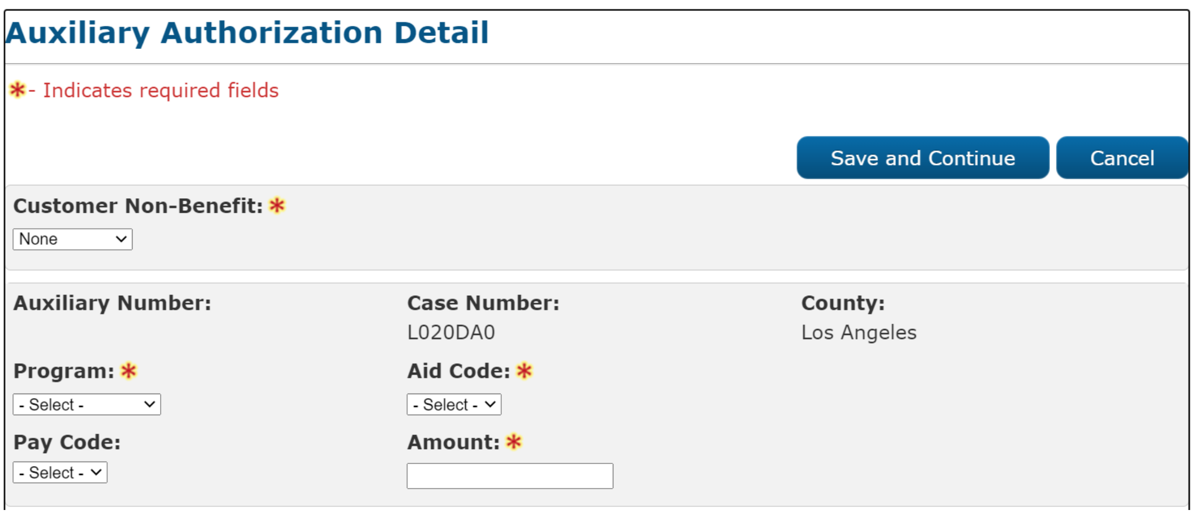



**Figure 2.3.1 – Auxiliary Authorization Detail page – On Page Load (Create Mode)**

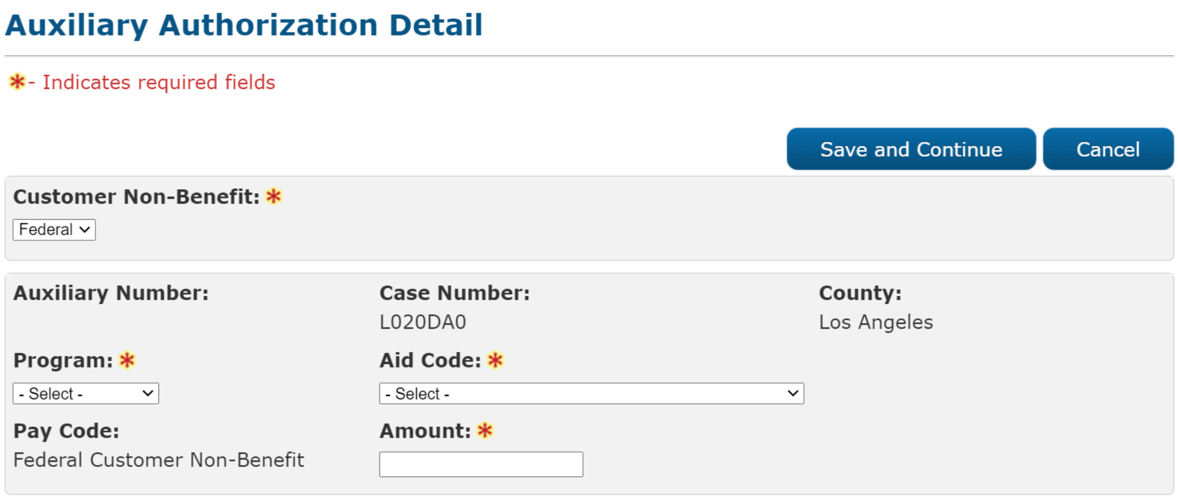



**Figure 2.2.2 – Auxiliary Authorization Detail page – Customer Non-Benefit Selection**

### 2.3.3 Description of Changes

1. Add a new section immediately before the header section of the Auxiliary Authorization Detail page. This section will only be visible for users with the appropriate security rights.
2. Add a 'Customer Non-Benefit' field to the new section with a dropdown containing the values 'None', 'Federal', and 'Non-Federal', with 'None' being the default value. Selecting 'Federal' or 'Non-Federal' from this dropdown will update the pay code field to the corresponding Federal or Non-Federal Customer Non-Benefit pay codes. They pay code field will then be set to read only. If the pay code field has been set to a Customer Non-Benefit pay code and made non-editable, selecting 'None' will remove the pay code selection and make the pay code field editable again.
3. Add a form validation that will verify that the worker has the appropriate security rights when a Customer Non-Benefit selection has been made other than 'None'. The validation message will be 'Customer Non-Benefit: Worker does not have appropriate security rights.'

### 2.3.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Auxiliary Authorization List

### 2.3.5 Security Updates

| Security Right | Right Description | Right to Group Mapping |
|---|---|---|
| CustomerNonBenefitCreate | This right will allow workers on the "Auxiliary Authorization Detail" page to view and click the "Customer Non-Benefit" and "Remove Customer Non-Benefit" buttons. | Customer Non-Benefit Create |

### 2.3.6 Page Mapping

| | Table Name | Column | Description |
|---|---|---|---|
| Customer Non-Benefit | AUX_PMT | CNB_TYPE_CODE | 10752 - This column stores the customer non-benefit type associated to the auxiliary authorization record |

### 2.3.7 Page Usage/Data Volume Impacts

No changes.

## 2.4 Issuance Batch

### 2.4.1 Overview

Issuance Batch is responsible for creating an Issuance record for each authorization that is subject to be paid on a Monthly/Nightly basis. This update is to configure the Issuance Batch to process the new Customer Non-Benefit Issuance Category.

### 2.4.2 Description of Change

1. Update the Issuance Batch to identify issuances based on the new Federal and Non-Federal Customer Non-Benefit pay codes and set the issuance category to the new Customer Non-Benefit issuance category.

2. Update the logic to update from Direct Deposit to Warrant if the county is a Monthly DD County and not a monthly benefit for the new Customer Non-Benefit issuance category.

#### 2.4.3 Execution Frequency

No Change.

#### 2.4.4 Key Scheduling Dependencies

No Change

#### 2.4.5 Counties Impacted

All CalSAWS counties.

#### 2.4.6 Data Volume/Performance

No Change.

#### 2.4.7 Failure Procedure/Operational Instructions

No Change.

### 2.5 Daily Direct Deposit Writer Jobs

#### 2.5.1 Overview

Several county direct deposit writer jobs share the same database access logic that will need to be updated to include the new Customer Non-Benefit issuance category.

#### 2.5.2 Description of Changes

1. Update the Direct Deposit Writer to retrieve issuances with the new Customer Non-Benefit issuance category in addition to what it currently retrieves.

#### 2.5.3 Execution Frequency

No Change.

#### 2.5.4 Key Scheduling Dependencies

No Change

### 2.5.5 Counties Impacted

All CalSAWS counties.

### 2.5.6 Data Volume/Performance

No Change.

### 2.5.7 Failure Procedure/Operational Instructions

No Change.

## 2.6 EBT Benefit Writer Interface

### 2.6.1 Overview

The EBT Benefit Writer Interface is responsible for transmitting EBT benefits to FIS to be issued. This update is to include the new Customer Non-Benefit issuance category when sending EBT reactivations.

### 2.6.2 Description of Changes

1. Modify the EBT Daily Cash and EBT Daily Food writers to include the Customer Non-Benefit Issuance Category.

### 2.6.3 Execution Frequency

No Change.

### 2.6.4 Key Scheduling Dependencies

No Change

### 2.6.5 Counties Impacted

All CalSAWS counties.

### 2.6.6 Data Volume/Performance

No Change.

### 2.6.7 Failure Procedure/Operational Instructions

No Change.

## 2.7 Daily SWR Writer Jobs

### 2.7.1 Overview

The Daily SWR Writer jobs are responsible for submitting warrant and direct deposit benefits to eCAPS to be issued. This update is to include issuances belonging to the new issuance category.

### 2.7.2 Description of Changes

1. Modify the DPSS Daily job (PO19F413) to include the new Customer Non-Benefit issuance category when retrieving issuances.
2. Modify the DCFS Daily job (PO19F418) to include the new Customer Non-Benefit issuance category when retrieving issuances.

### 2.7.3 Execution Frequency

No Change.

### 2.7.4 Key Scheduling Dependencies

No Change

### 2.7.5 Counties Impacted

Los Angeles County.

### 2.7.6 Data Volume/Performance

No Change.

### 2.7.7 Failure Procedure/Operational Instructions

No Change.

## 2.8 Migration Warrant Print Writer – POXXF100

### 2.8.1 Overview

The Migration Warrant Print Writer job writes the ready for issuance warrant issuances to the outbound file and updates their status to submitted.

### 2.8.2 Description of Changes

1. Update the Migration Warrant Print Writer job to include the Customer Non-Benefit issuance category.

### 2.8.3 Execution Frequency

No Change.

