

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-233206

Opt-In C-IV Counties to the Batch RE  
Appointment Scheduling for CW/CF Available  
for CalWIN Counties

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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This SCR outlines the necessary requirements to allow C-IV counties to opt into the CalWIN CalWORKs/CalFresh (CW/CF) Redetermination (RE) Appointment Scheduling batch job.

## 1.1 Current Design

Currently, the C-IV Counties do not have an automated process to schedule CW/CF RE Appointments. Per CA-216551, an automated process for scheduling CW/CF RE Appointments was implemented for the CalWIN Migration Counties in CalSAWS. The batch job retrieves CalWORKs only, CalFresh only, and CalWORKs/CalFresh combination (including Transitional CalFresh) cases that need an RE appointment with a program worker to evaluate the customer's ongoing eligibility.

The CalWIN Counties specified appointment durations per appointment types based on their county business process. This job is responsible for only scheduling CW/CF RE appointments five days prior to the CW/CF RE Packet generation. When the batch job creates the RE appointment, all appointment details will be included in the Appointment letter, which is included in the CW/CF RE packet.

## 1.2 Requests

Opt C-IV Counties into the CalWIN CW/CF RE Appointment Scheduling batch job and make 'CalWORKs/CalFresh: RE Appointment Not Scheduled' Task Automated Action available for C-IV Counties.

## 1.3 Overview of Recommendations

1. Opt C-IV Counties into the CalWIN CW/CF RE Appointment Scheduling batch job.
2. Make 'CalWORKs/CalFresh: RE Appointment Not Scheduled' Task Automated Action available for C-IV Counties.

## 1.4 Assumptions

1. There are no changes to the functionality of the existing LA or CalWIN batch jobs for CW/CF RE Appointment Scheduling.
2. New records added to the COUNTY\_APPT\_CONFIG table for this SCR do not need a value for GA/GR appointments. GA/GR appointments are scheduled with a different batch job, and the batch job is not scheduled to run for C-IV Counties.
3. Manage Personnel set up will include setting the Daily Threshold for each worker's position on the Position Detail page for General Appointment with Telephone Interview Recertification type. The batch appointment job will not schedule appointments for C-IV Counties that do not set up the Daily Threshold on the Position Detail page for their workers.

4. The CalWIN CW/CF RE appointment batch job will only schedule appointments of Category 'General Appointment' and Type 'Telephone Interview Recertification.' All other appointment types, including face-to-face appointments, must be scheduled manually. Additionally, appointments will not be scheduled on weekends or holidays by the batch job and must be scheduled manually.
5. CA-207399 migrated the CF RE Packet (PB00R543), CW RE Packet (PB00R544) and CW/CF RE Packet (PB00R547) into CalSAWS for the 57 Migration Counties. The CW/CF RE Packets are generated on the 15<sup>th</sup> of each month for the CalWIN and C-IV Counties.
6. There are no modifications to the processing of the 'CalWORKs/CalFresh: RE Appointment Not Scheduled' Task Automated Action.

## 2 RECOMMENDATIONS

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### 2.1 Batch Job for CW/CF RE Appointment

#### 2.1.1 Overview

This section outlines the necessary modifications to opt C-IV Counties into the CalWIN CW/CF RE Appointment Scheduling batch job.

#### 2.1.2 Description of Change

1. Create BPCRs to run the CalWIN CW/CF RE Appointment Scheduling batch job for C-IV Counties. Set the Appointment Duration for the following C-IV Counties:

Note: CW/CF RE appointments durations are defaulted to 60 minutes per program type. A CRFI will be sent out to C-IV Counties to determine if the Appointment Duration per program type should be set to a different length of time.

County	Appointment Category	Appointment Type	CW Only Duration (min.)	CF Only Duration (min.)	CW/CF Combo Duration (min.)
Alpine	General Appointment	Telephone Interview Recertification	60	60	60
Amador	General Appointment	Telephone Interview Recertification	60	60	60
Butte	General Appointment	Telephone Interview Recertification	60	60	60
Calaveras	General Appointment	Telephone Interview Recertification	60	60	60
Colusa	General Appointment	Telephone Interview Recertification	60	60	60
Del Norte	General Appointment	Telephone Interview Recertification	60	60	60
El Dorado	General Appointment	Telephone Interview Recertification	60	60	60
Glenn	General Appointment	Telephone Interview Recertification	60	60	60
Humboldt	General Appointment	Telephone Interview Recertification	60	60	60
Imperial	General Appointment	Telephone Interview Recertification	60	60	60
Inyo	General Appointment	Telephone Interview Recertification	60	60	60
Kern	General Appointment	Telephone Interview Recertification	60	60	60

