

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-246603

Update GEN 102 To Current Version (1/22)

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/15/2022	1.0	Initial Creation	Connor Gorry
10/12/2022	1.1	Preview with CW/CF Committee	Connor Gorry, Trevor Torres
11/03/2022	1.2	Internal Design Review	Connor Gorry, Trevor Torres, Avinda Bandaranayake

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1 OVERVIEW

CalSAWS currently utilizes the 9/20 version of the GEN 102 Appointment Letter. This change will update the Appointment Letter to utilize the latest state version wherever generated - from the Template Repository, from the Appointment Detail Page, or as a part of an existing packet. This change also requires the creation of a new Appointment Type – a Flexible Telephone Interview – in which the worker will call the customer (or vice versa, as indicated) during an appointment window, rather than a set time.

1.1 Current Design

The system currently uses the 09/20 version of the GEN 102 Appointment Letter.

At present, Migration Counties utilize the GEN 102 Appointment Letter for their RE Packets for CalWORKS and CalWORKS/CalFresh combo packets (CalFresh only packets use the CF 29 Appointment Letter). Los Angeles County uses the CF 29 for its packets, with different variations of the letter depending upon available customer information.

The current GEN 102 contains two sections – one for a fixed schedule phone interview, and the other for a fixed schedule face-to-face appointment. The new GEN 102 (1/22) adds a third section: A phone interview with a flexible window, which also indicates whether the county calls the customer or vice-versa. The Customer Appointment Detail Page currently does not have an option for a Flexible Appointment type or indicators for who calls whom – these will also be added with this SCR.

Los Angeles County currently auto-schedules its appointments with Batch Jobs PB19C902 and PB19C909 in 15-minute increments with a fixed phone interview. With this change, these auto-scheduling jobs will instead schedule flexible phone appointments, in which the county will call the customer, in two-hour windows at the same 15-minute staggered schedule.

At present, RE Packets are triggered for the following appointment category and sub-type combinations:

Appointment Category	Sub-Type (if applicable)
Re-Evaluation CW/CF Interview	-
RE Interview	-
Telephone CW/CF RE Interview*	-
Telephonic Interview	-
General Appointment	Telephone Interview Recertification**

***Note:** Los Angeles County auto-schedules its appointments with the 'Telephone CW/CF RE Interview' appointment type.

****Note:** A packet generated with the 'General Appointment – Telephone Interview Recertification' appointment type will currently only populate in a

packet for CalWIN migration counties. Recommendation 2.3.3 will update this population to apply to All Migration Counties (57 counties).

The CF 386 NOMI Letter (Notice of Missed Interview), which is triggered if a customer misses their scheduled appointment, can be triggered for the following appointment category and sub-type combinations:

	Appointment Category	Sub-Type (if applicable)
Intake	Intake Interview	-
	General Appointment	Telephone Interview Intake
Recertification	Re-Evaluation CW/CF Interview	-
	Telephone CW/CF Interview	-
	General Appointment	Telephone Interview Recertification
	General Appointment	Re-Affirmation Non-group

Recommendations 2.5 and 2.6 of this SCR will align the appointment categories and sub-types that will generate and populate the GEN 102 and NOMI letters.

1.2 Requests

Update GEN 102 Appointment Letter to the latest State Version (1/22).

1.3 Overview of Recommendations

1. Online:
 - a. Add a checkbox that reveals a drop down, a 'Phone Number:' field, and a 'Extension:' field to the Customer Appointment Detail page in the "General Information" section.
 - b. Add a column labeled 'End Time:' that calculates time when the meeting would end by adding the 'Duration' field hours to the 'Begin Time:' field.
2. Client Correspondence: Update GEN 102 to the Latest State Version
3. Client Correspondence: Replace Appointment Letter with Updated GEN 102 in CalFresh and CW/CF Packets
4. Client Correspondence: Update LA County CW/CF/MC Packet to use the new GEN 102
5. Client Correspondence: Update LA County CW/MC Packet to use the new GEN 102
6. Batch: Update LA County Appointment Batch to Schedule Flexible Phone Appointments