### 2.8.4 Key Scheduling Dependencies

No Change

### 2.8.5 Counties Impacted

C-IV Migration Counties.

### 2.8.6 Data Volume/Performance

No Change.

### 2.8.7 Failure Procedure/Operational Instructions

No Change.

## 2.9 San Bernardino Daily Warrant Print Writer – PO36F100

### 2.9.1 Overview

The San Bernardino Daily Warrant Print Writer job writes the ready for issuance warrant issuances to the outbound file and updates their status to submitted.

### 2.9.2 Description of Changes

1. Update the San Bernardino Daily Warrant Print Writer job to include the Customer Non-Benefit issuance category.

### 2.9.3 Execution Frequency

No Change.

### 2.9.4 Key Scheduling Dependencies

No Change

### 2.9.5 Counties Impacted

San Bernardino.

### 2.9.6 Data Volume/Performance

No Change.

### 2.9.7 Failure Procedure/Operational Instructions

No Change.

## 2.10 San Bernardino Daily Warrant Print EBT Writer – PO36F101

### 2.10.1 Overview

The San Bernardino Daily Warrant Print EBT Writer job writes the issued and canceled EBT issuances to the outbound file.

### 2.10.2 Description of Changes

1. Update the San Bernardino Daily Warrant Print EBT Writer job to include the Customer Non-Benefit issuance category.

### 2.10.3 Execution Frequency

No Change.

### 2.10.4 Key Scheduling Dependencies

No Change

### 2.10.5 Counties Impacted

San Bernardino.

### 2.10.6 Data Volume/Performance

No Change.

### 2.10.7 Failure Procedure/Operational Instructions

No Change.

## 2.11 Merced Warrant Print Writer – PO24F100

### 2.11.1 Overview

The Merced Warrant Print Writer job writes the ready for issuance warrant issuances to the outbound file and updates their status to submitted.

### 2.11.2 Description of Changes

1. Update the Merced Warrant Print Writer job to include the Customer Non-Benefit issuance category.

### 2.11.3 Execution Frequency

No Change.

### 2.11.4 Key Scheduling Dependencies

No Change

### 2.11.5 Counties Impacted

Merced.

### 2.11.6 Data Volume/Performance

No Change.

### 2.11.7 Failure Procedure/Operational Instructions

No Change.

## 2.12 Riverside Daily Warrant Print Writer – PO33F100

### 2.12.1 Overview

The Riverside Daily Warrant Print Writer job writes the ready for issuance warrant issuances to the outbound file and updates their status to submitted.

### 2.12.2 Description of Changes

1. Update the Riverside Daily Warrant Print Writer job to include the Customer Non-Benefit issuance category.

### 2.12.3 Execution Frequency

No Change.

### 2.12.4 Key Scheduling Dependencies

No Change

### 2.12.5 Counties Impacted

Riverside.

### 2.12.6 Data Volume/Performance

No Change.

### 2.12.7 Failure Procedure/Operational Instructions

No Change.

## 2.13 Update QCIS Interface CalFresh Secondary Universe job 'P0XXE801'

### 2.13.1 Overview

Currently the CalFresh secondary universe QCIS (Quality Control Information System) interface batch job 'P0XXE801'randomly selects the issued or manually issued issuances of issuance category code other than 'Monthly Benefit' and sends them to QCIS to measure accuracy in the food assistance programs.

### 2.13.2 Description of Changes

1. Update the batch job 'POXXE801' to exclude the issuance category type of 'Customer Non-Benefit' along with the 'Monthly Benefit' when selecting the issuances to send to to QCIS – Quality Control Information System.

### 2.13.3 Execution Frequency

No Change

### 2.13.4 Key Scheduling Dependencies

No Change

### 2.13.5 Counties Impacted

All counties

### 2.13.6 Data Volume/Performance

Unknown

### 2.13.7 Interface Partner

QCIS – Quality Control Information System

### 2.13.8 Failure Procedure/Operational Instructions

No Change

## 2.14 Update QCIS Interface CalFresh Negative Universe job 'PO19E812'

### 2.14.1 Overview

Currently the CalFresh Negative universe QCIS (Quality Control Information System) interface batch job 'PO19E812' randomly selects denied/Discontinued/ Rescinded CalFresh programs with cancelled issuances that have not been re-issued for a sample month and sends them to QCIS to measure accuracy in the food assistance programs.

### 2.14.2 Description of Changes

1. Update the batch job 'PO19E812' to exclude the issuance category type of 'Customer Non-Benefit' when selecting the cancelled issuances in the CalFresh program for the sample month to send to QCIS – Quality Control Information System.

### 2.14.3 Execution Frequency

No Change

### 2.14.4 Key Scheduling Dependencies

No Change

### 2.14.5 Counties Impacted

LA county

### 2.14.6 Data Volume/Performance

Unknown

### 2.14.7 Interface Partner

QCIS – Quality Control Information System

### 2.14.8 Failure Procedure/Operational Instructions

No Change

## 2.15 Fund Code Determination

### 2.15.1 Overview

Currently in the System, fund codes are used to store the accounting String information for a County. This information helps in claiming the funding for County from State (Federal/Non-Federal). This update will add the appropriate funding codes and accounting strings for the new Customer Non-Benefit Pay Codes.

### 2.15.2 Description of Changes

Add the new Fund Codes in the system to store the accounting string information for the new Customer Non-Benefit Pay Codes.

NOTE: Please refer to the attached "Customer Non-Benefit Fund Codes.xlsx "file under Section 3 for the appropriate fund codes and accounting string information for each county.

## 2.16 Counties Interface Testing

### 2.16.1 Overview

Each CalSAWS county has its separate warrant print & auditor control file exchange process. This section describes the recommendations to perform interface testing for all CalSAWS counties.

### 2.16.2 Description of Changes

1. Perform the interface file testing for following counties:
    - FIS - Food/Cash Daily EBT Interface
    - Los Angeles – eCAPS Special Warrant Request (SWR)
    - Migration (ISAWS) - WarrantPrintWriter file
    - Merced - FIRMS
    - Stanislaus
    - San Bernardino - FAS
    - Riverside - OASIS

## 2.17 Code Table Change Request (CTCR)

1. Add a new Federal Customer Non-Benefit pay code. This code will be used to identify an issuance as a Customer Non-Benefit issuance with a federal funding source.

  - The federal indicator attribute will be set to Yes.
  - The 'Claim Based on Pay Code' attribute will be set to Yes.
  - This pay code will be enabled for all programs.
  - This pay code will be disabled for all counties*****.

2. Add a new Non-Federal Customer Non-Benefit pay code. This code will be used to identify an issuance as a Customer Non-Benefit issuance with a Non-Federal funding source.
   - The federal indicator attribute will be set to No.
   - The 'Claim Based on Pay Code' attribute will be set to Yes.
   - This pay code will be enabled for all programs.
   - This pay code will be disabled for all counties*****.
3. Update the pay code chart on the web portal to include the two new Customer Non-Benefit pay codes.

***NOTE**: The new Customer Non-Benefit pay codes will be disabled for all counties as a measure to prevent them from being accessible on page pay code dropdowns. They will only be accessible through special functionality on the Auxiliary Authorization Detail page.

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | Fiscal | Customer Non-Benefit Fund Codes | Customer%20Non-Benefit%20Fund%20( |

# 4 REQUIREMENTS

## 4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|---|---|---|
| | | |
| | | |

## 4.2 Migration Requirements

| DDID # | REQUIREMENT TEXT | Contractor Assumptions | How Requirement Met |
|---|---|---|---|
| | | | |
| | | | |

# 5 MIGRATION IMPACTS

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

# 6 OUTREACH

No Change.

# 7 APPENDIX

No Change.

CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-235894

~~Remove~~ Update the 'LTC MC RE Packet Recipient' Field Label in Online Pages

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

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 02/02/2022 | 1.0 | Initial Draft | Farhat Ulain |
| 08/22/2022 | 2.1 | Content Revision – LTC MC RE Packet Field is being re-labeled | Farhat Ulain |
| 09/13/2022 | 2.2 | Design Clarification – in section 2.1.3 | Farhat Ulain |
| | | | |
| | | | |
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# Table of Contents

# 1 OVERVIEW

The 'LTC MC RE Packet Recipient' field is available in the 'Authorized Representative Program Detail' page and in the 'Administrative Role Detail' page. Currently, in CalSAWS, user can specify if the authorized representative may/may not receive the LTC MC RE Packet that gets generated for the Medi-Cal program~~. Due to the phasing out of LTC MC RE Packet, this field is longer required to be on these pages.~~ However, the LTC MC RE Packet is no longer available in the system. Due to SCR CA-204087 the 'LTC MC RE Packet Recipient' field will remain on the page; however, it needs to be re-labeled.

## 1.1 Current Design

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

## 1.2 Requests

~~Remove~~ Update the field label of 'LTC MC RE Packet Recipient' in the 'Authorized Representative Program Detail' page and the 'Administrative Role Detail' page.