County	Appointment Category	Appointment Type	CW Only Duration (min.)	CF Only Duration (min.)	CW/CF Combo Duration (min.)
Kings	General Appointment	Telephone Interview Recertification	60	60	60
Lake	General Appointment	Telephone Interview Recertification	60	60	60
Lassen	General Appointment	Telephone Interview Recertification	60	60	60
Madera	General Appointment	Telephone Interview Recertification	60	60	60
Marin	General Appointment	Telephone Interview Recertification	60	60	60
Mariposa	General Appointment	Telephone Interview Recertification	60	60	60
Mendocino	General Appointment	Telephone Interview Recertification	60	60	60
Merced	General Appointment	Telephone Interview Recertification	60	60	60
Modoc	General Appointment	Telephone Interview Recertification	60	60	60
Mono	General Appointment	Telephone Interview Recertification	60	60	60
Monterey	General Appointment	Telephone Interview Recertification	60	60	60



County	Appointment Category	Appointment Type	CW Only Duration (min.)	CF Only Duration (min.)	CW/CF Combo Duration (min.)
Napa	General Appointment	Telephone Interview Recertification	60	60	60
Nevada	General Appointment	Telephone Interview Recertification	60	60	60
Plumas	General Appointment	Telephone Interview Recertification	60	60	60
Riverside	General Appointment	Telephone Interview Recertification	60	60	60
San Benito	General Appointment	Telephone Interview Recertification	60	60	60
San Bernardino	General Appointment	Telephone Interview Recertification	60	60	60
San Joaquin	General Appointment	Telephone Interview Recertification	60	60	60
Shasta	General Appointment	Telephone Interview Recertification	60	60	60
Sierra	General Appointment	Telephone Interview Recertification	60	60	60
Siskiyou	General Appointment	Telephone Interview Recertification	60	60	60
Stanislaus	General Appointment	Telephone Interview Recertification	60	60	60

County	Appointment Category	Appointment Type	CW Only Duration (min.)	CF Only Duration (min.)	CW/CF Combo Duration (min.)
Sutter	General Appointment	Telephone Interview Recertification	60	60	60
Tehama	General Appointment	Telephone Interview Recertification	60	60	60
Trinity	General Appointment	Telephone Interview Recertification	60	60	60
Tuolumne	General Appointment	Telephone Interview Recertification	60	60	60
Yuba	General Appointment	Telephone Interview Recertification	60	60	60

2. Create BSCRs to schedule the CalWIN CW/CF RE Appointment Scheduling batch job for C-IV Counties. The BSCR(s) should schedule the batch job to run 5 calendar days prior to RE Packet generation.

**2.1.3 Execution Frequency**

Schedule batch job to run monthly on the 10th, 5 calendar days prior to the non-LA CW/CF RE Packet batch jobs (PB00R543, PB00R544, and PB00R547). If the batch run date falls on a Sunday or holiday, then the batch job will run on the next business day.

**2.1.4 Key Scheduling Dependencies**

N/A

**2.1.5 Counties Impacted**

C-IV Counties

**2.1.6 Category**

Job should run 5 days prior to CW/CF RE packet generation, which is typically on the 15<sup>th</sup> of a given month. Job should run on the 10<sup>th</sup> business day of the month and complete within the batch window.

### **2.1.7 Data Volume/Performance**

N/A

### **2.1.8 Failure Procedure/Operational Instructions**

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

## 2.2 CalWORKs/CalFresh: RE Appointment Not Scheduled Automated Action

### 2.2.1 Overview

Make 'CalWORKs/CalFresh: RE Appointment Not Scheduled' Task Automated Action available for C-IV Counties.

### 2.2.2 Description of Change

1. Make 'CalWORKs/CalFresh: RE Appointment Not Scheduled' Task Automated Action available for C-IV Counties.

Note: The Automated Action 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 the Automated Action. If a county decides to Activate the Automated Action, the page validation will require that the county also select a Task Type to be used.

### 3 REQUIREMENTS

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#### 3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2150	The CONTRACTOR shall update and incorporate into the CalSAWS Software an agreed upon list of C-IV County specific batch processes.		Implement batch RE appointment scheduling functionality for C-IV Counties.