CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201813

Display Important County Dates Phase I

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Edgars Reinholds; Michael Wu, Naga Chinduluru

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/04/2020	1.0	Initial Revision	Vallari Bathala
7/8/2022	1.1	Added Fiscal, Tech Arch, Online, and Batch sections	Howard Suksanti, Gerald Limbrick, Jimmy Tu, Henry Lee
10/5/2022	1.2	Added section 2.10 and add Auto Rescind on Request batch job in Section 2.7.2.5	Howard Suksanti
10/18/2022	1.3	Added Section 2.4.2 #3 Add new Code table	Jimmy Tu
10/24/2022	1.4	Updated Section 2.8.2	Jimmy Tu
11/15/2022	1.5	Updated Section 2.7.2.5 on the batch number	Howard Suksanti
11/18/2022	1.6	Update Online code to determine holidays (new section 2.4) Updated Fiscal Section 2.11 Section 2.10 removed as duplicate of Section 2.5 Update Section 2.9.2	Jimmy Tu, Gerald Limbrick

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1 OVERVIEW

The purpose of this SCR is to create a page in CalSAWS in which County users can view Counties holidays and important dates. This link will be accessible from the CalSAWS application homepage.

1.1 Current Design

At the end of each calendar year, Counties are required to identify all holidays observed for the following year. These dates are used to determine when batch jobs will and will not run throughout the year. To change or update the holiday dates, Counties need to the current Change Request (CR) process.

1.2 Requests

Create a process which will allow each County to view County Holiday Dates and other important County Dates. The process will be implemented in two phases. This SCR CA-201813 will be phase 1 and SCR CA-237401 will be phase 2.

1.3 Overview of Recommendations

1. Create a new page with a Calendar. The Calendar will display all County Holidays, Main Payroll Dates, 10-Day cutoff Dates, and Batch Discontinuance Dates.
2. Create a new page to view details of a specific Calendar entry.
3. Move all Important County Dates from Codes tables to a separate table in the database. Change architecture and scripts to use new table.
4. Holiday dates are used to determine satisfactory progress for customer activities and class performance. Update the logic used to determine holidays for mentioned online/front-end pages so that it uses the new County Dates table (see section titled "Create New County Dates Table").
5. Modify the architecture Date class to use the new table for the holiday and bank holiday logic.
6. Modify Batch FAC Helper module to use the new County Dates table.
7. Modify Program Person Sanction Status Update Batch module to use the new County Dates table.
8. Modify Medi-Cal Auto Rescind batch job (PB00E155) to use the new County Dates table.
9. Modify Sync SNB with CalFresh batch job (PB00E111) to use the new County Dates table.
10. Modify Fiscal Batch jobs to use the new County Dates table.
11. Update the getTenDayCutOffDate method to use the new County Dates table to determine the Ten Day Cut Off Date instead of Code Detail Table Category 10513.

1.4 Assumptions

1. CRFI will still be sent out to gather Holidays for each County.
2. CA-237392 will update BenefitsCal API to use the new County Dates table.
3. CA-237525 will update Reports to use the new County Dates table.
4. The prior years of the Holiday dates that are currently stored in CalSAWS will be migrated over to the new County Dates table.

2 RECOMMENDATIONS

2.1 Home page

2.1.1 Overview

Add a Link to the Home page to access the new County Calendar page (see below).

2.1.2 County Calendar page Mockup

Figure 2.1.2.1 – Link to Holiday Calendar will be on the Home Page

2.1.3 Description of Changes

1. Add a 'County Calendar' link to the Quick Links section, to navigate to the new County Calendar page.
   Note: In line with the functionality of existing Quick Links, users with the ability to log in with more than one county must select a County and click the 'Submit' button to complete selecting a different county i.e., changing the 'County' dropdown without clicking the 'Submit' button will result in this link showing the calendar for the default or previously selected County.

2.1.4 Page Location

Home Page

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add Page Mapping for the new link

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 County Calendar page

2.2.1 Overview

Online page will show the new County Calendar. Each County will only be able to view important dates related to the County of the worker who is logged in.

2.2.2 County Calendar page Mockup

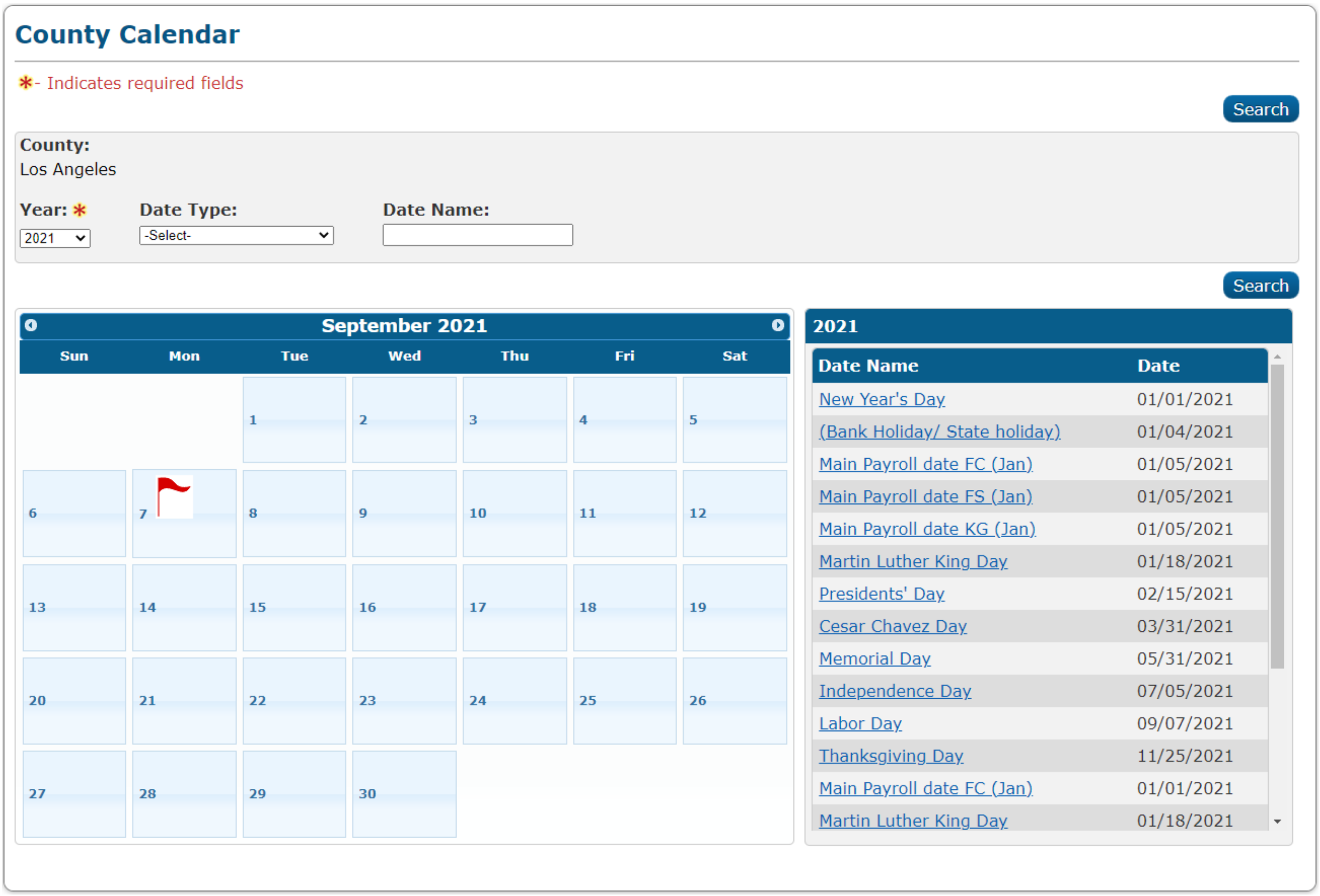


Figure 2.2.2.1 - County Calendar page (default view/ prior to clicking search or entering parameters, ***when current month is September 2021****)*

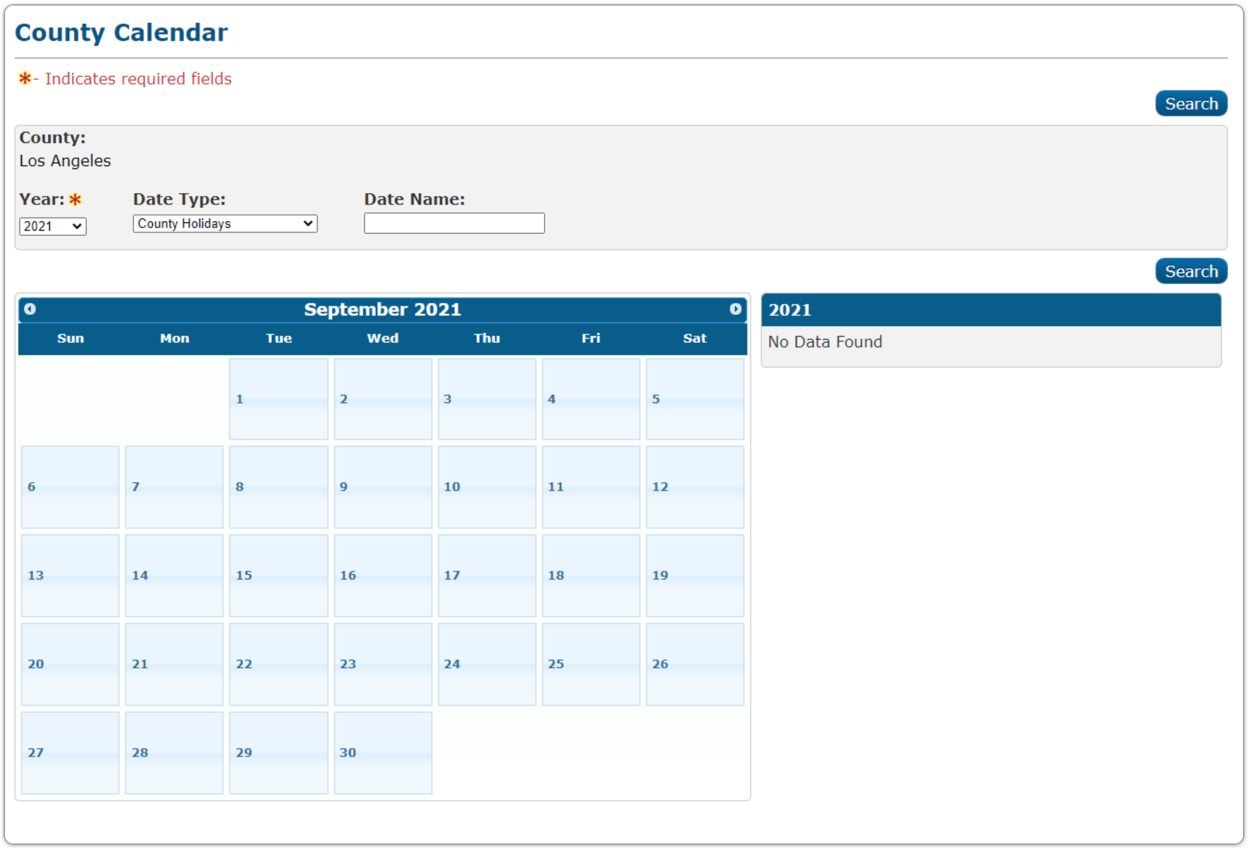


Figure 2.2.2.2 - No Search Results (after selecting a Date Type ***with no entries/results for the selected year*** *and pressing the 'Search' button)*

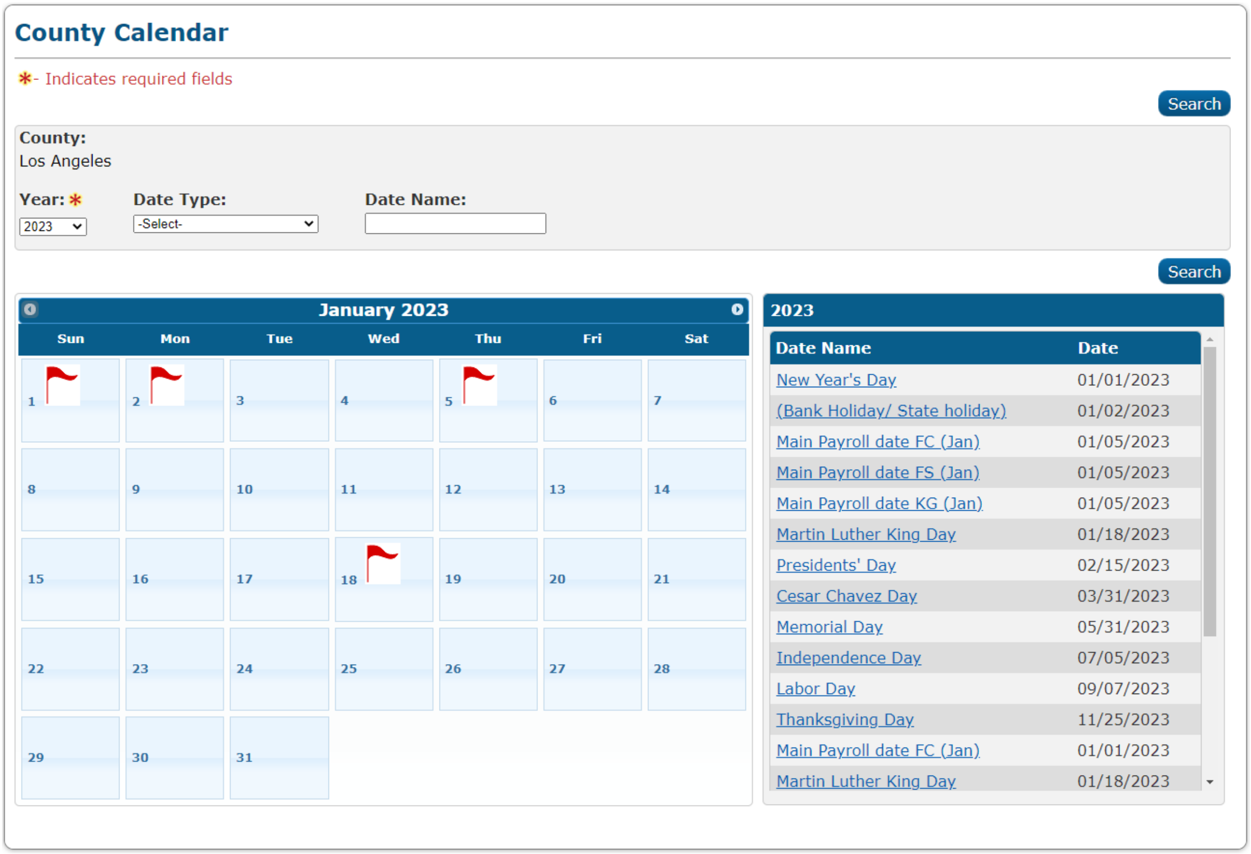


Figure 2.2.2.3 – Greyed Out 'Prev' Icon (Year Only search, after pressing the 'Search' button, or after a Default search) ***when showing the first month of the year***

2.2.3 Description of Changes

1. Create a new 'County Calendar' page to highlight county specific important dates. All users with access to the CalSAWS system will have the ability to view the County Calendar page.
2. At the top of the page, show the Required Field icon and text "-Indicates required fields"
3. Create a Search section to allow the user to filter by year, type, or by the name of a holiday or important date:
    a. Add a 'Year' dropdown, with a Required Field icon
        i. Populate the dropdown with an empty '-Select-' option and any years that have an associated date available i.e., only show options for years that have a holiday or important date for the logged in county.
        ii. Default to the current year or to a '-Select-' option if the current year has no associated dates.
        iii. On searching, limit the search results to those associated to the selected year
    b. Add a 'Date Type' dropdown. When a selection was made, on searching, limit the search results to dates of the selected Type.
        i. Add options for:

            1. -Select- (Default)
            2. Batch 10 – day cutoff Dates
            3. Batch Discontinuance Dates
            4. County Holidays
            5. Main Payroll Dates – AAP
            6. Main Payroll Dates – Cash and Food
            7. Main Payroll Dates – Foster Care
            8. Main Payroll Dates – KG
        ii. Display the empty '-Select-' option first, followed by the other options in alphabetically ascending order
    c. Add a 'Date Name' text box:
        i. When text is entered in this box, on searching, limit the search results to date names that include the entered text, ignore capitalization e.g., entering "YEAR" will return the "New Year's Day" Date even though text from the middle of the Date name was entered using different capitalization than what appears in the database.
        ii. Add logic to filter out programming language specific characters entered in the text box e.g., %, *, and < characters will be ignored during the search
4. Add a 'Search' button above and below the Search section:
    a. This button will initiate the search
    b. If no 'Year' is selected, show a validation message as: "Year - Field is required. Please enter a value."
5. Add a Calendar which will allow users to toggle to previous and future months:
    a. The Calendar will show only 1 month at a time, default to the current month and year
    b. On searching, show the earliest month, within the selected year, with a search result, or the current month if no results are returned
    c. Indicate days with search results, using an icon. If no 'Date Type' or 'Date Name' was entered, in the search criteria, show the indicator icon on each day of the selected month, that has any holiday or important date for the county
        i. Add arrow left and right icons to toggle backwards or forward to the previous or next month, with image alternate text as "Prev" & "Next" respectively
        ii. As the user toggles through the calendar months: When reaching the end of the year i.e., January or December, grey out and disable the relevant icon so that the user is not able to toggle to a different year
6. Add a table beside the calendar to show the search results
    a. Add an outer panel with a header showing the selected year
    b. Add a table with columns/headers for:
        i. 'Date Name': the name of the date as entered in the County Dates table (see the section labeled: Create New County Dates Table). Show the Date Name as a link

to the County Calendar Date Detail page (see below) in view mode **Note**: Edit mode will not be available until the phase 2 SCR

ii. 'Date' formatted as: MM/DD/YYYY

c. Add a scroll bar. Limit the maximum height of the outer panel to the same height as the calendar
d. Default the table to show all holidays and important dates in the current year, when no search filters were entered
e. If no results are returned, show the column headers only, with a text message as: "No Data Found"

2.2.4 Page Location

1. **Home page >** click the **'County Calendar'** link in the **'Quick Links'** section

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Create page mapping for this page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 County Calendar Date Detail page

2.3.1 Overview

The County Calendar Date Detail page will show details of a holiday or important county date.

2.3.2 County Calendar Date Detail page Mockup

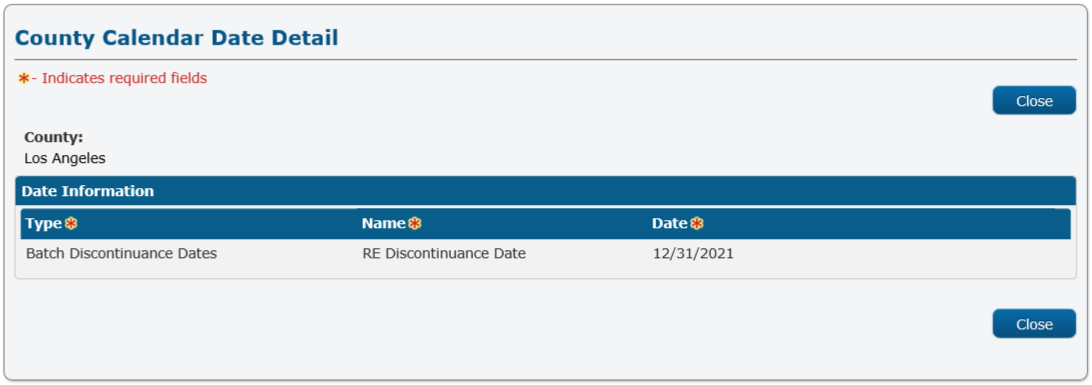


Figure 2.3.2.1 - County Calendar Date Detail page

2.3.3 Description of Changes

1. Create a new 'County Calendar Date Detail' page to view a specific important date. All users with access to the CalSAWS system will have the ability to view the County Calendar Date Detail page in view mode.
2. At the top of the page, show the Required Field icon and text "- Indicates required fields" **Note**: This SCR, for phase 1, will only implement the view mode. Required Field indicators for this page are included based on an Edit mode which is planned for phase 2 of the solution.
3. Add a 'Close' button to the top and bottom of the page: This button will navigate to the County Calendar page.
4. Add a 'County' label and field to show the County being displayed. **Note:** The County the user is logged in with will always display, even when viewing details of a date entry associated with multiple counties
5. Add a 'Date Information' panel with an inner table, with column headers showing the Required Field indicator after each column header. Add headers for:
    a. 'Type': the decoded type from the new County Dates table (see the section labeled: Create New County Dates Table)
    b. 'Name': the name of the date as entered in the new County Dates table
    c. 'Date': formatted as: MM/DD/YYYY

2.3.4 Page Location

Home page > click the **'County Holidays'** link in the **'Quick Links'** section **>** click the **Date_Name** link on the County Calendar page

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Create page mapping for this page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Activity Progress Detail, Activity Progress Summary & Class Performance Detail

2.4.1 Overview

Holiday dates are used to determine satisfactory progress for customer activities and class performance. Update the logic used to determine holidays for mentioned online/front-end pages so that it uses the new data model (see section titled "Create New County Dates Table").

2.4.2 Page Mockups

N/A

2.4.3 Description of Changes

1. Update the system logic to use the new data model to determine holidays for satisfactory participant activity progress and class performance affecting these pages:
    a. Activity Progress Detail
    b. Activity Progress Summary
    c. Class Performance Detail

2.4.4 Page Locations

Activity Progress Summary page:

Global: Empl. Services
Local: Activities
Task: Customer Activities > Click the 'Progress' button (on the Customer Activities List page)

Activity Progress Detail page:

Global: Empl. Services
Local: Activities
Task: Customer Activities > Click the 'Progress' button (on the Customer Activities List page) > Click the link in the 'Activity Attendance Weeks' column in the 'Search Results Summary' table

Class Performance Detail page:
Global: Empl. Services
Local: Activities
Task: Customer Activities > Click the 'Type' link (on the Customer Activity Detail page)> Click the 'View Performance' button (on the Activity Detail page) > Click the link in the "History" table (on the Class performance List page)

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Fiscal: Create New County Dates Table

2.5.1 Overview

Important County dates are currently stored in the Codes table. Therefore, a new table will be created to store all County Holidays.

2.5.2 Description of Change

1. Create a DBCR to create a new table in the Database to store the following Important date types:
    1. Batch 10 – day cutoff Dates
    2. Batch Discontinuance Dates
    3. County Holidays
    4. Main Payroll Dates – AAP
    5. Main Payroll Dates – Cash and Food
    6. Main Payroll Dates – Foster Care
    7. Main Payroll Dates – KG
2. Consolidate County Holiday dates, Main payroll dates, etc. to store and display on the online page (CTCR and DCR).
3. Create new Code Table to store Important Date Types listed below:
    a. Batch 10 – day cutoff Dates
    b. Batch Discontinuance Dates
    c. County Holidays
    d. Main Payroll Dates – AAP
    e. Main Payroll Dates – Cash and Food
    f. Main Payroll Dates – Foster Care
    g. Main Payroll Dates – KG
4. Create a new common method to retrieve Batch 10-day cutoff dates.

2.6 CalSAWS Tech Arch changes

2.6.1 Overview

Important County dates are currently stored in the Codes table. Therefore, a new table will be created to store all County Holidays.

2.6.2 Description of Change

1. Modify the architecture Date class to use the new table instead of the code detail table.
    a. isHoliday method

   b. isBankHoliday method - may be legacy code that's no longer used
2. Cache the important dates and look to the cache before querying the database.

2.6.3 Performance Impact

Performance impact will be evaluated as a part of release performance testing for this release.

2.7 Batch & Interface: Modify Batch-FACHelper module

2.7.1 Overview

FACHelper module is a module that batch jobs use for retrieving the Batch 10-day cutoff dates. Currently the module retrieves the Batch 10-Day cutoff dates from Code detail (CT 10513).

2.7.2 Description of Change

Update the FACHelper module to use the new County Dates table to get the Batch 10-Day cutoff dates.
Note: Example of batch job that uses this module is PB19E142.

2.8 Batch & Interface: Modify Batch jobs to use the new County Dates table

2.8.1 Overview

Program Person Sanction Status Update Batch uses the 10-day cutoff date to determine the sanction effective date. When the batch run after the 10-day cutoff date, the Sanction effective date will be the month after the following month.

Medi-Cal Auto Rescind batch job (PB00E155) uses Code detail (CT 10513) to determine the Batch 10-Day cutoff dates.

PB00E111 job uses Code detail (CT 10513) to determine the Batch10-Day cutoff dates.

2.8.2 Description of Change

Update the batch jobs below to use the new table to get the 10-day cutoff date.

1. ~~PBXXS881 - Set Sanction status for WTW/REP after 20 days of Non-Compliance.~~
2. PBXXS882 - Set Sanction status for WTW/REP after 20 days Non-Compliance and the Reason Code is not Conciliation or Curing Sanction.
3. PBXXS883 - Set Sanction status for WTW/REP when no-show for on Appraisal appointment.
4. PB00E155 - Medi-Cal Auto Rescind batch job.
5. PB19E485 - Medi-Cal Auto Rescind on Request batch job.
6. PB00E111 - Sync SNB with CalFresh batch job.

The batch jobs will use the new common method to retrieve the 10-day cutoff date.

2.8.3 Execution Frequency

No change.

2.8.4 Key Scheduling Dependencies

No change.

2.8.5 Counties Impacted

CalSAWS counties.

2.8.6 Data Volume/Performance

N/A.

2.8.7 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.)

2.9 Fiscal: Update Fiscal Batch Jobs

2.9.1 Overview

The following jobs use code detail (CT 10451) to determine the dates. We will be updating these jobs to reference the new table.

2.9.2 Description of Change

1. Update the following batch jobs to reference the new County Dates table instead of code table category 10451.
    a. Future Month Supplemental GR Sweep Batch (PB19F322)
    ~~b. Future Month Supplemental NB Sweep Batch (PB00F325)~~
    c. Future Month Supplement Sweep Batch (PB19F326).
    ~~d. Nighty EDBC Sweep Batch (PB00F318) (PB00F302)~~
    e. Nightly FC EDBC Sweep Batch ~~(PB00F304)~~ (PB19F304)
    f. Nightly FC Stop Dated Placement Sweep Batch (PB19F313)

2.9.3 Execution Frequency

No change.

2.9.4 Key Scheduling Dependencies

No change.

2.9.5 Counties Impacted

CalSAWS counties.

2.9.6 Data Volume/Performance

N/A.

2.9.7 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.)

~~2.10 Fiscal/Batch: Code Table Change Request~~

~~2.10.1 Overview~~

~~Create a new code table category for County Dates.~~

~~2.10.2 Description of Change~~

~~1. Create a new code table category to store county dates.~~
~~2. Create the following types in the new category to store county dates:~~
    ~~a. Batch 10 – day cutoff Dates~~
    ~~b. Batch Discontinuance Dates~~
    ~~c. County Holidays~~
    ~~d. Main Payroll Dates – AAP~~

~~e. Main Payroll Dates – Cash and Food~~
~~f. Main Payroll Dates – Foster Care~~
~~g. Main Payroll Dates – KG~~

~~2.10.3 Estimated Number of Records Impacted/Performance~~

~~~7 records impacted.~~

2.11 Update Time Limit Validation

2.11.1 Overview

Update the getTenDayCutOffDate method that is used in the Time Limit Validation Validator Class.

This method is used by the following pages:

1. IctAbawdTimeLimitMonthList
2. GAGRManualTimeLimitMonthList
3. GAGRTimeLimitMonthDetail
4. GAGRTimeLimitMonthList
5. GRTimeLimitMonthDetail
6. GRTimeLimitMonthList
7. TimeLimitList
8. TimeLimitMonthDetail
9. TimeLimitMonthList

2.11.2 Page Mockups

N/A

2.11.3 Description of Changes

1. Update the getTenDayCutOffDate method to use the new County Dates table to determine the Ten Day Cut Off Date instead of Code Detail Table Category 10513.
    a. This affects the following pages:
        i. IctAbawdTimeLimitMonthList
        ii. GAGRManualTimeLimitMonthList
        iii. GAGRTimeLimitMonthDetail
        iv. GAGRTimeLimitMonthList
        v. GRTimeLimitMonthDetail
        vi. GRTimeLimitMonthList
        vii. TimeLimitList
        viii. TimeLimitMonthDetail
        ix. TimeLimitMonthList
~~~

2.11.4 Page Locations

ICT ABAWD Time Limit Month List Page:

Global: Eligibility.
Local: Customer Information
Task: Time Limits > Click the 'Name' Hyperlink under the ABAWD Section

GAGR Manual Time Limit Month List Page:

Global: Eligibility
Local: Customer Information
Task: GAGR > GAGR Time Limits

GAGR Time Limit Month Detail Page:

Global: Eligibility
Local: Customer Information
Task: GAGR > GAGR Time Limits

GAGR Time Limit Month List Page:

Global: Eligibility
Local: Customer Information
Task: GAGR > GAGR Time Limits

GR Time Limit Month List page:

Global: Eligibility
Local: Customer Information
Task: GAGR > GR Time Limits

GR Time Limit Month Detail page:

Global: Eligibility
Local: Customer Information
Task: GAGR > GR Time Limits

Time Limit List Page:

Global: Eligibility
Local: Customer Information
Task: Time Limits

Time Limit Month Detail Page:

Global: Eligibility
Local: Customer Information
Task: Time Limits

Time Limit Month List Page:

Global: Eligibility
Local: Customer Information
Task: Time Limits

2.11.5 Security Updates

N/A

2.11.6 Page Mapping

N/A

2.11.7 Page Usage/Data Volume Impacts

N/A

2.12 Batch Operation:

2.12.1 Overview

Batch Operation team will maintain the Batch Calendar and County Holidays detail in the new tables after the SCR implementation date.

Batch Operation team will maintain the holiday schedule on the existing Code Detail table until all teams migrated over to the new tables.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.2.3	The LRS shall provide COUNTY-specified Users with a method for viewing business rules for any part of the LRS Data entry, change processing, or eligibility determination processes and shall provide links to policy requirements.	The SCR will add a page that display County Holiday dates.

California Statewide Automated Welfare System

Design Document

CA-204087

Generation of Renewal Packets and Reminder Notice to Additional Correspondents

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Chereddy
	Reviewed By	Priya Sridharan, Himanshu Jain, Elisa Miller, Maggie Orozco, Nina Butler, Virginia Bernal

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/29/2022	1.0	Initial version	Nithya Chereddy
11/10/2022	1.1	Content Revision	Nithya Chereddy
11/17/2022	1.2	Removed highlights	Maria Jensen

Table of Contents

1 OVERVIEW

The MAGI RE Packet, Non-MAGI RE Packet, Mixed HH RE Packet and the Medi-Cal Reminder Notice gets mailed to the Primary Applicants. With this effort the Medi-Cal Renewal packets and the Medi-Cal Reminder Notices will be mailed to Additional Correspondents who are also Medi-Cal Renewal Packet recipients.

1.1 Current Design

The current functionality generates the Medi-Cal Renewal packets and the Medi-Cal Reminder Notices for Primary Applicants.

A customer reporting entry will be added to the 'Customer Reporting' page once the packet gets generated and sent to the Primary Applicant.

The customer reporting entry will be marked as 'Received' once the packet gets returned by the customer.

1.2 Requests

1. Generate the Medi-Cal Renewal Packets for the Additional Correspondents who are also Medi-Cal Renewal Packet recipients.
2. Mark the 'Customer Reporting' entry for Medi-Cal Renewal Packet as 'Received' if either the packet from the Primary Applicant or Additional Correspondent gets returned.
3. Generate the MC Reminder Notice for the Additional Correspondents who are also Medi-Cal Renewal Packet recipients.

1.3 Overview of Recommendations

1. Add functionality to generate the Medi-Cal Renewal Packets for Additional Correspondents who are also MC RE Packet recipients.
2. Update Customer Reporting logic to mark the Medi-Cal Renewal Packet as received if either the packet from the Primary Applicant or Additional Correspondent gets returned.
3. Add functionality to generate the MC Reminder Notice for Additional Correspondent(s) who are also MC RE Packet recipients.
4. Modify the 'Mark Document Received' web service to update Customer Reporting to Received when the packet is received from either the Primary Applicant or Additional Correspondent(s).

1.4 Assumptions

1. If a packet fails to generate for the Additional Correspondents, this information will be included as part of the exception report. The SCR CA-250942 will update the exception report to include the person's name for whom the packet/form exceptioned out.
2. The functionality to pre-populate a packet for Additional Correspondent(s) will not be added to the Template Repository with this SCR if the additional correspondent is a non-case person or a resource. Per existing functionality

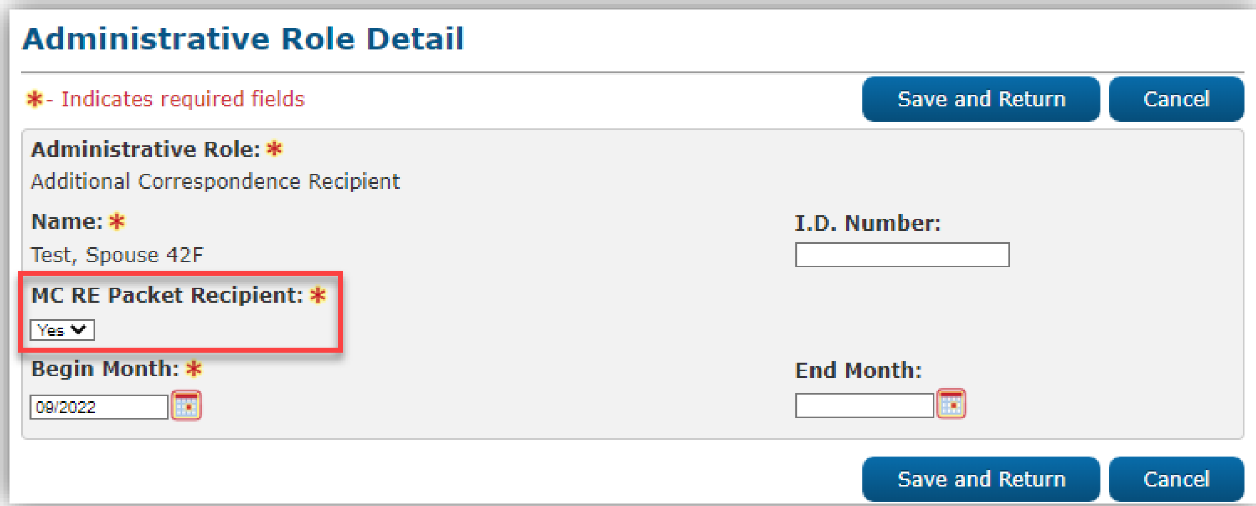
workers can generate a pre-populated a packet for an additional correspondent if the additional correspondent is a case person.

3. If a MC RE Packet or MC Reminder Notice is printed locally, the corresponding packet or form will not be generated for the additional correspondent from the system.
4. Per Existing logic counties can configure the Document Routing Rules to allow the configuration of tasks to be created based on the Imaged documents if the packets are received from both the Primary Applicant and the Additional Correspondent.
5. As part of the SCR CA-235894 the field 'LTC MC RE Packet Recipient' has been relabeled to 'MC RE Packet Recipient' and the validation which allows only one person to be the RE Packet Recipient has been removed, hence multiple persons can be added as 'MC RE Packet Recipients'.
6. The term 'Medi-Cal Renewal Packets' in this SCR references the three MC RE Packets which are MAGI RE Packet, Non-MAGI RE Packet and Mixed HH RE Packet.
7. The term 'Additional Correspondents' in this SCR references the Additional Correspondents added through either 'Administrative Role Detail' Page or 'Authorized Representative Program Detail' page.
8. The existing Hyland functionality will merge the forms/packets if they are retuned on the same day with the same case and form context, for example, if the customer returned half the packet in the morning and half the packet in the afternoon, because it is the same type of form/packet for the same case the two images in this instance would get merged. This functionality will remain the same with this SCR, as in, if the Primary applicant and the additional correspondent returned the packet(s) on the same day the images will get merged.
9. The SCR CA-239741 is adding the 2nd Medi-Cal Reminder Notice if the Medi-Cal Renewal packet(s) are still in sent status by the 2nd reminder notice generation date.
10. Per existing functionality, the Additional correspondent added through the 'Authorized Representative' page could be a case person, a non-case person or a resource.
11. Per existing functionality only Primary Applicants can link their Self-Service Portal accounts to CalSAWS. This means that any packet that gets generated for Additional Correspondent(s) will not be that viewable in the Self-Service Portal by the primary applicant.
12. The Medi-Cal Renewal Packet and the Medi-Cal Reminder Notice will generate for Additional Correspondent's in Primary Applicant's written language.
13. There will be one journal entry per every packet or form that gets generated for either the Primary Applicant or the Additional Correspondent.
14. If the Medi-Cal Renewal Packet or Medi-Cal Reminder Notice for Primary Applicant gets errored out during bundling process, then the corresponding RE Packet or Medi-Cal Reminder Notice for the Additional Correspondent will still get processed.