7. Client Correspondence: Update NOMI Letter Generation Conditions for Packet Appointment Types

1.4 Assumptions

1. Existing variable population for the in-person and Telephone Appointments sections of the GEN 102 will remain unchanged. Fields will continue to be editable when the GEN 102 is generated via the Template Repository or Appointment Detail Page.
2. GEN 102 Generation for remaining Appointment Types not identified with this design will remain unchanged. See Supporting Documents #X for additional information on current Appointment Category and Sub-Type information.
3. Telephone Appointment types that can be Fixed or Flexible will continue to trigger the existing CF 386 Notice of Missed Interview.
4. All existing functionalities will remain unchanged unless called out as part of this SCR.
5. For Migration Counties: When a GEN 102 is generated as a part of a packet for Telephone Interview or Re-Evaluation Interview Types, it will not be populated with Appointment Details, per existing functionality for packets without Appointment Details (established with CA-220610). Instead, the comments section will state the following: "You will get a separate letter with an interview appointment date and time. Call your worker right away if you do not get the appointment letter within 10 days of this notice. Your appointment letter will tell you if you have a phone interview or if you have to come into the office for your interview."
6. CA-250962 will add the SAWS 2 PLUS to the CW/CF RE Packet for Migration Counties.
7. The maximum duration selectable from the 'Duration' drop-down on the Appointment Details page is 5 hours. Increments will continue to be selectable in 15-minute increments.
8. If there are multiple workers selected on the Appointment Details page, the page's fields and GEN 102 Form will default to populate with the name and contact information of the worker assigned to the CalWORKS program. If there are multiple CalWORKS workers selected, the information of the first selected CW worker will be populated.
9. No changes will be made to BenefitsCal with this SCR. The updated GEN 102 will be posted to the Self-Service Portal.
10. Multiple appointments can be booked for the same time via the online application
11. Outlook invite functionality was added by SCR CA-207303 and only applies to appointments created from the 'Pending Assignment List' and 'Customer Appointment Detail' pages.
12. LA County batch job for auto scheduling will not use the position detail "overlapping appointment" settings for the RE appointments.
13. LA County Auto-Scheduled Appointments will only be made when the entire 2 hour duration is marked as available on the workers schedule (see supporting doc 1).

14. A worker's daily threshold for appointments can be configured on the Position Detail page. This value will allow the RE Appointment batch job to schedule the number of RE appointments per day. If there is no daily threshold amount for the worker, the batch job will not have a daily scheduling limit. To configure the daily threshold amount, the following conditions must be set on the Position Detail page in the Appointment Threshold section:
 - a. Category: General Appointment
 - b. Type: Telephone Interview Recertification
15. Workers can indicate when they are available for appointments on the Maintain Worker Schedule tab in the Office Schedule page. This page allows workers to set their availability and blocked times such as lunch, vacation, desk time, etc.

2 RECOMMENDATIONS

2.1 Customer Appointment Detail

2.1.1 Overview

The Customer Appointment Detail page allows you to add, edit, view, reschedule, cancel, or delete a participant/beneficiary appointment. You may also generate the Appointment Letter form from this page. This SCR will add additional options for every "Telephone" interview – in which either the customer or the worker will call during an appointment window, rather than a set time.

2.1.2 Customer Appointment Detail Mockup

Customer Appointment Detail

*- Indicates required fields

SaveCancel

Attendees

Customers

Attendance

☒

Doe, John M

Pending

Workers

36AS00BI6Q - Trevor Torres

Remove

36AS00NR6Q - Connor Gorry

Remove

Add

General Information

Category:

Telephone Interview

Flexible Block Appointment

Phone Number:

(555)555-5555

Office:

CalSAWS Project Office

Select

Location:

123 MAIN ST
NORWALK, CA 90650

Appointment Letter Comments:

Print Appointment Letter

Status:

Shown

Initiate Call:

Customer

Extension:

Status Reason:

Worker Initiated

Appointment Comments:

Addressee:

Doe, John M

Dates

Begin Date:

10/25/2022

Begin Time:

9:00 AM

Duration:

2 hours

End Time:

11:00 AM

SaveCancel

This Type 1 page took 0.67 seconds to load.

Figure 2.1.1 – Customer Appointment Detail Create/Edit Mode Mockup

Dates

Begin Date: *

09/28/2022

Begin Time: *

9:00 AM

Duration *

2 hours

End Time:

11:00 AM

System Suggested Time(s):

No Suggestions.

Suggest Time(s)

Save

Cancel

This Type 1 page took 0.47 seconds to load.

Figure 2.1.2 – Customer Appointment Detail Non-Flexible Suggested Times Mockup

Customer Appointment Detail

*- Indicates required fields

Save

Cancel

- [Phone Number](#) - The phone number must be in the form (999)999-9999 and cannot start with a zero.