## 1.3 Overview of Recommendations

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

## 1.4 Assumptions

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

# 2 RECOMMENDATIONS

## 2.1 Authorized Representative Program Detail

### 2.1.1 Overview

The 'Authorized Representative Program Detail' page allows the user to specify the representative who is authorized to receive the case information for the case person. Additionally, user can also specify if the authorized representative may/may not receive the LTC MC RE Packet. ~~Due to the phasing out of LTC MC RE Packet, this field is no longer required to be in this page. This SCR will be removing the 'LTC MC RE Packet Recipient' field from the page.~~ However, the LTC MC RE Packet is no longer available in the system. Due to SCR CA-204087 the 'LTC MC RE Packet Recipient' field will remain on the page; however, it needs to be re-labeled.

### 2.1.2 Authorized Representative Program Detail – Mockup

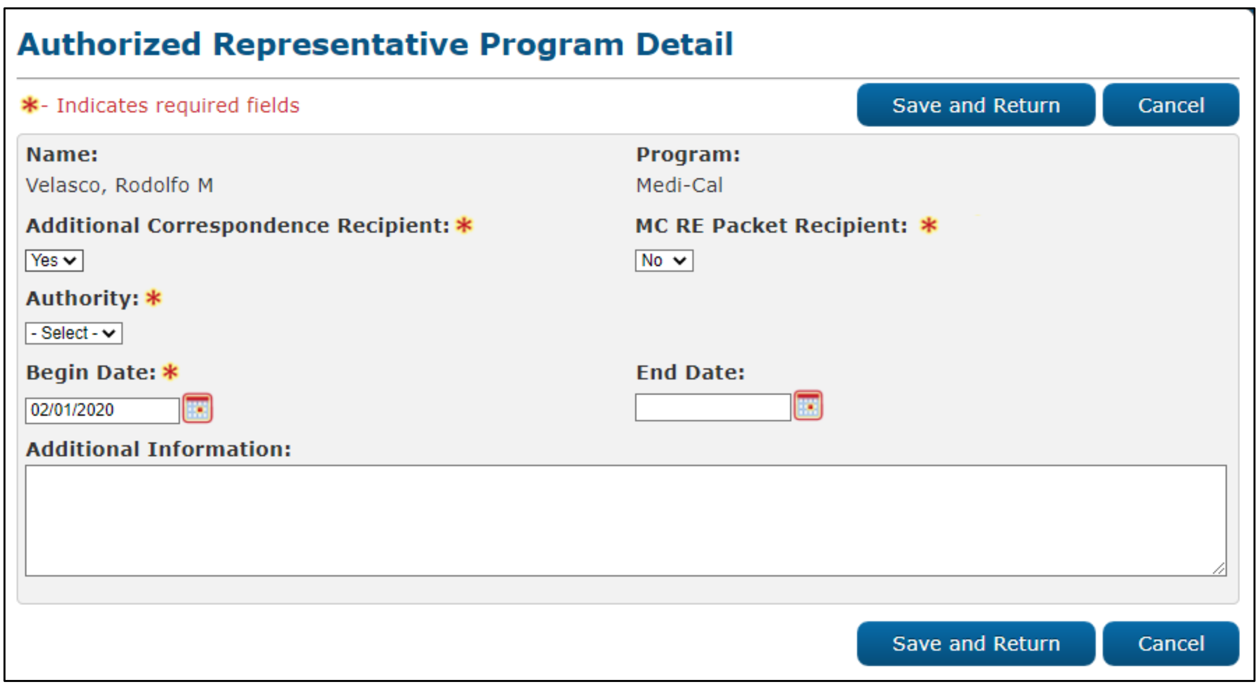



**Figure 2.1.2.1 – Authorized Representative Program Detail Page**

### 2.1.3 Description of Change

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

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

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

1. Update the field label of the 'LTC MC RE Packet' field to be 'MC RE Packet Recipient' field.
   a. Update the field label in the validation message given below. "MC RE Packet Recipient - Field is required. Please enter a value.

   b. Remove the following validation messages that gets displayed in the page when user adds the additional correspondence recipient.

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

   "An Authorized Representative is already set to be the recipient of this form during the time period selected."

   Note: User will be able to select more than one recipient to receive the MC RE Packet.

   User will be able to add the additional correspondence recipient when the "LTC MC RE Packet Recipient" field is set to "Yes".

### 2.1.4 Page Location

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

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

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

### 2.1.7 Page Usage/Data Volume Impacts

N/A

## 2.2 Administrative Role Detail Page

### 2.2.1 Overview

The Administrative Role Detail page allows the user to access the program information for an associated case and program participant/beneficiary.

Additionally, user can set the admin for the case correspondence from this page who may/may not receive the LTC MC RE Packet. However, the LTC MC RE Packet is no longer available in the system. ~~Due to the phasing out of LTC MC RE Packet, this field is no longer required to be in this page. This SCR will be removing the 'LTC MC RE Packet Recipient' field from the page.~~ Due to SCR CA-204087 the 'LTC MC RE Packet Recipient' field will remain on the page; however, it needs to be re-labeled.

### 2.2.2 Administrative Role Detail – Mockup

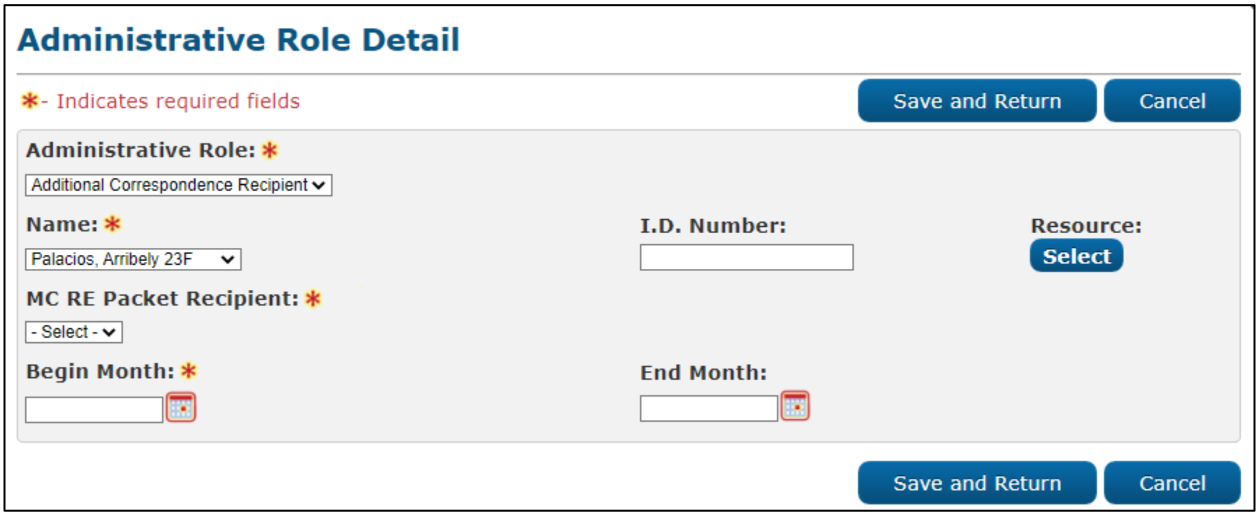



**Figure 2.2.2-1 – Administrative Role Detail Page**

### 2.2.3 Description of Change

~~1. Remove the 'LTC MC RE Packet Recipient' field from the 'Administrative Role Detail' page.~~

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

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

1. Update the field label of the 'LTC MC RE Packet' field to be 'MC RE Packet Recipient' field.

    a. Update the field label in the validation message given below.

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

    b. Remove the following validation message that gets displayed in the page when an authorized representative is already set to be the recipient from the Authorized Representative Detail page.

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

Note: User will be able to select more than one recipient to receive the MC RE Packet.

### 2.2.4 Page Location

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

### 2.2.5 Security Updates

N/A

### 2.2.6 Page Mapping

Update page mapping for the Administrative Role Detail' page.

### 2.2.7 Page Usage/Data Volume Impacts

N/A

# 3 SUPPORTING DOCUMENTS

N/A

# 4 REQUIREMENTS

## 4.1 Project Requirements

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

CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-242760

Enhance MAGI Request Delivery and Error Logging

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
| | Prepared By | Carmen Kolaskey |
| | Reviewed By | Derek Goering, Maksim Volf, Prasant Goel, Geetha Ramalingam, Ritu Chinya and Renee Gustafson |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 3/24/2022 | .01 | Draft Design | Carmen Kolaskey |
| 3/29/2022 | .02 | Added 2.1 Page Update: MAGI Determination List | Carmen Kolaskey |
| 4/6/2022 | .03 | Added 2.3 Pages Update: MAGI Determination Summary<br>Added 2.4 Page Update: MAGI Disposition Detail | Carmen Kolaskey |
| 5/4/2022 | .04 | Added 1.1.4 Error Acknowledgements<br>Updated the following:<br>1.2 Request<br>1.3 Overview of Recommendation<br>2.4.2 Description of Change Added Recommendation 4 | Carmen Kolaskey |
| 5/11/2022 | .05 | 1.1.2 Transaction Timeout | Carmen Kolaskey |
| 6/7/2022 | .06 | 2.4.2 Descriptions of Recommendation added a note for Recommendation 1 | Carmen Kolaskey |
| 6/10/2022 | .07 | Build/Test design walk through | Carmen Kolaskey |
| 6/11/2022 | .08 | 1.1.2 Transaction Timeout<br>Updated first bullet 'eHIT Transactions' | Carmen Kolaskey |
| 6/11/2022 | .09 | 1.1.2 Transaction Timeout<br>Added a note for Transactions | Carmen Kolaskey |
| 6/16/2022 | .10 | Analyst Review | Carmen Kolaskey |
| 6/29/2022 | .11 | 2.4.2 Descriptions of Recommendation<br>Added example screen for recommendation 2.4.2.3.b. | Carmen Kolaskey |
| 8/5/2022 | .12 | Content Revision<br>2.4.2 Description of Change Recommendation 2 removed time for Listener | Carmen Kolaskey |
| 8/8/2022 | .13 | Content Revision | Carmen |

| | | | |
|---|---|---|---|
| | | 2.4.2 Description of Change added Recommendation #5 Common Error ID | Kolaskey |
| 8/9/2022 | .14 | 1.3 Overview of Recommendation, added recommendation for Common Error ID | Carmen Kolaskey |
| 8/24/2022 | .15 | Content Revision – Analyst Review | Carmen Kolaskey |
| 8/25/2022 | .16 | Content Revision – Build/Test Review | Carmen Kolaskey |