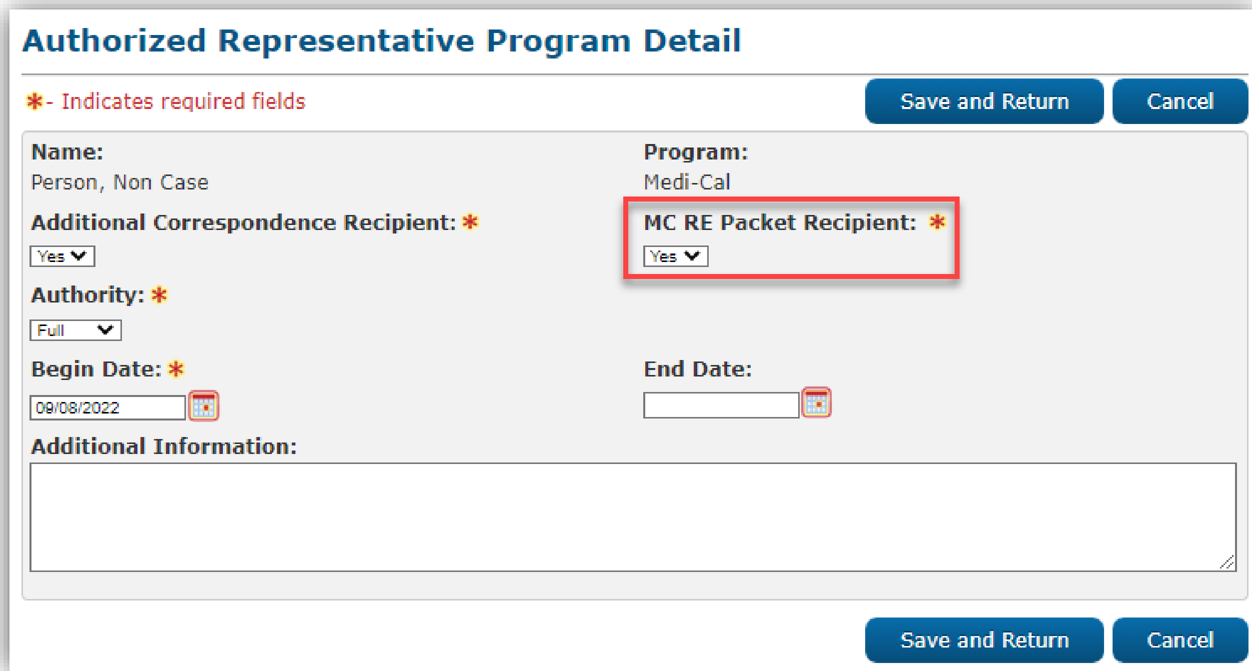
2 RECOMMENDATIONS

The Medi-Cal Renewal Packets (MAGI RE Packet, Non-MAGI RE Packet and the Mixed HH RE Packet) and the MC Reminder Notice when generated through batch job gets mailed to the primary applicant. With this effort the logic will be updated to start generating/mailing the Medi-Cal Renewal packets and the MC Reminder Notice to Additional Correspondents who are 'MC RE Packet Recipients', Additional Correspondents can be added to the program from the below mentioned two pages.

i) Administrative Role Detail Page



ii) Authorized Representative Program Detail Page



2.1 Update the Medi-Cal Renewal Packet generation logic

2.1.1 Overview

Current batch jobs generate Medi-Cal Renewal packets for primary applicants only.

2.1.2 Description of Change

Update the Medi-Cal Renewal packet generation logic to generate the Renewal packets for Additional Correspondents who are also MC RE Packet recipients.

1. The Medi-Cal Renewal Packets will be sent to the Authorized Representative if all the following conditions are true.
   a. There is an active Authorized Representative for the Medi-Cal program during the time of packet generation
   Technical Note: The Additional Correspondent will be considered as active if the end date in the AUTH_REPRESENT_PGM table is on or after the system date and the HIDE_IND is set to No.
   b. The Authorized Representative has the Additional Correspondence Recipient field set to 'Yes' on the Authorized Representative Program Detail page.

c. The Authorized Representative has the 'MC RE Packet Recipient' field set to 'Yes' on the Authorized Representative Program Detail page.
d. The corresponding Medi-Cal Renewal Packet exists for the Primary Applicant for the same effective month.
Note: The Medi-Cal Renewal Packet for Additional Correspondent(s) should get generated when the Packet for the Primary Applicant got generated though either Template Repository or through Batch.

2. The Medi-Cal Renewal Packets will be sent to an Administrative Role of 'Additional Correspondence Recipient' on the program if all the following conditions are true:
   a. There is an active Administrative Role of 'Additional Correspondence Recipient' for the Medi-Cal program during the time of packet generation.
   Technical Note: The Additional Correspondent will be considered as active if the end date in the PGM_ADMIN table is on or after the system date
   b. The Administrative Role of 'Additional Correspondence Recipient' has the MC RE Packet Recipient field set to 'Yes' on the Administrative Role Detail page.
   c. The corresponding Medi-Cal Renewal Packet exists for the Primary Applicant for the same effective month.

   Note: The Medi-Cal Renewal Packet for Additional Correspondent(s) should get generated when the Packet for the Primary Applicant got generated though either Template Repository or through Batch.

3. If the same person is listed as the 'MC RE Packet Recipient' on 'Authorized Representative Program Detail' Page and 'Administrative Role Detail' Page and satisfies the criteria in the above listed recommendations 2.1.2.1 and 2.1.2.2 then only one MC RE Packet should be sent for that person.
4. If the Medi-Cal Renewal Packet for Primary Applicant gets errored out during PDF generation, then the corresponding RE Packet for the Additional Correspondent will not be generated.
Note: If the packet for the Additional Correspondent gets errored out during PDF generation there won't be any impact to primary applicant's packet.
5. Update the logic to only insert one customer reporting entry for Primary Applicant although the Primary applicants and the Additional Correspondents who are 'MC RE Packet Recipients' receive the MC RE Packets.

   i.e., Although the Additional Correspondents who are 'MC RE Packet Recipients' receive the MC RE Packets in addition to the Primary Applicants, only one customer reporting entry will be created.

6. Modify the bundling job logic to update the customer reporting entry only for primary applicant.
7. Address the Medi-Cal Renewal Packet to the mailing address associated to the Authorized Representative record when either of the following conditions are true:

- The Authorized Representative is a Non-Case Person or
- The Authorized Representative is a Case Person with the Use Person Address set to 'No' or
- The Authorized Representative is a Resource with the Use Resource Address set to 'No'.

8. Address the Medi-Cal Renewal Packet to the mailing address associated to the Person's record when the Authorized Representative is a Case Person with the Use Person Address set to 'Yes'.
9. Address the Medi-Cal Renewal Packet to the mailing address associated to the Resource's record when the Authorized Representative is a Resource with the Use Resource Address set to 'Yes'.
10. Address the Medi-Cal Renewal Packet to the mailing address associated to the Person's Record when the Additional Correspondent is added through the 'Administrative Role Detail' page.
11. The MC RE packet(s) for the Additional Correspondent, when generated through batch, should have the same data population as the Primary Applicant's packet except for the mail to address on the MC RE Packet(s) Coversheet.

2.2 Update the Medi-Cal Reminder Notice generation logic

2.2.1 Overview

Current batch jobs generate the first and the second Medi-Cal Reminder notices for primary applicants only.

2.2.2 Description of Change

Update the first and second Medi-Cal Reminder Notice logic to generate the MC Reminder Notices for Additional Correspondents who are also MC RE Packet recipients.

1. The Medi-Cal Reminder Notice will be sent to the Authorized Representative if all the following conditions are true:
    a. There is an active Authorized Representative for the Medi-Cal program during the time of reminder notice generation
    Technical Note: The Additional Correspondent will be considered as active if the end date in the AUTH_REPRESENT_PGM table is on or after the system date and the HIDE_IND is set to No.

b. The Authorized Representative has the Additional Correspondence Recipient field set to ‘Yes’ on the Authorized Representative Program Detail page.
c. The Authorized Representative has the ‘MC RE Packet Recipient’ field set to ‘Yes’ on the Authorized Representative Program Detail page.
d. The corresponding Medi-Cal Reminder Notice exists for the Primary Applicant for the same effective month.

2. The Medi-Cal Reminder Notice will be sent to an Administrative Role of ‘Additional Correspondence Recipient’ on the program if all the following conditions are true:
   a. There is an active Administrative Role of ‘Additional Correspondence Recipient’ for the Medi-Cal program during the time of reminder notice form generation.
      Technical Note: The Additional Correspondent will be considered as active if the end date in the PGM_ADMIN table is on or after the system date
   b. The Administrative Role of ‘Additional Correspondence Recipient’ has the MC RE Packet Recipient field set to ‘Yes’ on the Administrative Role Detail page.
   c. The corresponding Medi-Cal Reminder Notice exists for the Primary Applicant for the same effective month.
3. If the same person is listed as the ‘MC RE Packet Recipient’ on ‘Authorized Representative Program Detail’ Page and ‘Administrative Role Detail’ Page and satisfies the criteria in the above listed recommendations 2.2.2.1 and 2.2.2.2 then only one MC Reminder Notice should be sent for that person.

   Note: A Medi-Cal Reminder Notice will be sent to the Additional correspondent who is also an ‘MC RE Packet Recipient’ irrespective of whether the person received the MC RE Packet or not.

4. If the Medi-Cal Reminder Notice for Primary Applicant gets errored out during PDF generation, then the corresponding Medi-Cal Reminder Notice for the Additional Correspondent will not be generated.
   Note: If the Medi-Cal Reminder Notice for the Additional Correspondent gets errored out during PDF generation there won’t be any impact to primary applicant’s Medi-Cal Reminder Notice.
5. Address the Medi-Cal Reminder Notice to the mailing address associated to the Authorized Representative record when either of the following conditions are true:

- The Authorized Representative is a Non-Case Person or
- The Authorized Representative is a Case Person with the Use Person Address set to ‘No’ or
- The Authorized Representative is a Resource with the Use Resource Address set to ‘No’.

6. Address the Medi-Cal Reminder Notice to the mailing address associated to the Person’s record when the Authorized Representative is a Case Person with the Use Person Address set to ‘Yes’.

7. Address the Medi-Cal Reminder Notice to the mailing address associated to the Resource's record when the Authorized Representative is a Resource with the Use Resource Address set to 'Yes'.
8. Address the Medi-Cal Reminder Notice to the mailing address associated to the Person's Record when the Additional Correspondent is added through the 'Administrative Role Detail' page.

2.3 Form Generation Batch

2.3.1 Overview

The batch processes which generate dynamic forms will be updated to handle generation of correspondence going to Additional Correspondents who are also 'MC RE Packet Recipient'.

2.3.2 Description of Change

Update the Dynamic Forms Generation batch jobs to identify records which need to be generated for Additional Correspondents who are also 'MC RE Packet Recipient' and generate the Forms for bundler processing.

2.3.3 Execution Frequency

Daily (every batch day)

2.3.4 Key Scheduling Dependencies

As-is

2.3.5 Counties Impacted

All counties will be impacted by this change.

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

N/A

2.3.8 Failure Procedure/Operational Instructions

N/A

2.4 Print Central Batch

2.4.1 Overview

The PBxxP200, PBxxP300, and PBxxP301 batch processes will be updated to handle printing of correspondence going to Additional Correspondents who are also 'MC RE Packet Recipient'.

2.4.2 Description of Change

Update the Print Central Batch (PBxxP200, PBxxP300, and PBxxP301) batch to identify records which need to be centrally printed for Additional Correspondents who are also 'MC RE Packet Recipient' and load those records into the PRINT_FILE table for bundler processing.

2.4.3 Execution Frequency

Daily (every batch day)

2.4.4 Key Scheduling Dependencies

As-is

2.4.5 Counties Impacted

All counties will be impacted by this change.

2.4.6 Data Volume/Performance

N/A

2.4.7 Interface Partner

N/A

2.4.8 Failure Procedure/Operational Instructions

N/A

2.5 Update the 'Barcoded Document Routing Detail' Page logic

2.5.1 Overview

When the worker enters the document's barcode in the "**Barcoded Document Routing Detail**" page, the corresponding customer reporting entry will be marked 'Received' if the customer reporting is not in

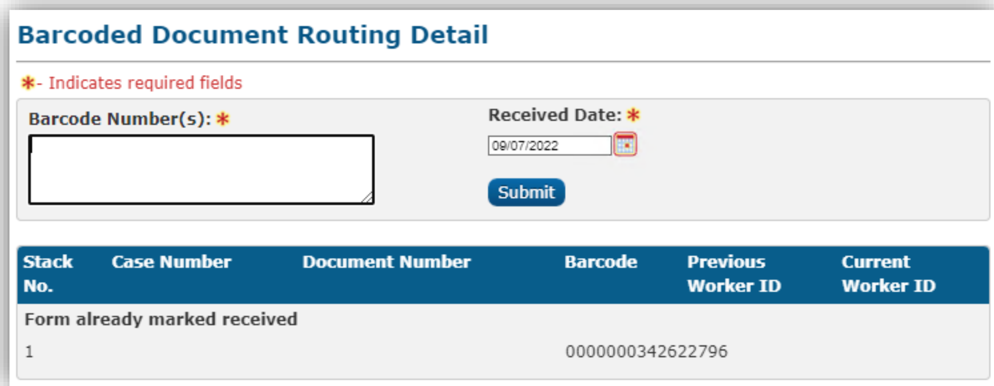
'Received', 'Not Applicable', 'Reviewed- Ready to Run EDBC' or 'Complete- EDBC Accepted' statuses.

2.5.2 Description of Change

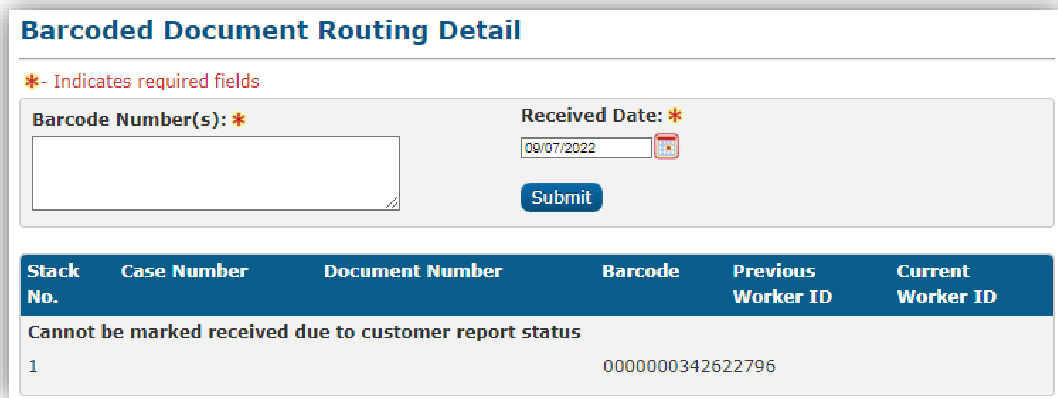
Update the "**Barcoded Document Routing Detail**" page logic to mark the customer reporting entry as 'Received' when the following conditions are true

a. Either the Primary Applicant or Additional Correspondent returned the MC RE packet(s) (i.e., when the worker receives the packet and enters the barcode in the 'Barcoded Document Routing Detail Page')
b. The customer reporting associated to the MC RE packet(s) returned is not already in 'Received', 'Not Applicable', 'Reviewed- Ready to Run EDBC' or 'Complete- EDBC Accepted' statuses.

Update the logic on 'Barcoded Document Routing Detail' page to show the message '**Form already marked received**' if the customer reporting entry associated to the MC RE packet(s) is already marked 'Received' either through the Packet from Primary Applicant or through the Additional Correspondent.



Update the logic on 'Barcoded Document Routing Detail' page to show the message '**Cannot be marked received due to customer report status**' if the status of the customer reporting entry associated to the MC RE packet(s) is 'Reviewed- Ready to Run EDBC' or 'Not Applicable' or 'Complete- EDBC Accepted'. This is applicable when the MC RE packet(s) is returned either by the Primary Applicant or the Additional Correspondent.



2.6 Update the 'Mark Document Received' Inbound Web Service logic

2.6.1 Overview

The Mark Document Received webservice will first search for the scanned document by via barcode number. Then the webservice will update the customer reporting records. During this update the webservice will get a list of all customer report records associated to the scanned document and will update to its status to 'Received' if the customer report status is not in the following statuses 'Received', 'Not Applicable', 'Reviewed-Ready to Run EDBC' or 'Complete- EDBC Accepted'.

2.6.2 Description of Change

1. Modify the markDocumentRecieved webservice's update status logic to mark the customer reporting entry as "Received" if:
    a. The MC RE packet(s) is from either the Primary Applicant or Authorized Representatives
    b. The customer report status is not in the following statuses: 'Received', 'Not Applicable', 'Reviewed- Ready to Run EDBC' or 'Complete- EDBC Accepted'

2.6.3 Partner Integration Testing

No Partner Integration Testing

2.6.4 Execution Frequency

Real Time – No Change

2.6.5 Key Scheduling Dependencies

N/A

2.6.6 Counties Impacted

All Counties – No Change

2.6.7 Category

Webservice

2.6.8 Data Volume/Performance

N/A

2.6.9 Interface Partner

Hyland

2.6.10 Failure Procedure/Operational Instructions

N/A

2.7 Update Form Status Batch Job (PB00C3XX)

2.7.1 Overview

PB00C3XX sends BenefitsCal the Med-Cal Renewal information to allow the BenefitsCal customer to fill out and submit the packet to CalSAWS.

2.7.2 Description of Change

1. Modify PB00C3XX to be compatible with the multiple barcodes associated to the Medi-Cal Renewal's customer reporting record.

2.7.3 Partner Integration Testing

Y – partners integrated testing.

2.7.4 Execution Frequency

No Change - Daily.

2.7.5 Key Scheduling Dependencies

No Change.

2.7.6 Counties Impacted

BenefitsCal-supported Counties.

2.7.7 Category

Non-Core job.

2.7.8 Data Volume/Performance

N/A.

2.7.9 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.6	The LRS shall produce notices, NOAs, forms, letters, stuffers, and flyers, either generated by the LRS or initiated by COUNTY-specified Users, that may be sent to an applicant, participant, caregiver, sponsor, authorized representative, Vendor, landlord, and/or any other public or private individual or agency.	The functionality to mail the Medi-Cal RE Packets to the Additional Correspondents has been added with this SCR.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-220188

Add Missing Foster Care NOAs that existed in C-IV, Phase 1

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tiffany Huckaby, Jasmine Chen
	Reviewed By	Tiffany H., Priya S., Himanshu J., William B.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/16/2021	1.0	Initial Revision	Tiffany Huckaby
02/20/2022	1.1	Updated details for top 3 FC reasons	Jasmine Chen
03/09/2022	1.2	Added Automated Regression details	William Baretsky
03/22/2022	1.3	Updated details per FC Committee Meeting review	Jasmine Chen
03/28/2022	1.4	Updated design per QA Comments Log	Jasmine Chen
04/04/2022	1.5	Updated per FC Committee's review: FC budget for 2 FC Disc reasons, 'ISP Started' references for NonCCR	Jasmine Chen
04/18/2022	1.6	Updated assumptions	Jasmine Chen
07/29/2022	1.7	Content Revision 1: Updated 2.1, 2.3, 2.6 recs; Added assumption	Jasmine Chen
08/16/2022	1.8	Content Revision 1: New action fragment; Removed 'Child Eligible to KG' budget; Clarified which NOA has Spanish, infant's name	Jasmine Chen
09/12/2022	1.9	Content Revision 1: Clarified Section 2.5 verbiage derived from FC_KG_TN_ACTION4; Added assumptions	Jasmine Chen
10/07/2022	2.0	Design clarif. for Spanish NOAs and new Disc Action for 'Placement Ends Mid-Month'	Jasmine Chen
11/10/2022	3.0	Content Revision 2: Updated the Date variable population for the newly added Action Fragments	Tiffany Huckaby

Table of Contents

1 OVERVIEW

CalSAWS currently only has a limited number of Foster Care (FC) NOAs. This effort will add three new NOA reasons into the system.

1.1 Current Design

Currently CalSAWS generates a Discontinuance Notice for Foster Care when the placement ends for the following reason: No longer in Care.

CalSAWS does not currently generate verbiage for discontinuing benefits when a Placement has ended Mid-Month nor when a Child becomes eligible for Kin-GAP.

1.2 Requests

Generate NOAs for the following reasons:

1. Placement has ended Mid-Month
2. Child is Eligible to Kin-GAP
3. Infant Supplement Payment (ISP) has started

1.3 Overview of Recommendations

1. Update Foster Care NOA Action Fragments in CalSAWS
2. Add new Foster Care Discontinuance Action Fragment(s) into the System
3. Add new Foster Care NOA Message Fragment into the System
4. Add new 'Placement Ends Mid-Month' NOA Reason for Discontinuance
5. Add new 'Child Eligible to Kin-GAP' NOA Reason for Discontinuance
6. Update the 'ISP Started' NOA Reason for Benefit Change and for Non-CCR rate structures

1.4 Assumptions

1. The 'Placement Ends Mid-Month' Discontinuance NOA only generates if there is a Placement End Reason-value detailed in Section 2.7.4.
2. FC programs will only have 1 recipient (child or young parent). If a worker needs to add an infant of a young parent, the infant will not be a FC program recipient and will be considered MMO (Medi-Cal Member Only).
3. Additional Foster Care NOA reasons will be added with SCRs CA-238042, CA-240146 and CA-229838.
4. The NOAs per this effort are generatable for any county as long as the reasons' generation conditions are satisfied from the Foster Care's EDBC Summary pages (as detailed in Section 2.7, 2.8, 2.9).
5. Threshold Language versions of the new NOA reasons will be added with CA-249511.
6. Threshold Language versions of existing NOA reasons will be added with CA-249509.

7. Spanish language versions of action and message fragments: FC_KG_CH_ACTION3, FC_KG_TN_ACTION4, FC_CH_MESSAGE1 will be added by CA-228880.
8. For this effort, the new NOA Message will be added to the Discontinuance reasons of Placement Ends Mid-Month, Child Eligible to Kin-GAP. This new Message will be updated for all other FC Discontinuance NOAs in CA-240146.
9. In this effort, the ISP Started Change NOA will generate for an infant with ISP started. CA-240146 will update the ISP Started NOA logic to handle scenarios when a young parent has 1 or more infants having ISP started.
10. The system's Template Repository continues to have the CSF 166 – Free Format NOA template. This NOA template allows the user to fill in any necessary details to be generated into a NOA.
11. CA-223829 is scoped to provide new verbiage of NA 403 and NA 403A for proration and effective dates.

2 RECOMMENDATIONS

2.1 Update FC NOA Action Fragment, FC_KG_CH_ACTION3

2.1.1 Overview

The recommendation is updating the verbiage of the existing Foster Care Change Action in English.

Action Fragment Name and ID: FC_KG_CH_ACTION3 (ID = 4111)

State NOA: This verbiage comes from State NA 403

Current Program(s): Foster Care

Current Action Type(s): Change

Current Fragment Level: Program

Currently Repeatable: No, this generates once as the first fragment on the NOA.

Existing Languages: English

Note: CA-228880 will be adding this action fragment in Spanish.

2.1.2 NOA Verbiage

Update Fragment XDP

Update the action verbiage in English.

Note: The following verbiage is used with rate structures of CCR.

1. Update the FC Change Action XDP verbiage in English.

Description	Existing Text	Updated Text	Addt'l Formatting*
Static	As of <DATE>, the county is Changing your <PGMTYPE> aid from $<PRIORAMT> to $<NEWAMT>. This aid is for: <u>Name:</u> <u>Type of Aid:</u> <PERSON> <TYPE> Here's why: Your rate is based on a level of care determination as defined in AB 403 and WIC section 11461.	As of <DATE>, the county is **Changing** your <PGMTYPE> aid from $<PRIORAMT> to $<NEWAMT>. This aid is for: <u>Name:</u> <u>Type of Aid:</u> <PERSON> <TYPE> Here's why: Your rate is based on a level of care determination as defined in AB 403 and WIC section 11461.	'Changing' is bolded.

*English is in Arial font size 10; Spanish and threshold will generate based on project standards for that language.

2.1.3 NOA Variable Population

<u>Fragment Variable Population</u>

There are no changes to the variable population.

2.1.4 NOA Generation Conditions

<u>Fragment Generation</u>

There are no changes to the existing generation logic.

2.2 Update FC NOA Action Fragment, FC_KG_CH_ACTION4

2.2.1 Overview

The recommendation is updating the verbiage of the existing Foster Care Change Action in English and Spanish.

Action Fragment Name and ID: FC_KG_CH_ACTION4 (ID = 4130)

State NOA: This verbiage comes from State NA 403

Current Program(s): Foster Care

Current Action Type(s): Change

Current Fragment Level: Program

Currently Repeatable: No, this generates once as the first fragment on the NOA.

Existing Languages: English, Spanish

2.2.2 NOA Verbiage

Update Fragment XDP

Update the action verbiage in English and in Spanish.

Note: The following verbiage is used with rate structures of Non-CCR.

1. Update the FC Change Action XDP verbiage in English.

Description	Existing Text	Updated Text	Addt'l Formatting*
Static	As of <DATE>, the county is Changing your <PGMTYPE> aid from $<PRIORAMT> to $<NEWAMT>. This aid is for: <PERSON> Here's why:	As of <DATE>, the county is **Changing** your <PGMTYPE> aid from $<PRIORAMT> to $<NEWAMT>. This aid is for: <PERSON> Here's why:	'Changing' is bolded.

*English is in Arial font size 10; Spanish and threshold will generate based on project standards for that language.

2. Update the FC Change Action XDP verbiage in Spanish.

2.2.3 NOA Variable Population

Fragment Variable Population

There are no changes to the variable population.

2.2.4 NOA Generation Conditions

Fragment Generation

There are no changes to the existing generation logic.

2.3 Add a New FC NOA Discontinuance Action Fragment

2.3.1 Overview

The recommendation is adding a new Foster Care Discontinuance NOA Action to be used with reasons a Non-CCR rate structure.

Known County NOA: This verbiage comes from the C-IV Foster Care Discontinuance NOA, derived from the C-IV's equivalent action fragment, ACTN_FOSTER_CARE_DISCONTINUANCE.

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Person

Repeatable: No

Languages: English, Spanish

2.3.2 NOA Verbiage

Create Fragment XDP

A new action fragment will be created for FC Discontinuance NOAs of a Non-CCR rate structure.

NOA Mockups/Examples: See Supporting Documents #1

1. Add the new FC Discontinuance Action XDP for the verbiage in English.

Description	Text	Formatting*
Static	As of <DATE>, the County is stopping your <PGM_NAME> for <PERSON>. Here's why:	Arial Font Size 10

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

2. Add the new FC Discontinuance Action XDP for the verbiage in Spanish.

2.3.3 NOA Variable Population

Add Fragment Variable Population

The new FC Discontinuance Action will have three variables.

Variable Name	Population	Formatting*
PERSON	Name of the Child. For Example: John Doe	Arial Font Size 10

PGM_NAME	Populates with the name of the program being noticed. For Example: Foster Care	Arial Font Size 10
DATE	Populates with Placement End date (FC_BUDGET.PLACEMT_END_DATE) If there is no Placement, within the EDBC Begin month then populate with: Populates with the first day of the EDBC Begin month. For Example: 01/15/2022	Arial Font Size 10 MM/DD/YYYY

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

Variables Requiring Translations: N/A

Technical Note: The variable population of this new reason fragment can be derived from the CIV's equivalent fragment, ACTN_FOSTER_CARE_DISCONTINUANCE.

2.3.4 NOA Generation Conditions

Add Fragment Generation

This new Discontinuance Action Fragment will generate when a FC reason is generated for a Non-CCR rate structure.

Ordering on NOA: The Fragment generates once prior to all associated Reason Fragments on the NOA.

2.4 Add a New FC NOA Discontinuance Action Fragment

2.4.1 Overview

The recommendation is adding a new Foster Care Discontinuance NOA Action to use with the new 'Placement Ends Mid-Month' NOA reason for a CCR rate structure with prorated benefits.

Known County NOA: This verbiage was derived from CalSAWS FC_KG_TN_ACTION4 (ID = 4112) action fragment.

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Person

Repeatable: No

Languages: English, Spanish

2.4.2 NOA Verbiage

Create Fragment XDP

A new action fragment will be created for 'Placement Ends Mid-Month' with a CCR rate structure with prorated benefits.

NOA Mockups/Examples: See Supporting Documents #1

1. Add the new FC Discontinuance Action XDP for the verbiage in English.

Description	Text	Formatting*
Static	As of <DATE>, the county is **Discontinuing** your <PGM_NAME> aid of <PRIORAMT> per month. Here's why:	Arial Font Size 10 'Discontinuing' is bolded.

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

2. Add the new FC Discontinuance Action XDP for the verbiage in Spanish.

2.4.3 NOA Variable Population

Add Fragment Variable Population

The new FC Discontinuance Action will have two variables.

Variable Name	Population	Formatting*
DATE	Populates with Placement End date (FC_BUDGET.PLACEMT_END_DATE)	Arial Font Size 10 MM/DD/YYYY

	If there is no Placement, within the EDBC Begin month then populate with: Populates with the first day of the EDBC Begin month. For Example: 01/01/2022	
PGM_NAME	Populates with the name of the program being noticed. For Example: Foster Care	Arial Font Size 10
PRIORAMT	Populates with the prior benefit month's amount. For Example: $1,900	Arial Font Size 10

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

Variables Requiring Translations: N/A

Technical Note: The variable population of this new reason fragment can be derived from the CalSAWS FC_KG_TN_ACTION4 (ID = 4112).

2.4.4 NOA Generation Conditions

Add Fragment Generation

This new Discontinuance Action Fragment will generate when the 'Placement Ends Mid-Month' (See Section 2.7) NOA reason is generated for a CCR rate structure with prorated benefits.

Ordering on NOA: The Fragment generates once prior to all associated Reason Fragments on the NOA.

2.5 Add a New FC NOA Message Fragment

2.5.1 Overview

The recommendation is adding a new Foster Care NOA Message to use with the FC Discontinuance NOA reasons: Placement Ends Mid-Month, Child Eligible to Kin-GAP.

Note: This new Message will be updated for all other FC Discontinuance NOAs in CA-240146.

Known County NOA: This verbiage comes from NA 290 and derived from existing FC_DN_MESSAGE1 (Fragment ID: 5060).

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Program

Repeatable: No

Languages: English, Spanish

2.5.2 NOA Verbiage

Create Fragment XDP

1. Add a new FC message fragment XDP in English.

Description	Text	Addt'l Formatting*
Static	**Medi-Cal:** This notice DOES NOT change or stop Medi-Cal Benefits. **Keep using your plastic Benefits Identification Card(s).** You will get another notice telling you about any changes to your health benefits.	'Medi-Cal:' and the sentence 'Keep using your plastic Benefits Identification Card(s).' are bolded.

*English is in Arial font size 10; Spanish and threshold will generate based on project standards for that language.

2. Add a new FC message fragment XDP in Spanish.

2.5.3 NOA Variable Population

There are no variables in this verbiage.

2.5.4 NOA Generation Conditions

Fragment Generation

This new Message Fragment will generate when one of the following Reason Fragments are triggered:

- Placement Ends Mid-Month (See Section 2.7)
- Child Eligible to Kin-GAP (See Section 2.8)

Ordering on NOA: This generates after all of the associated Reason Fragments on the NOA.

2.6 Add New FC NOA Discontinuance Reason: Placement Ends Mid-Month

2.6.1 Overview

The recommendation is adding a new FC Discontinuance NOA reason.

Known County NOA: This reason verbiage is derived from C-IV's reason fragment of: MSG_MOVED_TO_A_NEW_FACILITY.
NOA Template: FC_NOA_TEMPLATE (Fragment ID = 3030)
Program(s): Foster Care
Action Type(s): Discontinuance
Fragment Level: Person
Repeatable: Yes
Include NA Back 9: Yes
Forms/NOAs Generated with this NOA: N/A
Languages: English, Spanish

2.6.2 NOA Reason Verbiage

Create new reason fragment XDP

Add a new FC NOA reason fragment XDP to display the following verbiage.

NOA Mockups/Examples: See Supporting Documents #1

1. Add the new FC Discontinuance Reason XDP for the verbiage in English.

Description	Text	Formatting*
Static	<PERSON> left your facility/home or became ineligible to Foster Care on <ENDDATE>. The county will stop paying for Foster Care from the day the child became ineligible or leaves the facility/home. You will be paid <AMOUNT> for the following period(s):	Arial Font Size 10

	From To Amount <FROMDATE> <TODATE> <AMOUNT>	

*English only; the text in Spanish and threshold will generate based on project standards for that language.

2. Add the new FC Discontinuance Reason XDP for the verbiage in Spanish.

2.6.3 NOA Reason Variable Population

<u>Add Fragment Variable Population</u>

Add new variables for this reason fragment:

Technical Note: The variable population of this new reason fragment can be derived from the CIV's equivalent fragment, MSG_MOVED_TO_A_NEW_FACILITY.

Variable Name	Population	Formatting*
<PERSON>	The full name of the person. For Example: Jane Doe	Arial Font Size 10
<ENDDATE>	The end date of when <PERSON> left the placement or became ineligible. Sourced from: FC_BUDGET.PLACEMT_END_DATE For Example: 02/12/2022	Arial Font Size 10 MM/DD/YYYY
<FROMDATE>	The date of when Foster Care payments started. Sourced from: FC_BUDGET.BEG_DATE For Example: 02/01/2022	Arial Font Size 10 MM/DD/YYYY
<TODATE>	The date of when Foster Care payments will end. Sourced from: FC_BUDGET.END_DATE For Example: 02/12/2022	Arial Font Size 10 MM/DD/YYYY
<AMOUNT>	The amount of Foster Care payment. Sourced from: EDBC.AUTH_AMT	Arial Font Size 10

	For Example: $22.00	

*English only; the text in Spanish and threshold will generate based on project standards for that language.

Add Fragment Regulations

Add the following regulations derived from C-IV:

CCR Regulations: EAS 22-001 (a) (1); EAS 22-001 (t) (1), EAS 45-302.5
Non-CCR Regulations: EAS 22-001 (a) (1); EAS 22-001 (t) (1), EAS 45-302.5

Add NOA Title and Footer Reference

The below references and details will be included for this new fragment:

NOA Reference on Document List Page: Plcmt Ends Mid-Mth

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
CCR	Notice of Action – Discontinued	FC_TN_NOA_TYPE_CCR (3141)
Non-CCR	Notice of Action – Termination	FC_TN_NOA_TYPE (3120)

NOA Footer:

NOA Type	NOA Footer
CCR	NA 403 (01/22) REQUIRED FORM - SUBSTITUTES PERMITTED
Non-CCR	NA 290 - Termination (02/14) AFDC-FC

2.6.4 NOA Reason Fragment Generation

1. **Add Reason Fragment Generation**
   a. This new reason fragment will generate when EDBC is run for Foster Care (CCR or Non-CCR rate structures), the child is no longer living at the placement with an end date that is on or before the last day of the EDBC benefit month with the following also satisfied:
      - The program status is 'Active'
      - The placement that is ending has an end reason (CHILD_PLACEMT_DETL.END_RSN_CODE) of one of the following:
        - 'Change of Placement'
        - 'Child ran away from Placement'
        - 'Reunified with parent/Guardian (Court)'
        - 'Reunified with parent/Guardian (Non-Court)'

   Ordering on NOA: Generate this reason following the Action fragment.

2. Below are the associated action, message, and budget fragments for this reason.

   A. Action, Message

   <u>CCR</u>

   Action Fragment: The new FC Action from Section 2.5
   Message Fragment: The new FC Message from Section 2.6

   <u>Non-CCR</u>

   Action Fragment: The new Discontinuance Action from Section 2.4
   Message Fragment: The new FC Message from Section 2.6

   B. Budget

   Add the budget fragment, BUDGT_FC_APPROVAL (Fragment ID: 25) to this reason.

   Technical Note: This BUDGT_FC_APPROVAL budget to be added on this Discontinuance NOA was per the FC Committee's request.

Note: The system may generate a FC approval NOA informing the Foster Care benefits originally approved for a Placement. And if the Placement satisfies above generation conditions for 'Placement Ends Mid-Month', then this new FC discontinuance NOA will also generate.

2.7 Add New FC NOA Discontinuance Reason: Child Eligible to Kin-GAP

2.7.1 Overview

The recommendation is adding a new FC Discontinuance NOA reason.