Attendees

Customers *

Attendance

☒

Doe, John M

Pending

Workers *

36AS00BI6Q - Trevor Torres

Remove

Add

General Information

Category: *

Telephone Interview

Status: *

Scheduled

Status Reason: *

Worker Initiated

☒

Flexible Block Appointment

Initiate Call: *

Customer

Phone Number: *

012-345-6789

Extension:

Figure 2.1.3 – Phone Number Validation Message

10

Customer Appointment Detail

*- Indicates required fields

Edit Attendance Reschedule Edit Close

Attendees	
Customers *	Attendance
Doe, John M	Pending

Workers *
36AS00Q06Q - Trevor Torres

General Information		
Category: * Telephone Interview <input checked="" type="checkbox"/> Flexible Block Appointment	Status: * Scheduled Initiate Call: * Customer	Status Reason: * Client Initiated
Phone Number: * (555)555-5555	Extension: 123	
Office: CalSAWS Project Office		
Location: * 123 MAIN ST NORWALK, CA 90650		
Appointment Letter Comments:	Appointment Comments:	

Dates			
Begin Date: * 11/03/2022	Begin Time: * 9:00 AM	Duration * 2 hours	End Time: 11:00 AM

Edit Attendance Reschedule Edit Close

Last Updated On 11/03/2022 10:04:31 AM By: [1036105](#)

This Type_1 page took 1.87 seconds to load.

Figure 2.1.4 – Customer Appointment Detail page View Mode Mockup

2.1.3 Description of Changes

1. Add a checkbox labeled 'Flexible Block Appointment' on the Customer Appointment Detail page in the "General Information" section, as shown in Figure 2.1.1.
 - a. The checkbox will be editable in "Create", "Edit", and "Reschedule" mode.
 - i. If the checkbox is checked, "View" mode will display a checkmark next to the checkbox but will not be editable, as shown in Figure 2.1.4.
 - b. The checkbox will appear only when the "Category" field is 'Telephone Interview' or 'Telephone CW/CF RE Interview' or when the Category field is 'General Appointment' and the Appointment-Type field is '2nd Telephone Interview Recertification', 'Telephone Interview Intake', or 'Telephone Interview Recertification'.

- c. When the checkbox is selected, a drop-down field labeled 'Initiate Call:', a 'Phone Number:' field, and 'Extension:' field will appear, as shown in Figure 2.1.1.
 - i. The 'Initiate Call:' drop down, 'Phone Number:' field, and 'Extension:' field will be editable in "Create", "Edit", and "Reschedule" mode.
 - 1. These values will only display in "View" mode if the "Flexible Block Appointment" is checked, as shown in Figure 2.1.4.
 - ii. The 'Initiate Call:' drop-down field will have two options: 'Customer' and 'Worker'.
 - iii. The 'Phone Number:' field will auto populate with the first Worker's phone number selected from the "Worker" section of the Customer Appointment Detail page.
 - 1. The 'Phone Number:' field will auto populate with the Worker's Main type Phone Number from the Position Detail page.
 - 2. The 'Phone Number:' field will auto populate the Worker's information when a Worker has been selected and will auto populate the next Worker if the first Worker has been removed and another Worker is already in the "Workers" section.
 - a. Note: This is existing functionality and will auto populate similarly to the "Location" field.
 - b. When a Worker is removed and no other Workers is to be selected, remove the auto populated phone number from the 'Phone Number:' field.
 - 3. The 'Phone Number:' field must be in the form of '(###)###-####' and cannot start with a zero.
 - a. This field will use the Phone Number validation constraint as shown in Figure 2.1.3.
 - iv. The 'Extension:' field will auto populate, if applicable, with the first Worker's extension selected from the "Worker" section of the Customer Appointment Detail page.
 - 1. The 'Extension:' field will auto populate, if applicable, with the worker's Main type Extension from the Position Detail page.
 - 2. The 'Extension:' field, if applicable, will auto populate the Worker's information when a worker has been selected and will auto populate the next Worker if the first Worker has been removed and another worker is already in the "Workers" section.
 - a. Note: This is existing functionality and will auto populate similarly to the "Location" field.
 - b. When a Worker is removed and no other Workers are selected, remove the auto

- populated extension number from the 'Extension:' field.
3. The 'Extension:' field must be a numerical value and cannot exceed 10 numbers.
 - a. This field will use the Extension validation constraints as shown in Figure 2.1.5 and Figure 2.1.6.
 2. Add a row/column titled 'End Time' in the "Dates" section that displays the meeting's ending time on the Customer Appointment Detail page, as shown in Figure 2.1.1.
 - a. The 'End Time:' will display the end meeting time once the user saves the appointment and is not editable by the user.
 - b. The 'End Time:' will be calculated by adding the hours in the 'Duration' field to the time in the 'Start Time:' field.
 - c. The "System Suggested Time(s)" section and "Suggest Time" button will hide dynamically when the "Flexible Block Appointment" is checked.
 - i. If the "Flexible Block Appointment" is not checked, then the "System Suggested Time(s)" and "Suggest Time" button will display, as shown in Figure 2.1.2.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Customer Schedule**
- **Task: Add Appointment**

2.2 Update GEN 102 to the latest state version

2.2.1 Overview

Update the GEN 102 Appointment Letter to the latest state version. The new 1/22 version of the Appointment Letter includes an additional section for a Flexible Phone Interview. Recommendation 2.1 updates the Appointment Detail Page to accommodate this new scheduling option, and this recommendation will populate the GEN 102 with this new data.