# Table of Contents

# 1 OVERVIEW

## 1.1 Current Design

### 1.1.1 JMS Settings

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

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

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

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

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

### 1.1.2 Transaction Timeout

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

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

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

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

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

### 1.1.3 Error Logging

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

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

Issues:

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

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

### 1.1.4 Error Acknowledgement (a.k.a ACK)

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

## 1.2 Requests

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

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

## 1.3 Overview of Recommendations

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

## 1.4 Assumptions

1. These changes will equally apply to Disposition and Outbound Information Update transactions because they are handled by the same JMS Queues and Listeners.

2. All outbound eHIT transactions are handled by the same JMS Queues and Listeners. The updates to the JMS Queue and Listener settings will apply to the following outbound eHIT transaction types:
    a. MAGI Request (EDR)
    b. Disposition
    c. Cancel DER
    d. Information Update

# 2 RECOMMENDATIONS

## 2.1 MAGI Determination List Page

### 2.1.1 Overview

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

### 2.1.2 MAGI Determination List Page Mockup

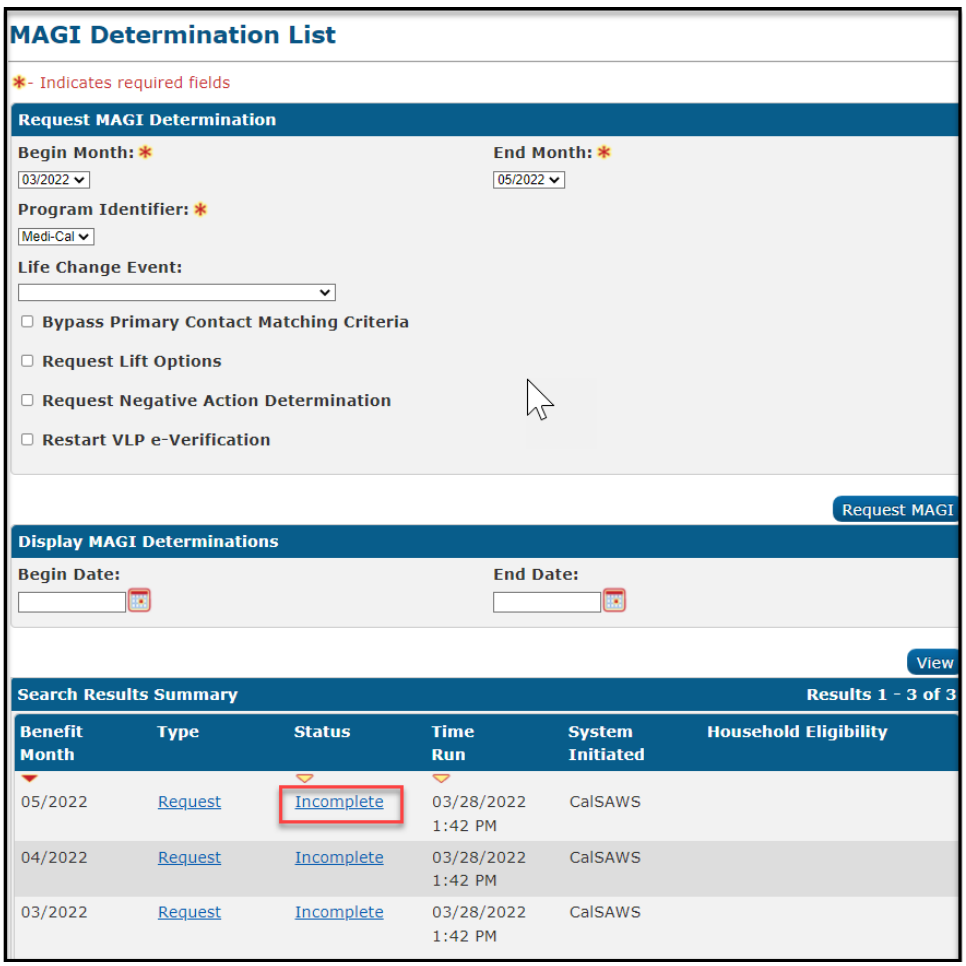
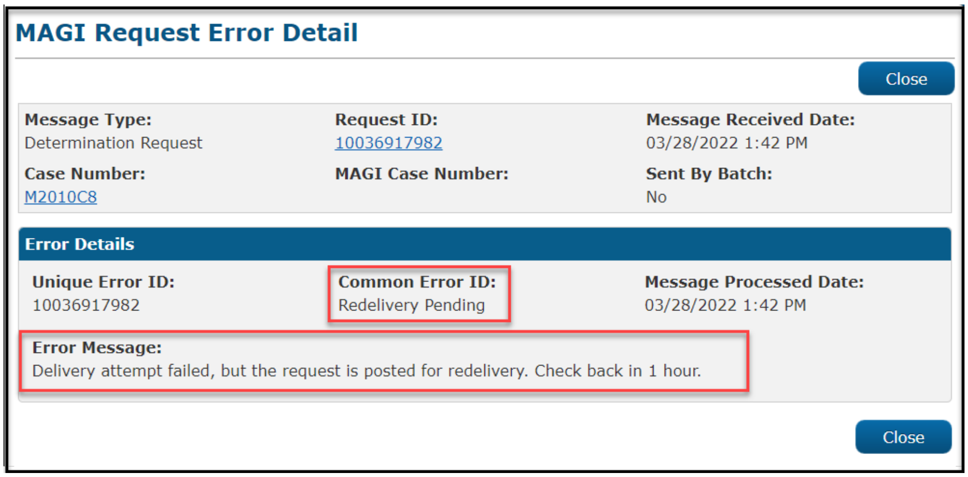


**Figure 2.1.1 – MAGI Determination List displaying a status of ‘Incomplete’**

### 2.1.3 Description of Changes

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


MAGI Request Error Detail

Close

Message Type: Determination Request
Request ID: 10036917982
Message Received Date: 03/28/2022 1:42 PM
Case Number: M2010C8
MAGI Case Number:
Sent By Batch: No

Error Details

Unique Error ID: 10036917982
Common Error ID: Redelivery Pending
Message Processed Date: 03/28/2022 1:42 PM
Error Message: Delivery attempt failed, but the request is posted for redelivery. Check back in 1 hour.