Known County NOA: This reason verbiage is derived from C-IV's reason fragment of: RSN_CHILD_ELIGIBLE_TO_KINGAP
NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)
Program(s): Foster Care
Action Type(s): Discontinuance
Fragment Level: Program
Repeatable: No
Include NA Back 9: Yes
Forms/NOAs Generated with this NOA: N/A

Languages: English (Please refer to Section 2.8.4.1 for details of turning off CCR NOA in Spanish and the available NOA languages.)

2.7.2 NOA Reason Verbiage

Create new reason fragment XDP

Add a new FC NOA reason fragment XDP to display the following verbiage.

NOA Mockups/Examples: See Supporting Documents #2

1. Add the new FC Discontinuance Reason XDP for the verbiage in English.

Description	Text	Formatting*
Static	The Foster Care child is no longer eligible to Foster Care benefits because he/she is now Eligible to Kin-GAP benefits.	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

2. Add the new FC Discontinuance Reason XDP for the verbiage in Spanish.

2.7.3 NOA Reason Variable Population

Variable Population

This verbiage has no variables.

Add Fragment Regulations

Add the following regulations derived from C-IV:

CCR Regulations:
EAS 22-001 (a) (1); EAS 22-001 (t) (1); Title 22, CCR, Section 50179.5
Non-CCR Regulations:
EAS 22-001 (a) (1); EAS 22-001 (t) (1); Title 22, CCR, Section 50179.5

Add NOA Title and Footer Reference

The below references and details will be included for this new fragment:

NOA Reference on Document List Page: Child Elig Kin-GAP

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
CCR	Notice of Action – Discontinued	FC_TN_NOA_TYPE_CCR (3141)
Non-CCR	Notice of Action – Termination	FC_TN_NOA_TYPE (3120)

NOA Footer:

NOA Type	NOA Footer
CCR	NA 403 (01/22) REQUIRED FORM - SUBSTITUTES PERMITTED
Non-CCR	NA 290 - Termination (02/14) AFDC-FC

2.7.4 NOA Reason Fragment Generation

1. **<u>Turn Off Threshold Language Fragments</u>**

   Turn off the reason fragment (CCR) and its NOA for Spanish.

   Final Language Availability of CCR NOA: English

   Final Language Availability of Non-CCR NOA: English, Spanish

   Note: As the associated FC_KG_TN_ACTION4 is not available yet per CA-228880, the CCR NOA will be turned off for Spanish for time-being (The reason verbiage in Spanish would still be stored in the System per Section 2.8.2).

2. **<u>Add Reason Fragment Generation</u>**

   This new reason fragment will generate when EDBC is run for Foster Care (CCR or Non-CCR) and the following are satisfied:
   - The EDBC results in a program status of Discontinued
   - The EDBC status reason is 'Child Eligible to Kin-GAP' (CT73_JL)

   Ordering on NOA: Generate this reason following the Action fragment.

3. Below are the associated action, message, fragments for this reason.

   A. Action, Message

   <u>CCR</u>

   Action Fragment: 4112, FC_KG_TN_ACTION4

   Note: CA-228880 will be adding above fragment in Spanish.

   Message Fragment: The new FC Message from Section 2.6

   <u>Non-CCR</u>

   Action Fragment: The new Discontinuance Action from Section 2.4

   Message Fragment: The new FC Message from Section 2.6

2.8 Update FC NOA Change Reason: Infant Supplemental Payment (ISP) Started

2.8.1 Overview

Update an existing CalSAWS FC benefit change NOA reason's verbiage and generation conditions. Currently this reason is used for CCR scenarios but will be updated to also generate for non-CCR scenarios.

Reason Fragment Name and ID:
FC_CH_INFANT_SUPLIMENT_PAY_T312 (ID: 7487)
Known County NOA: This reason verbiage is derived from the C-IV's equivalent reason fragment of: RSN_CHILD_PLACEMT_ISP_STARTED
Current NOA Template: FC_NOA_TEMPLATE (Fragment ID = 3030)
Current Program(s): Foster Care
Current Action Type: Change
Current Fragment Level: Program
Currently Repeatable: No
Includes NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English (Please refer to Section 2.9.4.1 for details of turning off CCR NOA in Spanish and the available NOA languages.)

2.8.2 NOA Reason Verbiage

Update reason fragment XDP
Update the reason verbiage in English and add the fragment in Spanish.

NOA Mockups/Examples: See Supporting Documents #3

1. Update the existing XDP verbiage in English.

Description	Existing Text	Updated Text	Formatting*
Static	Your case has been issued an Infant Supplemental Payment.	An Infant Supplemental Payment is being issued for <PERSON> in the amount of <FcISP>.	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

2. Add a new XDP for the fragment in Spanish.

2.8.3 NOA Reason Variable Population

Add Fragment Variable Population

Add new variables for the updated reason fragment:

Variable Name	Population	Formatting*
<PERSON>	The full name of the infant. Sourced from: The infant's name associated to the infant supplement payment. For Example: Jane Doe	Arial Font Size 10
<FcISP>	The total amount of Infant Supplemental Payment. (The summation of FC Budget page's ISP + IS Rate Supplement Payment categories) Sourced from: FC_BUDGET.ADDL_PMT_AMT For Example: $100.00	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

Fragment Regulations

The regulations will be updated to the following:

> **CCR Regulations**: EAS 22-001 (a) (1); EAS 22-001 (t) (1), EAS 45-200.2; EAS 45-302.2; EAS 11-415, Assembly Bill 1603 (Chapter 25, Statutes of 2016), for the ISRS
> **Non-CCR Regulations**: EAS 22-001 (a) (1); EAS 22-001 (t) (1), EAS 45-200.2; EAS 45-302.2; EAS 11-415, Assembly Bill 1603 (Chapter 25, Statutes of 2016), for the ISRS

Update NOA Title and Footer Reference

Currently the NOA Reference on the Distributed List page is: Infant Supplemental Payment

1. Update the NOA Reference for this reason to:
   NOA Reference on Document List Page: ISP Started

2. The NOA Title and Footer for the existing FC_CH_INFANT_SUPLIMENT_PAY_T312 fragment of CCR scenarios will remain the same.

   Now with the NOA generating for Non-CCR scenarios, below details and references will distinguish the NOA for NonCCR scenarios.
   NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
CCR	Notice of Action – Change	FC_CH_NOA_TYPE_CCR (3142)
Non-CCR	Notice of Action – Rate Change	FC_CH_NOA_TYPE (3121)

NOA Footer:

NOA Type	NOA Footer
CCR	NA 403 (01/22) REQUIRED FORM - SUBSTITUTES PERMITTED
Non-CCR	NA 290 Rate Change (02/14) AFDC-FC

2.8.4 NOA Reason Fragment Generation

1. **Turn Off Threshold Language Fragments**

   Turn off the reason fragment (CCR) and its NOA for Spanish.

   Final Language Availability of CCR NOA: English

   Final Language Availability of Non-CCR NOA: English, Spanish

   Note: As the associated FC_KG_CH_ACTION3, FC_CH_MESSAGE1 are not available yet per CA-228880, the CCR NOA will be turned off for Spanish for time-being (The reason verbiage in Spanish would still be stored in the System per Section 2.9.2).

2. **Update Reason Fragment Generation**

   Update the existing generation logic to also generate for Non-CCR rate scenarios.

   Technical Note: The existing generation logic for CCR rate scenarios will not be changed.

   Note: If there is an infant supplemental payment that is started, but no infant is on the FC program, the inability to populate all necessary variables (i.e. infant's name) will cause the NOA to not generate as there is missing information on the NOA.

3. **Fragment Configuration**

   Below is the updated association of action and message fragments for this reason.

   CCR

   Action Fragment: 4111, FC_KG_CH_ACTION3

Message Fragment: 5092, FC_CH_MESSAGE1
Note: CA-228880 will be adding above fragments in Spanish.

Non-CCR

Action Fragment: 4130, FC_KG_CH_ACTION4
Message Fragment: N/A; there will be no message fragment.

Ordering on NOA: Generate this reason following the action fragment.

2.9 Automated Regression Test

2.9.1 Overview

Create new automated regression test scripts to generate the following NOA reason/fragments: Discontinuance NOA of 'Placement Ends Mid-Month'; Change NOA of 'ISP Started'(Non-CCR); Change NOA of 'Child Eligible to Kin-GAP'.

2.9.2 Description of Changes

Create new regression scripts to verify the NOA reason/fragments generated in the following scenarios:

1. In the context of an ongoing Foster Care case, end-date the final placement mid-month. Run EDBC and verify that a Discontinuance NOA generates containing the 'Placement Ends Mid-Month' fragment.
2. In the context of an ongoing Foster Care case with a Non-CCR rate, add a new Infant Supplement Additional Rate. Run EDBC and verify that a Change NOA generates containing the 'ISP Started' fragment.
3. In the context of an ongoing Foster Care case, add a new Kin-GAP program (and required Summary and Rate details) mid-month. Run EDBC and verify that:
    a. The Kin-GAP program is made Active
    b. The Foster Care program is Discontinued
    c. A Discontinuance NOA generates containing the 'Child Eligible to Kin-GAP' fragment

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	FC Discontinuance NOA for Placement Ending Mid-Month	CA 220188_01 – NonCCR – DS – Plcmt Ends Mid-Mth.pdf
2	NOA	FC Discontinuance NOA for Child Eligible to Kin-GAP	CA 220188_02 – CCR – DS – Child Elig Kin-GAP.pdf
3	NOA	FC BC NOA for ISP Started	CA 220188_03 – CCR – BC – ISP Started.pdf
4	NOA	Zip folder holding design-related NOA fragments in PDFs	CA 220188 PDFs.zip

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.7 CAR-1243	The LRS shall identify case actions that require a notice, NOA, form, letter, stuffer, or flyer, and shall generate that appropriate notice, NOA, form, letter, stuffer, or flyer, using variable case-specific information.	This SCR will add Foster Care NOAs for reasons of Placement Ends Mid-Month, Child Eligible to Kin-GAP, and ISP Started.

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

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: - 2.13.2.4 Updated number of teams limit to 500	Kevin Hooke
11/7/2022	V2.1	Content Revision 2: - Removed Scheduled Call back (DDID 2284) - Removed Supervisor E-mail notification (DDID 2222) - Removed Playback option - Updated Mockups	Nicole Kenny

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 Message Sender' 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~~
4. Queue Hold Messages, Emergency Messages, and Informational Messages use Amazon Polly to read the text to speech.
   a. Languages not supported by Amazon Polly will disable the input fields when the language is selected from the drop-down list and display a message "language not currently supported".

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

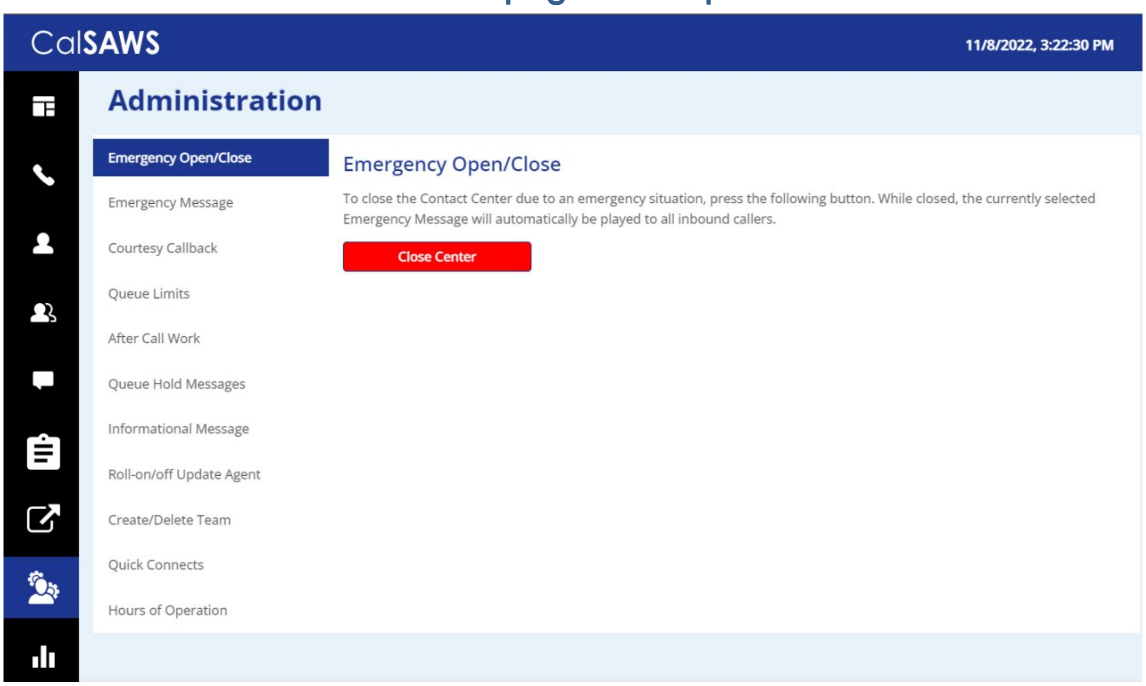


Figure 1 Administration page menu options

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.

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

- If a user has the 'Contact Center Message Sender' 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 Message Sender' 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 Message Sender' role

2.1.2.4 Administration page Security – access without role

If a user does not have the required 'Contact Center Message Sender' 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 Message Sender' 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

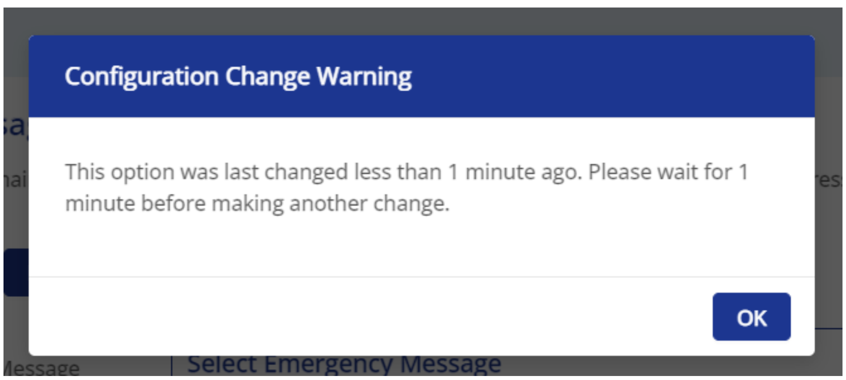


Figure 2 Configuration Change Warning Page Mockup

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.

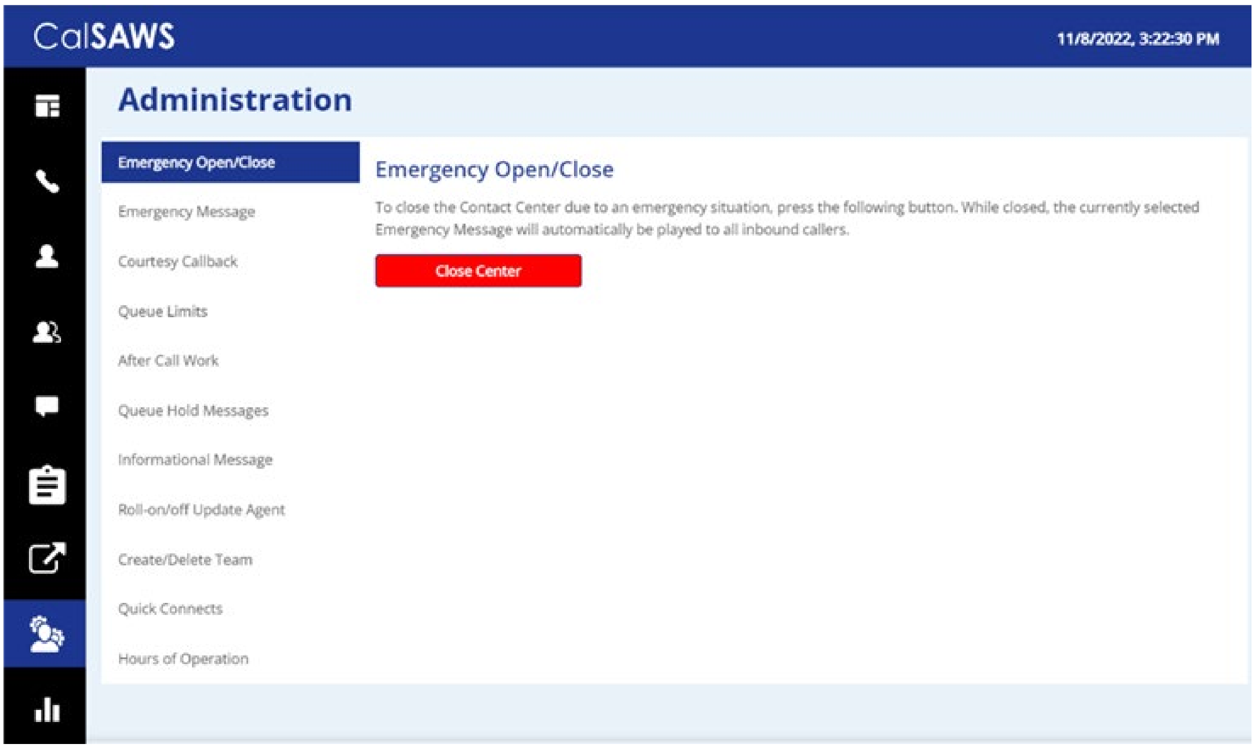


Figure 3 Emergency Closure - Perform Closure Option

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.

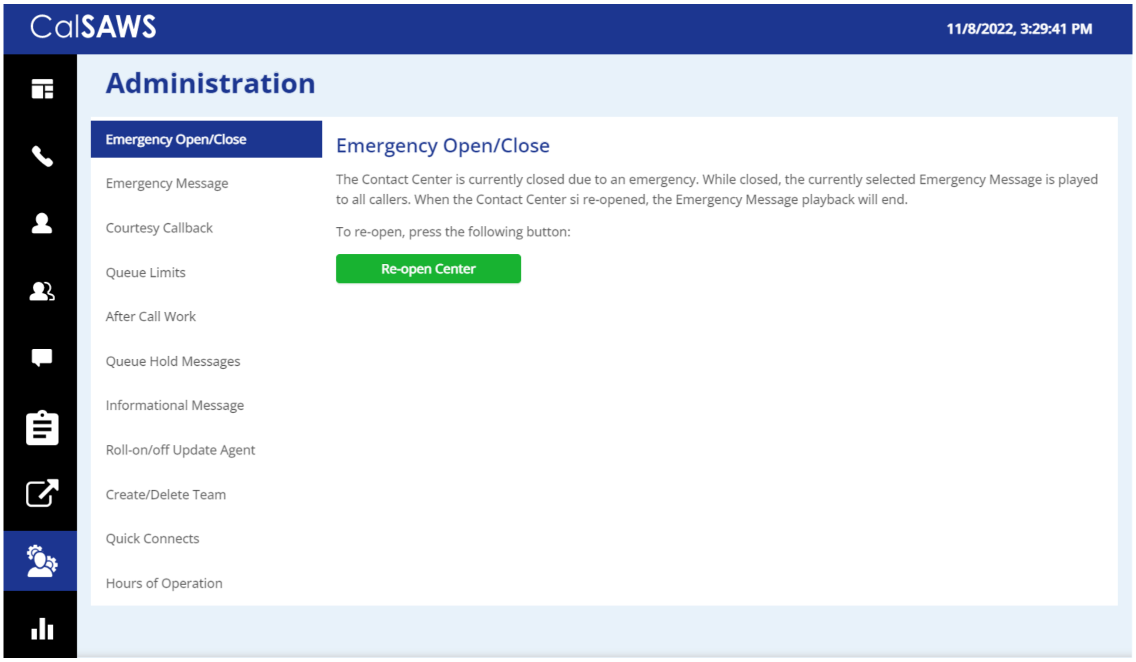


Figure 4 Emergency Closure - Re-open Option

2.3.2.3 Emergency Open/Close – Contact Center closed warning mockup

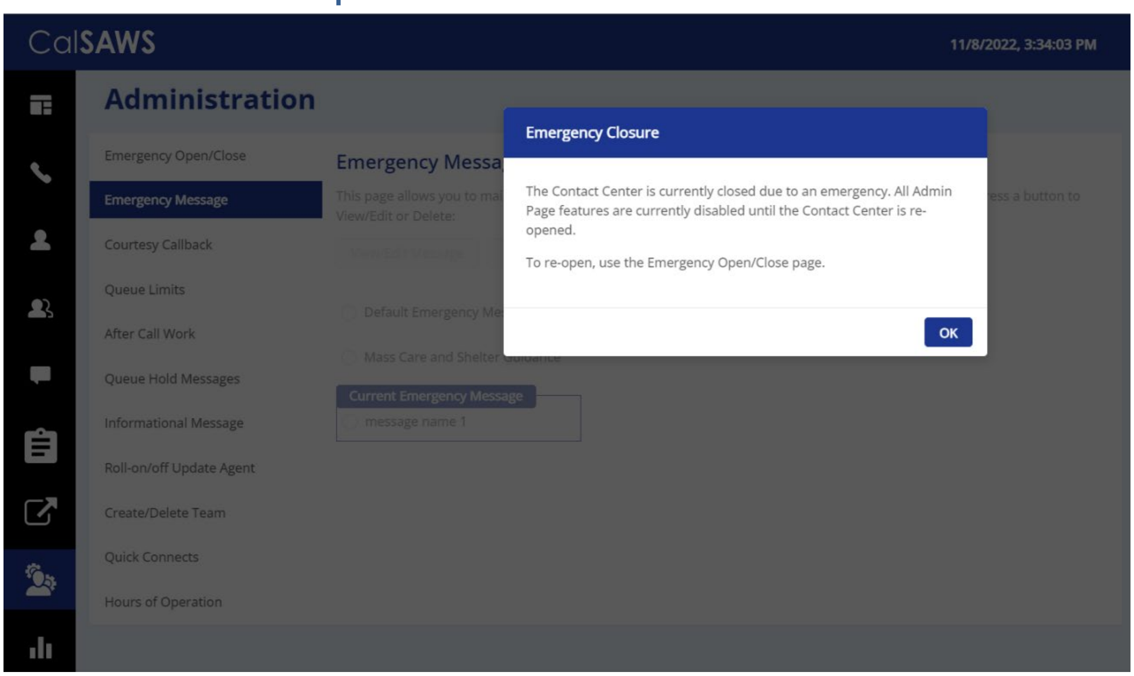


Figure 5 Emergency Closure warning dialog

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:

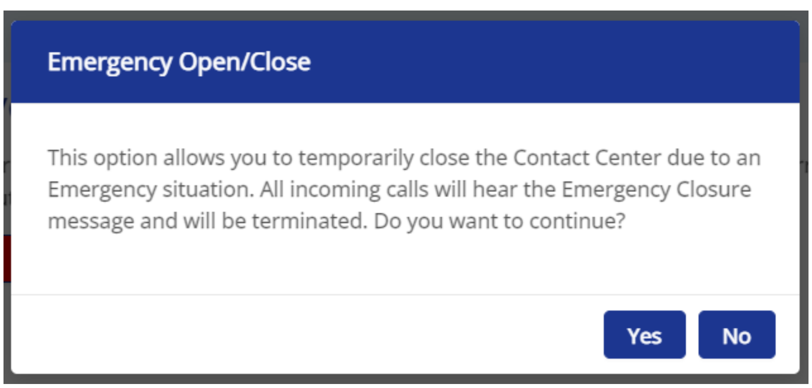


Figure 6 Emergency Closure Confirmation dialog

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:

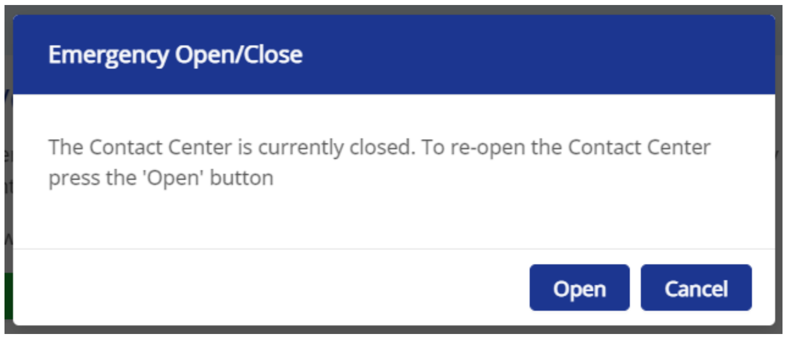


Figure 7 Emergency Open/Close - Re-open dialog

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:

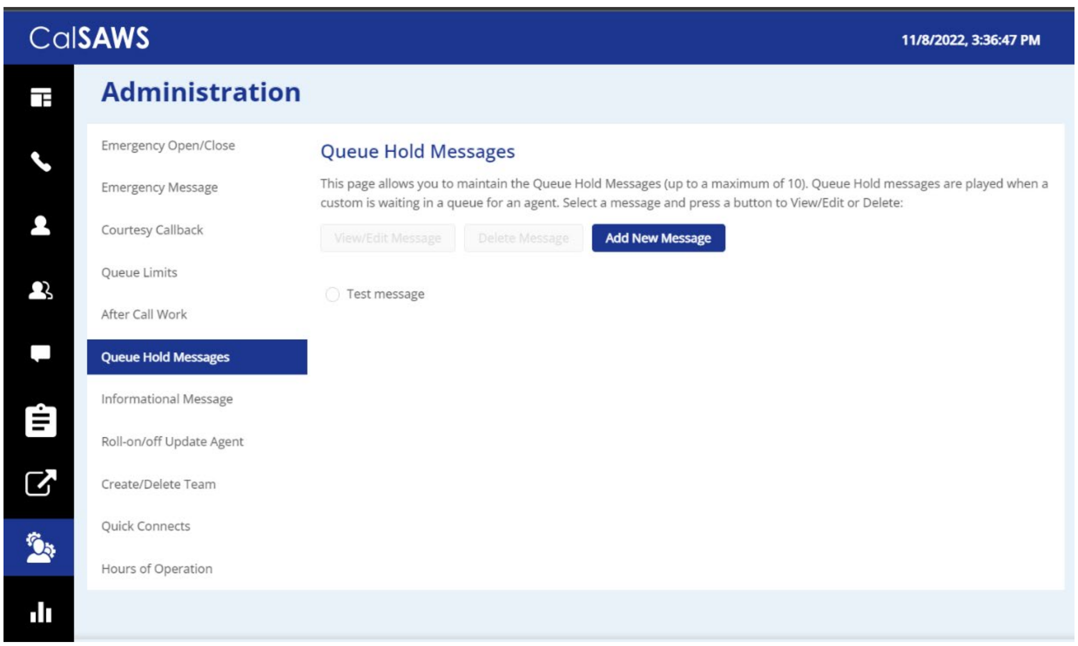


Figure 8 Queue Hold Messages - no messages defined

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:

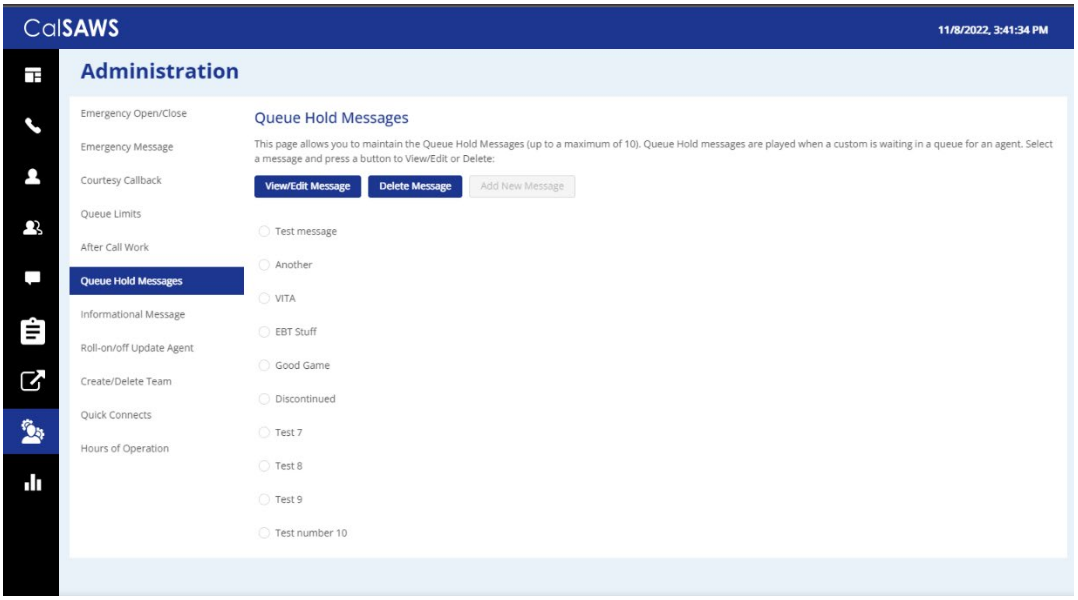


Figure 9 Queue Hold Messages - message display

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:

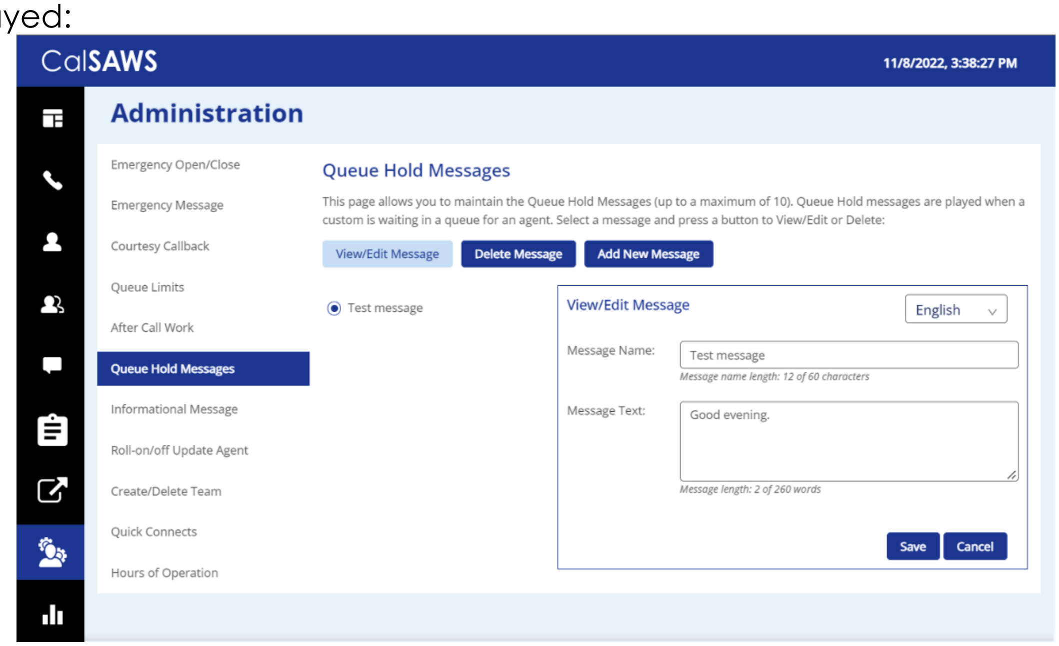


Figure 10 Queue Hold Messages - Add New Message dialog

2.4.2.5 Queue Hold Messages: Language selection dropdown

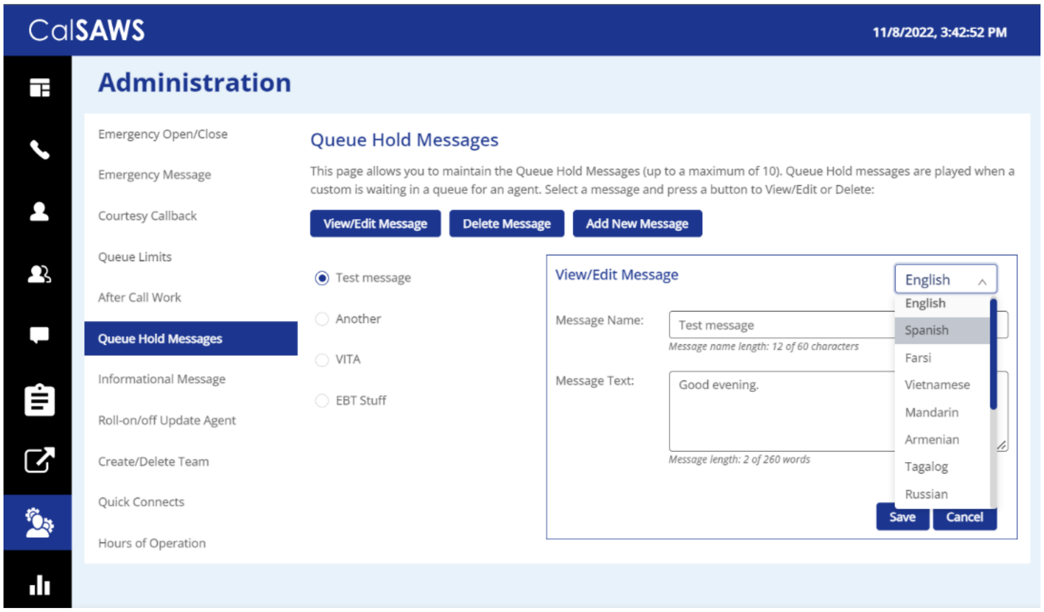


Figure 11 Queue Hold Messages - Language selection dropdown

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. When selecting a language other than English, the "Save" button will change to "Add". The supported languages are:
    a. English (default)
    b. Spanish
    c. Mandarin
    d. Russian
    e. Korean
    f. Cantonese
    g. Arabic
    h. Portuguese

        i. ~~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.~~

    a. Any unsupported languages will display the message "This language is not currently supported". The unsupported languages are:
        i. Farsi
        ii. Vietnamese
        iii. Armenian
        iv. Tagalog
        v. Cambodian
        vi. Hmong
        vii. Lao

7. If the user presses the 'Save' button, the message is saved, and the page is updated to show the new message in the list.
8. 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

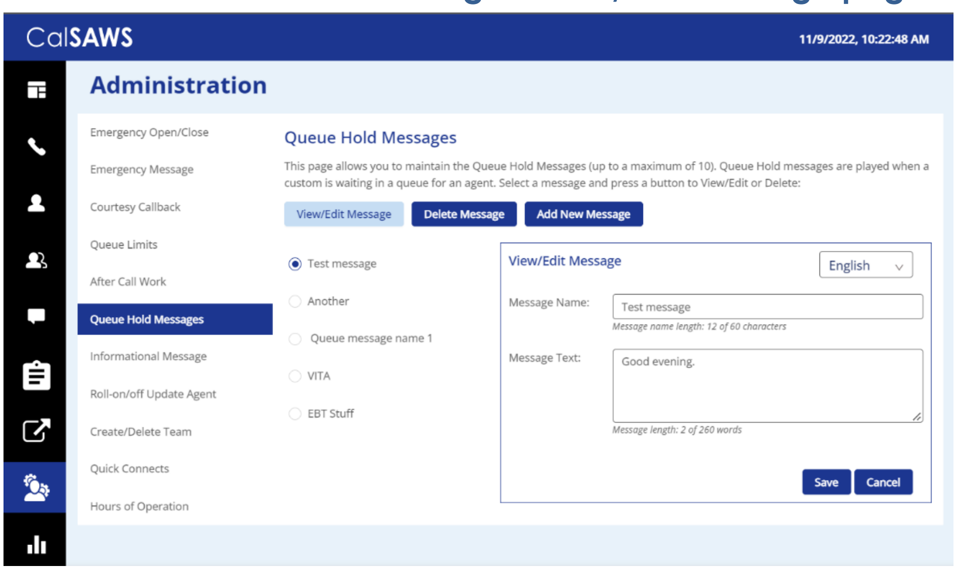


Figure 12 Queue Hold Messages - Edit Message dialog

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. When selecting a language other than English, the “Save” button will change to “Add”. The supported languages are:
    a. English (default)
    b. Spanish
    c. Mandarin
    d. Russian
    e. Korean
    f. Cantonese
    g. Arabic
    h. Portuguese
6. Any unsupported languages will display the message “This language is not currently supported”. The unsupported languages are:
    a. Farsi
    b. Vietnamese
    c. Armenian
    d. Tagalog
    e. Cambodian
    f. Hmong
    g. Lao
7. If the user presses the ‘Save button’ the changes are saved and the dialog closes.
8. 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