State Forms: GEN 102

Programs: Multiple

Attached Forms: N/A

Forms Category: Forms

Editable: Yes

Visibility: All Counties

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

2.2.2 Update GEN 102 Form Verbiage

Update GEN 102 Form XDP

Update XDP for the GEN 102 (1/22) Form. The updated GEN 102 contains a new table – in addition to its existing tables for In-Person and Telephone Appointments – which represents Flexible Telephone Appointments, that take place in a window rather than a set time.

Form Header: CalSAWS Standard Header 1

Form Title: Appointment Letter

Form Number: GEN 102

Include NA Back 9: No

Imaging Form Name: Appointment Letter

Imaging Document Type: Appointment Letter

Form Mockups/Examples: See Supporting Documents #1 - #X

Updated Languages (13):

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

2.2.3 Update GEN 102 Variable Population

Add variable population to the body of the GEN 102 for the new flexible Telephone Appointment section. This section will be populated when an

- ☐ **You have a phone interview with a flexible appointment time.**
- ☐ You must call the county during the appointment times listed below on your appointment date.
 - ☐ The county will call you during the appointment times listed below on your appointment date.

Appointment Date:	Appointment Time Between:
	and
Your Phone Number:	County Phone Number:

appointment is created with a Flexible Phone Appointment type (detailed in Recommendation 2.1).

The variables in this section will only populate if there is an appointment with a telephonic appointment category/sub-type and the 'Flexible' option has been selected from the drop-down on the Appointment Detail Page.

Existing category/sub-type combinations that will populate the 'phone interview' section are:

- Telephone Interview
- Telephone CW/CF RE Interview
- General Appointment – Telephone Interview Intake
- General Appointment – Telephone Interview Recertification
- General Appointment – 2nd Telephone Interview Recertification

Form Header Variables:

Standard population for CalSAWS Header_1

Form Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation	Populates in Packet
Flexible Phone Interview Checkbox	Checked if GEN 102 is generated for an applicable Appointment Type (see above) and the 'Flexible' option is checked.the drop-down on the Appointment Detail Page.	--	Y Standard Checkbox	N	Y	Y
'You Must Call' Checkbox	Checked if the 'You must call...' drop-down the Appointment Detail Page is selected.	--	Y Standard Checkbox	N	Y	Y
'County will call you' Checkbox	Checked if the 'County will call you...' radio button on the Appointment Detail Page is selected.	--	Y Standard Checkbox	N	Y	Y

Appointment Date	Date from Appointment Detail Page.	Arial, Size 10 mm/dd/yyyy	Y Date Field	N	Y	Y
Flexible Appointment Start Time	The Begin Time, selected from the drop-down menu in the 'Dates' section of the Appointment Detail Page.	Arial, Size 10 XX:XX	Y Time Field	N	Y	Y
Flexible Appointment End Time	The appointment window's end time. Note: This value is calculated by start time and duration, and will display on the Appointment Detail Page, and will be added with Recommendation 2.1. For example: An Appointment with a Begin Time of 9AM and a Duration of 1 hour and 45 minutes will have an end time of 10:45AM.	Arial, Size 10 XX:XX	Y Time Field	N	Y	Y
Customer Phone Number	Customer's primary phone number from Appointment Detail Page. Note: This will be the same as the 'Your Phone Number' population in the above fixed phone interview section.	Arial, Size 10 (XXX) XXX-XXXX (can include extension)	Y Phone Number	N	Y	Y
County Phone Number	Populate with the Phone Number from the Appointment Detail Page (See Figure 2.1.1). This will be displayed as a new field on the Appointment Detail page (See Figure 2.1.1). If there is an	Arial, Size 10 (XXX) XXX-XXXX Or (XXX) XXX-XXXX-XXXX if there is an extension.	Y Phone Number	N	Y	Y

	extension (see Recommendation 2.1), append it to the phone number on the Form.					
Comment*	Static generic message: "YOU WILL GET A SEPARATE LETTER WITH AN INTERVIEW APPOINTMENT DATE AND TIME. CALL YOUR WORKER RIGHT AWAY IF YOU DO NOT GET THE APPOINTMENT LETTER WITHIN 10 DAYS OF THIS NOTICE. YOUR APPOINTMENT LETTER WILL TELL YOU IF YOU HAVE A PHONE INTERVIEW OR IF YOU HAVE TO COME INTO THE OFFICE FOR YOUR INTERVIEW."	Arial, ALL CAPS				

Variables Requiring Translation: None

***Note:** Current logic that populates the 'Comment' section with its static message will remain unchanged. The formatting of this message will be updated to populate in ALL CAPITALS to draw reader attention.