Close

### 2.1.4 Page Location

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

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

N/A

### 2.1.7 Page Usage/Data Volume Impacts

N/A

## 2.2 MAGI Determination Summary

### 2.2.1 Overview

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

### 2.2.2 MAGI Determination Summary Mockup

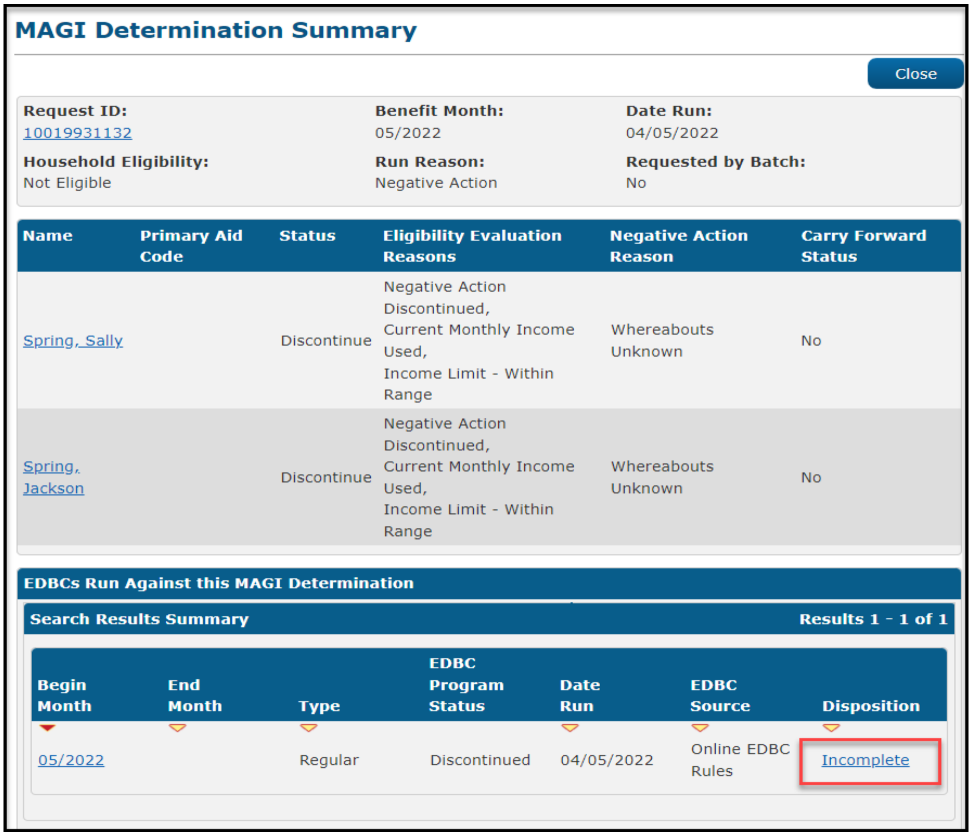
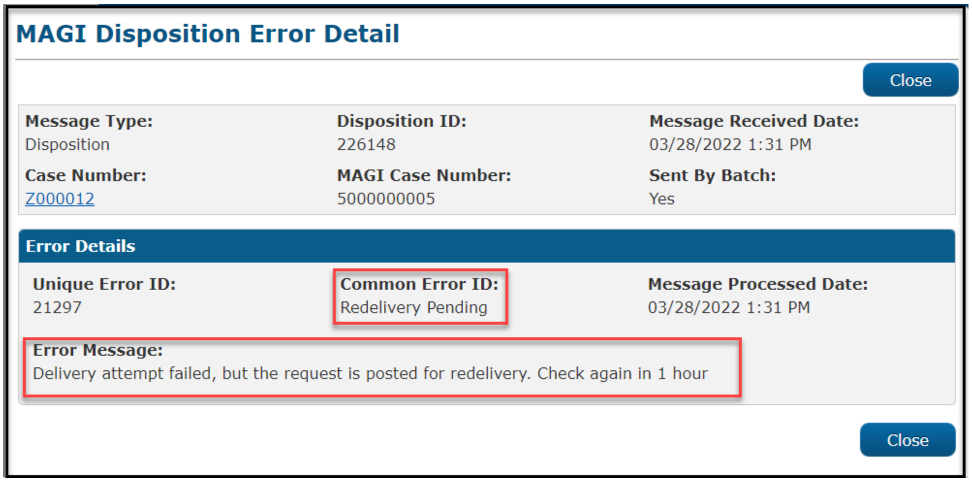



**Figure 2.2.1 – MAGI Determination Summary Page Displaying a Disposition Status of 'Incomplete'**

### 2.2.3 Description of Changes

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




### 2.2.4 Page Location

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

### 2.2.5 Security Updates

N/A

### 2.2.6 Page Mapping

N/A

### 2.2.7 Page Usage/Data Volume Impacts

No Change

## 2.3 MAGI Disposition Detail

### 2.3.1 Overview

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

### 2.3.2 MAGI Disposition Mockup

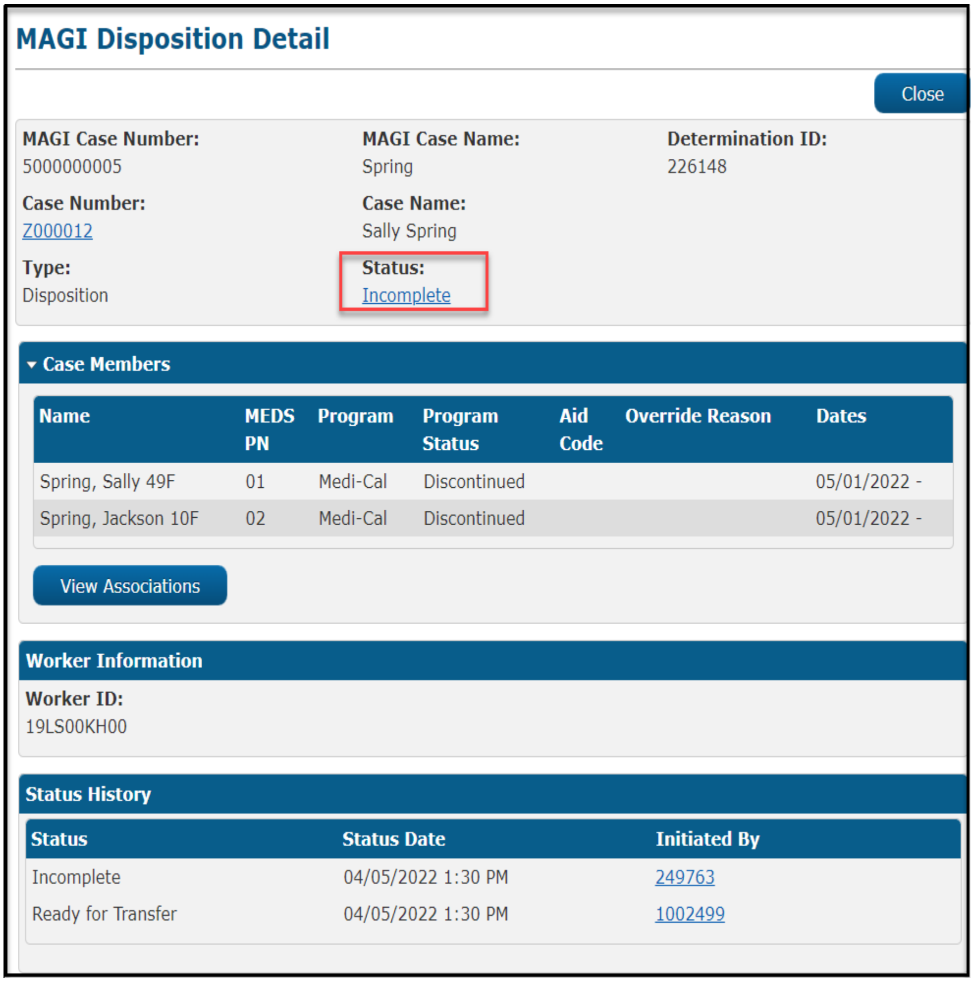
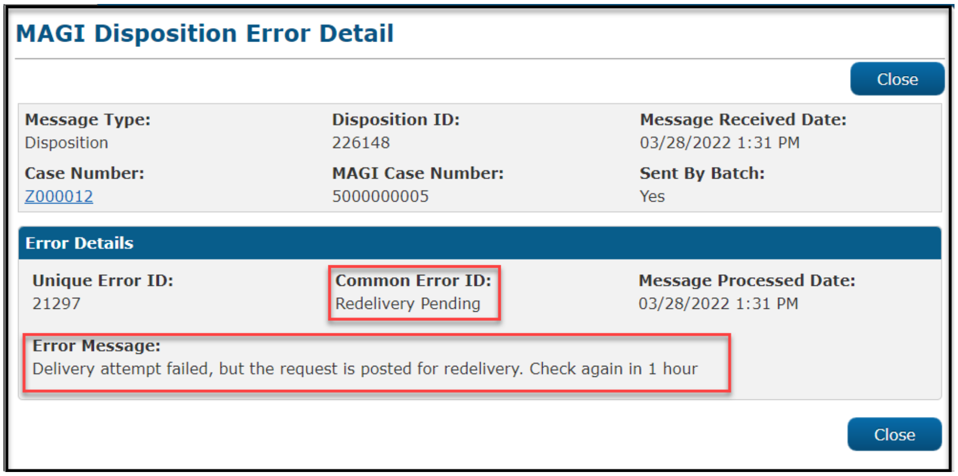