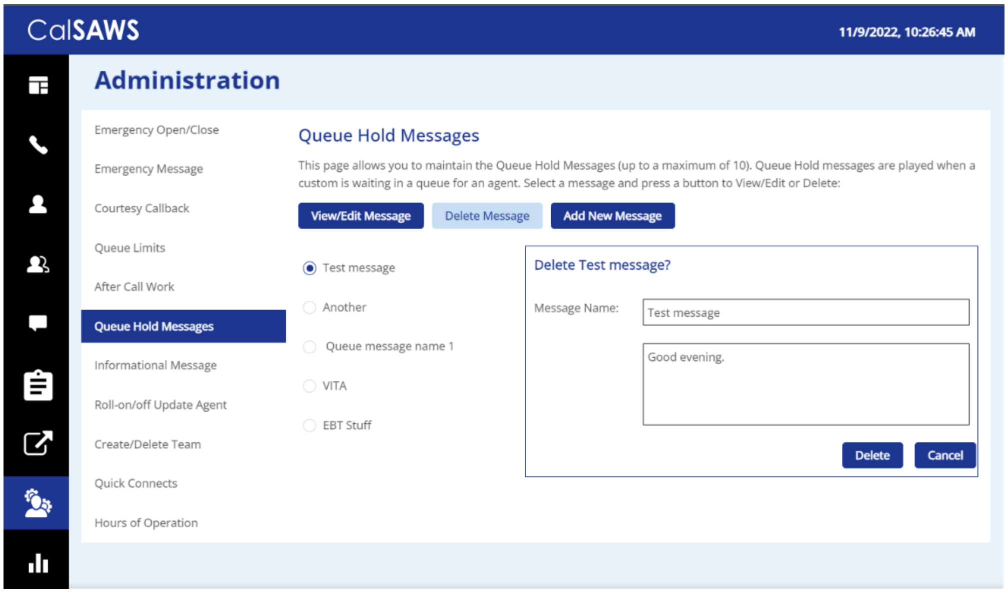


Figure 13 Queue Hold Messages - Delete Message dialog

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.
9. 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

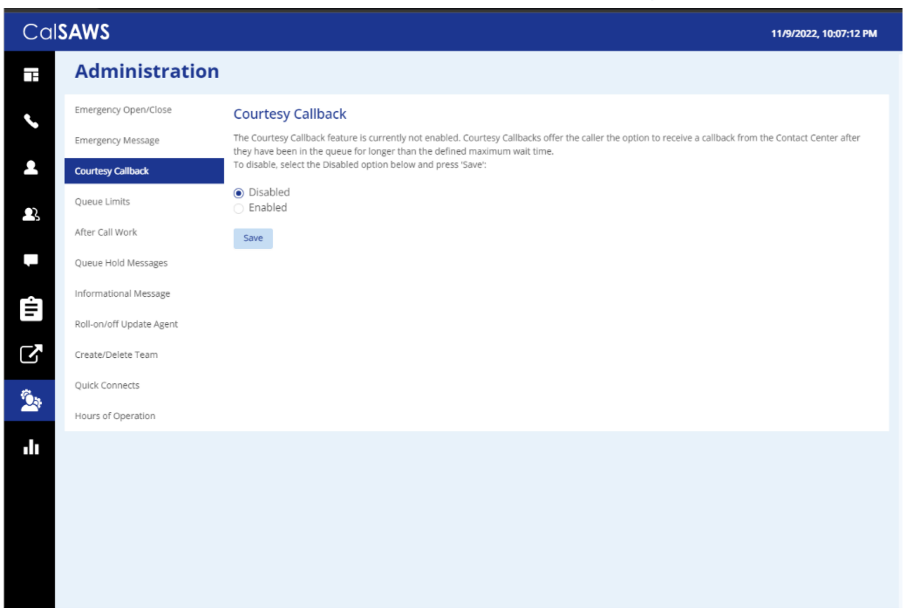


Figure 14 Courtesy Callback feature currently disabled

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

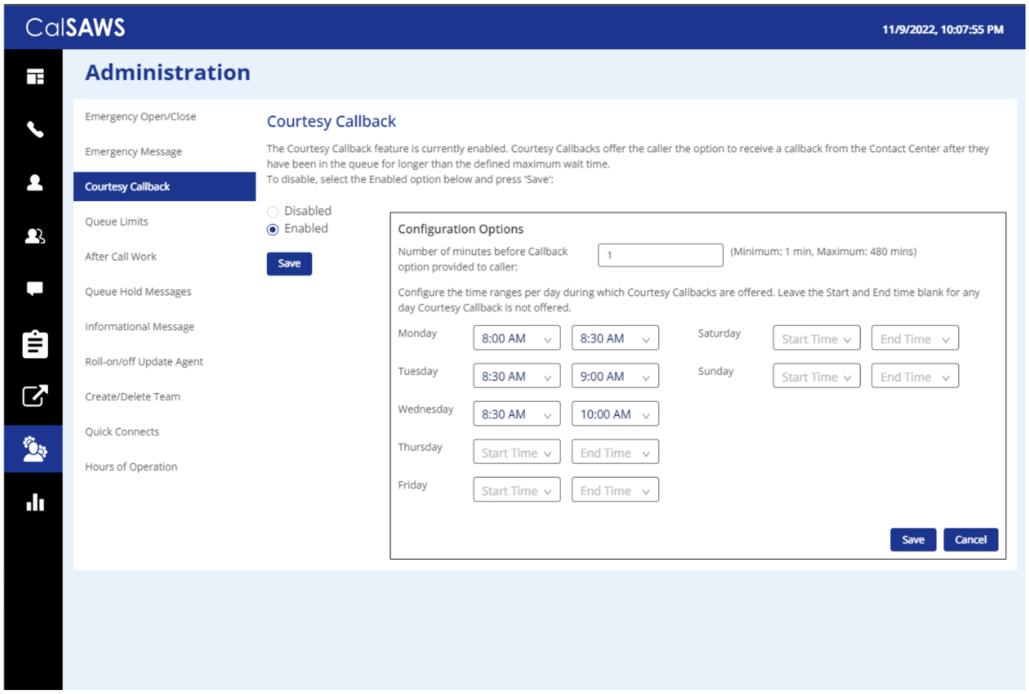


Figure 15 Courtesy Callback Enabled Page Mockup

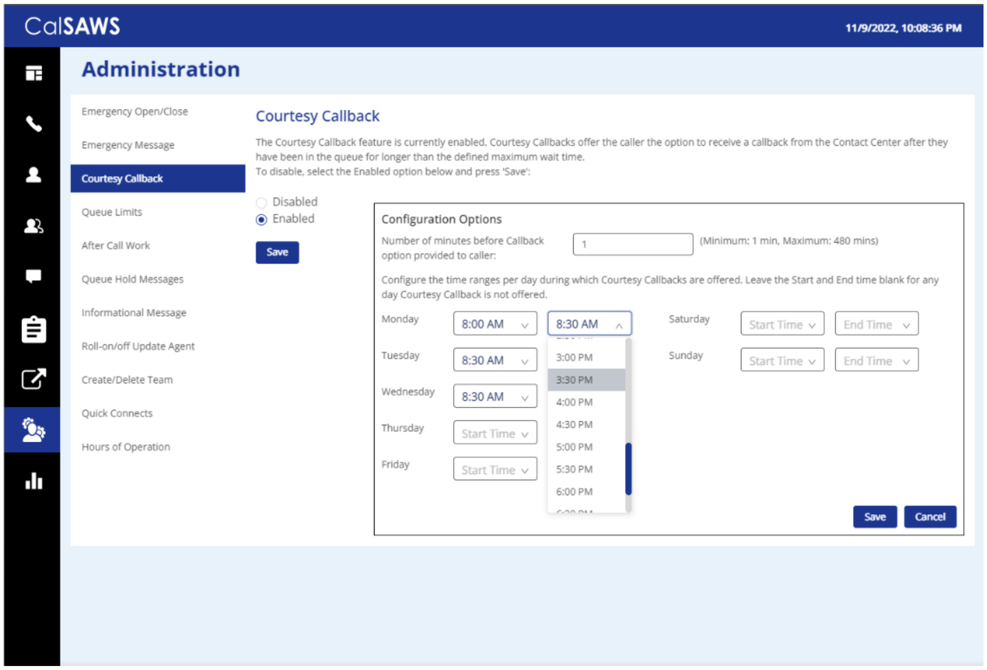


Figure 16 Courtesy Callback Enabled Page Mockup showing time selection dropdown

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.

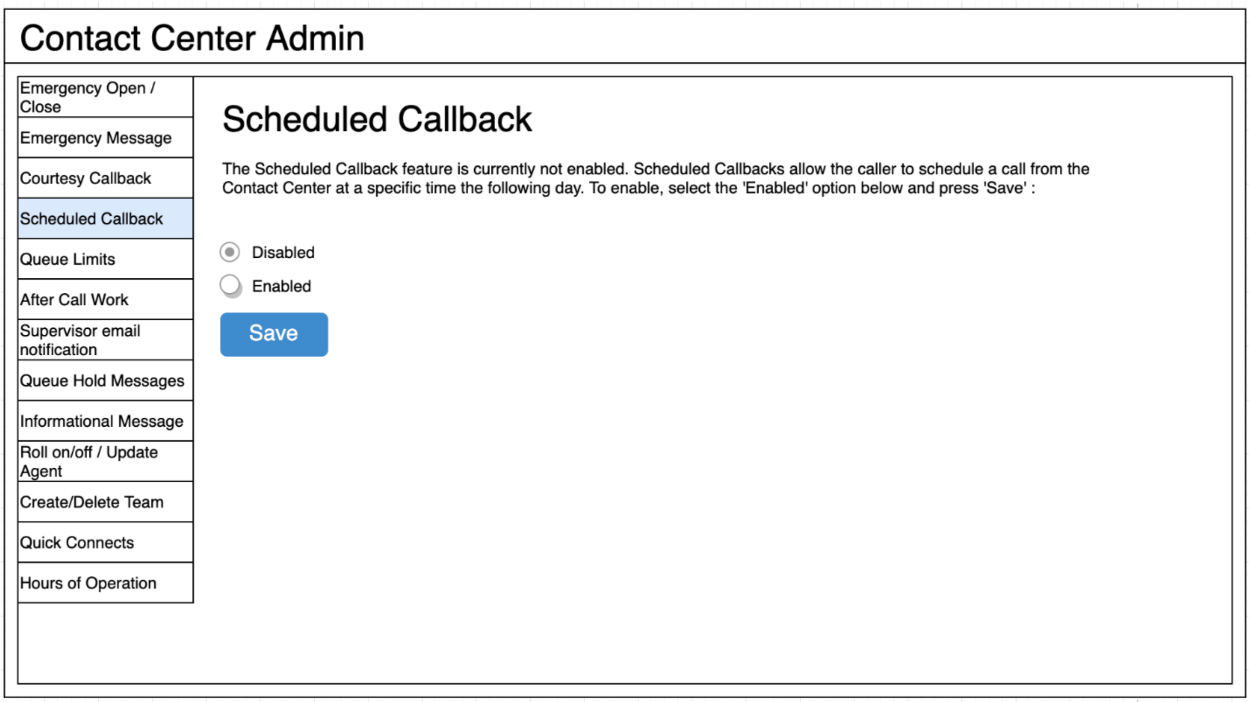
~~2.6 Scheduled Callback~~

~~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~~

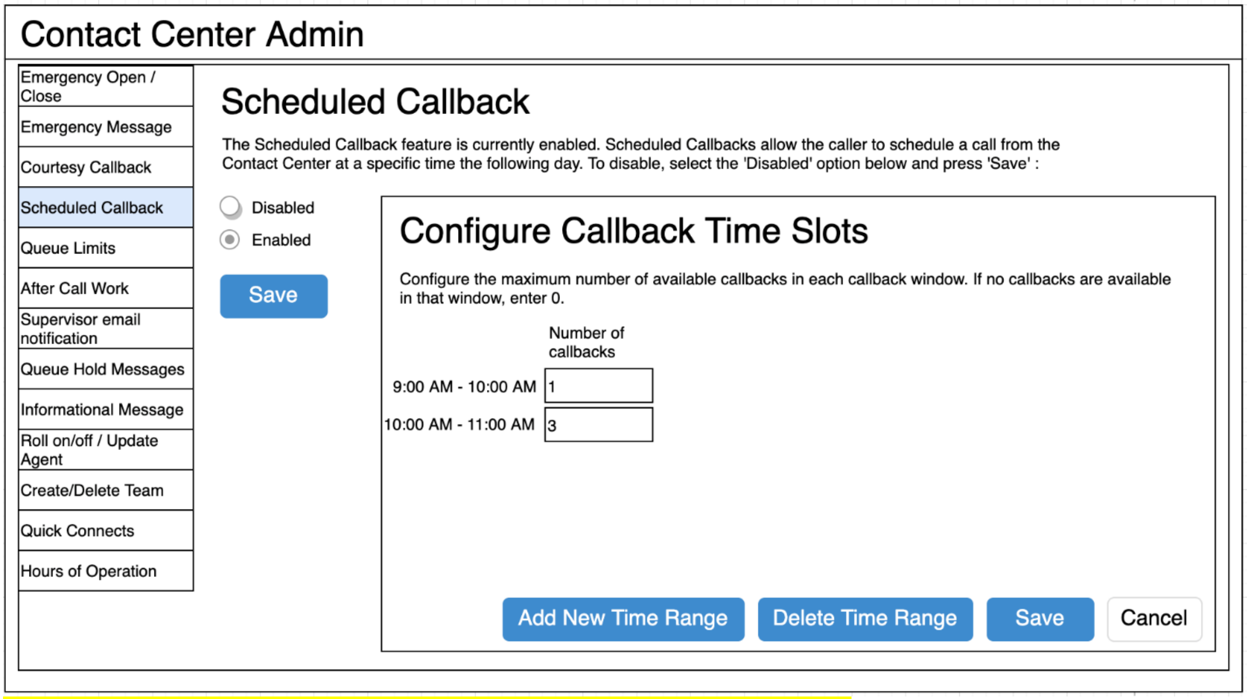
~~2.6.2.1 Scheduled Callback – feature disabled page mockup~~



~~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~~



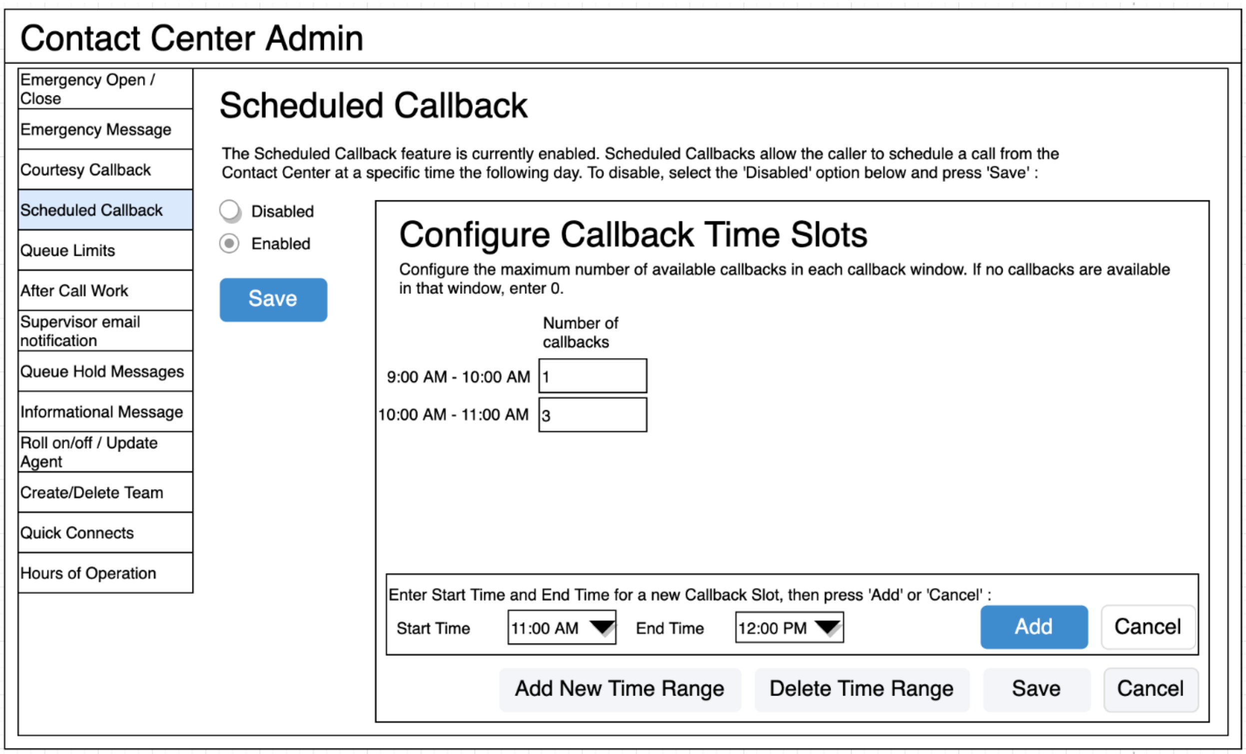
~~Figure 17 Scheduled Callback - feature enabled, 2 example slots defined~~

~~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".~~

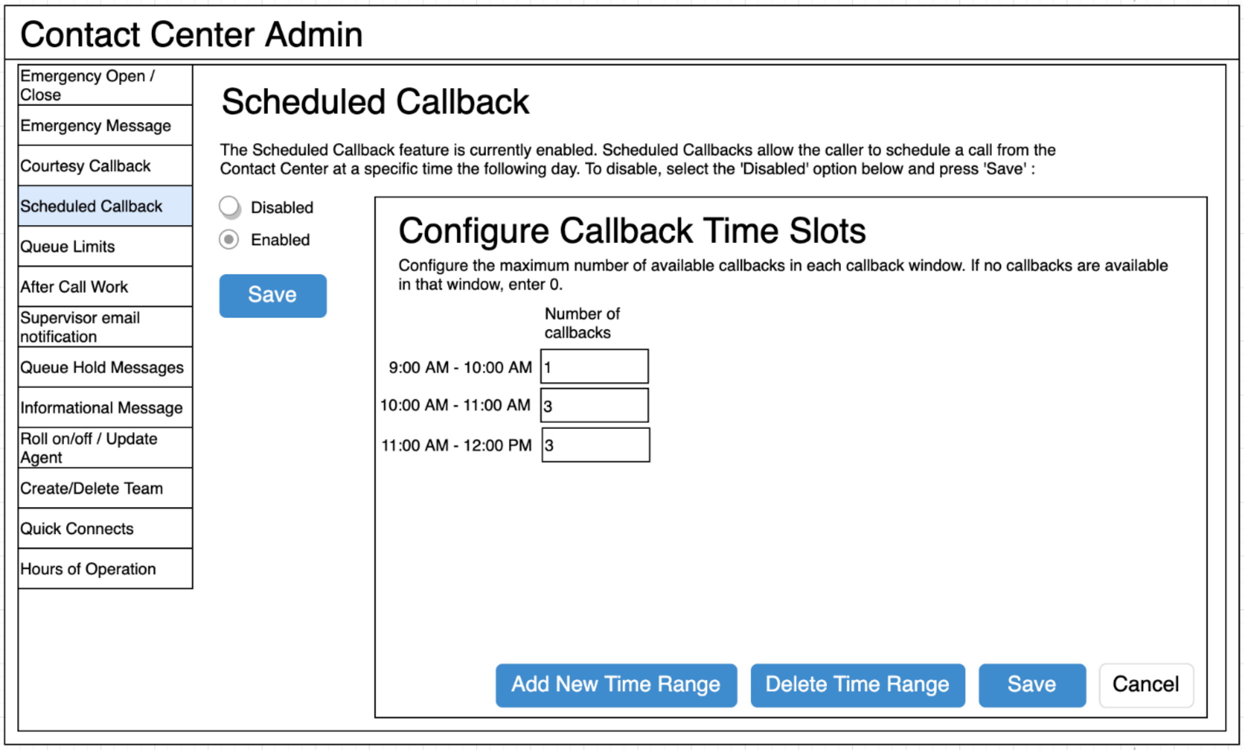
8. ~~If the user presses ‘Cancel’ any changes are discarded and no actions are performed. The displayed callbacks per timeslot revert to the currently configured values.~~

~~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.~~

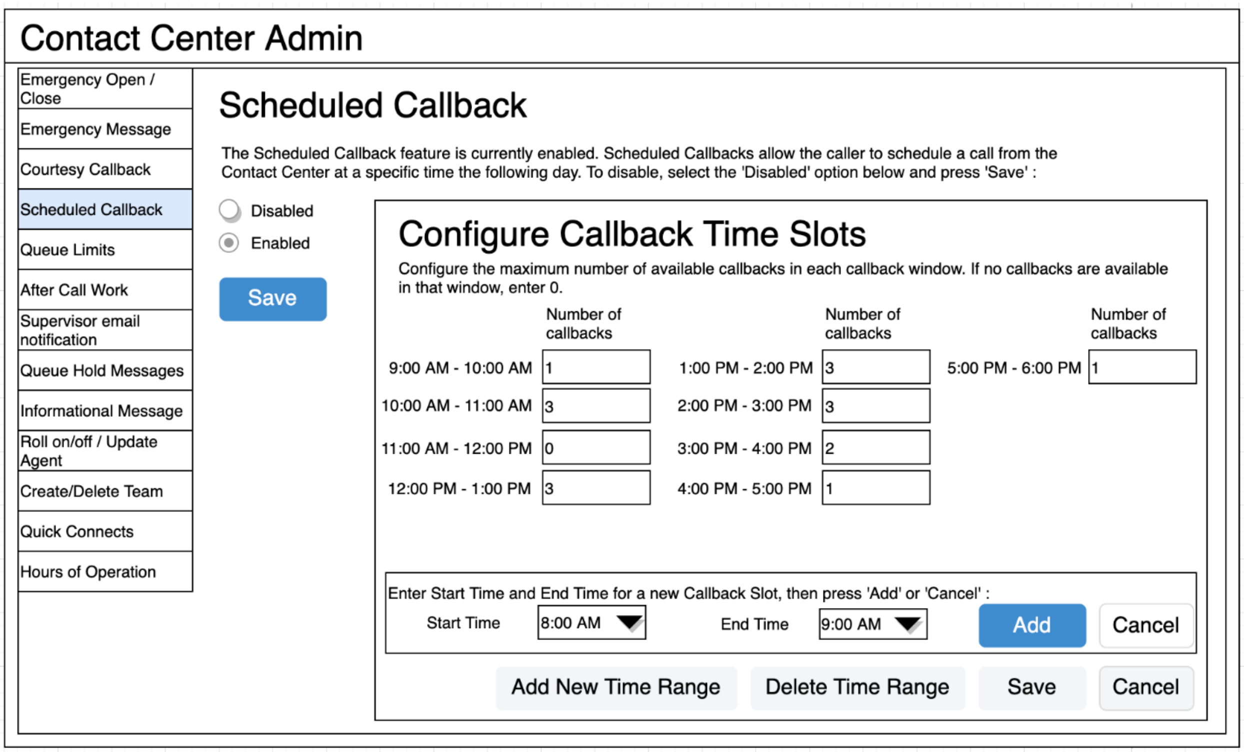
~~Figure 19 shows a page mockup after a new time slot added, 11 AM to 12 PM.~~

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~~



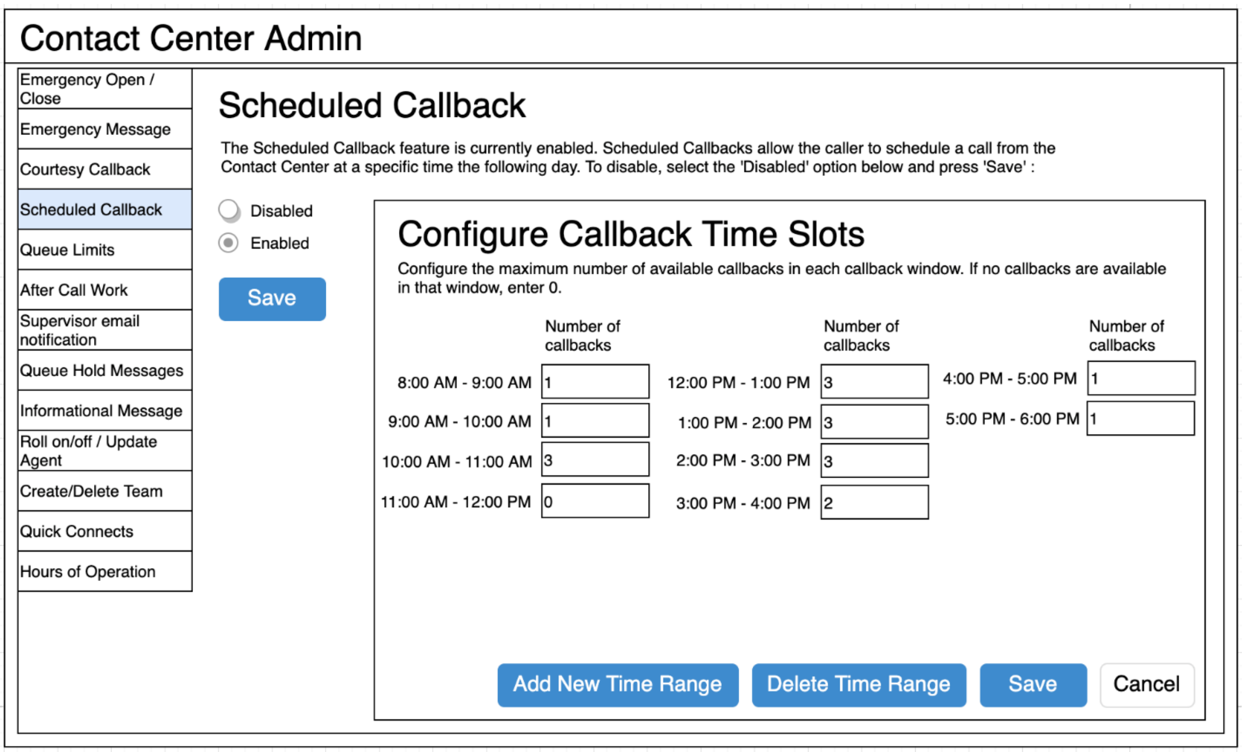
~~*Figure 20 Scheduled Callback - before adding new slot (8:00 AM to 9:00 AM) before existing slots*~~

~~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~~

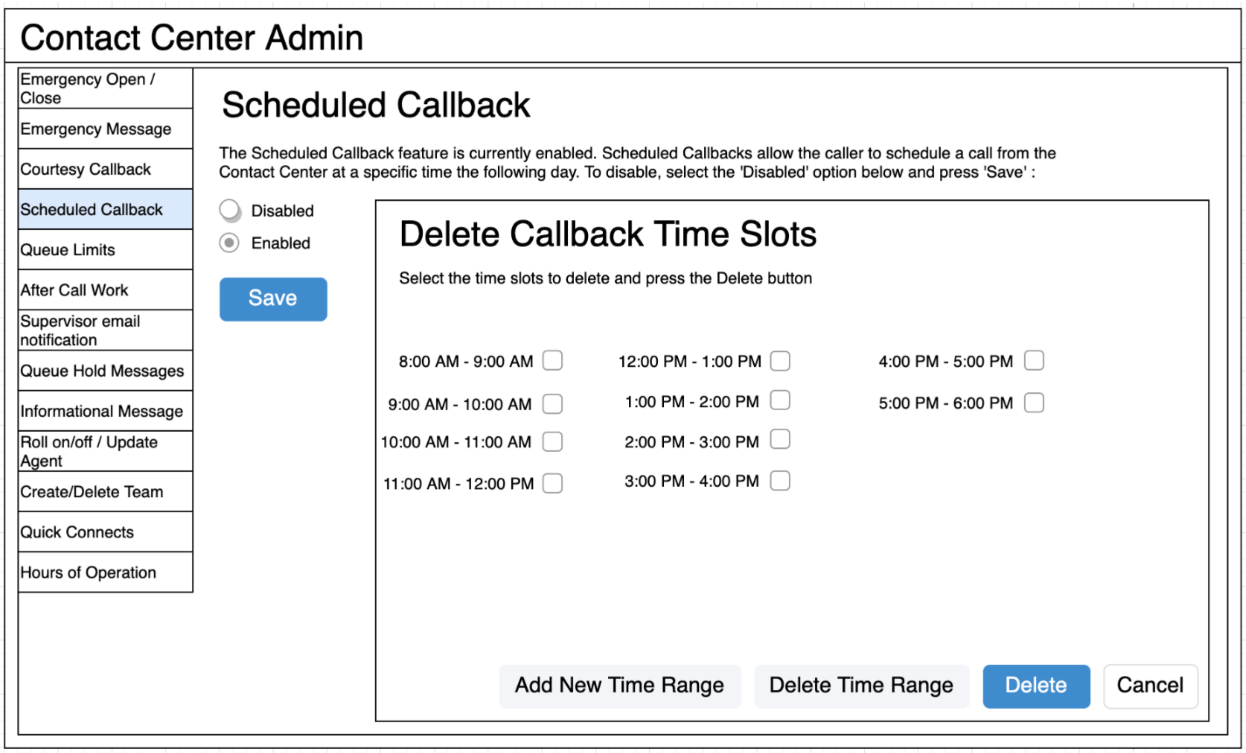


~~*Figure 21 Scheduled Callback - new slot (8:00 AM to 9:00 AM) added before existing slots*~~