Population for each of the three sections of the GEN 102 – fixed Phone Interview, Flexible Phone Interview, and In-Person Interview – will remain unchanged from their existing scenarios when generated alone or in a packet.

For example, an interview scheduled with a category and sub-type of 'General Appointment – Fingerprinting' will populate the In-Person section of the GEN 102. An interview with a category and sub-type of 'General Appointment – 2nd Telephone Interview Recertification' will populate either the fixed or flexible Phone Interview section, depending upon whether a flexible appointment has been indicated. For a full list of Appointment category and sub-type combinations and their population, see Supporting Documents #X.

2.3 Replace Appointment Letter with Updated GEN 102 in CalFresh and CW/CF Packets

2.3.1 Overview

Update CalFresh and CalFresh/CalWORKs combo packets to use the most recent version of the GEN 102 (1/22).

2.3.2 Replace Appointment Letter with Updated GEN 102 in CalFresh and CW/CF Packets

The updated GEN 102 will replace the outdated GEN 102 (09/2020) or existing CF 29 Series in the following packets:

Form/Packet Number	County	Currently Uses...	Current Languages	Replace with...
CW RE Packet	MIG	GEN 102 (09/2020)	All Threshold (13)	GEN 102 (11/22)
CF RE Packet	MIG	CF 29 (10/13)	All Threshold (13)	GEN 102 (11/22)
CW/CF RE Packet	MIG	GEN 102 (09/2020)	All Threshold (13)	GEN 102 (11/22)
CF Packet - LA	LAC	CF 29 (10/13) Series	EN, SP, AE, CA, CH, KO, RU, TG, VI (9)	GEN 102 (11/22)

2.3.3 Update GEN 102 Variable Population in Packets for C-IV Counties

Update the variable population for the GEN 102 to populate appointment details for the following type/sub-type for C-IV Migration Counties to add to the existing types in all three packets (CF, CW, CW/CF Combo):

Appointment Category	Sub-Type (if applicable)
General Appointment	Telephone Interview Recertification

Update the variable population for the GEN 102 in the same packets to *remove* population for appointment details for the following Appointment Category/Sub-type Combination in the CalFresh Packet and CalWORKS Packet:

Appointment Category	Sub-Type (if applicable)
Telephone Interview	-

Note: Per existing logic, a packet generated with a blank GEN 102 will have an explanatory message populated in the 'Comments' section on the form (see

Assumption #7). No data population changes will be made to the packets for CalWIN counties.

2.4 Update LA County CW/CF/MC Packet to use the new GEN 102

2.4.1 Overview

Los Angeles County's current CalFresh/CalWORKS/Medi-Cal RE Packets use the CF 29 (CalFresh Recertification Appointment Letter). Three different versions of the Packet – FS29LA 3A, FS29LA 3B, and FS29LA 3C – are generated depending upon the type of appointment scheduled.

Current Packet	Used For...
CalWorks/CalFresh/Medi-Cal Packet - FS29LA 3A	Telephone Interview Appointment (county calls person)
CalWorks/CalFresh/Medi-Cal Packet - FS29LA 3B	Telephone Interview Appointment (no number on file – person must provide phone number)
CalWorks/CalFresh/Medi-Cal Packet - FS29LA 3C	Interview Appointment (in-person)

These Packets will be consolidated to a single packet, and utilize the updated GEN 102 Appointment Letter. Because the GEN 102's updated population can accommodate all these scenarios, only one packet variation is needed. Existing CalWorks/Medi-Cal Packet - FS29LA 3A/3B/3C Packets will be end-dated.

State Form: N/A

Programs: Multiple (CalWORKS, CalFresh, Medi-Cal)

Attached Forms: N/A

Forms Category: Application

Template Repository Visibility: Los Angeles County

Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

*As with other CF RE Packets, the CW/CW/MC Packet for Farsi will use an English cover sheet.

2.4.2 Description of Change

1. Create a single CW/CF/MC Packet XDP for LA County.

Form
GEN 102
Cover Letter

Note: The GEN 102 CW/CF/MC Packet will follow the current process of 'pre-stuffed' RE Packets, with only the Cover Letter and GEN 102 being generated out of CalSAWS. The remainder of the forms will be pre-stuffed at the print center. Forms stuffed with this packet will remain unchanged from the existing CW/CF/MC Packet - 3A/3B/3C.