**Figure 2.3.1 – MAGI Disposition Detail Page displaying a Status of 'Incomplete'**

### 2.3.3 Description of Changes

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




### 2.3.4 Page Location

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

### 2.3.5 Security Updates

N/A

### 2.3.6 Page Mapping

N/A

### 2.3.7 Page Usage/Data Volume Impacts

No change

## 2.4 Update JMS Settings

### 2.4.1 Overview

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

### 2.4.2 Description of Change

1. Update the JMS Queue settings as follows:

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

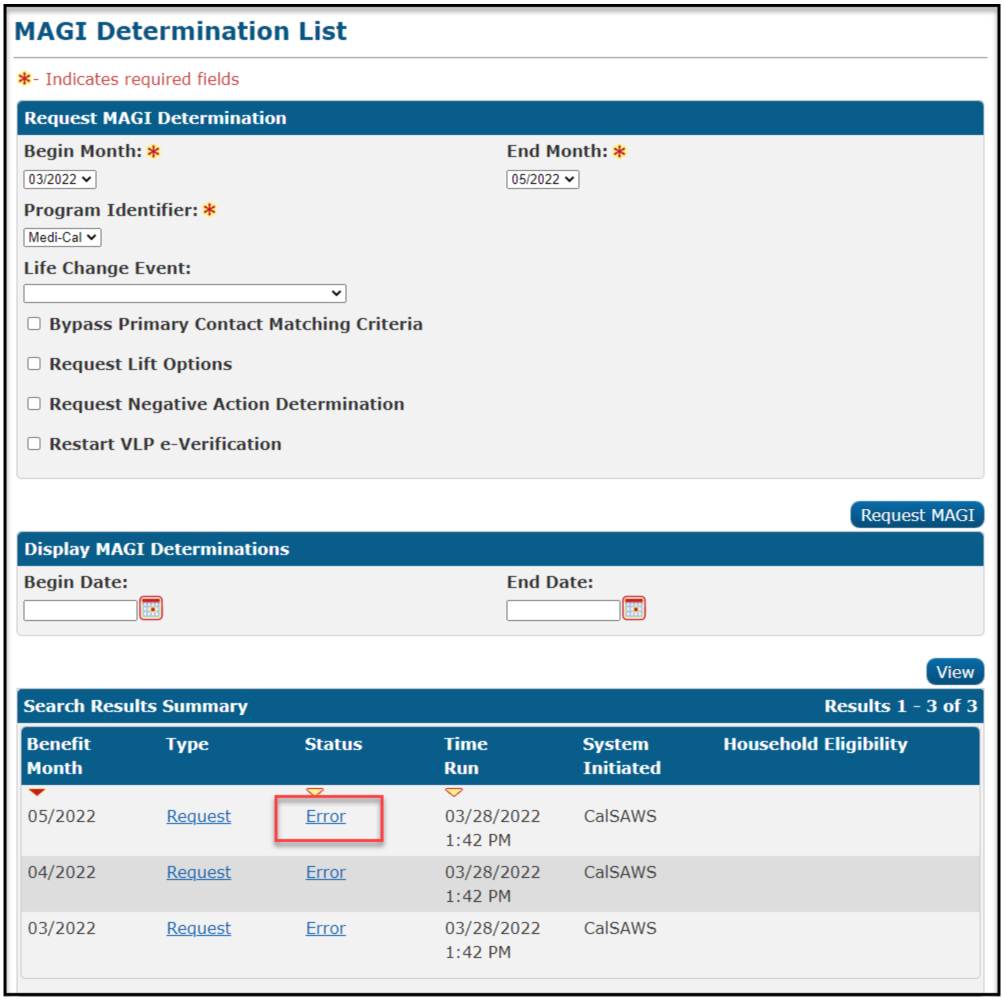
**Note:** Updates are required in all clustered domains for clustered environments.

2. Separate the Listener transaction from the Queue transaction to allow a longer duration for CalHEERS to respond without altering the JTA settings for the whole server.
3. Update outbound eHIT transaction error logging as follows:
    a. When an outbound eHIT transaction delivery fails but a re-delivery will be attempted, add a status of 'Incomplete' (CT450_IC) and 'Error Message': "Delivery attempt failed, but the request is posted for redelivery. Check again in 1 hour.", on the MAGI Request Error Detail Page (EDR failure) or MAGI Disposition Error Detail page (Disposition failure).
    b. On the final redelivery attempt, update the status to 'Error' on the MAGI Determination List page or MAGI Determination Summary page. Display the 'Error Message': "The system has encountered an error in processing the Outbound eHIT transaction. Final attempt failed. Please contact the Service Desk and report the appropriate details.", on the on the MAGI Request Error Detail Page (EDR failure) or MAGI Disposition Error Detail page (Disposition failure) *Example below
    **Technical Note:** The status code of Error (CT450_ER) will remain unchanged.
    c. Update the Common Error IDs that display on the MAGI Request Error Detail Page (EDR failure) or MAGI Disposition Error Detail page (Disposition failure) when an outbound eHIT transaction fails or errors as follows:
        i. "Redelivery Pending" for Error Message, "Delivery attempt failed, but the request is posted for re-delivery. Check again in 1 hour.". "Redelivery Pending" will display with the new Status "Incomplete" when the system attempts to redeliver the transaction.
        ii. "Delivery Failed" for Error Message, "The system has encountered an error in processing the Outbound eHIT transaction. Final attempt failed. Please contact the Service Desk and report the appropriate details.".

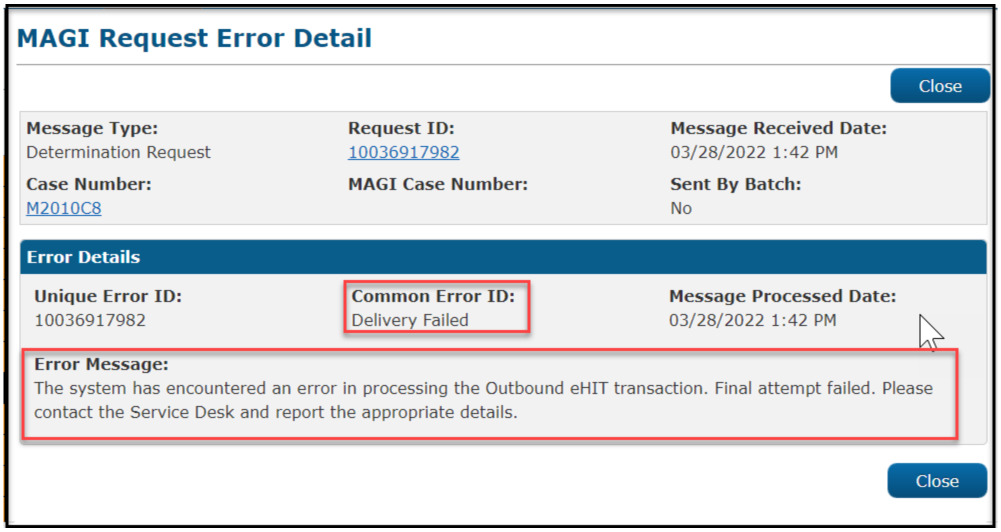
"Delivery Failed" will display with Status "Error" when the final redelivery attempt fails.

iii. "Multi-Month Cancel" for Error Message, "One of the months in a multi-month request received an Error from CalHEERS. All unsent months in the request will not be sent.". "Multi-month Cancel" will display with Status "Error", when more than one transaction is sent and at least one transaction in the group errored.

**Example:** MAGI Determination List Page (2.4.2.3.b)




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




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

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

### 2.4.3 Interface Partner

CalHEERS

### 2.4.4 eHIT Schema Version

Version 18

CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-246284

Update Application Source to be a Required Field

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
| | Prepared By | Vallari Bathala, Cynthia Ridley |
| | Reviewed By | Girish Chakkingal, Prashant Goel, Geetha Ramalingam, Akira Moriguchi, Renee Gustafson, Ritu Chinya, Naga Chinduluru, Michael Wu, Matt Lower, Himanshu Jain, Shilpa Suddavanda, William Baretsky, Elisa Miller |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 06/07/2022 | 1.0 | Initial Revision | Vallari Bathala |
| 6/8/2022 | 1.1 | Updated Design for Medi-Cal EBDC Auto-test Rules | Cynthia Ridley |
| 08/23/2022 | 1.2 | Updated Section 2.4.2.1 to add clarifications:<br>• If the application source is blank for the cash-based Medi-Cal program, default the application source to 'Other'.<br>• **Note**: The application source will only be copied over upon the transition from the failed cash-based Medi-Cal program to the newly created, or re-opened Medi-Cal program.<br>Added a new assumption: Existing program applications that do not have a source will remain as is. | Cynthia Ridley, Vallari Bathala |
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# Table of Contents

# 1 OVERVIEW

When creating a new application in CalSAWS, County Users will navigate to the New Application Detail which contains the option to list the application source. When adding a new program to an existing case, the Users will navigate to the New/Reapplication Detail pages which also contains the option to list the source. The Application Source on program applications is a needed component on state and federal reports. When Medi-Cal is auto-tested from a failed cash-based Medi-Cal program, the application source from the cash-based Medi-Cal program will copy over to the Medi-Cal program.

## 1.1 Current Design

Currently, the application source information is not required when manually creating a program application in CalSAWS.

Medi-Cal EDBC auto-test does not copy over the application source from the failed cash-based Medi-Cal program and instead sets the application source for the Medi-Cal program to 'Other'.

## 1.2 Requests

Update the New Programs Detail, New/Reapplication Detail and Application Registration Summary to make the application source dropdown a required field.

Update the application source for the auto-tested Medi-Cal program to copy the application source from the failed cash-based Medi-Cal program.

## 1.3 Overview of Recommendations

1. Update the New Programs Detail page to have the Application Source field as a required field.
2. Update the New/Reapplication Detail page to have the Application Source field as a required field.
3. Update the Application Registration Summary page to have the Application Source field as a required field.
4. Copy the Application Source from the failed cash-based Medi-Cal program to the auto-tested Medi-Cal program block.

## 1.4 Assumptions

Existing program applications that do not have a source will remain as is.

# 2 RECOMMENDATIONS

## 2.1 New Programs Detail

### 2.1.1 Overview

When adding a new program to a new case, the User will select the application source in the New Programs Detail page. The New Programs Detail page will be updated to require the Source dropdown field.