~~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~~

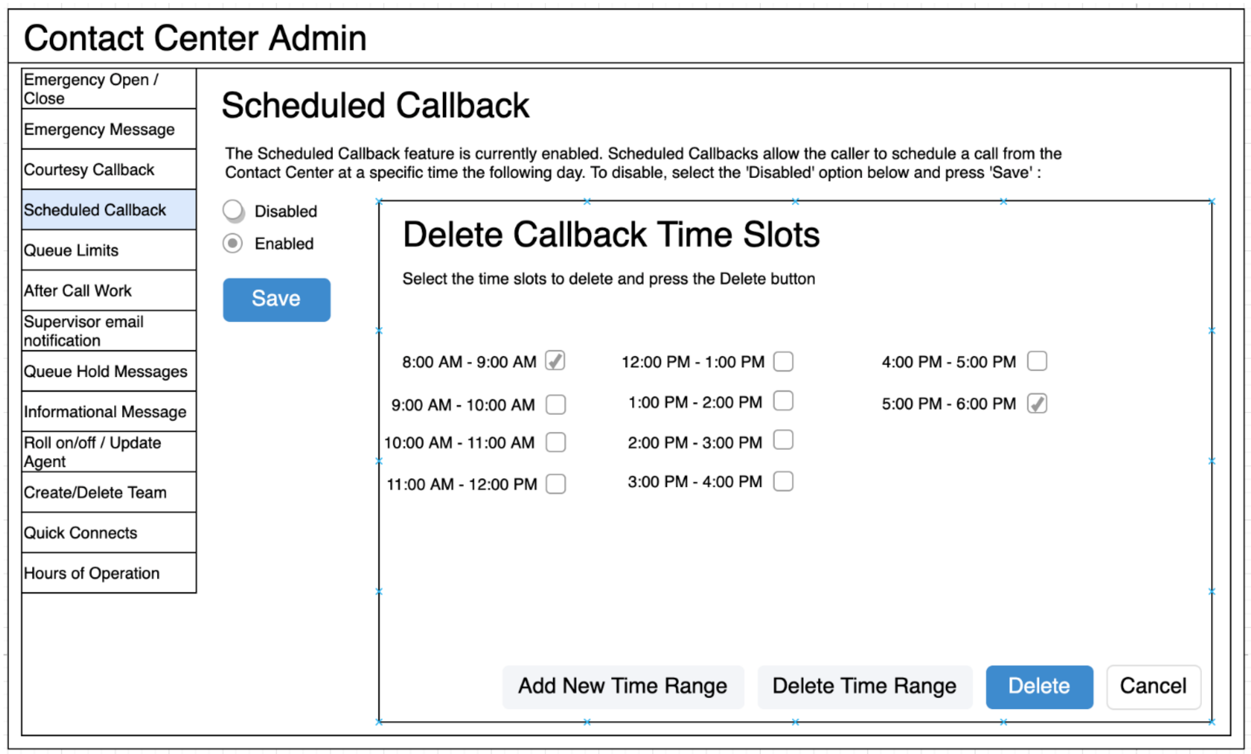


~~*Figure 22 Scheduled Callback - delete callback time slots*~~

~~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~~

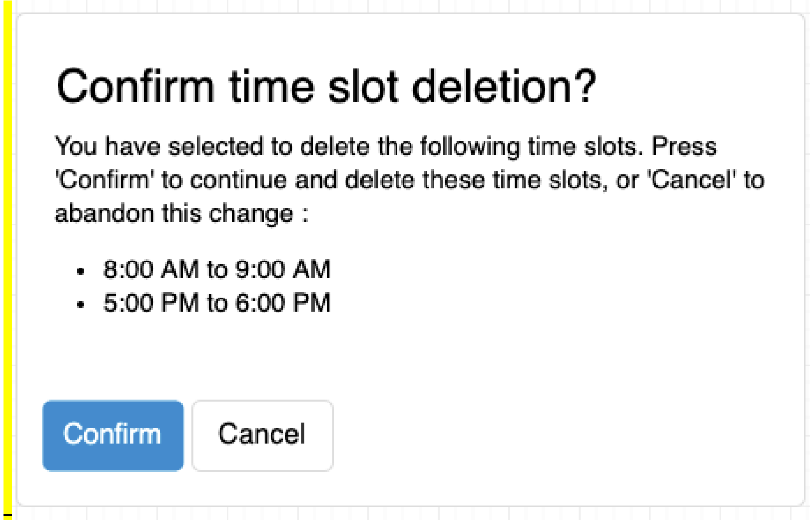


~~Figure 23 Scheduled Callback - delete time slots, slots selected~~

~~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~~

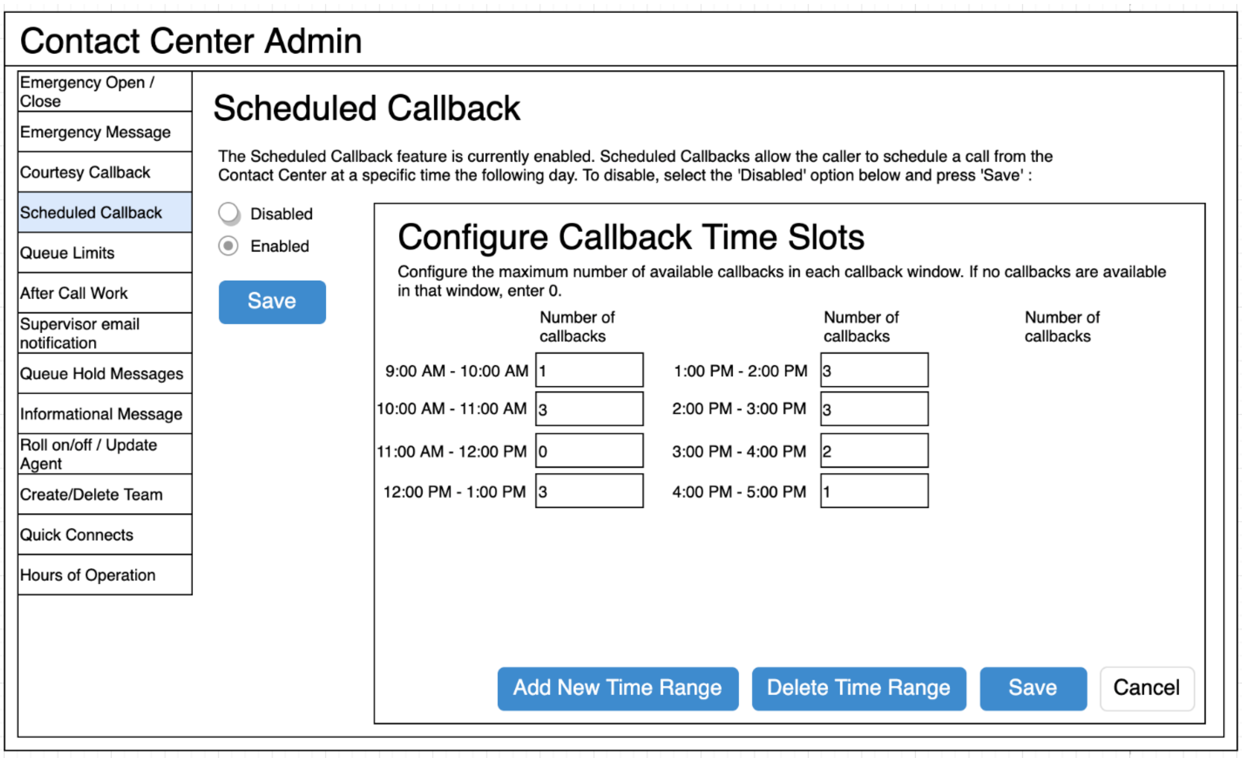


~~*Figure 24 Scheduled Callback - Confirm time slot deletion*~~

~~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

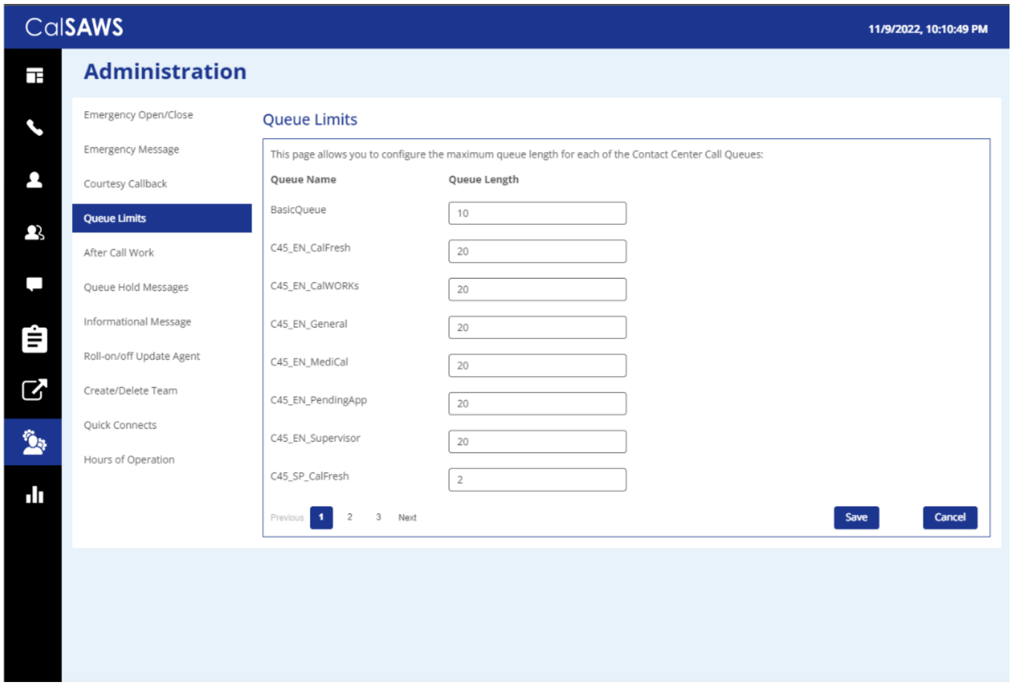


Figure 26 Queue Limits

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

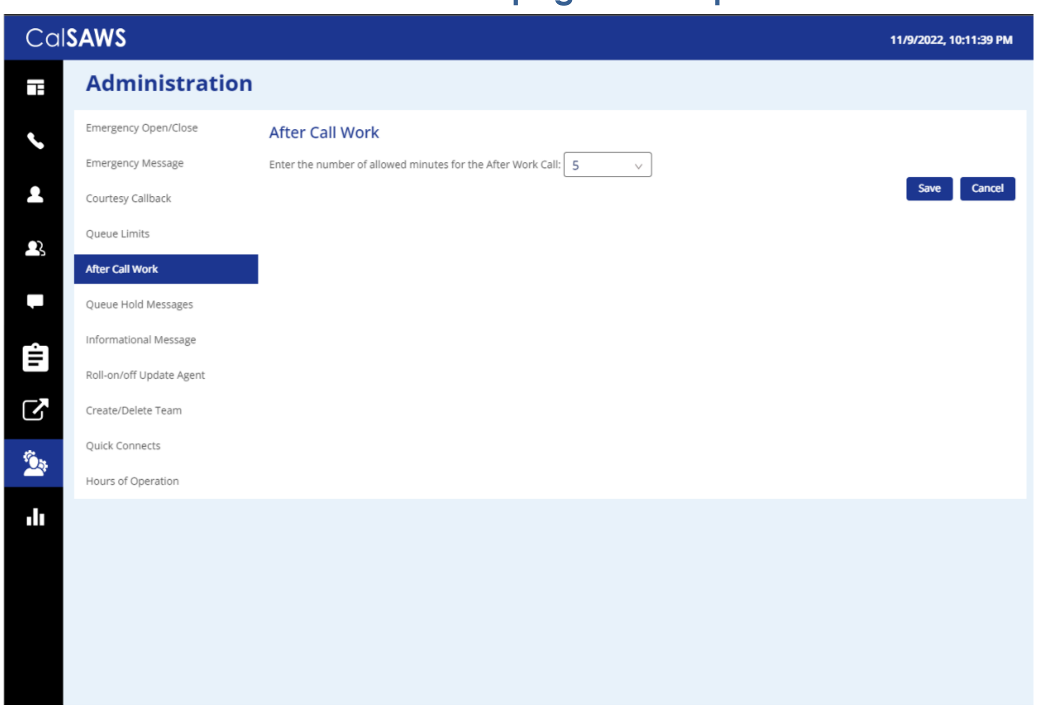


Figure 27 After Call Work Limit

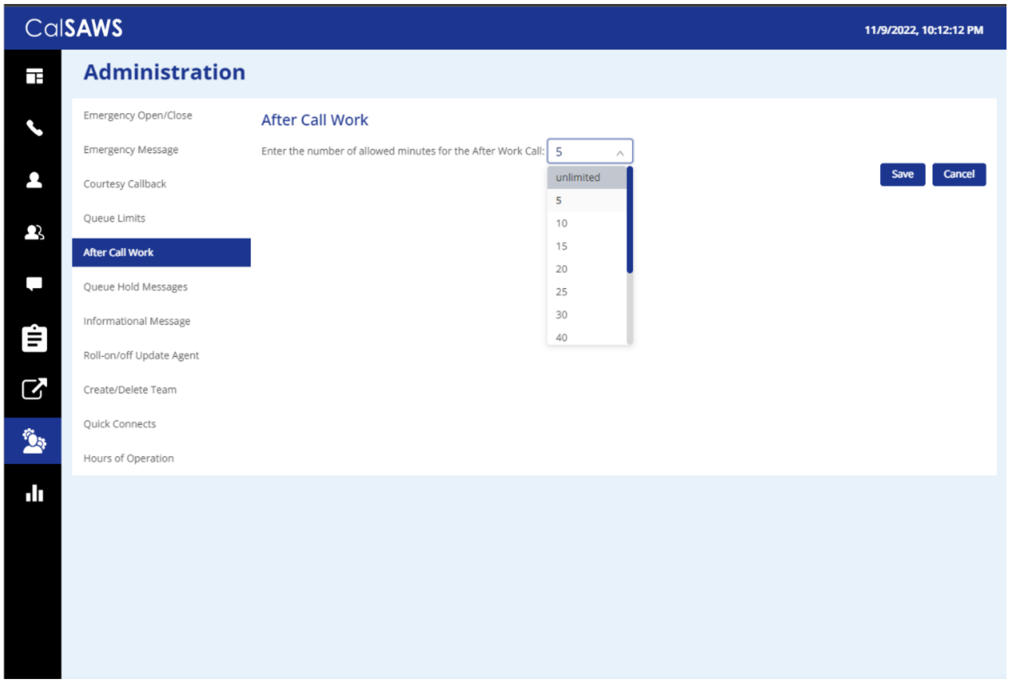


Figure 28 After Call Work Limit – dropdown list to select minutes

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

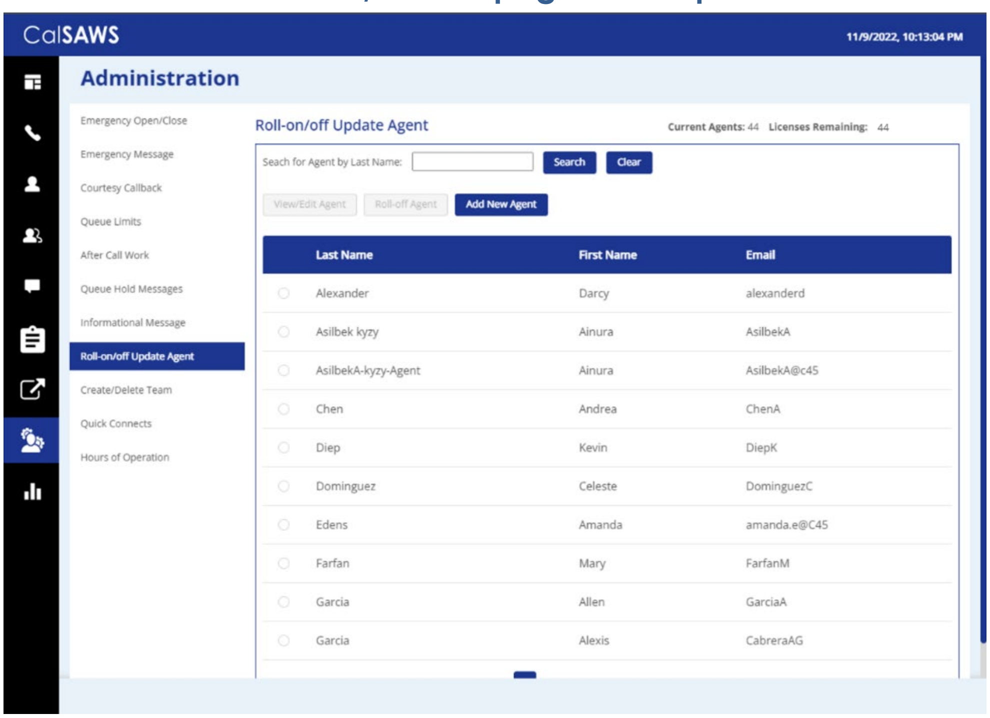
The Roll-on/Roll-off / Update Agent feature allows an Admin user to roll-on and roll-off Agents from the Contact Center. It also allows an Admin user to search for and update existing Agent details (for example, assigned Team and Routing Profile).

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

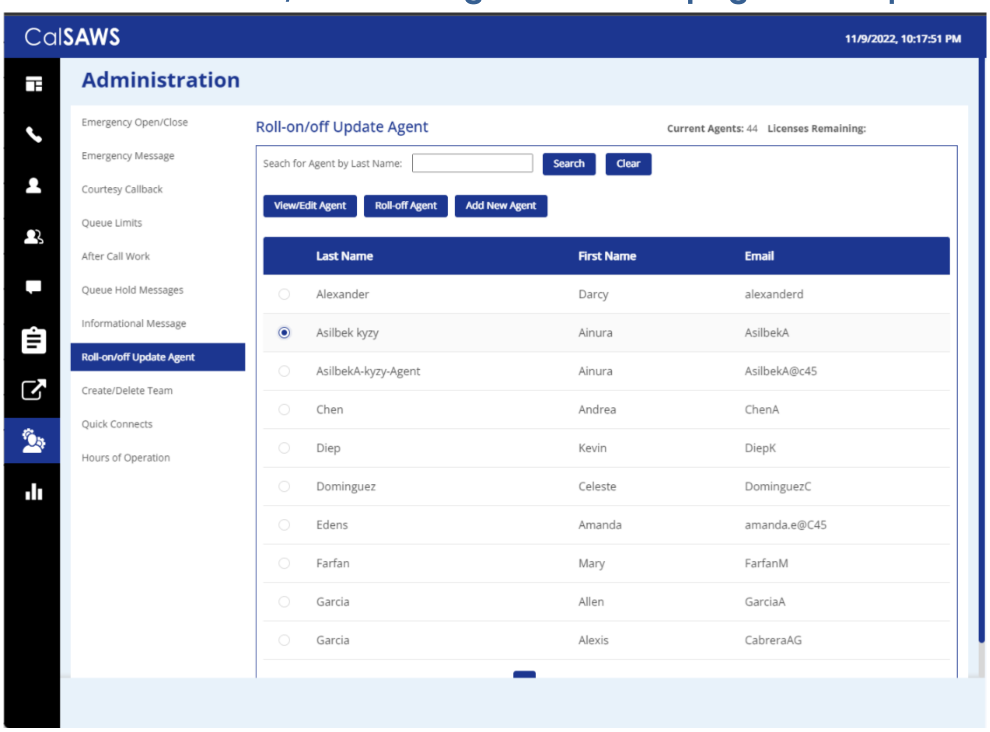


Figure 29 Roll-on / Roll-off / Update Agent

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

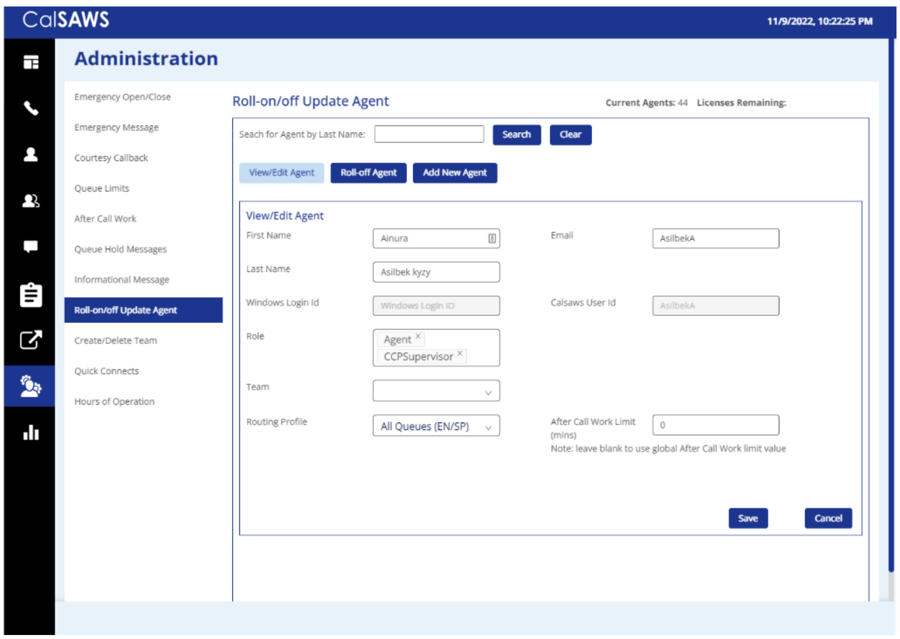


Figure 30 Roll-on / Roll-off - View/Edit Agent

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

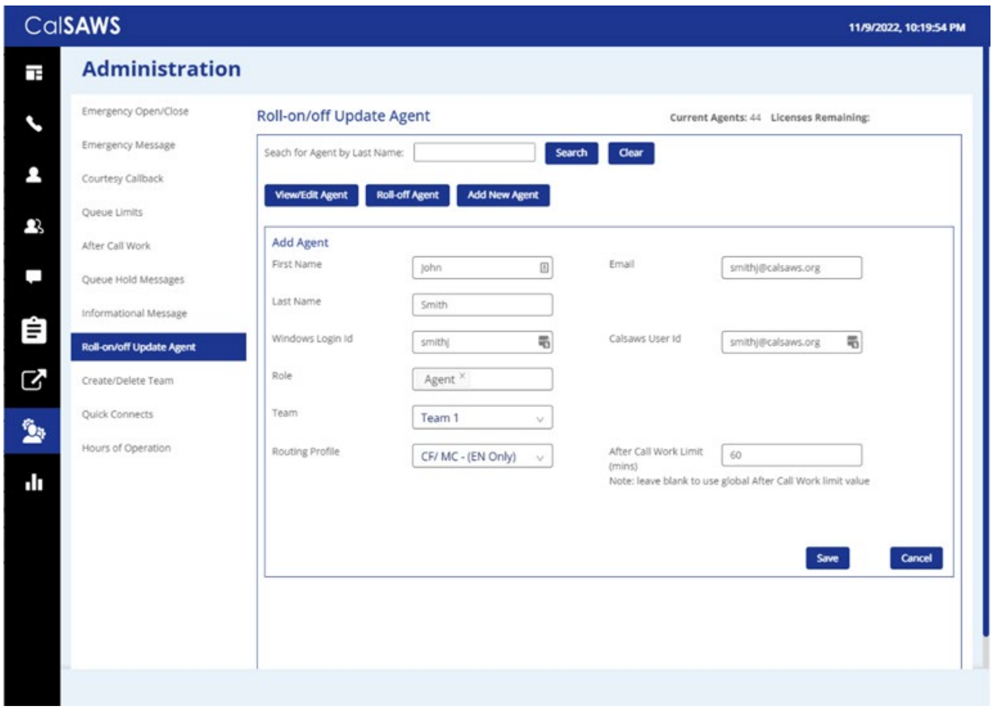


Figure 31 Roll-on / Roll-off - Add Agent

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

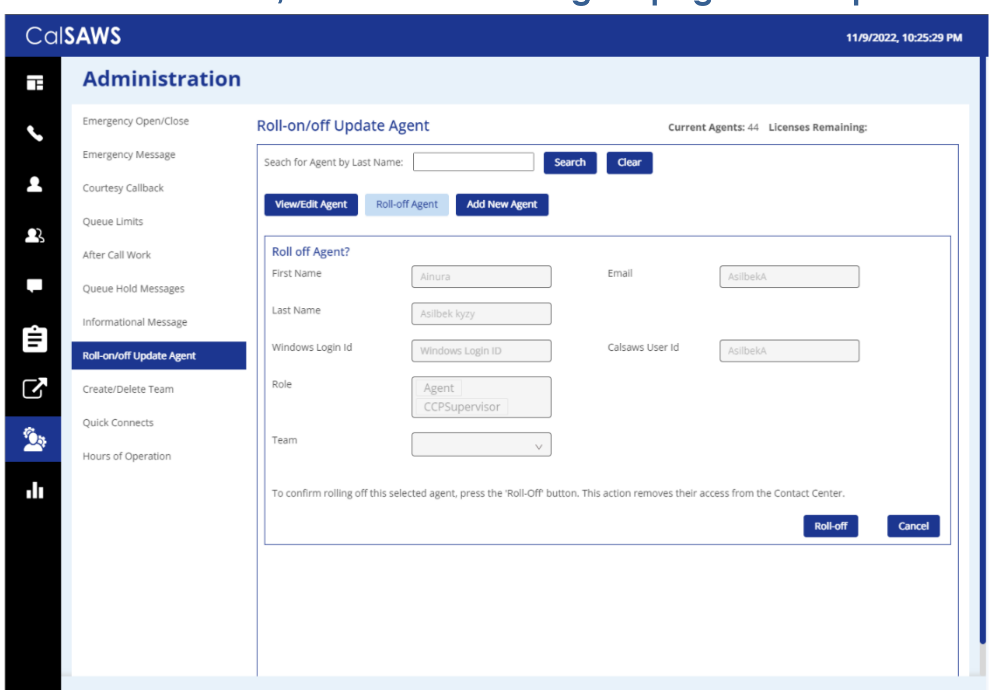


Figure 32 Roll-on/Roll-off - Delete Agent

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

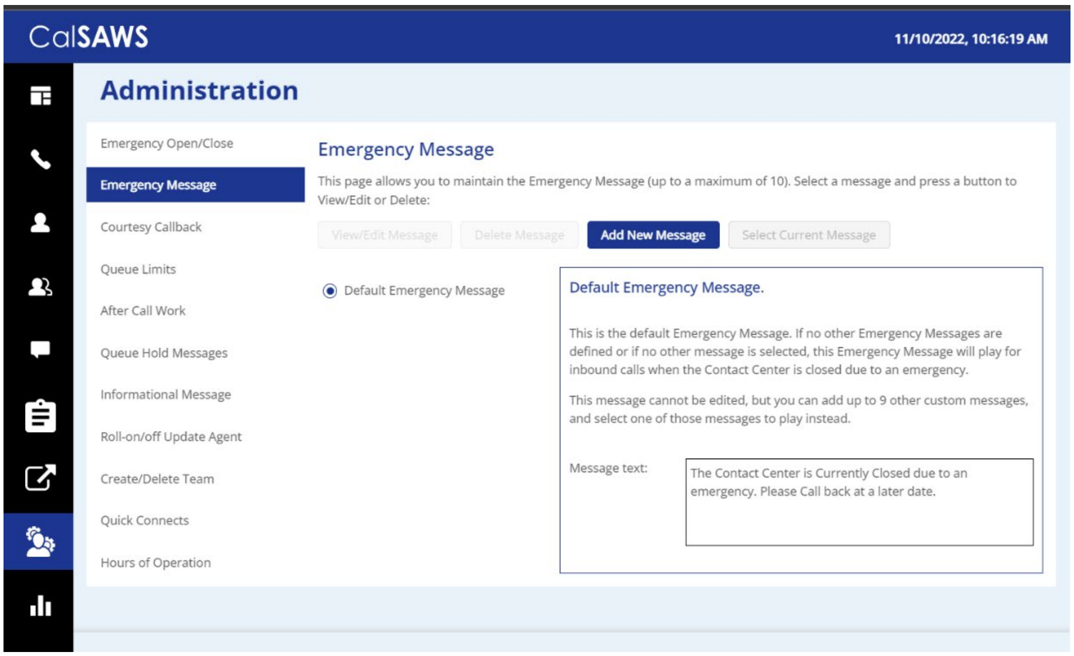


Figure 33 Emergency Message - no messages defined

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

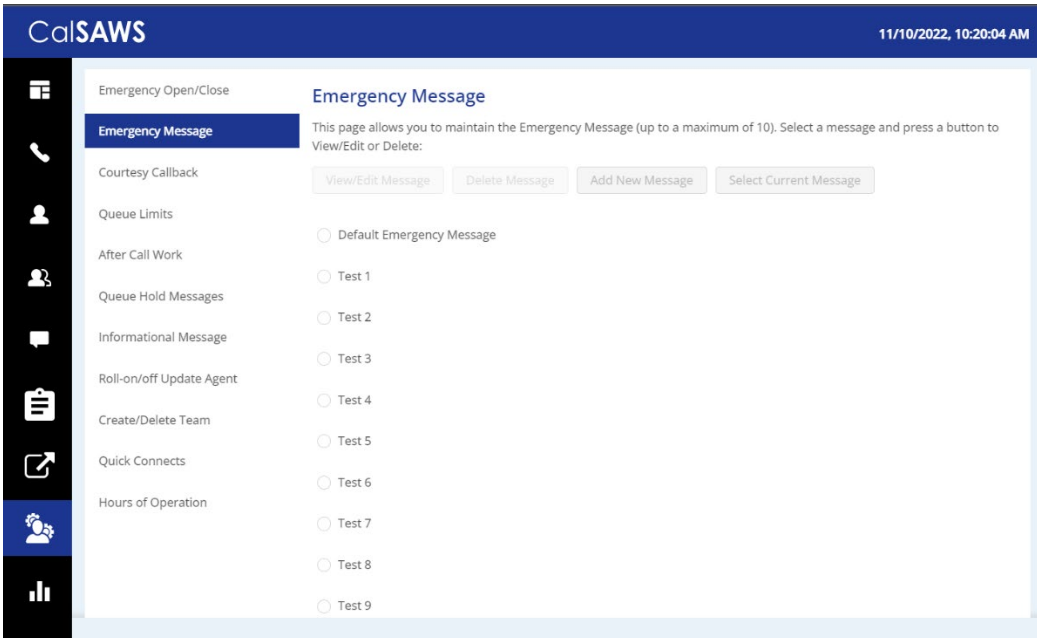


Figure 34 Emergency Message - messages defined, no selected message

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

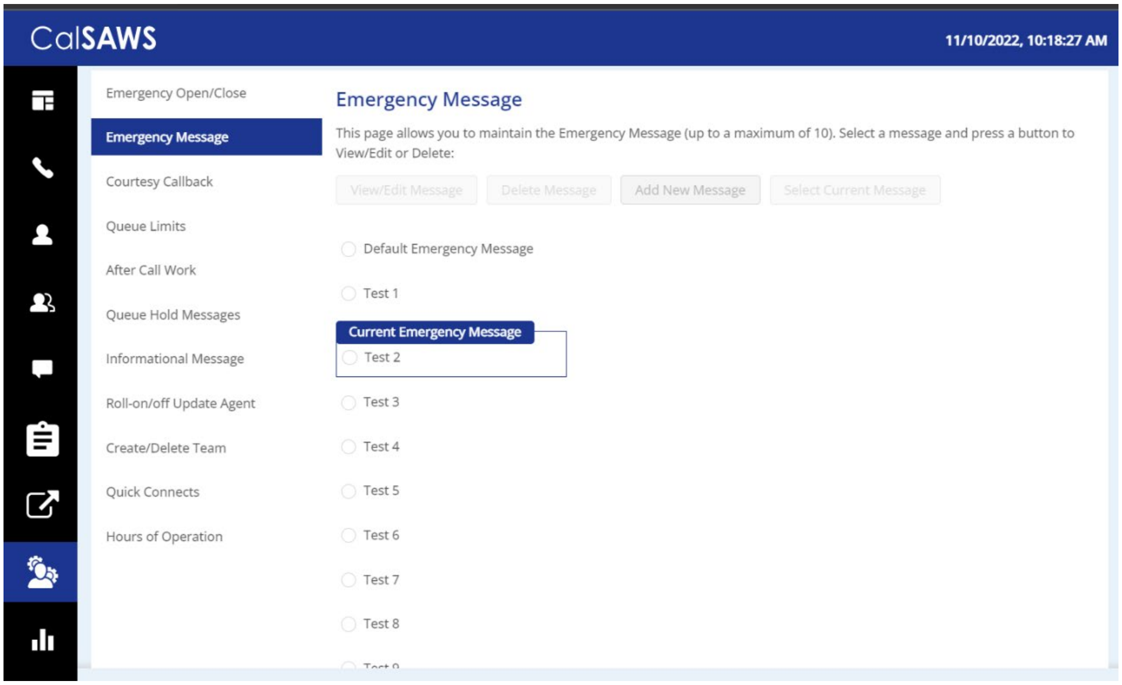


Figure 35 Emergency Message - messages defined and message selected

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

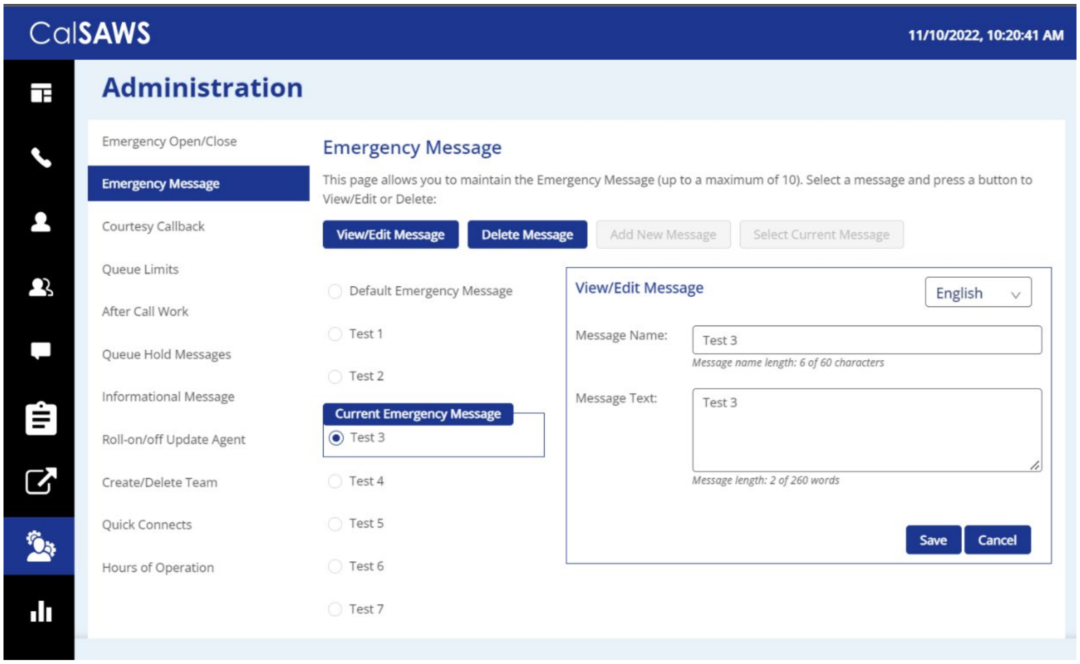


Figure 36 Emergency Message - view/edit message

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

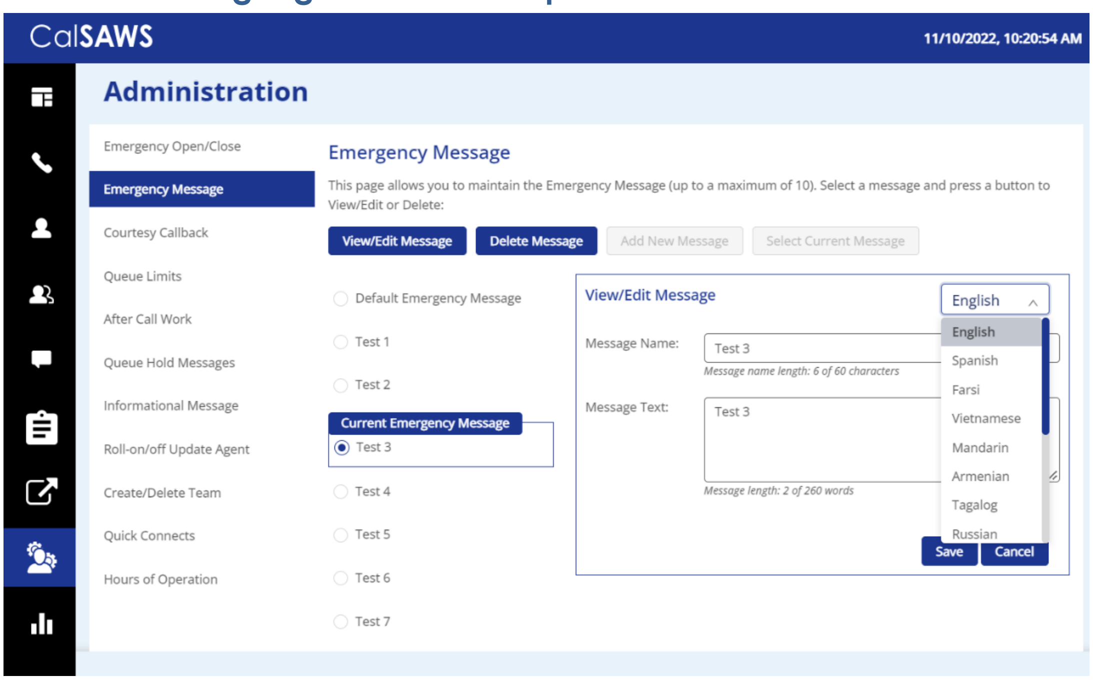


Figure 37 Emergency Message - Language selection dropdown

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. When selecting a language other than English, the "Save" button will change to "Add". The supported languages are:
    a. English (default)
    b. Spanish
    c. Mandarin
    d. Russian
    e. Korean
    f. Cantonese
    g. Arabic
    h. Portuguese
6. Any unsupported languages will display the message "This language is not currently supported". The unsupported languages are:
    i. Farsi
    ii. Vietnamese
    iii. Armenian
    iv. Tagalog
    v. Cambodian
    vi. Hmong
    vii. Lao
7. 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.
8. ~~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.~~
9. If the user presses "Save", text changes for any of the selected languages are saved and the dialog closes.
10. If the user presses "Cancel", the changes are discarded and the dialog closes.

2.10.2.10 Emergency Message – Delete Message page mockup

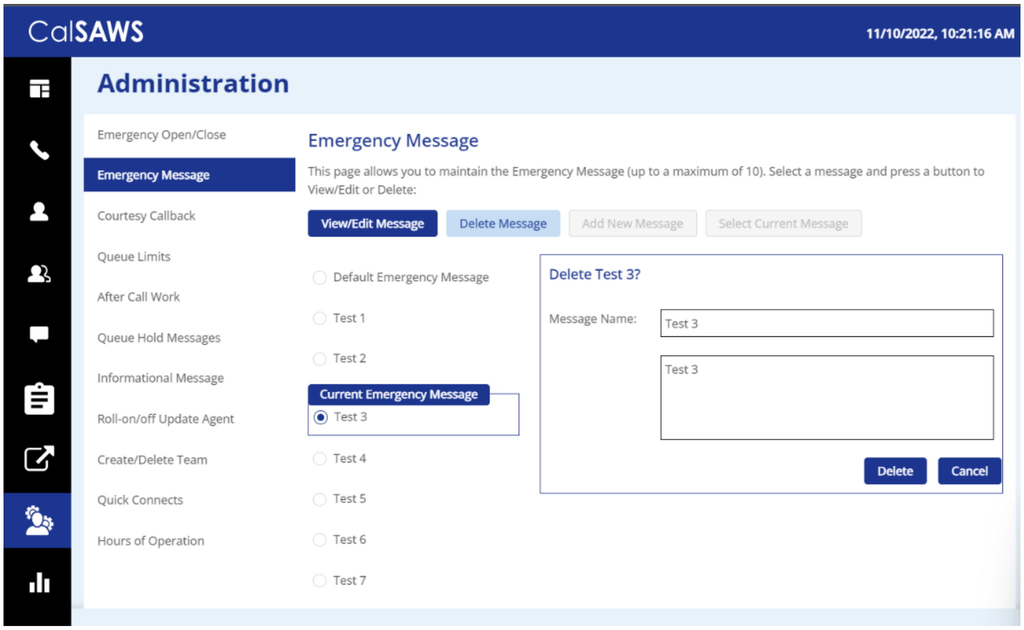


Figure 38 Emergency Message - delete message

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

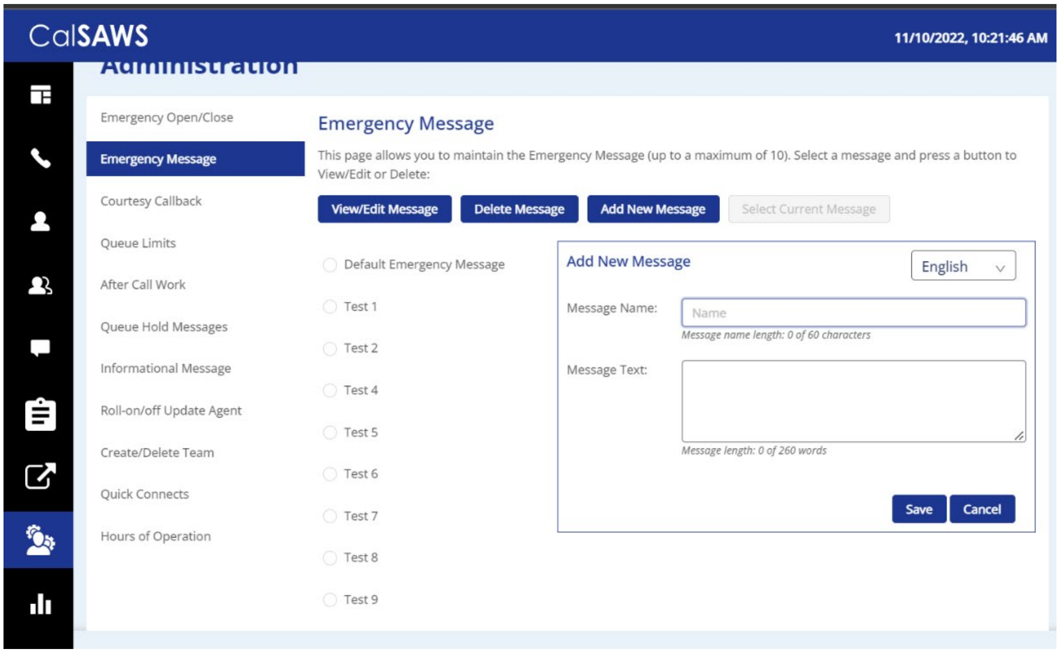


Figure 39 Emergency Message - Add new message

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. When selecting a language other than English, the "Save" button will change to "Add". The supported languages are:
    a. English (default)
    b. Spanish
    c. Mandarin
    d. Russian
    e. Korean
    f. Cantonese
    g. Arabic
    h. Portuguese

6. Any unsupported languages will display the message "This language is not currently supported". The unsupported languages are:
    i. Farsi
    ii. Vietnamese
    iii. Armenian
    iv. Tagalog
    v. Cambodian
    vi. Hmong
    vii. 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 "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.
9. If the user presses "Cancel", the changes are discarded and the dialog closes.