Form Header: N/A – has a coversheet

Form Title: CW/CF/MC Packet

Form Number: CW/CF/MC Packet

Include NA Back 9: Y

Imaging Form Name: CW/CF/MC Packet

Imaging Document Type: Customer Reporting

Form Mockups/Examples: See Supporting Documents #X

2. Add the packet to Template Repository. The packet has the following required form inputs:
 - Case Number
 - Customer Name
 - Program
 - RE Month
 - Language

Figure 2.3.2.1 – Document Parameter Page

- Add validation on the Document Parameters page to prevent the generation of the packet from Template Repository when a CF/CF/MC Packet in any status except 'Not Applicable' for the same RE Month exists. The validation message will state: 'RE

Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'

3. Add population logic for the packet. The packet will use the existing population logic for the GEN 102 and populate the Appointment Letter based upon the type of scheduled Appointment.

4. Add the packet name for the CW/CF/MC Packet for Los Angeles County to the Redetermination Bundle Names Codes Table (CT 10448).

Note: The values from this codes table are used when constructing the bundle names for the packets. The packets are in mailing priority 04 for LA County.

5. Add the following form control for the packet:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

6. Add the following print options for the packet:

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

7. Add the following mailing options for the packet:

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	Existing Worker's Office/District Office Address used by CW/CF/MC Packet – 3A/3B/3C
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Full Size Flat Mail
Return Envelope Type	BRM
Special Paper Stock	N/A

Mailing Options	Option for RE Packet
Enclosures	N/A
Electronic Signature	Yes
Check to Sign	No
Post to SSP	Yes

8. Create a Customer Reporting entry with the following information when the packet is generated and saved:

Field to Populate	Population for RE Packet
Type	Existing type used by CW/CF/MC Packet – 3A/3B/3C
Submit Month - when generated from Template Repository	RE Month from Document Parameters page
Submit Month - when generated through Batch	Current CalFresh Program RE Due Date
Program	Existing program used by CW/CF/MC Packet – 3A/3B/3C
Status	Customer Reporting Tracking Status
Status Date	Date of the latest Status Date

9. End-date the existing CW/CF/MC Packets:

- CW/CF/MC Packet – 3A
- CW/CF/MC Packet – 3B
- CW/CF/MC Packet – 3C

2.5 Update LA County CW/MC Packet to use the new GEN 102

2.5.1 Overview

Los Angeles County's current CalWORKS/Medi-Cal RE Packets use the CF 29 (CalFresh Recertification Appointment Letter). Three different versions of the Packet – FS29LA 3A, FS29LA 3B, and FS29LA 3C – are generated depending upon the type of appointment scheduled.

Current Packet	Used For...
CalWorks/Medi-Cal Packet - FS29LA 3A	Telephone Interview Appointment (county calls person)

CalWorks/Medi-Cal Packet - FS29LA 3B	Telephone Interview Appointment (no number on file – person must provide phone number)
CalWorks/Medi-Cal Packet - FS29LA 3C	Interview Appointment (in-person)

These Packets will be consolidated to a single packet, and utilize the updated GEN 102 Appointment Letter. Because the GEN 102's updated population logic can accommodate all these scenarios, only one packet variation is needed. Existing CalWorks/Medi-Cal Packet - FS29LA 3A/3B/3C Packets will be end-dated.

State Form: N/A

Programs: Multiple (CalWORKS, Medi-Cal)

Attached Forms: N/A

Forms Category: Application

Template Repository Visibility: Los Angeles County

Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

*As with other CF RE Packets, the CW/MC Packet for Farsi will use an English cover sheet.

2.5.2 Description of Change

1. Create a single CW/MC Packet XDP for LA County. This packet will have three impressions – two for the GEN 102, and a third for the Redetermination Mail Back Cover Letter.

Form
GEN 102
Cover Letter

Note: The GEN 102 CW/MC Packet will follow the current process of 'pre-stuffed' RE Packets, with only the Cover Letter and GEN 102 being generated out of CalSAWS. The remainder of the forms will be pre-stuffed at the print center. Forms stuffed with this packet will remain unchanged from the existing CW/MC Packet - 3A/3B/3C.

Form Header: N/A – has a coversheet

Form Title: CW/MC Packet

Form Number: CW/MC Packet
Include NA Back 9: Y
Imaging Form Name: CW/MC Packet
Imaging Document Type: Customer Reporting
Form Mockups/Examples: See Supporting Documents #X

2. Add the packet to Template Repository. The packet has the following required form inputs:
 - Case Number
 - Customer Name
 - Program
 - RE Month
 - Language

Figure 2.3.2.1 – Document Parameter Page

- Add validation on the Document Parameters page to prevent the generation of the packet from Template Repository when a CF/CF/MC Packet in any status except 'Not Applicable' for the same RE Month exists. The validation message will state: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'
3. Add population logic for the packet. The packet will use the existing population logic for the GEN 102 and populate the Appointment Letter based upon the type of scheduled Appointment.
 4. Add the packet name for the CW/MC Packet for Los Angeles County to the Redetermination Bundle Names Codes Table (CT 10448).