### 2.1.2 New Programs Detail Mockup

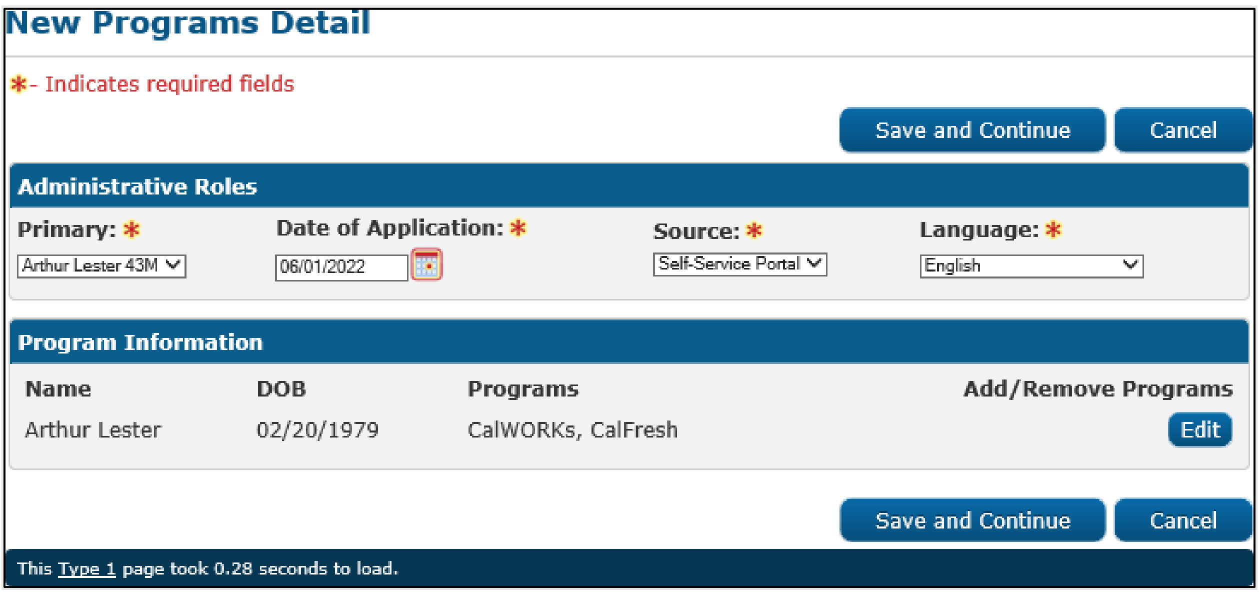


**Figure 2.1.2-1 –** New Programs Detail

### 2.1.3 Description of Changes

1. Update the Source dropdown to be a required field.
2. If the Source dropdown is left blank, display the following validation message:
    a. Source - Field is Required. Please enter a value.

### 2.1.4 Page Location

- **Global:** Case Info
- **Local:** New Application
- **Task:** N/A

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

N/A

### 2.1.7 Page Usage/Data Volume Impacts

N/A

## 2.2 New/Reapplication Detail

### 2.2.1 Overview

When adding a new program to an existing case, the User will select the application source in the New/Reapplication Detail page. The New/Reapplication Detail page will be updated to require the Source dropdown field.

### 2.2.2 New/Reapplication Detail Mockup

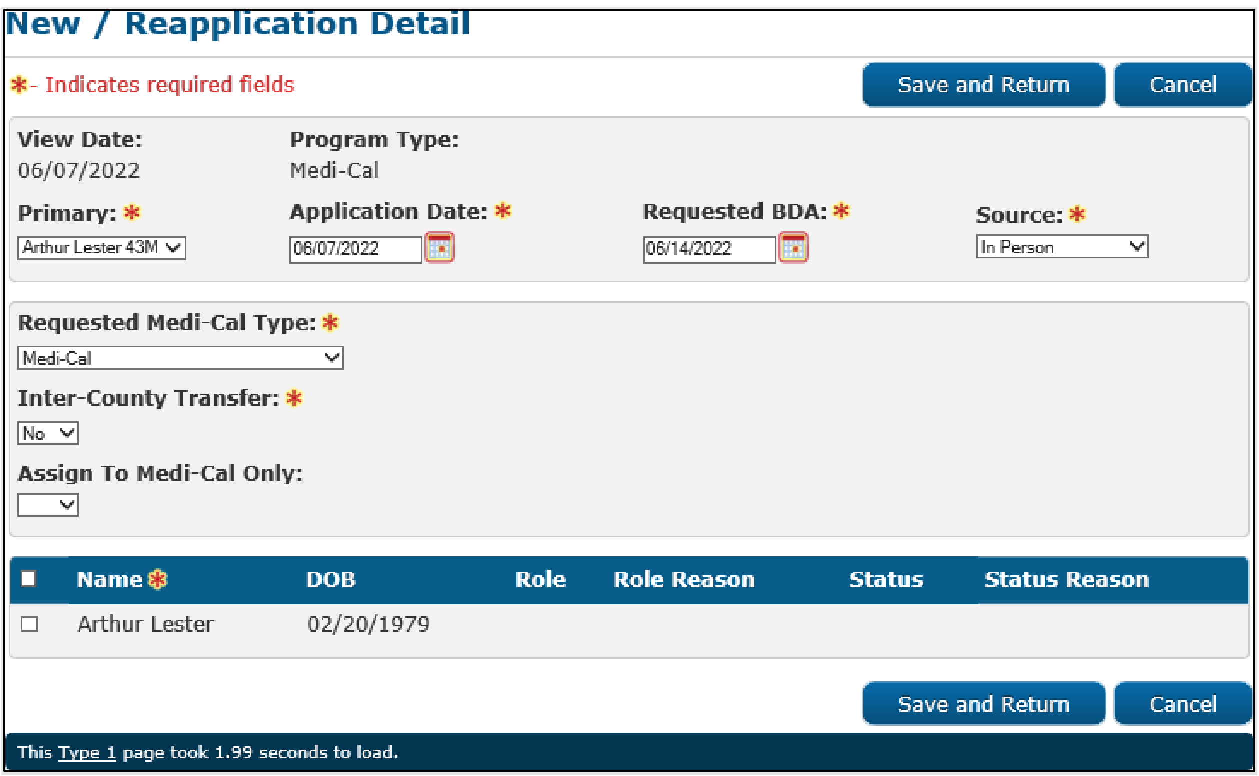


**Figure 2.2.2-1 –** New/Reapplication Detail

### 2.2.3 Description of Changes

1. Update the Source dropdown to be a required field.
2. If the Source dropdown is left blank, display the following validation message:
    a. Source - Field is Required. Please enter a value.

### 2.2.4 Page Location

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

### 2.2.5 Security Updates

N/A

### 2.2.6 Page Mapping

N/A

### 2.2.7 Page Usage/Data Volume Impacts

N/A

## 2.3 Application Registration Summary

### 2.3.1 Overview

When creating a new application, the User will select the application source in the Application Registration Summary page. The Application Registration Summary page will be updated to require the Source dropdown field.

### 2.3.2 Application Registration Summary Mockup

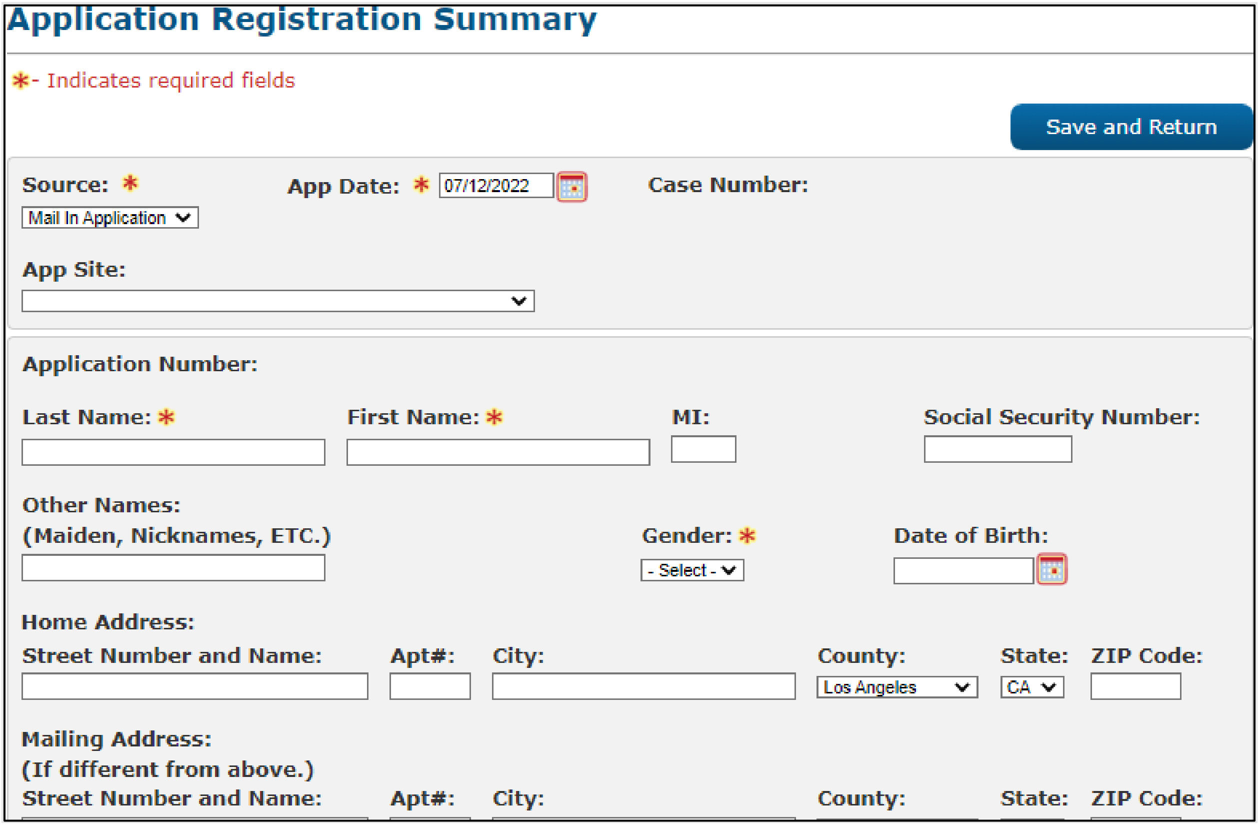


**Figure 2.3.2-1 – Application Registration Summary**

### 2.3.3 Description of Changes

1. Update the Source dropdown to be a required field.
2. If the Source dropdown is left blank, display the following validation message:
    a. Source - Field is Required. Please enter a value.