2.10.2.14 Emergency Message – Select Emergency Message page mockup

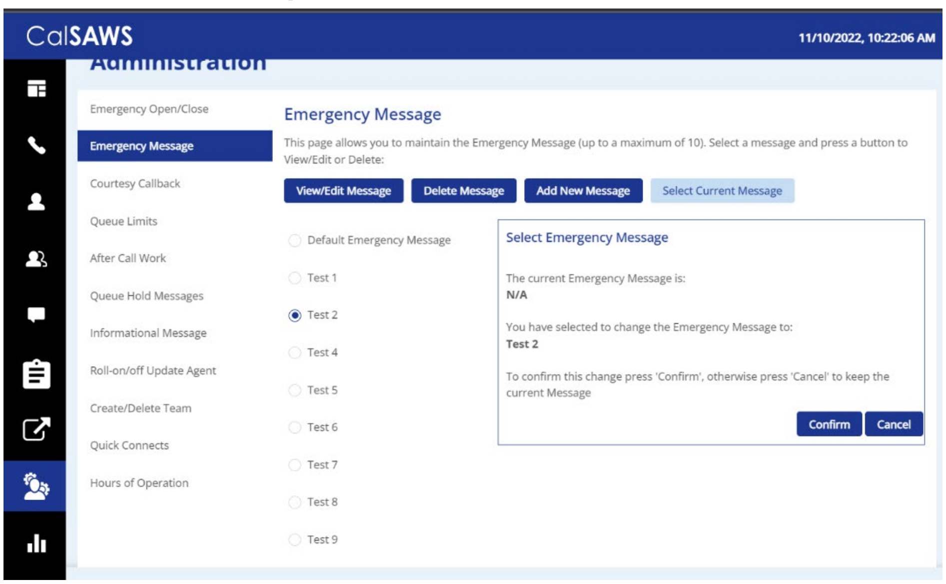


Figure 40 Emergency Message - Select message

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

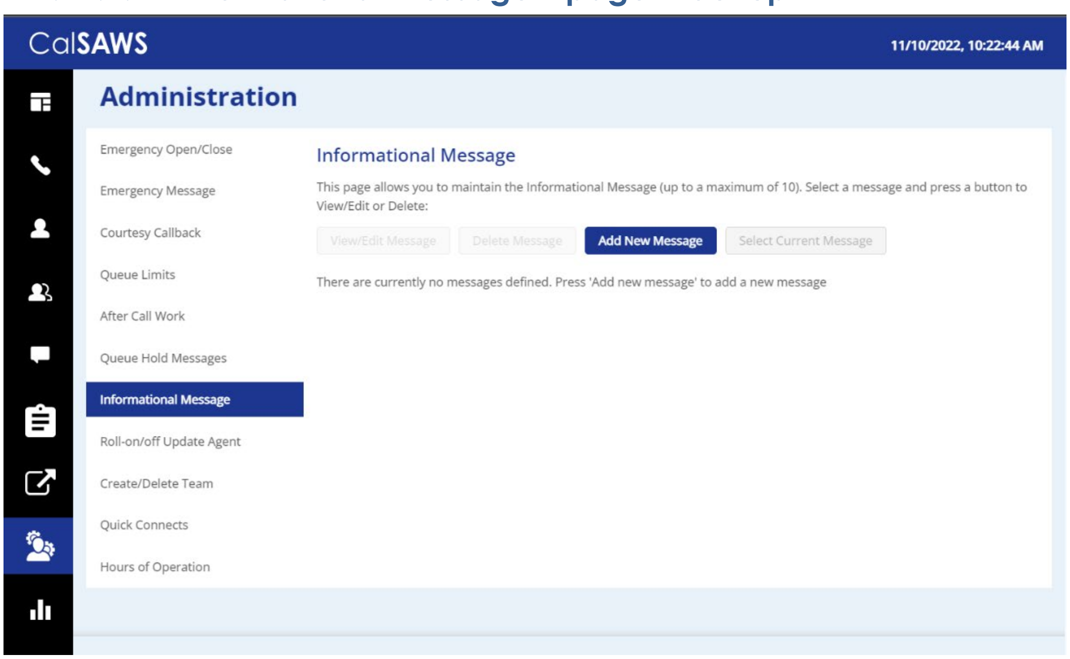


Figure 41 Informational Message - no messages defined

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

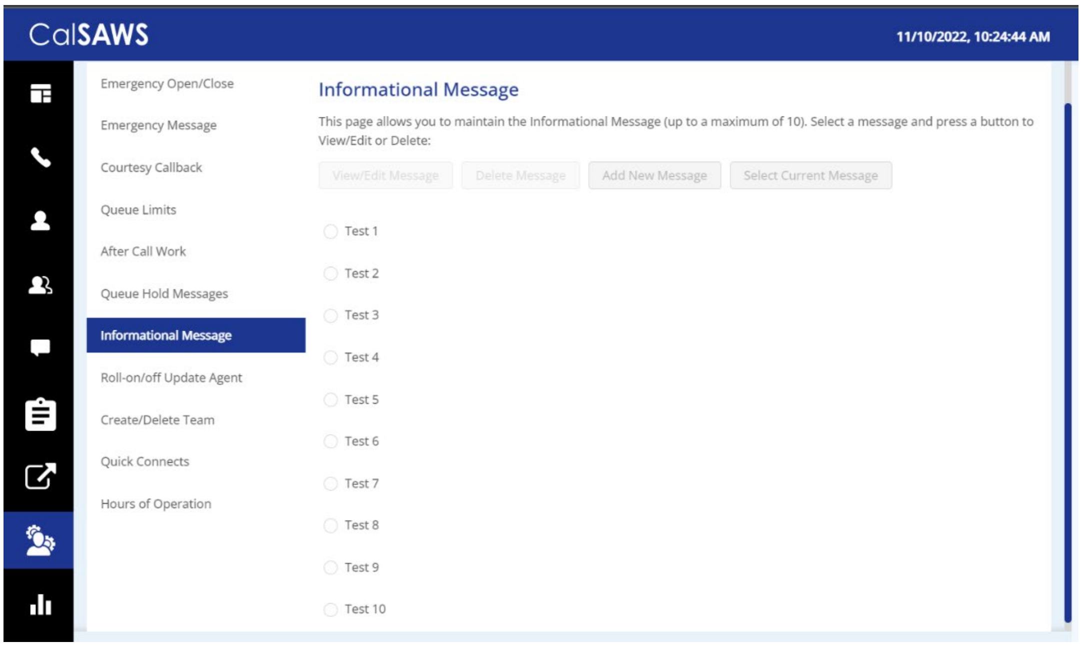


Figure 42 Informational Message - no message selected

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

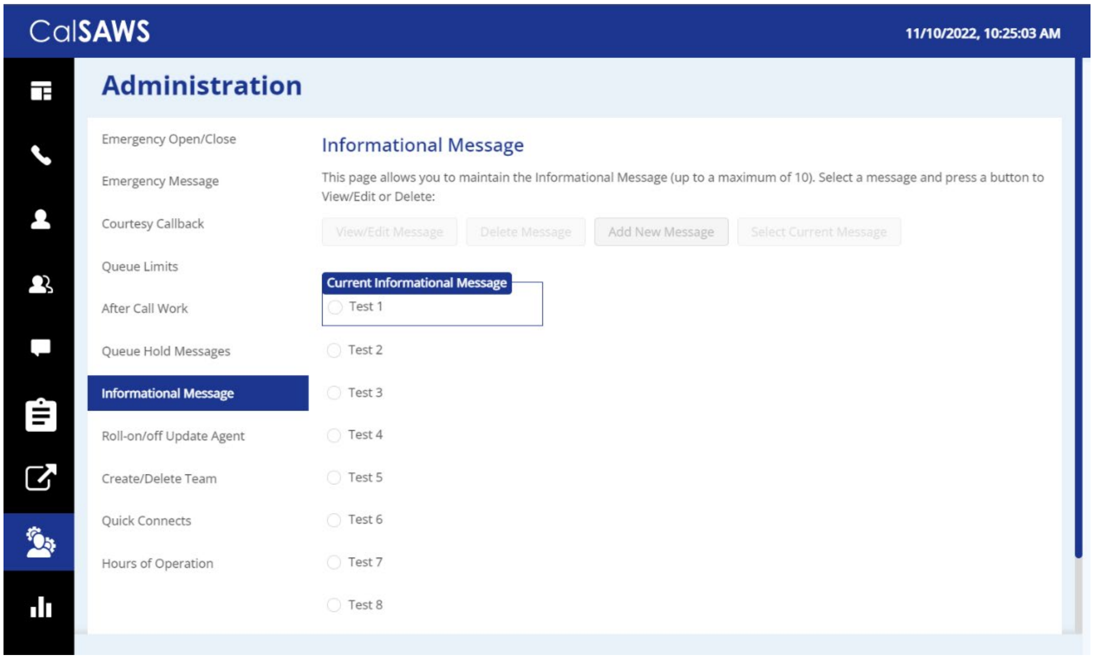


Figure 43 Informational Message - message selected

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

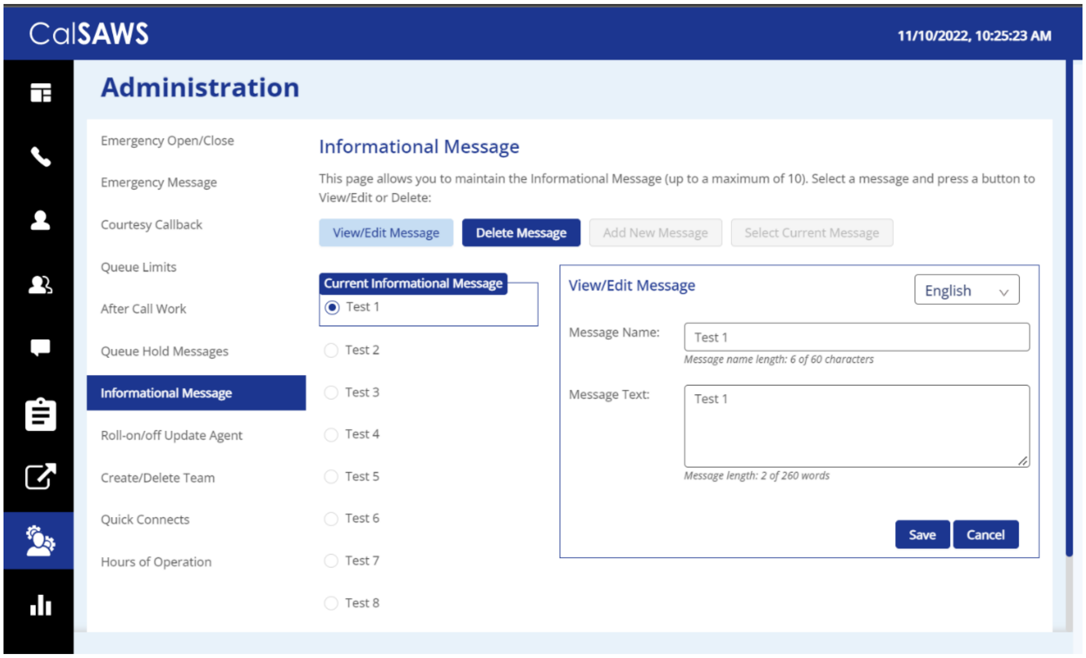


Figure 44 Informational Message - View/Edit Message

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

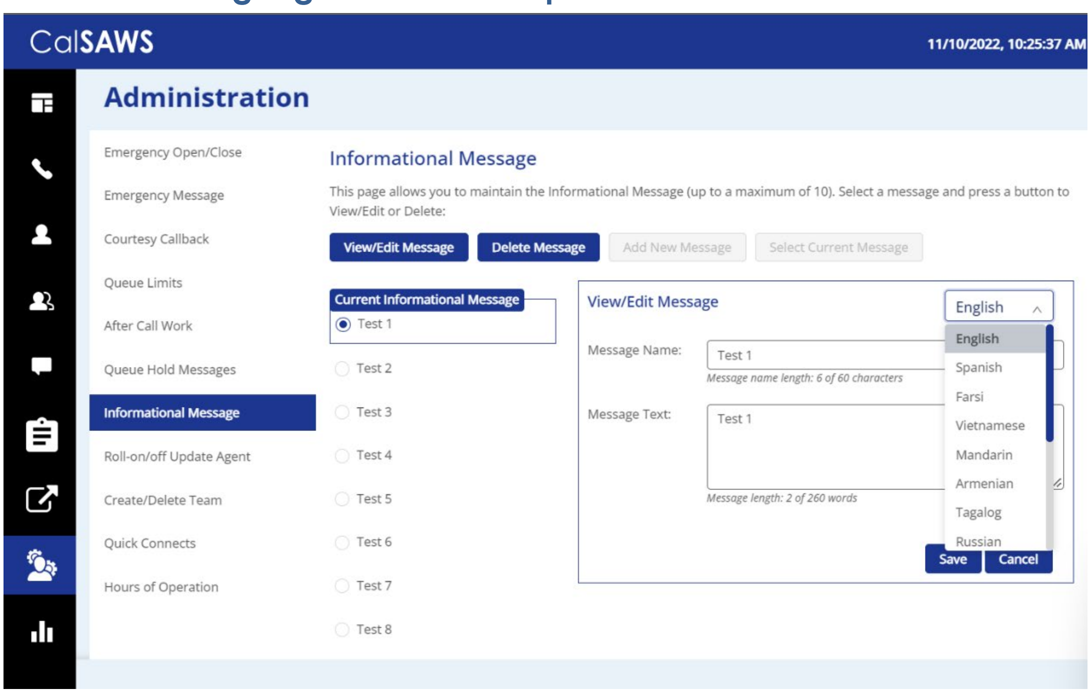


Figure 45 Informational Message - Language selection

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

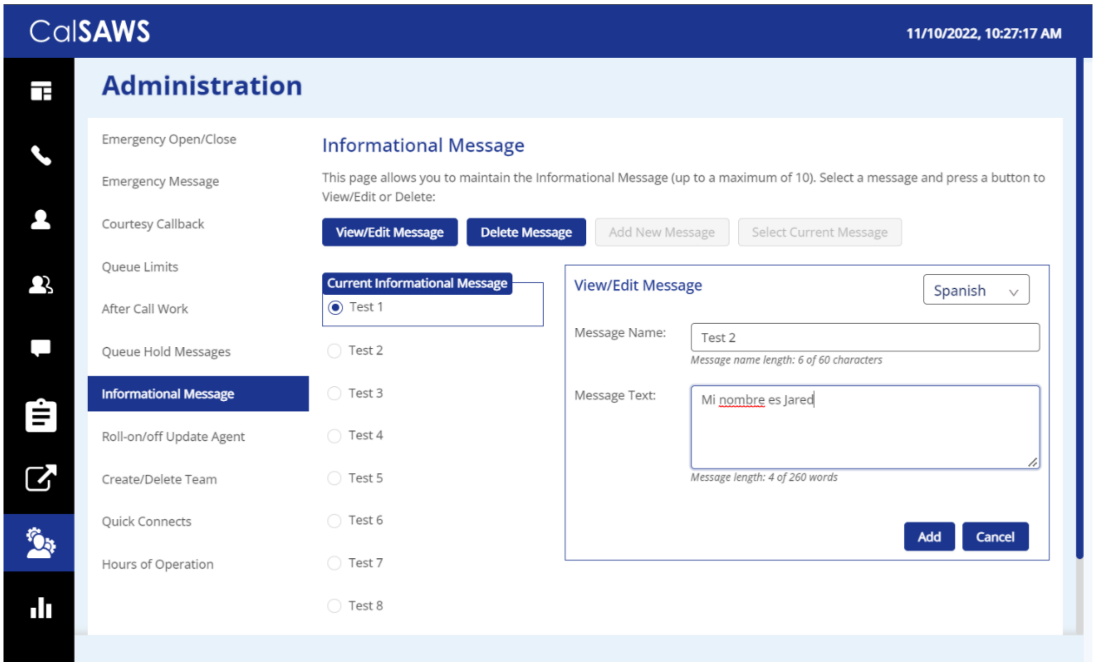


Figure 46 Informational Message - Spanish language

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. When selecting a language other than English, the "Save" button will change to "Add". The supported languages are:
    a. English (default)
    b. Spanish
    c. Mandarin
    d. Russian
    e. Korean
    f. Cantonese
    g. Arabic
    h. Portuguese

6. Any unsupported languages will display the message "This language is not currently supported". The unsupported languages are:
    i. Farsi
    ii. Vietnamese
    iii. Armenian
    iv. Tagalog
    v. Cambodian
    vi. Hmong
    vii. 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 "Save", changes to the text for any of the languages selected from the Languages dropdown are saved and the dialog closes.
9. If the user presses "Cancel", all changes are discarded and the dialog closes.

2.11.2.11 Informational Message – Delete Message page mockup

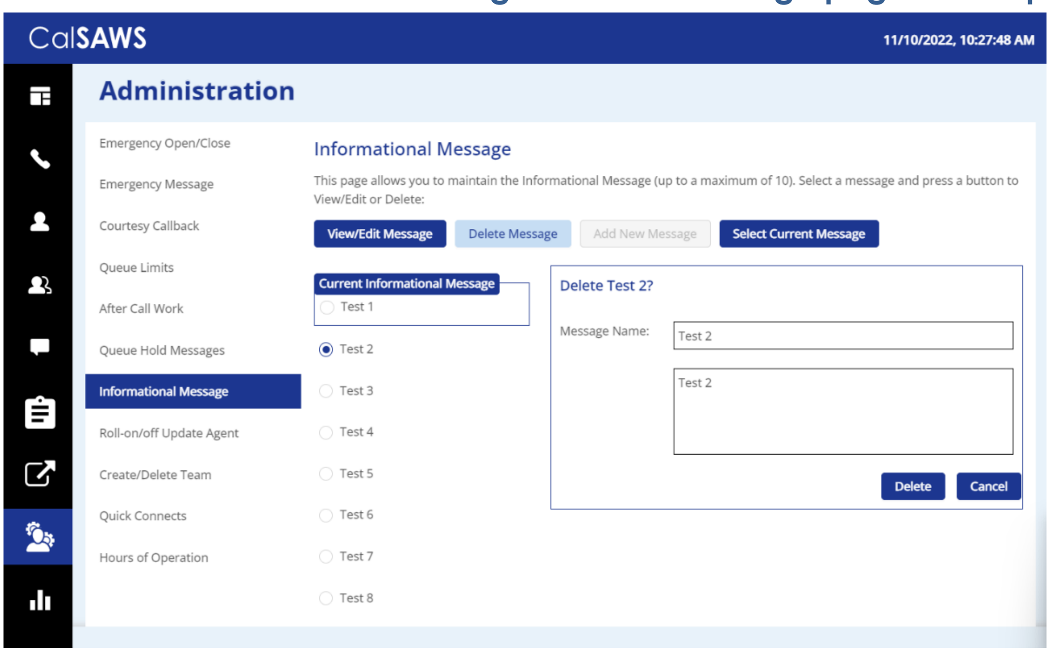


Figure 47 Informational Message - Delete Message

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

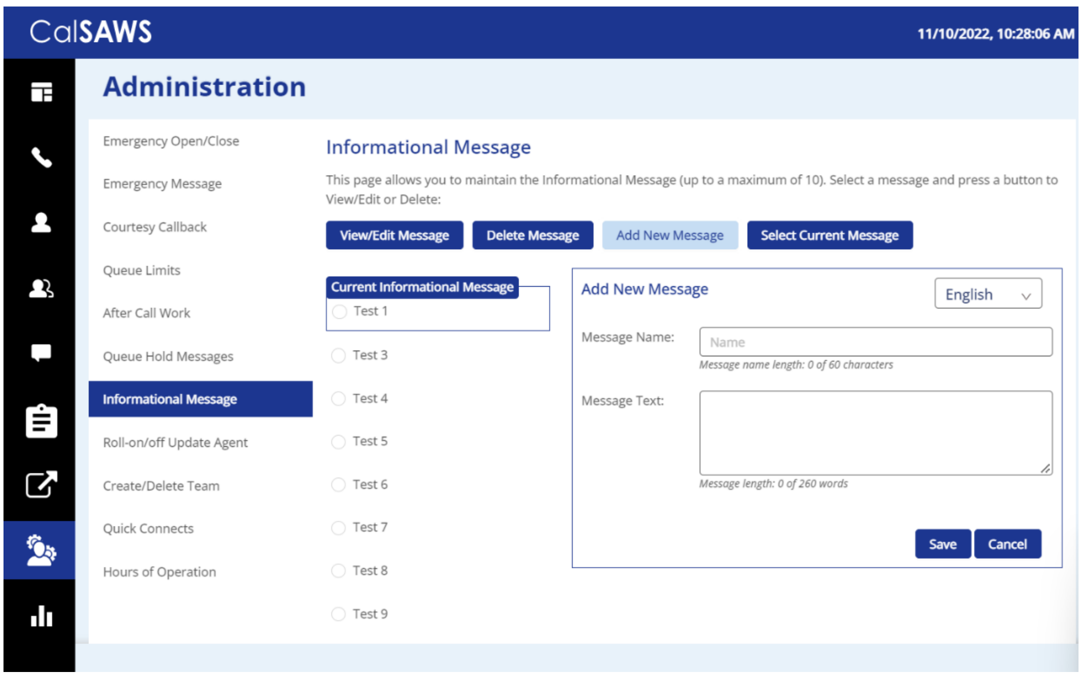


Figure 48 Informational Message - Add New Message

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. When selecting a language other than English, the “Save” button will change to “Add”. The supported languages are:
    a. English (default)
    b. Spanish
    c. Mandarin
    d. Russian
    e. Korean
    f. Cantonese
    g. Arabic
    h. Portuguese
6. Any unsupported languages will display the message “This language is not currently supported”. The unsupported languages are:
    i. Farsi
    ii. Vietnamese
    iii. Armenian
    iv. Tagalog
    v. Cambodian
    vi. Hmong
    vii. 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 “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.
9. If the user presses “Cancel”, the changes are discarded and the dialog closes.

2.11.2.15 Informational Message – Select Informational Message page mockup

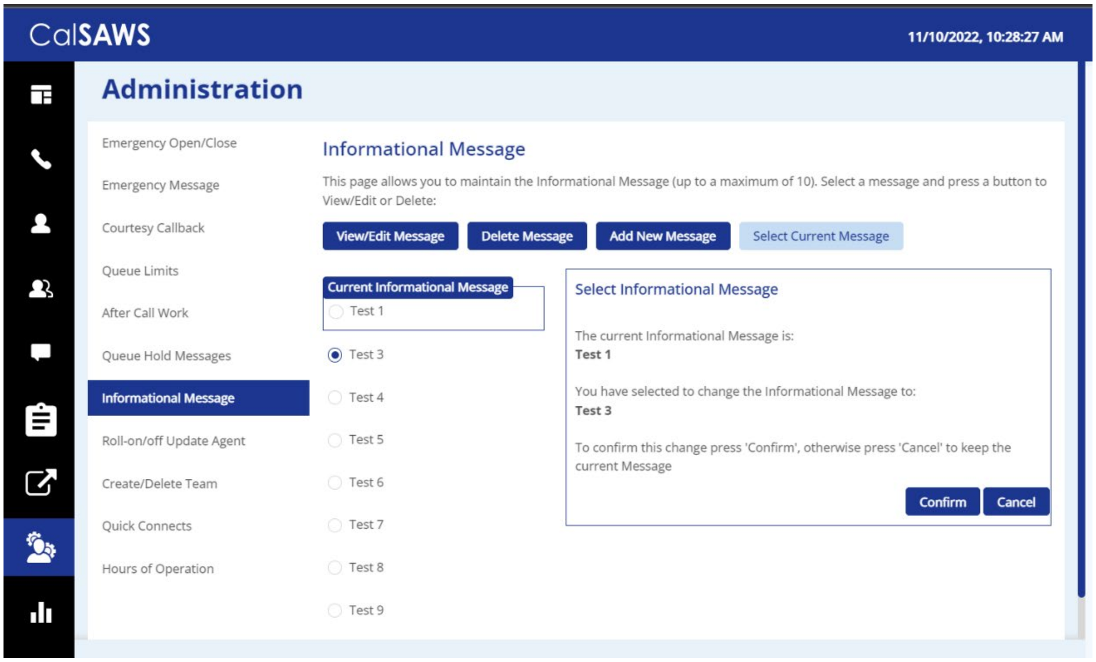


Figure 49 Informational Message - Select Message

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~~

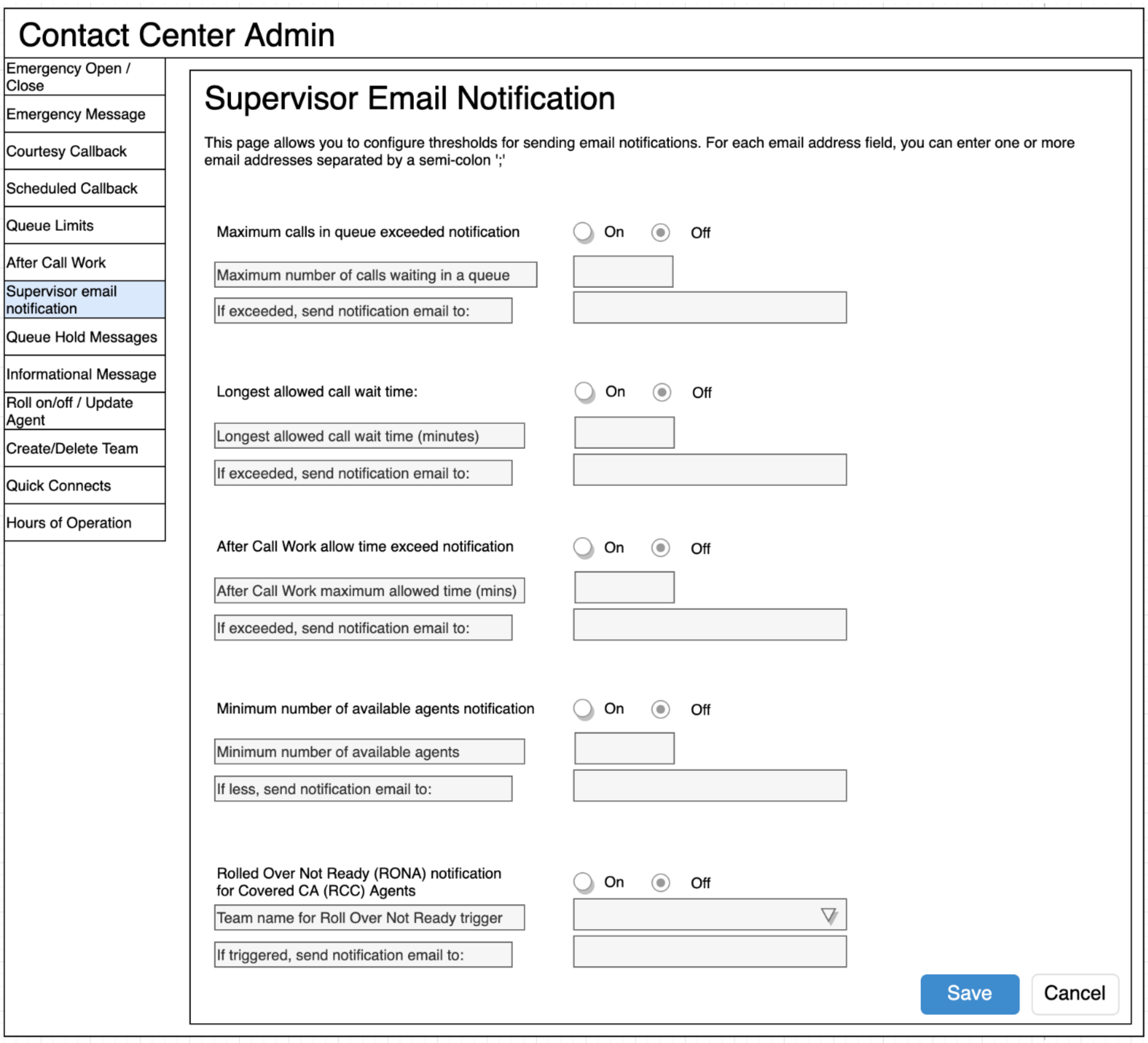
~~The Supervisor Email notification page allows an Admin user to define thresholds and notifications for Contact Center metrics. If the threshold is exceeded for a specific metric, the system sends a notification email to the specified email address(es).~~

~~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~~



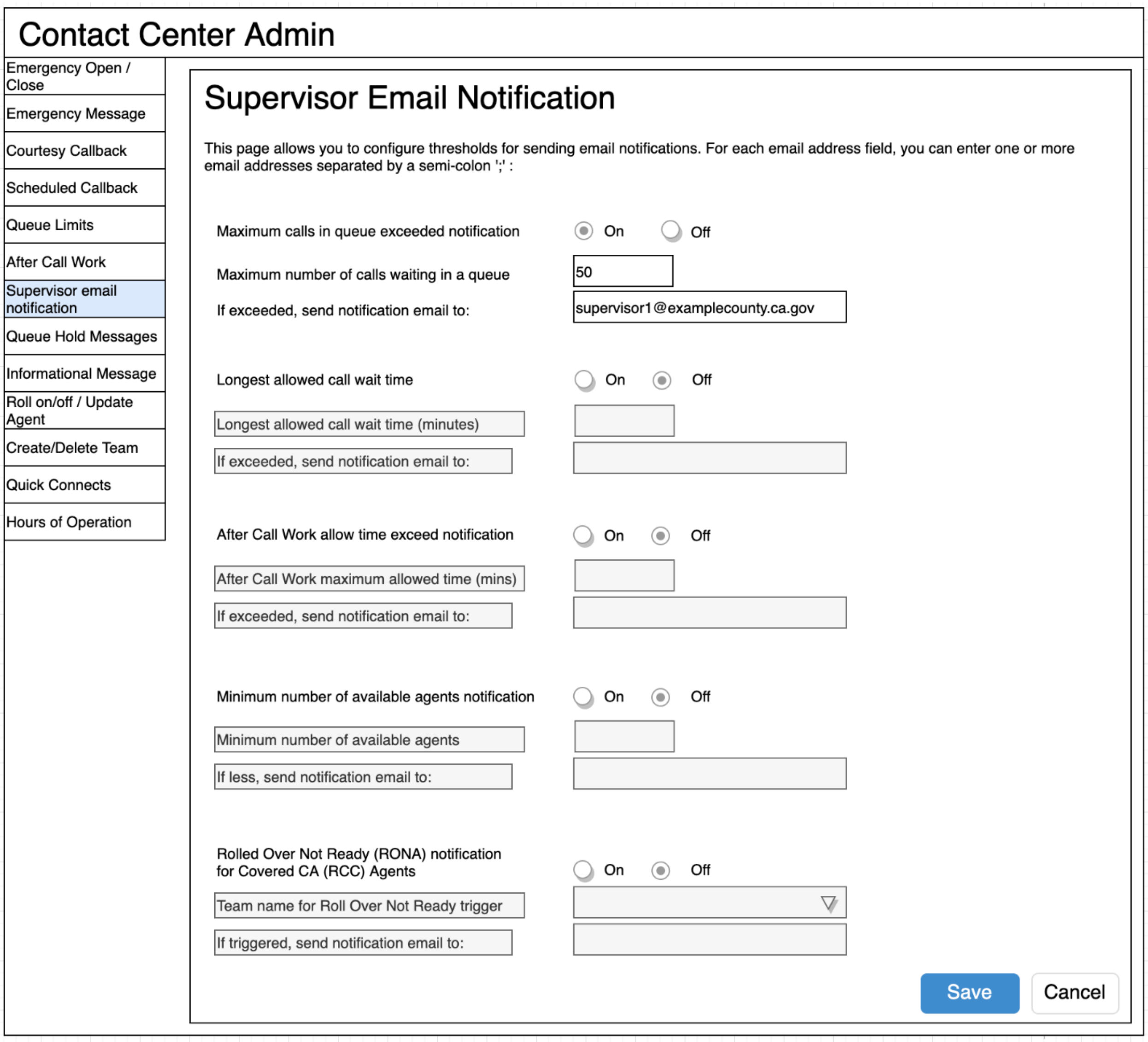
~~Figure 50 Supervisor Email Notification - Notifications Off~~

~~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.~~

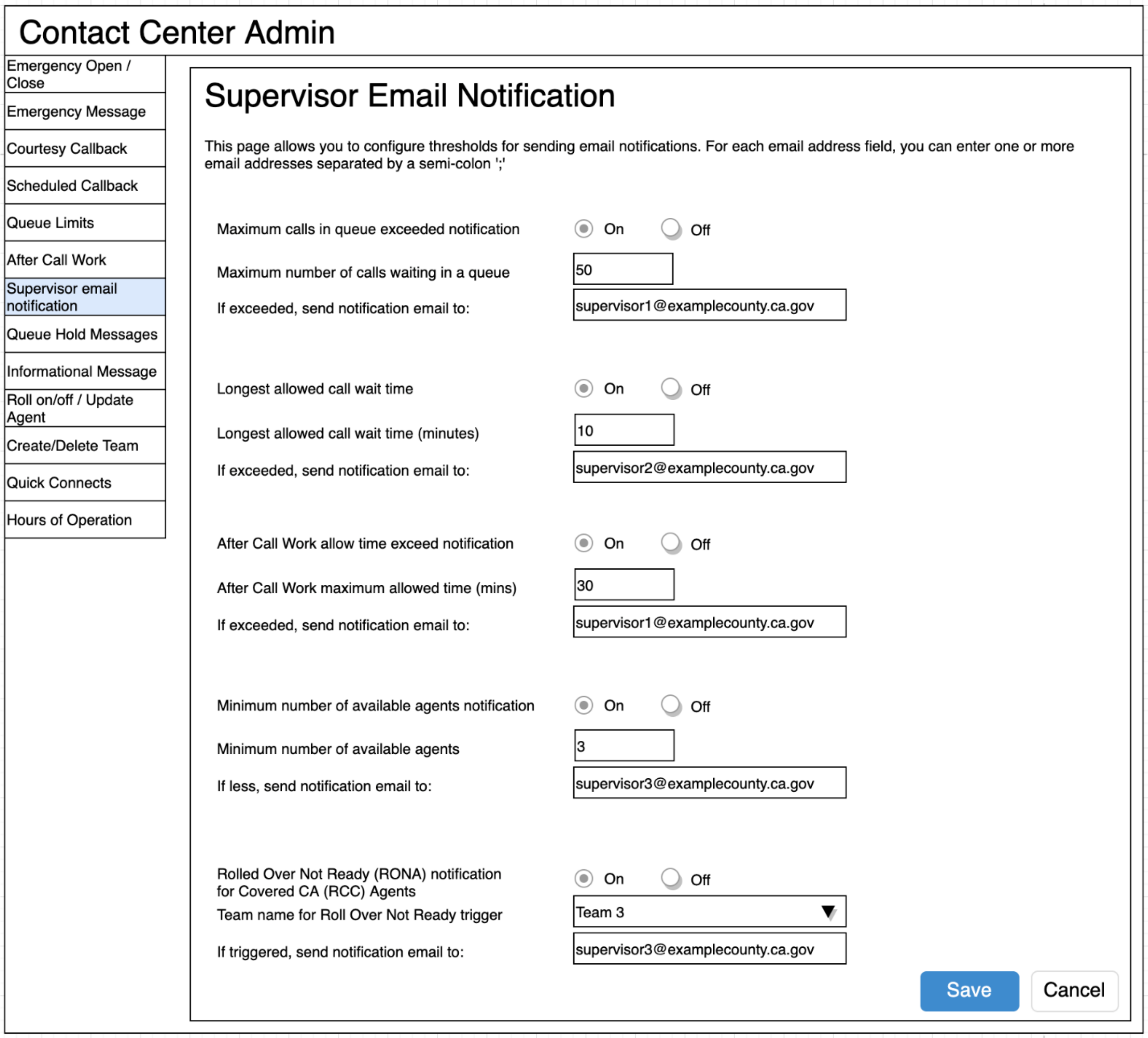
2. ~~The page mockup shows the 'Maximum calls in queue' notification is enabled and the 'Maximum number of calls waiting in queue' and 'If exceeded, send notification to' entry fields are enabled.~~
3. ~~User enters values for 'Maximum calls in queue' and 'If exceeded, send notification to' email field. 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