Note: The values from this codes table are used when constructing the bundle names for the packets. The packets are in mailing priority 04 for LA County.
 5. Add the following form control for the packet:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

6. Add the following print options for the packet:

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

7. Add the following mailing options for the packet:

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	Existing Worker's Office/District Office Address used by CW/MC Packet – 3A/3B/3C
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Full Size Flat Mail
Return Envelope Type	BRM
Special Paper Stock	N/A
Enclosures	N/A
Electronic Signature	Yes
Check to Sign	No
Post to SSP	Yes

8. Create a Customer Reporting entry with the following information when the packet is generated and saved:

Field to Populate	Population for RE Packet
Type	Existing Type used by CW/MC Packet – 3A/3B/3C
Submit Month - when generated from Template Repository	RE Month from Document Parameters page

Field to Populate	Population for RE Packet
Submit Month - when generated through Batch	Current CalFresh Program RE Due Date
Program	Existing Program used by CW/MC Packet – 3A/3B/3C
Status	Customer Reporting Tracking Status
Status Date	Date of the latest Status Date

10. End-date the existing CW/CF/MC Packets:

- CW/MC Packet – 3A
- CW/MC Packet – 3B
- CW/MC Packet – 3C

2.6 Update LA County Appointment Batch

2.6.1 Overview

The Recertification Appointment Batch (PB19C902 and PB19C909) is a two-day batch that schedules RE appointments for CW/CF cases with an RE Due Date in the upcoming month. This section outlines the necessary modifications to the batch job when scheduling appointments for the upcoming RE Due Month.

The RE Appointment Batch logic will distribute appointments throughout the RE appointment period for workers who do not have a daily threshold. Batch will first schedule appointments on the first available time slot(s) for each day from the beginning of the RE appointment period until the end of the appointment period and will increment throughout the days until all cases assigned to the worker have been scheduled.

2.6.2 Description of Change

1. If a phone number is available for the participant
 - a. Modify the auto scheduling logic for (PB19C902 and PB19C909) to create an over lapping telephone appointment when
 - i. Category: General Appointment
 - ii. Type: Telephone Interview Recertification
 all other existing logic will remain the same. (See Assumption 14)
2. Appointments should last 2 hours and should be booked in overlapping 15 min increments.
3. Book appointments only if the entire two-hour block is available.
4. See "CA- 246603 Supporting Document" for additional criteria on overlapping logic.

5. If a phone number is not available create an in-person appointment.
6. Update the "Flexible Block Appointment" to be checked.

2.6.3 Execution Frequency

No Change. This batch job runs monthly on the 4th and 5th business day.

2.6.4 Key Scheduling Dependencies

No Change.

2.6.5 Counties Impacted

Los Angeles County

2.6.6 Data Volume/Performance

Currently approximately 20,000 – 50,000 appointments for CalWORKs/CalFresh cases are created monthly.

2.6.7 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.)

Note: For additional information on GEN 102 population when generated from an LA County Auto-scheduling job, see Appendix.

2.7 Update NOMI Letter Generation Conditions for Packet Appointment Types

2.7.1 Overview

The CF 386 Notice of Missed Interview (NOMI) is currently generated via daily Batch (Batch #: PB00R541) for the following Appointment Category/Sub-type combinations:

	Appointment Category	Sub-Type (if applicable)
Intake	Intake Interview	-
	General Appointment	Telephone Interview Intake
Recertification	Re-Evaluation CW/CF Interview	-
	Telephone CW/CF Interview	-
	General Appointment	Telephone Interview Recertification
	General Appointment	Re-Affirmation Non-group

Note: For a full description of the NOMI's existing generation conditions, see Appendix.

This change will update the NOMI Letter's generation conditions to remove the 'General Appointment – Re-Affirmation Non-group' appointment type, and add 'RE Interview' appointment types to its generation conditions.