### 2.3.4 Page Location

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

### 2.3.5 Security Updates

N/A

### 2.3.6 Page Mapping

N/A

### 2.3.7 Page Usage/Data Volume Impacts

N/A

## 2.4 Medi-Cal EDBC Auto-Test Rules

### 2.4.1 Overview

The Medi-Cal EDBC Auto-Test Rules will be updated to copy over the application source from the failed cash-based Medi-Cal program to the newly created Medi-Cal program.

### 2.4.2 Description of Changes

1. Set the application source for the auto-tested Medi-Cal program to the same application source from the failed cash-based Medi-Cal program. If the application source is blank for the failed cash-based Medi-Cal program, default the application source to 'Other'.
   **Note**: The application source will only be copied over upon the transition from the failed cash-based Medi-Cal program to the newly created, or re-opened Medi-Cal program.

### 2.4.3 Programs Impacted

Medi-Cal

### 2.4.4 Performance Impacts

N/A

## 2.5 Automated Regression Test

### 2.5.1 Overview

Create (or expand the scope of existing) automated regression test scripts to verify that the application source value is copied over to the new Medi-Cal program during auto-test.

### 2.5.2 Description of Change

Create (or update) regression scripts to verify that the application source of the auto-tested Medi-Cal program matches the application source of the following program during an applicable EDBC denial or discontinuance:

1. CalWORKs
2. RCA

CalSAWS

California Statewide Automated Welfare System

# Design Document

CA-247705

Opt Out Customers Opted into E-Notifications Without BenefitsCal Account

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

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 07/18/2022 | 1.0 | Initial Draft | Phong Xiong |
| 09/07/2022 | 2.0 | Content Revision – Adding missing languages in section 2.1.1 | Phong Xiong |
| 09/19/2022 | 3.0 | Design Clarification to section 2.3.2 to clarify format of Primary Applicant name | Phong Xiong |
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# 1 OVERVIEW

This SCR will be identifying the cases that have opted in to E-notification but does not have a BenefitsCal account. These cases will be opted out of E-notification and reverted back to paper notifications.

## 1.1 Current Design

At cutover, E-Notification statuses were brought over. Not all customers who previously had a C4Yourself (C4Y) or YourBenefitsNow (YBN) accounts created a BenefitsCal account. Now we have customers who are opted into E-Notification without a BenefitsCal account.

## 1.2 Requests

Opt out customers who are currently opted into E-Notifications and do not have a BenefitsCal account. Send a NA 1275 notifying the customer that they have been switched back to paper. Add a special message under the other section regarding why they are getting opted out.

Create a one-time Journal Entry for cases that are going to be opted out of E-Notification.

## 1.3 Overview of Recommendations

1. Update the NA 1275 form
2. Mass mailer to send out the NA 1275 form to all primary applicants for active cases that are opted in to E-notification, with a verified email account, and no BenefitsCal account.
    a. Estimated total count of impacted cases = approx. 92,000
    b. See attached "Mass Mailer – E-Notification Count by County.xlsx" to see total count broken down by each county
3. DCR to PERS table for cases Opted In to E-Notification with no BenefitsCal Account, regardless of program status
    a. Flip EMAIL_NOTIF_IND from "Y" to "N"
    b. Flip MAIL_VERIF_STAT_CODE (CT465) to OP (Opted Out) regardless of current status
    c. Create a Journal Entry for population opted out of E-Notification

## 1.4 Assumptions

1. The mass mailer will be sent prior to the DCR. If the DCR is run first, cases affected cannot be identified for mass mailer.
2. The mass mailer will be sent to primary applicants on all active cases with verified email account status, while the DCR will run for primary applicants regardless of program status and email account status.

# 2 RECOMMENDATIONS

## 2.1 Updates to Existing NA 1275 Form Recommendation

### 2.1.1 Overview

The NA 1275 form is sent to the participant to inform them that they are being switched back to traditional paper correspondence for the provided reason. It informs them who to contact for questions and how to continue receiving electronic notices.

**State Form:** NA 1275 (7/13)

**Current Programs:** CalFresh, General Assistance/General Relief, CAPI

**Current Attached Form(s):** None

**Current Forms Category:** Form

**Current Template Repository Visibility:** All Counties

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

### 2.1.2 NA 1275 Form Verbiage

There are no changes to this section of the design.

### 2.1.3 NA 1275 Form Variable Population

Only one variable is updated with this effort called "OTHER". It currently populates with the following text,

> "If you would like more information on the reason for cancellation, please contact the DPSS Customer Service Center (CSC) at (866) 613-3777"

when the "Other" checkbox is checked. This effort will add an additional text to generate.

Only one message will display at a time when the "Other" checkbox is checked.

LA County will continue to use the existing text. Migration counties will use the new text as shown in the table below.

All other variables are not updated; therefore, are not displayed or mentioned here in the design document.

| Variable Name | Population | Formatting | Editable*/Field Type | Template Repository Population | Populates with Form Generation |
|---|---|---|---|---|---|

| | | | | | |
|---|---|---|---|---|---|
| OTHER | Populate "If you would like more information on the reason for cancellation, please contact your county worker" for Migration Counties. | Arial Font Size 10 | Yes/Text Field | Yes | Yes |

*Note: The Editable column of the table above refers to if the variable will be editable when populated. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated.

**Variables Requiring Translations:** OTHER

***Technical Note:*** *The variable updated in this section is populated from the form scripting of the XDP.*

### 2.1.4 NA 1275 Form Generation Conditions

There are no changes to the existing generation conditions of the form.

This form will be sent in a mass mailer (see section 2.2).

## 2.2 Mass Mailer to Send NA 1275 Form Recommendation

### 2.2.1 Overview

This effort will be to send out a mass mailer of the NA 1275 to the population that are opted in to E-notification, with verified e-mails, and do not have a BenefitsCal account.

### 2.2.2 Description of Changes

Generate the NA 1275 for a one-time mailing for all primary applicants for all active cases opted in to E-notification, E-mail has been verified, and does not have a BenefitsCal account.

***Technical Note:***

*Opted in to E-Notification – EMAIL_NOTIF_IND = 'Y' in PERS table*

*E-Mail Verified – EMAIL_VERIF_STAT_CODE = 'VF' in PERS table*

*No BenefitsCal Account – GUID IS NULL in C4Y_LOGIN_INFO table*

*Please see supporting document #1 for query.*

*Please see supporting document #3 for impacted count by counties.*

## 2.3 DCR for PERS Table Recommendation

### 2.3.1 Overview

This effort will be to opt out of E-notification for primary applicants that are currently opted in to E-notification and does not have a BenefitsCal account.

### 2.3.2 Description of Changes

Create a DCR to do the following:

1. Find cases that meet the following criteria, regardless of program status:
    a. The person is the primary applicant,
    b. The person is opted in to E-notification, and
    c. The person does not have a BenefitsCal account
2. For each record returned from the driving query, do the following actions, regardless of their current E-mail verification status:
    a. Flip EMAIL_NOTIF_IND from 'Y' to 'N'
    b. Update EMAIL_VERIF_STAT_CODE to 'OP'

***Technical Note:*** *Please see supporting document #2 for query to find population that needs the DCR.*

*Please see supporting document #4 for impacted count by counties.*

Create a one-time Journal entry with the following information when the mass mailer is generated:

| Field to Populate | Population for Opt Out of E-Notification |
|---|---|
| Case Id | The case associated to the Primary Applicant Opted Out |
| Type | Document |
| Short Description | Opt Out of E-Notification |
| Long Description | <Primary Applicant – FirstName LastName> has been opted out of E-notification. The account was migrated over from either C4Yourself or YourBenefitsNow, and a BenefitsCal account has not been created for <Primary Applicant – FirstName LastName>. |
| Created by | Batch or User |
| Updated by | Batch or User |

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | SQL | Query to find count associated to recommendation 2.2. | Mass_Mailer_Query.sql |
| 2 | SQL | Query to find count associated to recommendation 2.3 | DCR_Count_Query.sql |
| 3 | Count | Count by counties of impacted population. | Mass Mailer - E-Notification Count by County.xlsx |
| 4 | Count | Count by counties of impacted population. | DCR and Journal Entry - E-Notification Count by County.xlsx |

# 4 REQUIREMENTS

## 4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|---|---|---|
| 2.18.3.7<br>CAR-1243 | The LRS shall identify case actions that require a notice, NOA, form, letter, stuffer, or flyer, and shall generate that appropriate notice, NOA, form, letter, stuffer, or flyer, using variable case-specific information. | Update the NA 1275 variable population logic. |
| 2.18.3.19<br>CAR-1254 | The LRS shall generate special mailings and mass notifications to specific programs, populations, or individuals, as specified by COUNTY. | Generate mass mailer for NA 1275. |