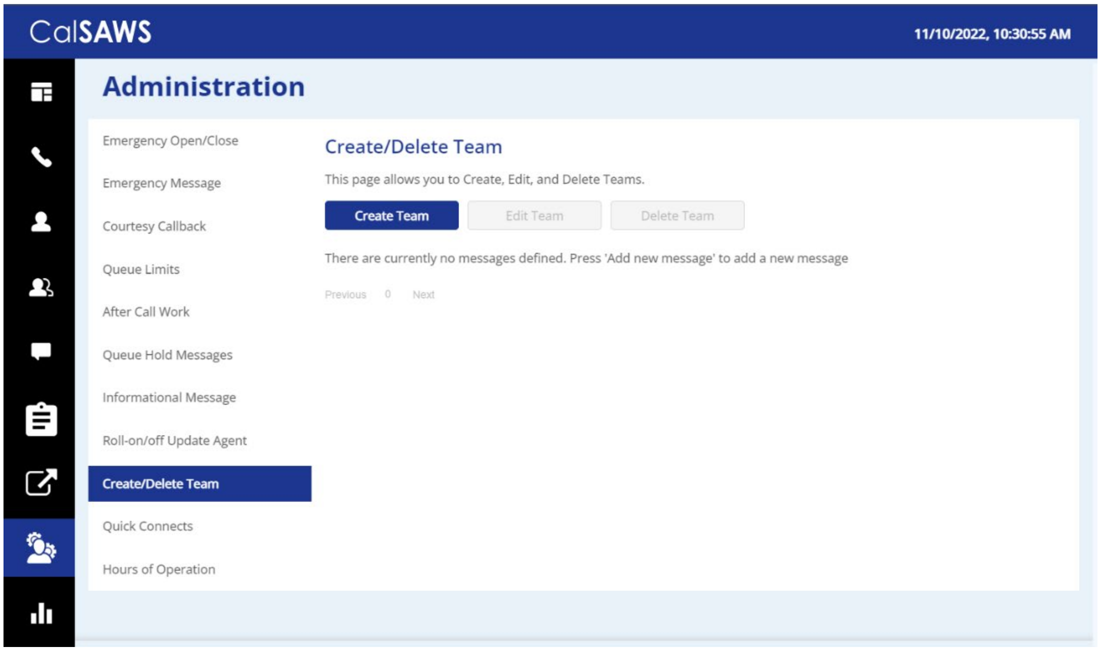


Figure 53 Create/Delete Team = no teams defined

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

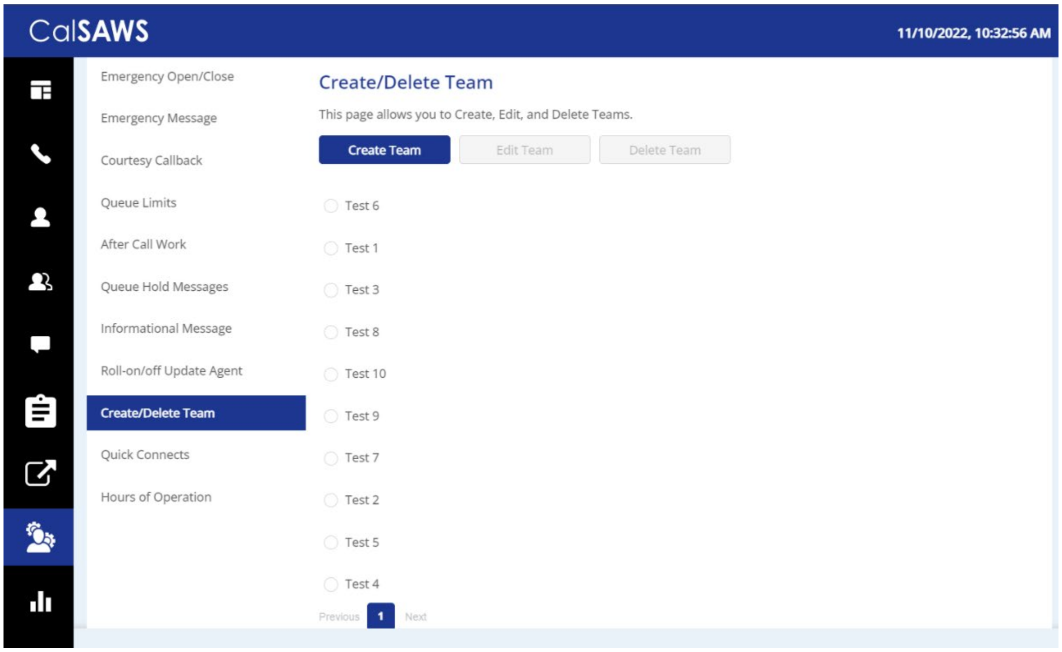


Figure 54 Create/Delete Team = teams defined

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 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

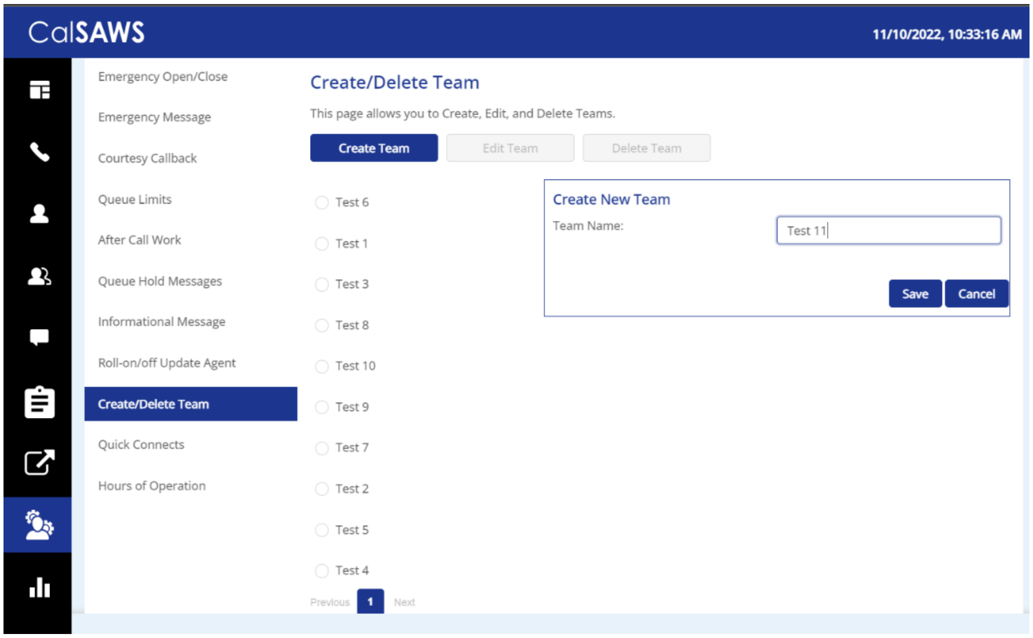


Figure 55 Create/Delete Team - Create New Team

2.13.2.6 Create/Delete/Edit Team – Create Team

1. User can add new teams up to a maximum of 500 per County.
2. If there are less than 500 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

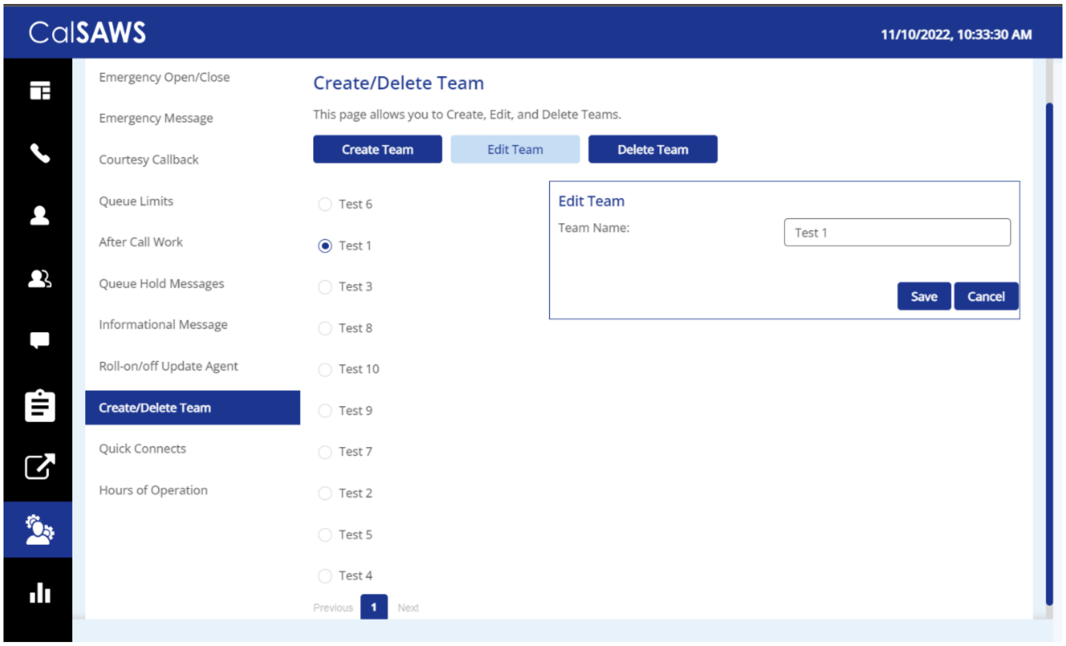


Figure 56 Create/Edit/Delete Team - Edit Team page

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

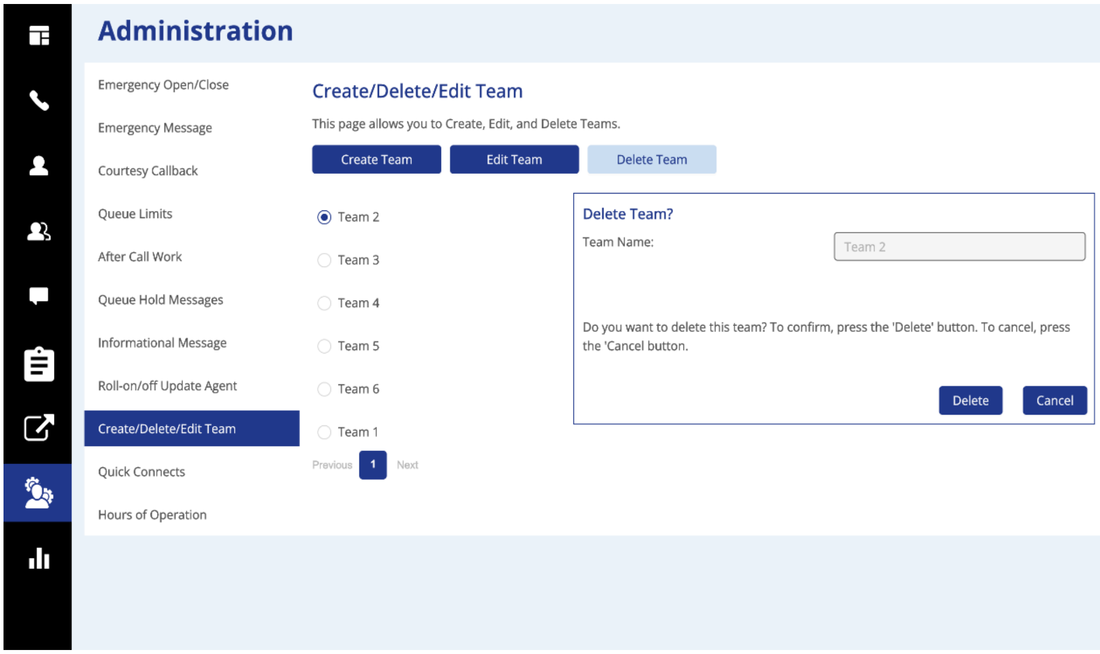


Figure 57 Create/Delete Team - Delete Team

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

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.

2.14.2.2 Quick Connects – Quick Connects defined mockup

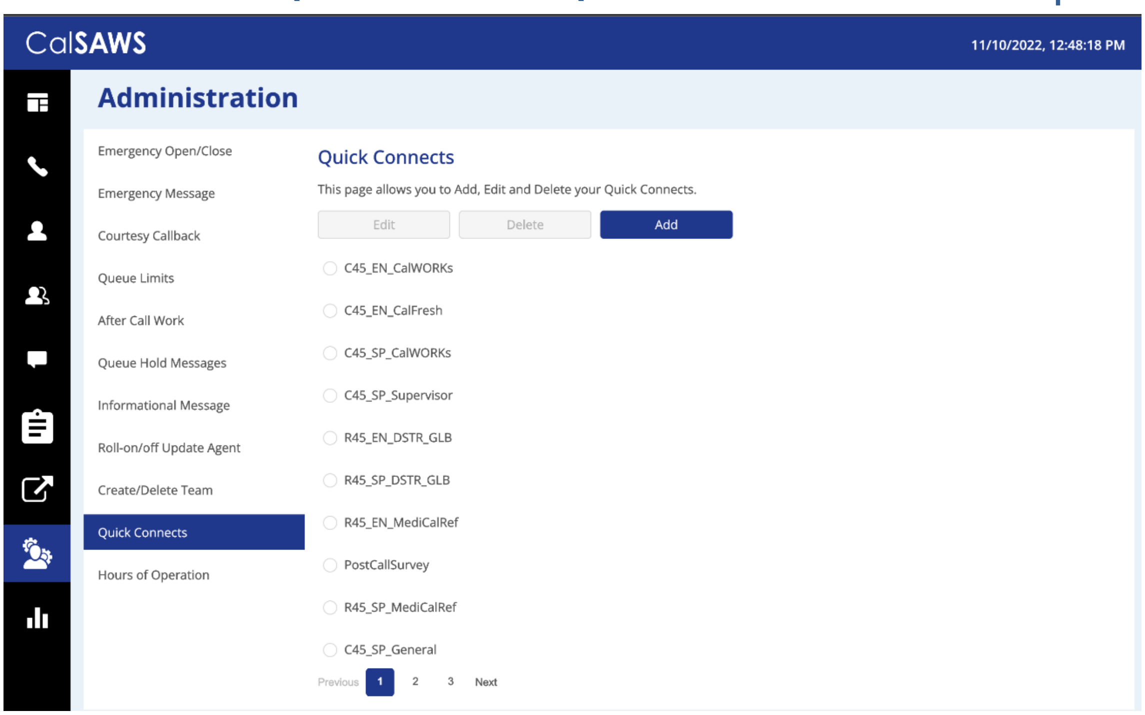


Figure 58 Quick Connects: Quick Connects defined mockup

2.14.2.3 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.

2.14.2.4 Quick Connects – add new Quick Connect mockup showing Quick Connect type

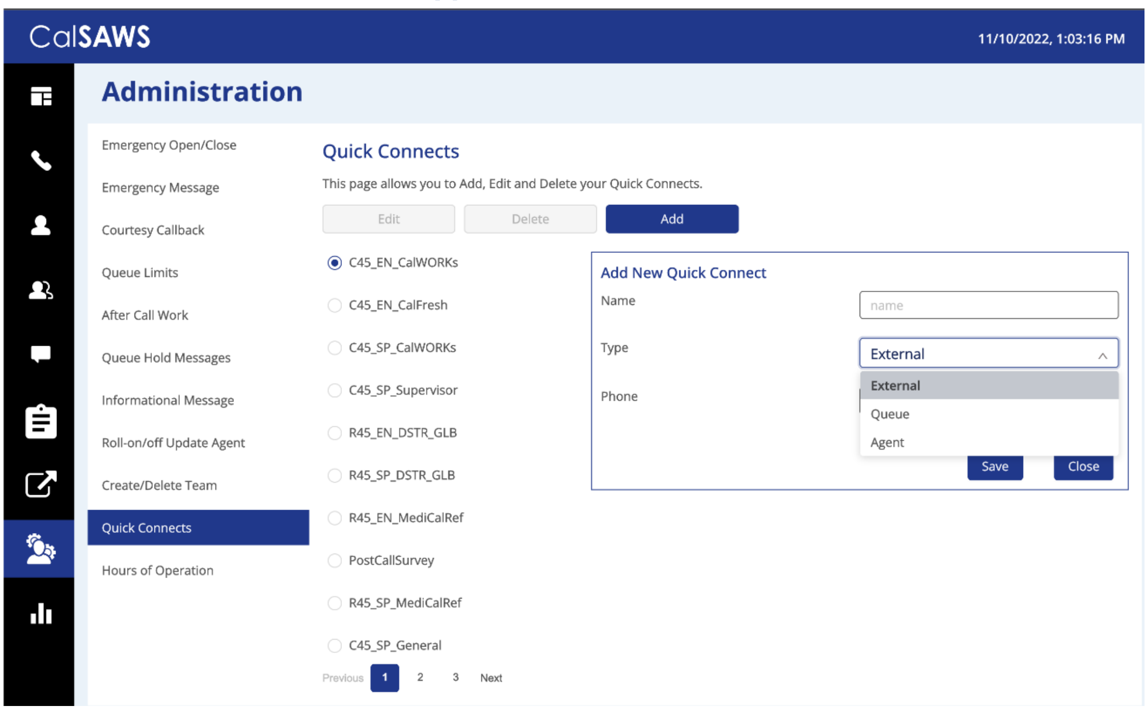


Figure 59 Quick Connects: Add new Quick Connect type dropdown menu

2.14.2.5 Quick Connects – add new Quick Connect - External type mockup

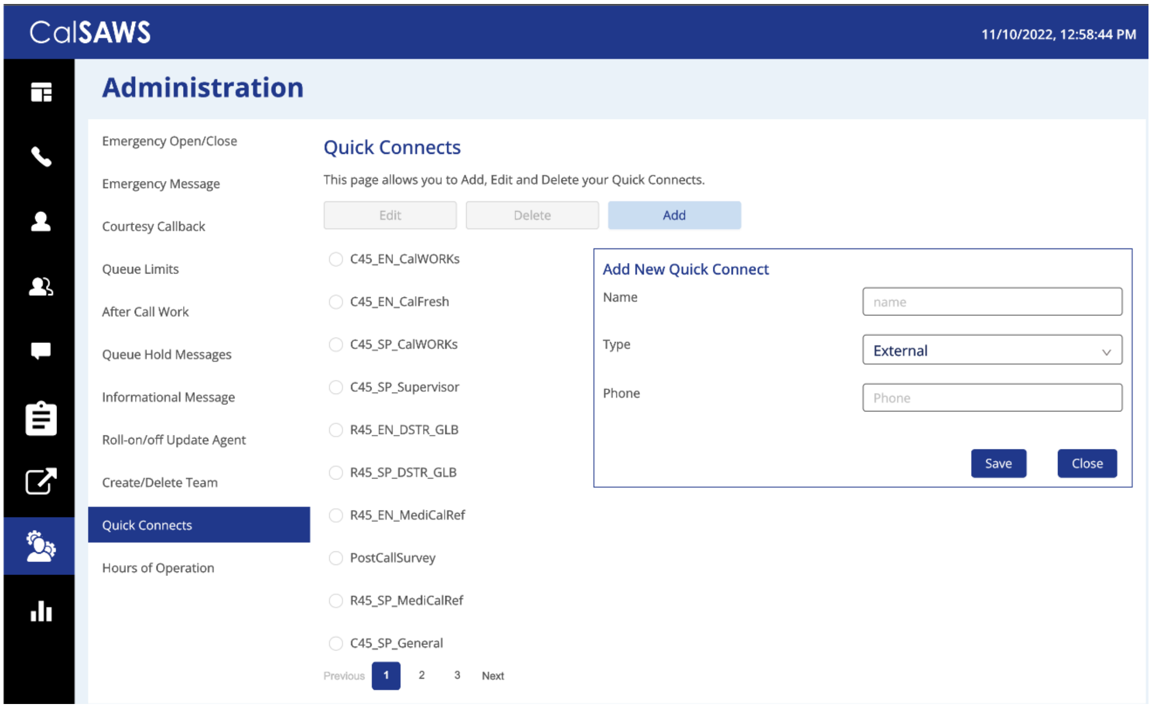


Figure 60 Quick Connects: Add new Quick Connect - External type

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

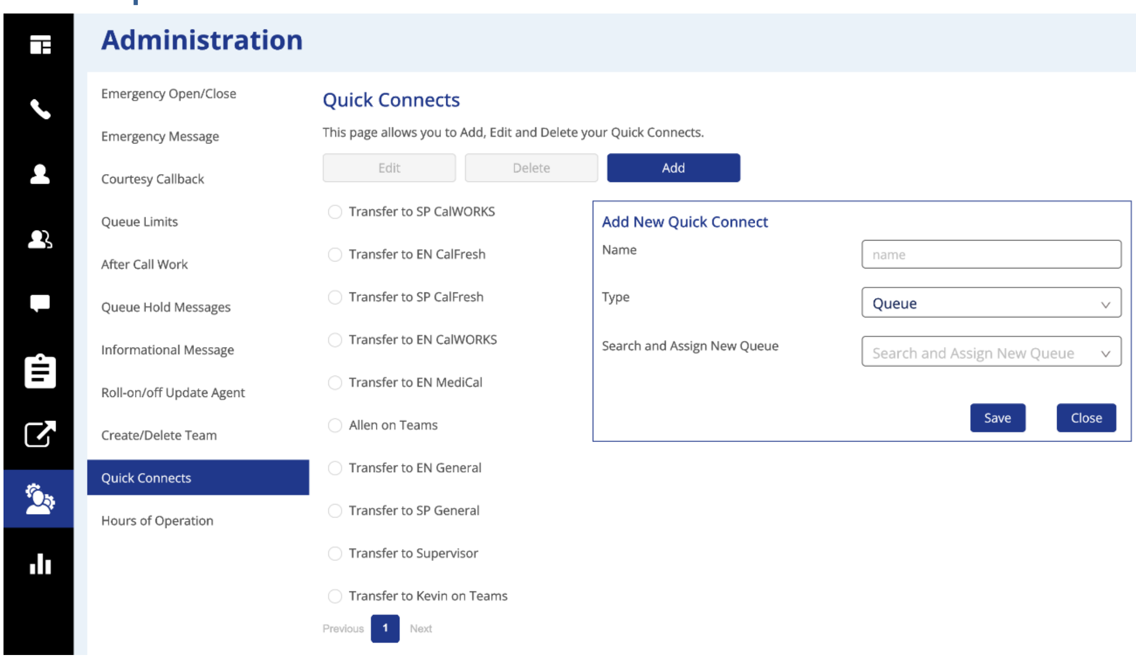


Figure 61 Quick Connects: Add new Quick Connect - Queue type

2.14.2.6 Quick Connects – add new Quick Connect - Agent type mockup

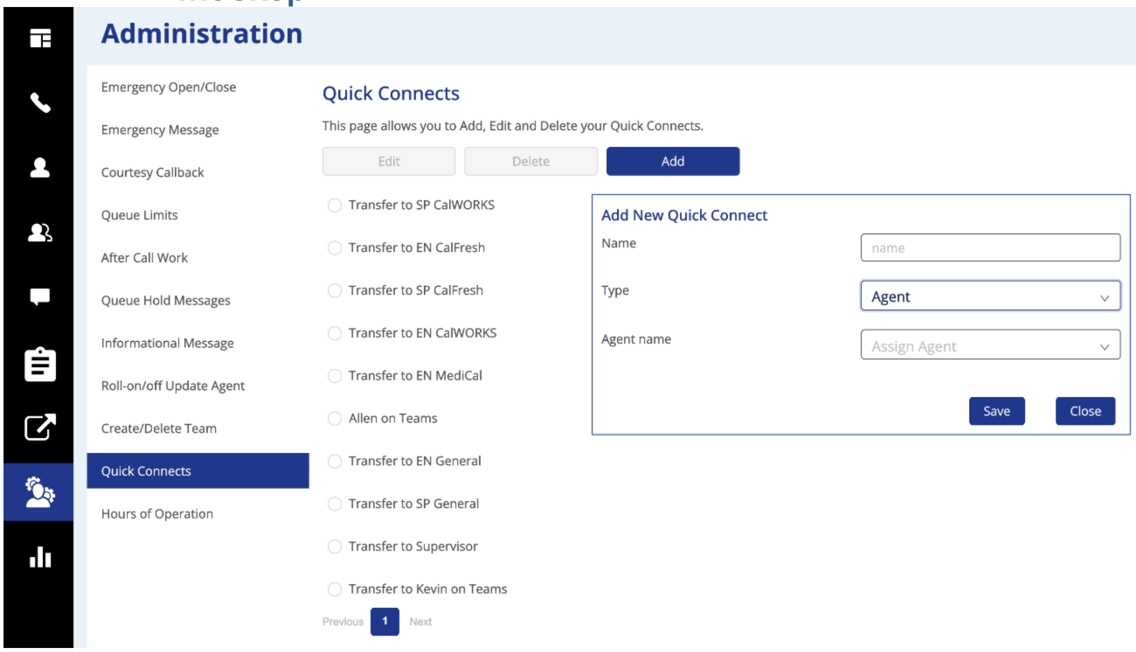


Figure 62 Quick Connects: Add new Quick Connect - Agent type

2.14.2.7 Quick Connects – add new Quick Connect – assign to new queue mockup

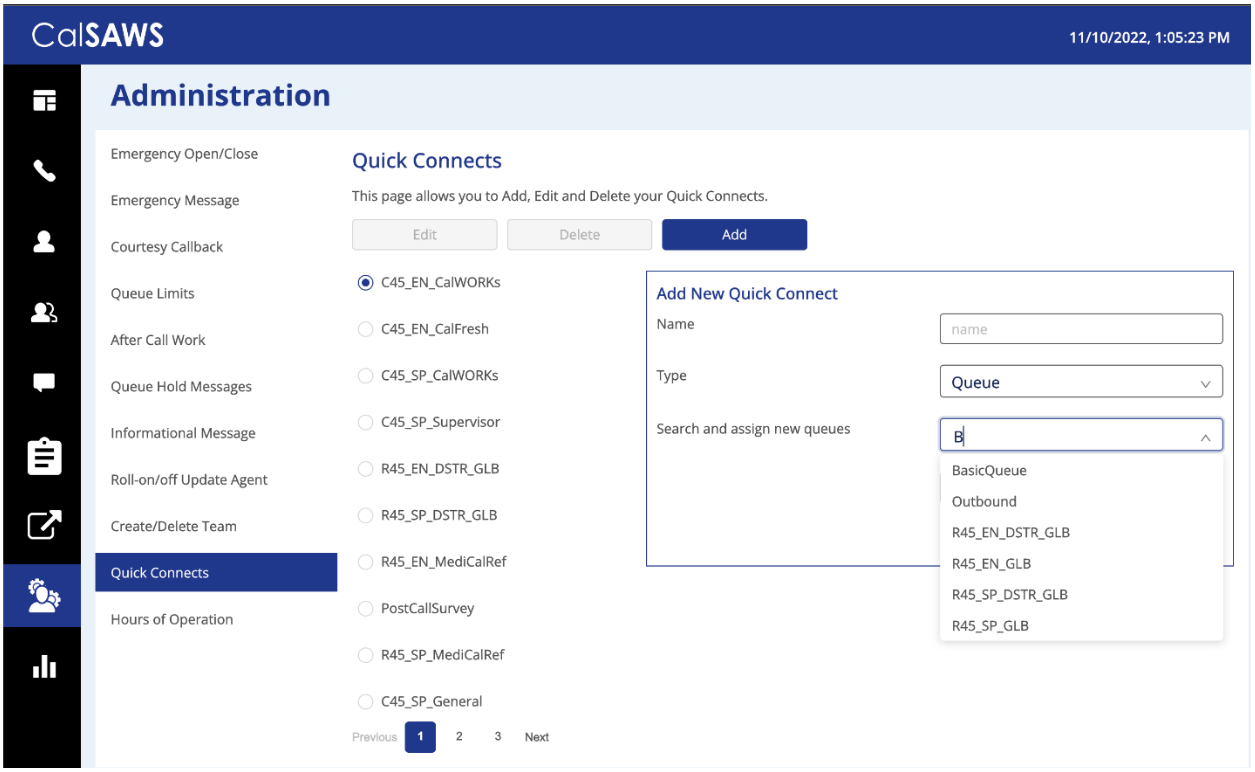


Figure 63 Quick Connects - assign to new queue mockup

2.14.2.8 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 ‘Search and assign 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