State Form: CF 386 (2/14) – CalFresh Notice Of Missed Interview

Current Programs: CalFresh

Current Attached Forms: NA Back 9

Current Forms Category: Form

Current Template Repository Visibility: All Counties

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

2.7.2 Update CF 386 NOMI Letter Generation Conditions

Update the CF 386 NOMI Letter to generate for the following interview Category and Sub-Type combinations:

	Appointment Category	Sub-Type (if applicable)
Intake	Intake Interview	-
	General Appointment	Telephone Interview Intake
Recertification	Re-Evaluation CW/CF Interview	-
	Telephone CW/CF Interview	-
	General Appointment	Telephone Interview Recertification
	RE Interview	-

2.8 Automated Regression Test

2.8.1 Overview

Create new automated regression test scripts to verify the new functionality of the Customer Appointment Detail page.




2.8.2 Description of Change

1. Create new regression scripts to verify each of the following scenarios in "Create", "Edit", or "Reschedule" mode of the Customer Appointment Detail page:
 - a. The 'Flexible Block Appointment' checkbox displays when each of the following Category and Appointment-Type combinations is selected:
 - i. Category: Telephone Interview
 - ii. Category: Telephone CW/CF RE Interview
 - iii. Category: General Appointment, and:
 1. Appointment-Type: 2nd Telephone Interview Recertification
 2. Appointment-Type: Telephone Interview Intake
 3. Appointment-Type: Telephone Interview Recertification
 - b. When the 'Flexible Block Appointment' checkbox is selected the following fields display and are editable: 'Initiate Call', 'Phone Number', 'Extension'.
 - i. If at least one Worker is associated to the appointment, the fields are pre-populated with the details of the first Worker (if available).
 - ii. If no Worker is associated to the appointment, the fields are pre-populated with blank values.
 - c. When the 'Flexible Block Appointment' checkbox is selected the "Suggest Time" button is not displayed.
 - d. A validation message displays when attempting to save the page with a Phone Number value that:
 - i. Does not match the required form
 - ii. Starts with a zero
 - e. A validation message displays when attempting to save the page with an Extension value that does not match the required form.
 - f. A validation message displays when attempting to save the page with the 'Flexible Block Appointment' checkbox is selected and no value is populated for each of the following fields:
 - i. Initiate Call
 - ii. Phone Number

Technical Note: Each scenario will be verified in at least one of the listed page modes, but will not be repeated for every such page mode.

2. Create new regression scripts to verify each of the following in “View” mode of the Customer Appointment Detail page when the ‘Flexible Block Appointment’ checkbox is selected:
 - a. The following fields display: ‘Initiate Call’, ‘Phone Number’, ‘Extension’.
 - b. The ‘End Time’ column and value display in the “Dates” section.

3 SUPPORTING DOCUMENTS

Ref #	Document	Functional Area	Description	Attachment
1	GEN 102 Mockup (EN)	Client Correspondence	Mockup of the GEN 102 (1/21) in English with the following scenarios: <ul style="list-style-type: none"> • Flexible Phone Appointment • In-Person Appointment 	 GEN 102 11/22 Mockup - Flexible Phc  GEN 102 11/22 Mockup - In-Person
2	GEN 102 Mockup – Threshold Languages	Client Correspondence	Mockup of the GEN 102 (1/21) in the following languages: <ul style="list-style-type: none"> • Armenian • Arabic • Cambodian • Chinese • Farsi • Tagalog • Hmong • Korean • Lao • Russian • Spanish • Vietnamese 	<Pending Approval>
3	LAC Appointment Schedule Graphical Aid	Batch	Spreadsheet detailing scheduling pattern for LA County's auto-scheduling Batch Job (see Recommendation 2.6)	 LA County Auto-Scheduling Exan

4 APPENDIX

4.1 GEN 102 Population when Auto-scheduled

Per LA County's CDI, the county's auto-scheduling batch job will send and populate GEN 102 Packets with the following population:

- a. Always <check> "You have a flexible interview appointment" and "The county will call you during the business hours listed below."
- b. Appointment Date = the appointment date scheduled
- c. Appointment Time Between = The actual appointment time + 2 hours
EX: Appointment time is 8:15am. then the field will be populated with 8:15am and 10:15am. If the Appointment Time is 8:30am, then the field will be populated 8:30am and 10:30am
- d. Your Phone Number = current functionality (logic to pull the phone number on CF 29-LA 3 form)
- e. County Phone Number = current functionality
- f. If a phone number does not exist for the participant, then "You have an in-person interview appointment. Please go to the county office at the date and time listed below"
 - i. Appointment Date = current functionality per FS 29 LA 3B
 - ii. Appointment Time = current functionality per FS 29 LA 3B
 - iii. County Office Name = current functionality per FS 29 LA 3B
 - iv. County Office Address: current functionality
 - v. City = current functionality
 - vi. State = current functionality
 - vii. Zip Code = current functionality

5 REQUIREMENTS

Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters;	This SCR updates the GEN 102 Appointment Letter to generate the state's most recently published version of the Form.

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