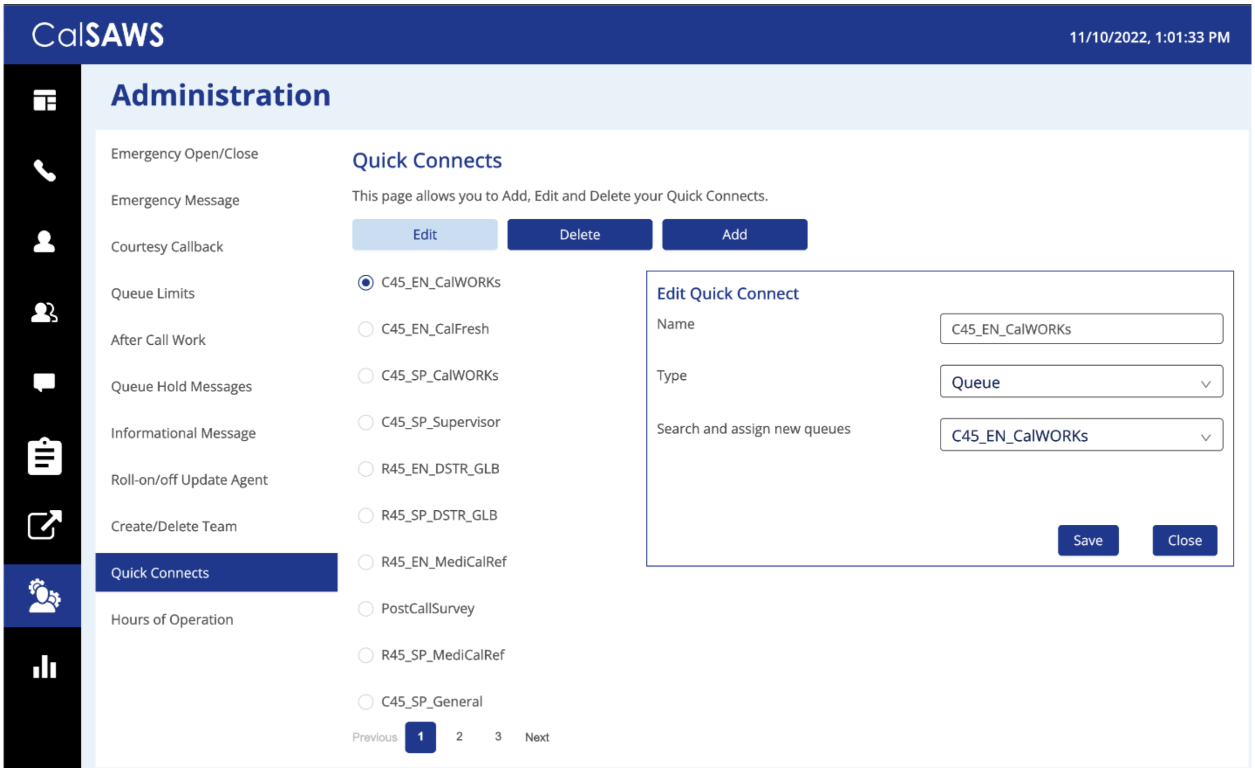


Figure 64 Quick Connects: Edit Quick Connect mockup

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

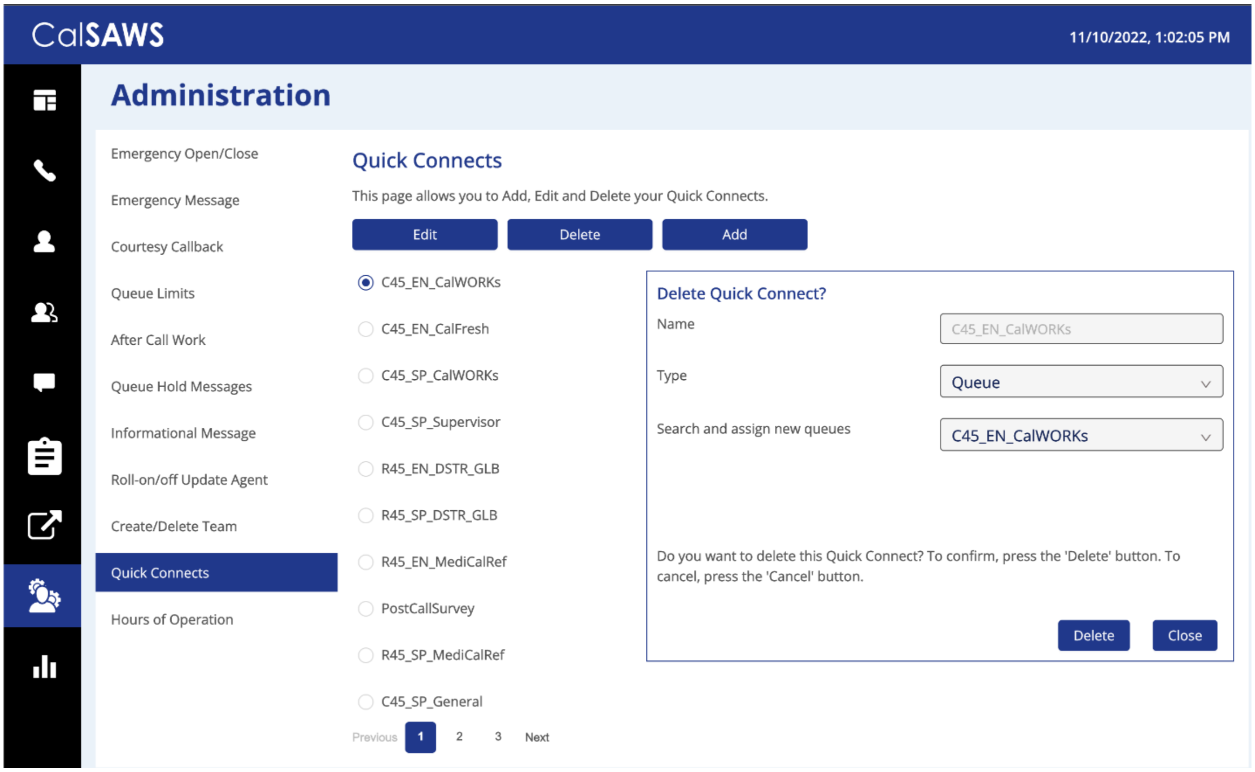


Figure 65 Quick Connects: delete Quick Connect mockup

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

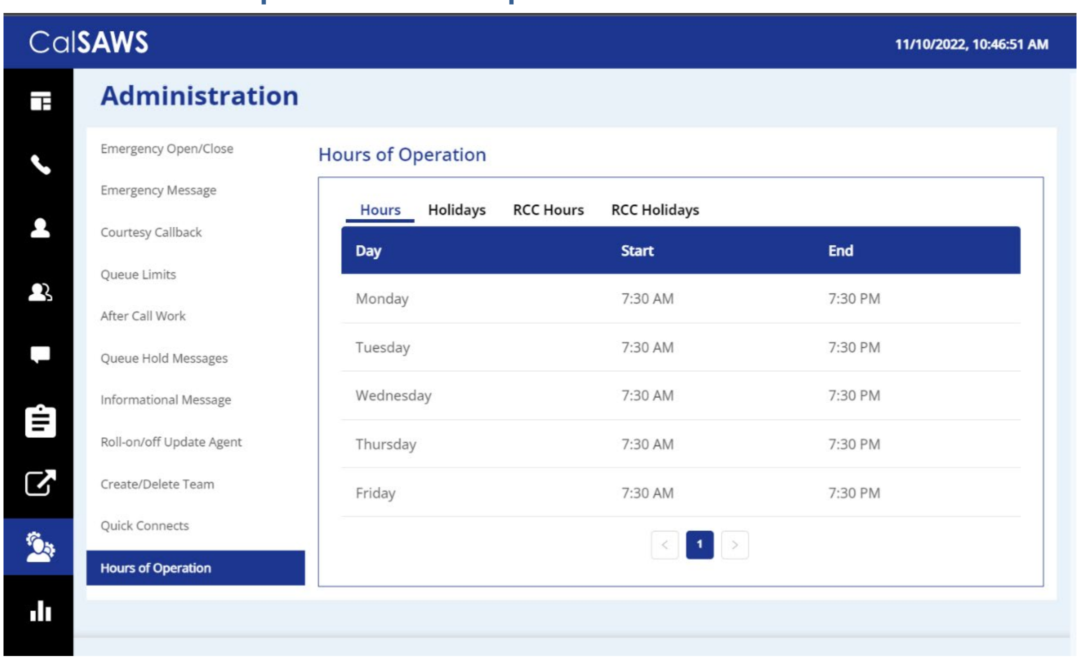


Figure 66 Hours of Operation mockup

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

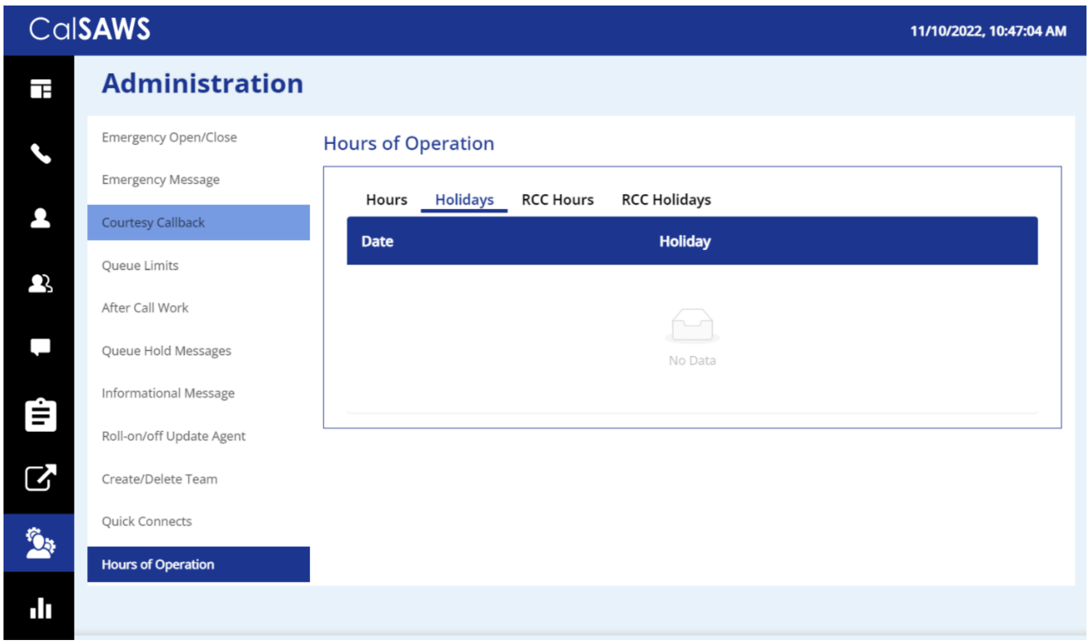


Figure 67 Hours of Operation: Holidays

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

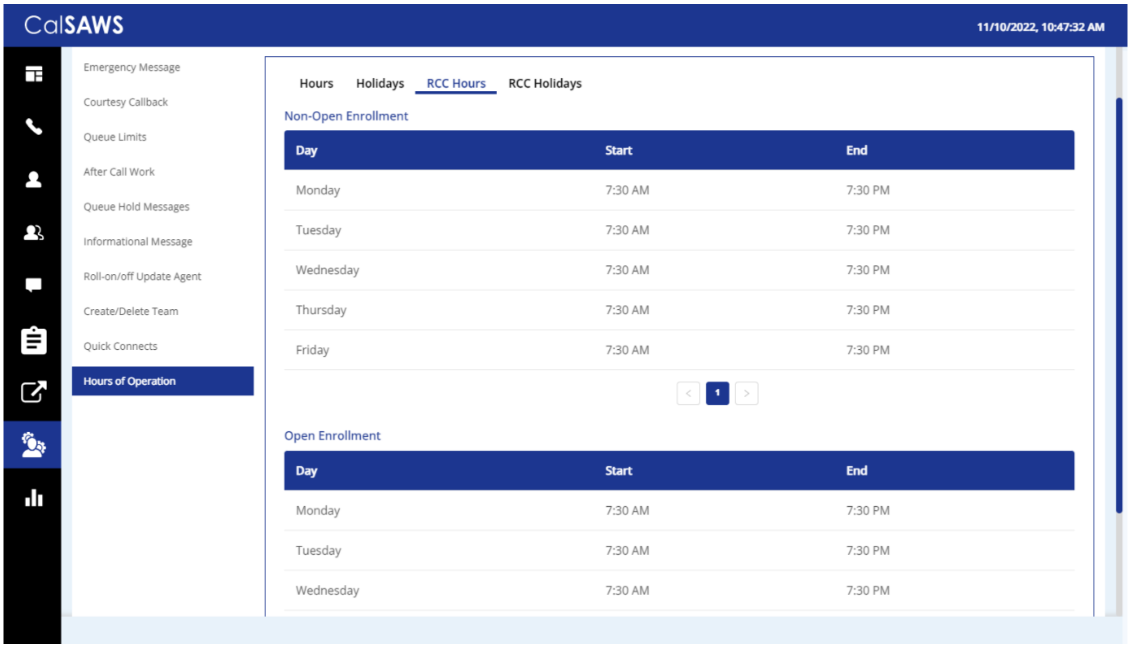


Figure 68 Hours of Operation: RCC Hours

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

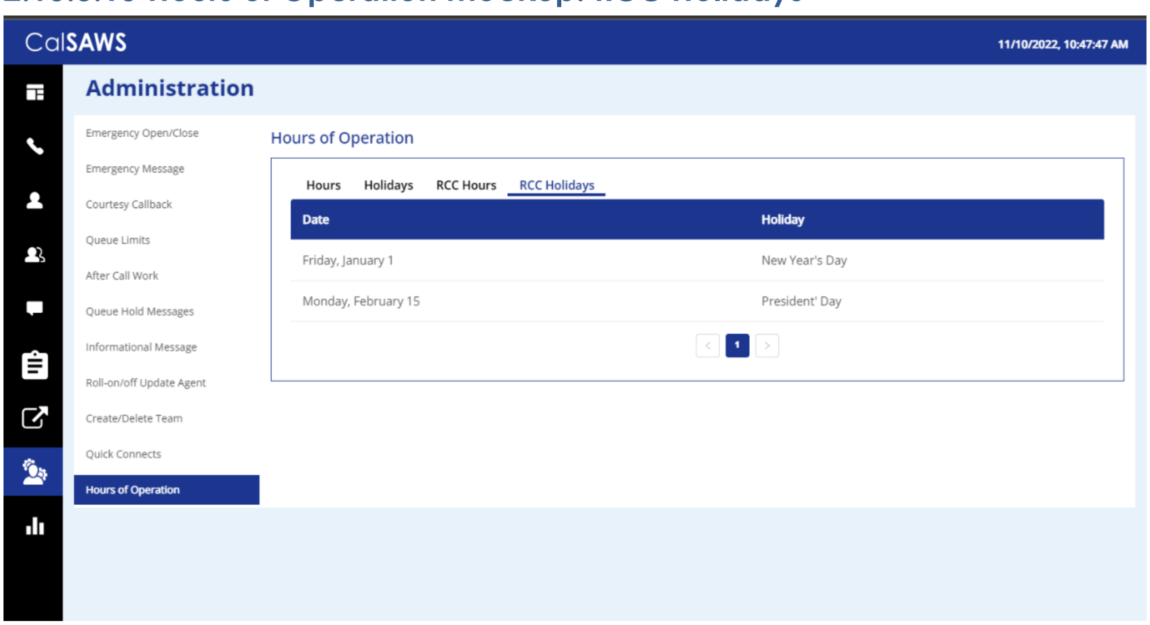


Figure 69Hours of Operation: RCC Holidays

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 Close	None

Queue Hold Message	Message added Message deleted Message edited	Message id
Courtesy Callback	Enabled Disabled Minutes changed Time slot range changed	None
Scheduled Callback	Enabled Disabled Time slot added Time slot deleted Callbacks changed	None
Queue Limits	Queue length changed	None
After Call Work Limit	Limit changed	None
Roll-on / Roll-off	Search performed Agent updated Roll-on agent Roll-off agent	Search value Agent id
Emergency Message	Message added Message deleted Message edited Current message changed	Message id
Informational Message	Message added Message deleted Message edited Current message changed	Message id
Supervisor Email Notification	Notification enabled Notification disabled Notification email changed	Changed email address
Create/Delete Team	Create new team Edit team name Delete team	Team id
Quick Connects	Add new Quick Connection Edit Quick Connect 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:~~ ~~- Number of calls waiting in queue~~ ~~- Longest wait time for a call in a queue~~ ~~- After Call Work state time limit for an agent~~ ~~- Number of agents available to take calls~~ ~~- Agent Rolled Over Not Ready (RONA) state~~ ~~This is County configurable through the administration page.~~	~~Section 2.12: 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: Scheduled Callback configuration through Administration page~~ ~~Section 2.7: 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: The Counties will be responsible for the management of the following:	Agent Routing Profiles: - Section 2.9: Routing profile is configured for an Agent as part of Roll-on Resource roll-on/roll-off - Section 2.9

	- Work force management - Agent routing profiles - Use of the reporting solution - Resource roll-on/roll-off - Create/Delete/Edit Teams CalSAWS will be responsible for the management of the following: - IVR changes - Direct database access - IVR build - Adding/removing queues The Counties and CalSAWS will both have the ability to independently access the following: - Emergency closure - Queue hold messages - Office hour changes - Queue limits - After call work time limit - Informational messages - Emergency messages - Supervisor email notifications - Remote closure of the county Customer Service Center - Amazon Quick Connects	Create/Delete/Edit Teams - Section 2.13 Create / Delete Team Independently access the following: Emergency closure - Section 2.3 Queue hold messages - Section 2.4 Office hour changes - Section 2.15Administration page Queue limits - Section 2.7 After call work time limit - Section 2.8 Informational messages - Section 2.11 Emergency messages - Section 2.10 Supervisor email notifications - Section 2.12 Remote closure of the county - Section 2.3 Amazon Quick Connects - 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: - First Name - Last Name - County Email Address - Windows Login ID - Team - Role	Section 2.9: 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: 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: - English - Spanish	Custom Queue Hold Messages - Section 2.4

	- Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - 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: 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: 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: 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: 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: - English - Spanish - Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao 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: - English - Spanish - Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao This message plays after language selection in the IVR.	Section 2.11: Informational Message configuration through Administration page

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-227571

GR Hearing Notices

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/23/2022	0.1	Initial Draft	Ayman Hussein
8/24/2022	1.1	Updated the doc data info as per R6 request in CER 249066	Ayman Hussein
9/19/2022	1.2	Updated the Table of Content as per QA request.	Ayman Hussein
10/19/2022	1.3	Updated Doc Data new column names to be more clear and indicated that this change is only for LA County.	Ayman Hussein
11/14/2022	1.4	Updated the following: • Added assumption #3 • Removed Assumption #6 since there is updates to the Doc_DATA table values • Added assumption #9 • Updated the existing languages in sections 2.1 & 2.2 • Updated section 2.1.3 & 2.2.3 to add the highlighted clarifications • Updated section 3 #1 to point to the correct file name • Highlighted the PRIMARY_PH_NUM value in red for GW Glendale district in the supported doc #1 to add missing space in the DOC_DATA table • Removed references to GR_CHANGE_TEMPLATE since there are no GROW NOAs currently linked to this template hence cannot be tested	Ayman Hussein
11/23/2022	1.5	Updated the following: • Added assumption #10&11 • Updated the screenshots in section 2.2.2 • Removed variable GROWHearingOfficerName as per R6 request to only populate the GROW Hearing Officer Phone Number. • Updated section 3, English PDF mockup and renamed it	Ayman Hussein

		to"GR_TERMINATION_TEMPLATE_Variable Updates_Content Revision 3 EN.pdf"and attached it to Jira. • Added SP mockup in section 3	

Table of Contents

1 OVERVIEW

This SCR is to add the GROW hearing officer contact information on the GROW hearing notices. This change is only for LA County.

1.1 Current Design

The GROW Hearing Notices are showing information for the GR Hearing Officer and not the GROW Hearing Officer. GR and GROW Hearing Notices were updated in July 2020; however, the dynamic information on both notices is different. The change eliminated the GROW Hearing information and is incorrectly informing customers of their hearing officer contact information.

1.2 Requests

1) Add the GROW hearing officer contact information on the GROW hearing notices

1.3 Overview of Recommendations

1) Replace the GR officer contact information with the GROW hearing officer contact information on the GROW Discontinuance ~~and Benefit Change NOA~~ template~~s~~.
    a. ~~GR_CHANGE_TEMPLATE XDP~~
    b. GR_TERMINATION_TEMPLATE XDP
2) Update the DOC_DATA table with updated information.

    Update the values on the following existing columns:

    - DEPTY_DIST_PH_NUM
    - DIST_DIR_PH_NUM
    - DIV_CHIEF_PH_NUM
    - LIAISON_NAME
    - LIAISON_PH_NUM
    - SUPRVSR_PH_NUM

    Add the following new columns and values associated to them:

    - GR HEARING OFFICER NAME
    - ~~GR~~ GR_Hearing_Worker_Title
    - GROW HEARING OFFICER NAME
    - ~~PH_NUM~~ GROW_Hearing_PH_NUM

    Insert the following new rows and values associated to them:

    - CSC IV
    - CSC V

1.4 Assumptions

1) The form number ABP 4023 is used for GR dynamic NOAs. The form number itself is dynamic and based on the type of NOA. For example, a GR benefit discontinuous will populate form number ABP 4023-T.
2) These updates are only completed in English, Spanish.
3) Threshold languages will be updated with SCR CA-252639.
4) The GR_TERMINATION_TEMPLATE ~~and GR_CHANGE_TEMPLATE~~ currently not available in CalSAWS in Arabic, Hmong, and Lao. This effort will not update or add these languages.
5) Both GR and GROW programs use the same dynamic template and only the verbiage for GROW program will be updated with this SCR.
6) ~~There are no updates to the population logic of the information in the DOC_DATA table.~~
7) Since all other threshold languages for these templates are suppressed, customers who do not speak English and/or Spanish will receive a GEN1365.
8) The updates to DOC_DATA table are only made to LA County (County Code – 19).
9) The existing generation condition for the GROW fragment section will not be changed with this effort.
10) Currently the SUPRVSR_PH_NUM does not populate on the Denial/Termination GROW Hearing notices.
11) The updates to DOC_DATA column names and removal of column SUPRVSR_PH_NUM will be done with SCR CA-252639.

2 RECOMMENDATIONS

~~2.1 Update the GR_CHANGE_TEMPLATE~~

~~2.1.1 Overview~~

~~The GR_CHANGE_TEMPLATE is used for dynamic GR & GROW NOA fragments for benefit changes.~~

~~**State Form/NOA:** N/A~~

~~**Existing Template Revision Date:** ABP 4023 (revision N/A)~~

~~**Current Program(s):** General Relief & GROW~~

~~**Includes NA Back 9:** No~~

~~**Existing Languages:**~~

~~English, Spanish~~

~~2.1.2 Description of Change~~

~~Update the GROW hearing information on the GR_CHANGE_TEMPLATE to reflect the contact information for GROW Hearing officer.~~

~~**GROW Screenshots/Changes on the Hearing Information section:**~~

~~**Before:**~~

Hearing Officer Phone Number:
{LiaisonPhoneNumber}

~~**After:**~~

Hearing Officer Phone Number:
{GROWHearingOfficerName}
{GROWHearingOfficePhoneNumber}

~~**Before:**~~

Please call {LiaisonName} at
{LiaisonPhoneNumber} if:
1. You have trouble reading this notice.
2. You do not understand this notice.
3. You think this is a mistake.
4. You have any questions.

~~**After:**~~

Please call {GROWHearingOfficerName} at
{GROWHearingOfficerPhoneNumber} if:
1. You have trouble reading this notice.
2. You do not understand this notice.
3. You think this is a mistake.
4. You have any questions.

~~2.1.3 Update Fragment Variable Population~~

~~The following variables are updated/removed/added on the GR_CHANGE_TEMPLATE for GROW fragment section.~~

~~**Variable Name**~~	~~**Add/Remove/Update**~~	~~**Population**~~	~~**Formatting**~~
~~**{LiaisonPhoneNumber}~~	~~Remove~~	~~Populates with GR LIAISON_PH_NUMBER on GROW fragment section from DOC_DATA table.~~	~~Arial Font Size 10~~
~~**{LiaisonName}~~	~~Remove~~	~~Populates with GR LIAISON_NAME on the GROW fragment section from DOC_DATA table.~~	~~Arial Font Size 10~~
~~{GROWHearingOfficerName}~~	~~Add~~	~~Populates with GROW_HEARING_OFFICER_NAME from DOC_DATA table.~~ ~~***Note:** This is a new column.*~~	~~Arial Font Size 10~~
~~{GROWHearingOfficerPhoneNumber}~~	~~Add~~	~~Populates with the GROW officer PH_NUM from DOC_DATA table.~~ ~~***Note:** This is a new column.*~~	~~Arial Font Size 10~~

~~please refer to supporting document #2 for the highlighted variable updates~~

2.2 Update the GR_TERMINATION_TEMPLATE

2.2.1 Overview

The GR_TERMINATION_TEMPLATE is used for dynamic GR NOA fragments for discontinuances.

State Form/NOA: N/A

Existing Template Revision Date: ABP 4023 (revision N/A)

Current Program(s): General Relief & GROW

Includes NA Back 9: No

Existing Languages:

English, Spanish

2.2.2 Description of Change

Update the GROW hearing information on the GR_TERMINATION_TEMPLATE to reflect the contact information for GROW Hearing officer.

GROW Screenshots/Changes on the Hearing Information section:

EN Before:

Hearing Officer Phone Number:
{LiaisonPhoneNumber}

EN After:

Hearing Officer Phone Number:
{GROWHearingOfficerPhoneNumber}

EN Before:

Please call {LiaisonName} at {LiaisonPhoneNumber} if:

1. **You have trouble reading this notice.**
2. **You do not understand this notice.**
3. **You think this is a mistake.**
4. **You have any questions.**

EN After:

Please call GROW Hearing Officer at {GROWHearingOfficerPhoneNumber} if:

1. **You have trouble reading this notice.**
2. **You do not understand this notice.**
3. **You think this is a mistake.**
4. **You have any questions.**

SP Before:

Número de teléfono del oficial encargado de la audiencia:
{LiaisonPhoneNumber}

SP After:

Número de teléfono del oficial encargado de la audiencia:
{GROWHearingOfficerPhoneNumber}

SP Before:

Por favor llame a {LiaisonName} al {LiaisonPhoneNumber} si:

1. **Tiene problemas para leer este aviso.**
2. **No entiende este aviso.**
3. **Cree que esto es un error.**
4. **Tiene alguna pregunta.**

SP After:

Por favor llame al Oficial de Audiencias de GROW al {GROWHearingOfficerPhoneNumber} si:

1. **Tiene problemas para leer este aviso.**
2. **No entiende este aviso.**
3. **Cree que esto es un error.**
4. **Tiene alguna pregunta.**

2.2.3 Update Fragment Variable Population

The following variables are updated/removed/added on the GR_TERMINATION_TEMPLATE for GROW fragment section.

Variable Name	Add/Remove/Update	Population	Formatting
**{LiaisonPhoneNumber}	Remove	Populates with GR LIAISON_PH_NUMBER on the GROW fragment section from DOC_DATA table.	Arial Font Size 10
**{LiaisonName}	Remove	Populates with GR LIAISON_NAME on the	Arial Font Size 10

		GROW fragment section from DOC_DATA table.	
~~{GROWHearingOfficerName}~~	~~Add~~	~~Populates with GROW_HEARING_OFFICER_NAME from DOC_DATA table.~~ ~~***Note:** This is a new column.*~~	~~Arial Font Size 10~~
{GROWHearingOfficerPhoneNumber}	Add	Populates with the GROW officer PH_NUM from DOC_DATA table. ***Note:** This is a new column.*	Arial Font Size 10

please refer to supporting document #3 for the highlighted variable updates

2.3 Update the DOC_DATA Table

2.3.1 Overview

The DOC_DATA table contains information that is used to populate addresses, phone numbers, and names of district offices/personnel. The information from this table is pulled to populate for hearing information and other similar NOAs.

2.3.2 Description of Change

2.3.3 Update Values in Existing DOC_DATA Columns

The following list shows what data in the DOC_DATA table that needs to be updated, please refer to **supporting document #1** for the updates with red text:

Update the values on the following existing columns:

- DEPTY_DIST_PH_NUM
- DIST_DIR_PH_NUM
- DIV_CHIEF_PH_NUM
- LIAISON_NAME
- LIAISON_PH_NUM
- SUPRVSR_PH_NUM

Add the following new columns and values associated to them:

- GR HEARING OFFICER NAME
- ~~GR~~ GR_Hearing_Worker_Title
- GROW HEARING OFFICER NAME

- ~~PH_NUM~~ GROW_Hearing_PH_NUM

Insert the following new rows and values associated to them:

- CSC IV
- CSC V

Technical Note: The new district name rows (CSC IV & CSC V) added in DOC_DATA *table will populate the LIAISON_PH_NUM (phone number) of the specified individuals as indicated on Supporting document#1. This information will populate on the GR section (Not Grow section) of GR_TERMINATION_TEMPLATE and GR_CHANGE_TEMPLATE.*

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Excel Sheet	Revised DOC_DATA table	DOC_DATA_REVISED (by GR GROW)_11-2022_Content Revision 2.xlsx
~~2~~	~~PDF Mockup~~	~~Variable updates highlighted on GR_CHANGE_TEMPLATE~~	~~GR_CHANGE_TEMPLATE_Variable Updates.pdf~~
3	EN PDF Mockup	Variable updates highlighted on GR_TERMINATION_TEMPLATE	GR_TERMINATION_TEMPLATE_Variable Updates_Content Revision 2 EN.pdf
4	SP PDF Mockup	Variable updates highlighted on GR_TERMINATION_TEMPLATE	GR_TERMINATION_TEMPLATE_Variable Updates_Content Revision 2 SP.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; I. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	Update the GROW section in GR_TERMINATION_TEMPLATE with appropriate GROW variables.

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

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

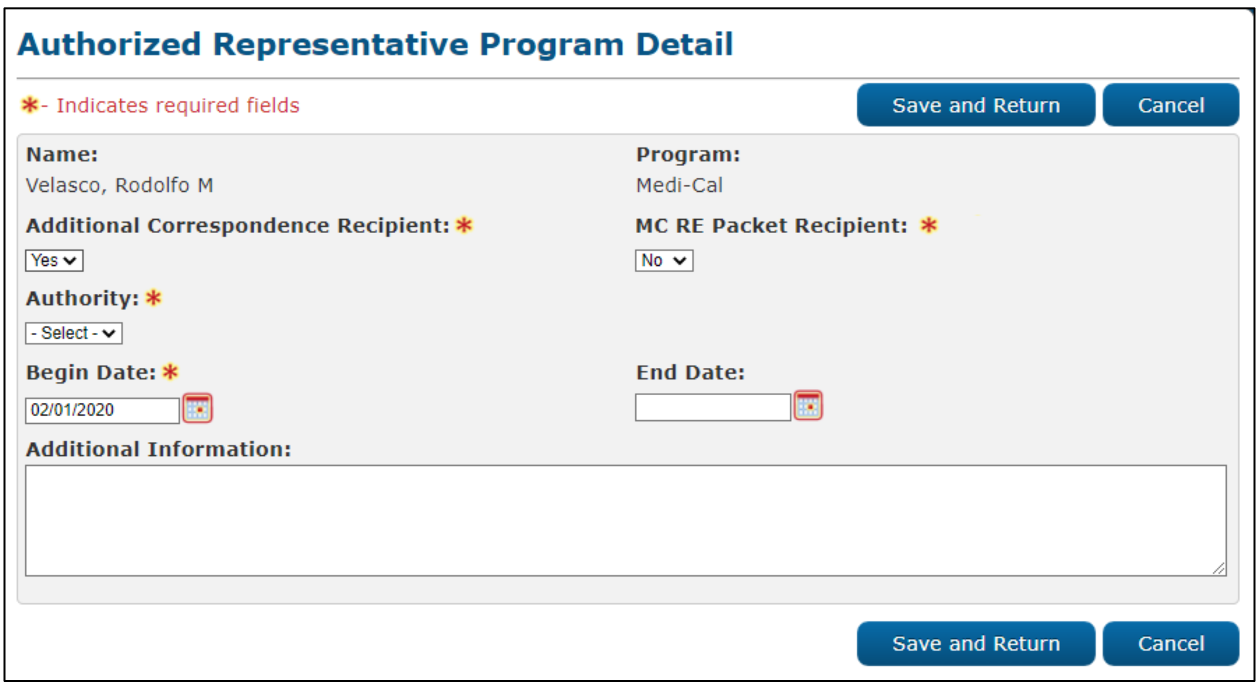


Figure 2.1.2.1 – Authorized Representative Program Detail Page

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

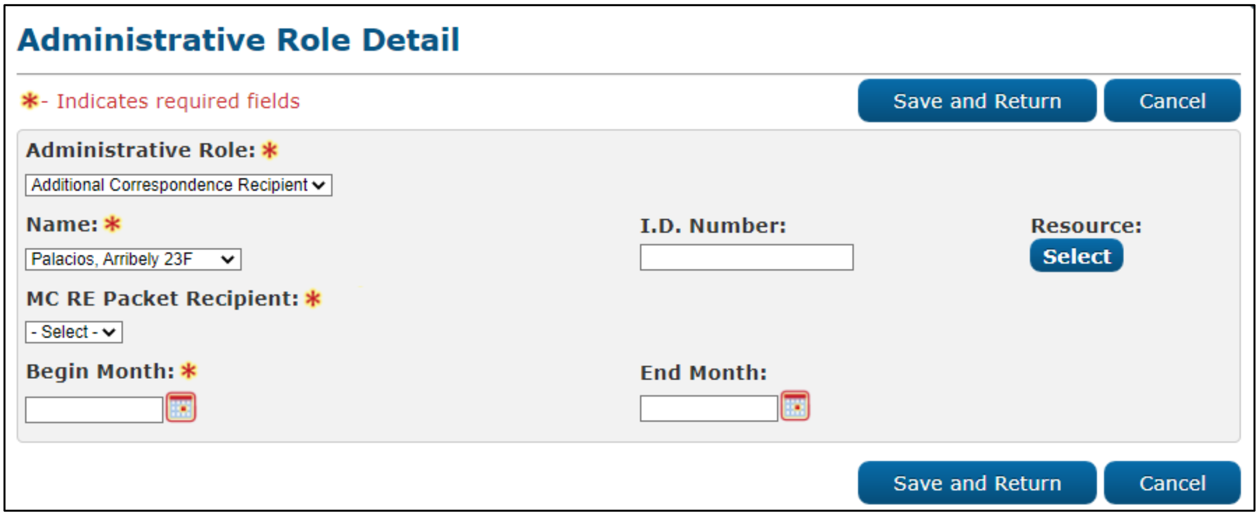


Figure 2.2.2-1 – Administrative Role Detail Page

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-236332

CalFresh Benefit Replacement due to Electronic Theft

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	Carlos A., John B., Sheryl E., Sidhant G., Claudia P., Kapil S.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/20/2021	1.0	Initial Version	Jimmy Tu
5/10/2022	1.1	Section 2.1.3 #3 – Set pay code to 'ET' on the back end to leverage existing fund codes #6 – Additional validation for CF replacements to only be replaced 2x every 6 months. Section 2.2.2 #1 rename skimming and scam Section 2.3.2 #1/#2 – Update to send replacement CF benefits due to ebt theft as cash instead of food. #3 – Update JVW Jobs	Jimmy Tu
7/6/2022	1.2	Section 2.5 and 2.6 added for new fund codes for LA County as well as IPT. Updated Section 2.2 to include CTCR to add new pay code.	Jimmy Tu
10/11/2022	1.3	Updated Section 2.5 and 2.6 to include Fund Codes and IPT from CA-210234	Jimmy Tu
10/19/2022	1.4	Updated Section 2.1.3 #3	Jimmy Tu
11/7/2022	1.5	Section 2.3.2 #1 #2. Updated batch job numbers.	Jimmy Tu
11/10/2022	1.6	Updated Section 1.3 #8, 2.5.2 and 2.6.2 #1, Section 3.0 #1	Jimmy Tu

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1 OVERVIEW

This document describes the changes needed for the new CalFresh benefit replacement policy in accordance with Ortega v. Johnson (2020) as it relates to electronic benefit theft, inclusive of benefit theft via skimming and scamming. Effective upon release of this letter, CWDs are responsible for replacing CalFresh food benefits that have been stolen via electronic theft.

The system will claim all these replaced issuances based on CFL 21/22-61.

1.1 Current Design

CalFresh Electronic theft benefit replacements (for skimming/scamming) cannot be done in CalSAWS today. Currently CalSAWs counties are replacing these benefits outside of CalSAWs and issuing directly from FIS.

1.2 Requests

This request is to update the system to allow CalFresh EBT benefits to be replaced due to Electronic Theft with the EBT Benefit Type Code of "Electronic Theft Replacement Cash Benefits" (ETRCB).

1.3 Overview of Recommendations

1. Update the Issuance Detail page to make the "Status Reason" field a required field if the replace button is clicked for CalFresh.
2. Update the Issuance Detail page to set the Aid Code to 99 – Electronic Theft Replacement Cash Benefit when replacing an Issuance due to EBT Theft.
3. Update the EBT host-to-host interface for rush issuances to send the 'ETRCB' benefit type when a CalFresh issuance is replaced.
4. Update Code Detail tables category 623 to include new pay code and category 10547 to rename skimming and scam.
5. Update EBT and Claiming Batch jobs.
6. Add the new Fund Codes in the system to store the accounting string information for CalFresh EBT Theft Replacements for Los Angeles and Riverside Counties only.
7. Add the new Pay Code in the system for CalFresh EBT Theft Replacements due to electronic theft.
8. Perform the interface file testing for LA, Riverside, San Bernardino, Merced, and Migration Counties new CF EBT Theft Replacement fund codes.
9. Add WtW/REP/Cal-Learn Gain Repayment/Refunds to the Fund Code table for Los Angeles County only.
10. End Date 3 fund codes for WTW/REP/CL CalWORKs Repayments/Refunds for LA County only.
11. Perform Interface Partner Testing for new WTW/REP/CL Repayment/Refund Fund Codes for LA County only.

1.4 Assumptions

1. Reports updates to Temp 2313 and Temp 2035 will be done with SCR CA-239721 and Forms updates to EBT 2259, EBT 2259A, WI 100072A, WI 10072B, and M44-350k will be done with separate SCR CA-209721.
2. The system will automatically populate journal entries upon when a worker replaces an Issuance on the Issuance Detail page and clicks the “Save” button. No system updates are required. Journal Entry will state the following (sample): “Replacement issuance of Supplemental Benefit in the amount of 459.00 for the benefit month of 05/2022 and issuance method of EBT.”
3. With this new CalFresh benefit replacement policy in accordance with Ortega v. Johnson (2020) as it relates to electronic benefit theft, reference to EBT Theft in this design document is inclusive of benefit theft via skimming and scam.

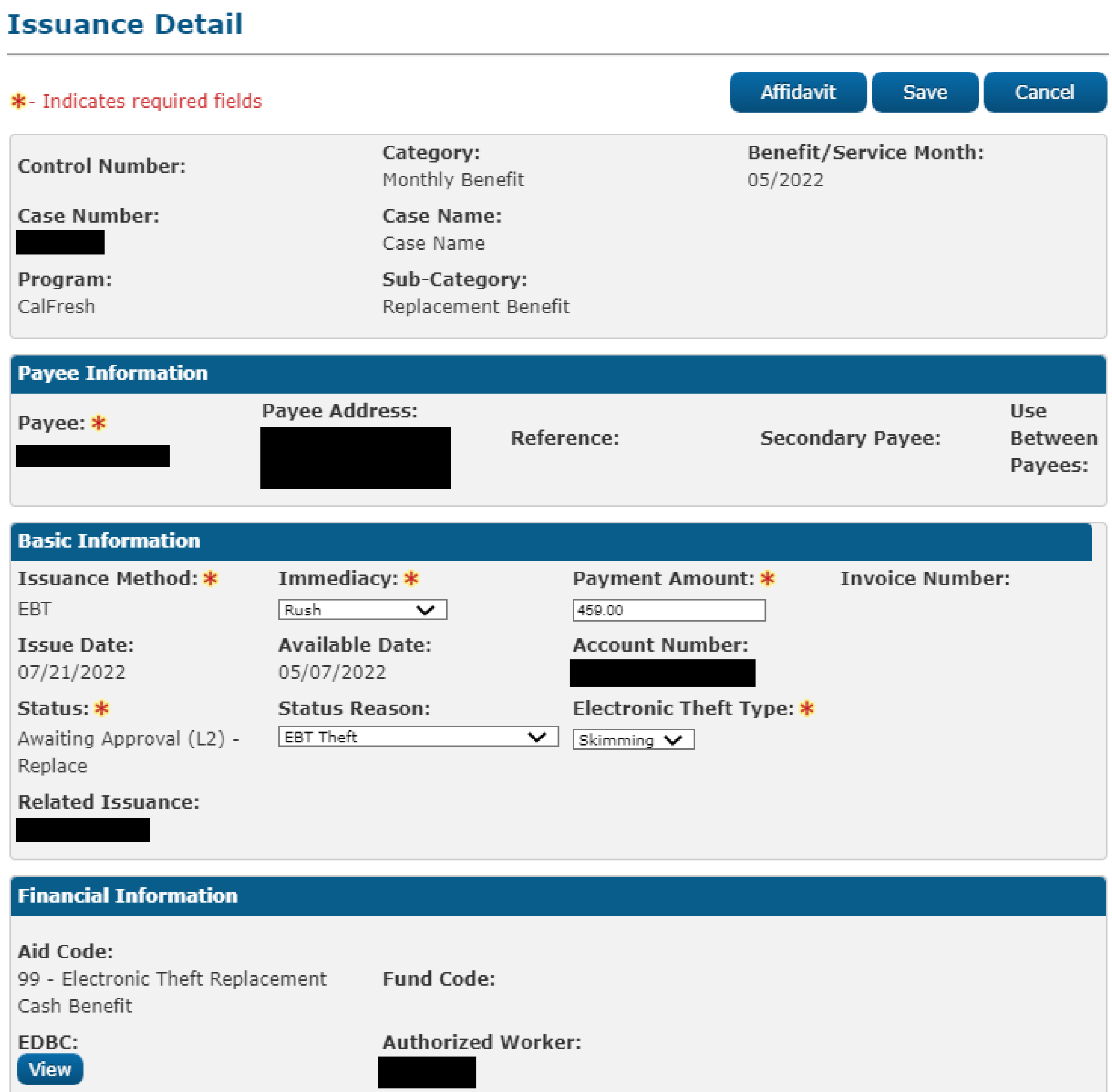
2 RECOMMENDATIONS

2.1 Issuance Detail Page

2.1.1 Overview

The Issuance Detail Page allows users to add edit or view issuances. It also allows users to replace EBT benefits and this SCR is to update the Issuance Detail page replacement process for EBT Thefts.

2.1.2 Issuance Detail Page Mockup



Issuance Detail

*- Indicates required fields

Affidavit | Save | Cancel

Control Number:

Category: Monthly Benefit

Benefit/Service Month: 05/2022

Case Number: [redacted]

Case Name: Case Name

Program: CalFresh

Sub-Category: Replacement Benefit

Payee Information

Payee: * [redacted]

Payee Address: [redacted]

Reference:

Secondary Payee:

Use Between Payees:

Basic Information

Issuance Method: * EBT

Immediacy: * Rush

Payment Amount: * 459.00

Invoice Number:

Issue Date: 07/21/2022

Available Date: 05/07/2022

Account Number: [redacted]

Status: * Awaiting Approval (L2) - Replace

Status Reason: EBT Theft

Electronic Theft Type: * Skimming

Related Issuance: [redacted]

Financial Information

Aid Code: 99 - Electronic Theft Replacement Cash Benefit

Fund Code:

EDBC: View

Authorized Worker: [redacted]

Figure 2.1.1 – Issuance Detail Page – Replace Issuance

2.1.3 Description of Changes

1. Update the Issuance Detail page to make the "Status Reason" field a required field when the replace button is clicked for CalFresh.
2. Update the Issuance Detail page to set the Aid Code to 99 – Electronic Theft Replacement Cash Benefit when the following is true for a replaced issuance:
    a. Issuance Sub Type Category: Replacement Benefit
    b. Status Reason: EBT Theft
3. Update the Issuance Detail page to set the Pay Code to the new pay code "CalFresh EBT Theft Replacements" when the following is true for a replaced issuance:
    a. Issuance Sub Type Category: Replacement Benefit
    b. Status Reason: EBT Theft
    c. Program: CalFresh
    d. Original Issuance's Sub-Category Code is not 'SUAS' (Replaced Issuance)
    Note: This pay code will only be set on back end. This is like the functionality that we use today for SUAS and WINS.
4. Update the EBT host-to-host interface for rush issuances to send the 'ETRCB' benefit type when a CalFresh issuance is replaced due to EBT Theft.
5. Claim issuances as non-Federal when the following are true:
    a. Issuance Sub Type Category: Replacement Benefit
    b. Status Reason: EBT Theft
    c. Program: CalFresh
6. Update the Issuance Detail page to display the 'Electronic Theft Type' as a required field when the following is true:
    a. Status Reason = EBT Theft
    b. Program = CalFresh

2.1.4 Page Location

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

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

No Change.

2.1.7 Page Usage/Data Volume Impacts

No Change.

2.2 Code Table Change Request

2.2.1 Overview

This CTCR is to update CT 10547 to rename the electronic theft type field dropdowns on the Issuance Detail page.

2.2.2 Description of Change

1. Update Category 10547 to rename the following records:

Code Number Identifier	Decode Name Before:	Decode Name After:
SC	AB 2313 – Scam	Scam
SK	AB 2305 – Skimming	Skimming

2. Update Category 623 to include the following new pay code:
   a. CalFresh EBT Theft Replacements

Note: Refer to Pay Code 'Electronic Theft Replacement Cash Benefits' (ET) for reference columns.

2.2.3 Estimated Number of Records Impacted/Performance

2 records impacted.

2.3 Batch Changes

2.3.1 Overview

These batch updates will send the ETRCB Benefit Type when a CalFresh issuance is replaced with status reason of EBT Theft and Aid Code 99. These will be sent out via the Daily EBT outbound Cash Writer interface and NOT the Daily EBT outbound Food Writer Interface. This will also require further updates to the Journal Voucher Writer (JVW) jobs.

2.3.2 Description of Change

1. Update daily EBT outbound Cash Writer interface (POxxF403) to send the 'ETRCB' benefit type on the file for when the following are true:
    1. Issuance Sub Type Category: Replacement Benefit
    2. Status Reason: EBT Theft
    3. Program: CalFresh
2. Update daily EBT outbound Food Writer interface (POxxF401) to not send the 'ETRCB' benefit type on the file for when the following are true:
    1. Issuance Sub Type Category: Replacement Benefit
    2. Status Reason: EBT Theft
    3. Program: CalFresh
3. Update the Ecaps Expenditure Reports Writer (PO19F410, PO19F412) to include the following issuances:
    1. Program: CalFresh
    2. Benefit Type Code: Electronic Theft Replacement Cash (ETRCB)

2.3.3 Execution Frequency

No Change.

2.3.4 Key Scheduling Dependencies

No Change.

2.3.5 Counties Impacted

All 58 counties impacted.

2.3.6 Data Volume/Performance

No Change.

2.3.7 Failure Procedure/Operational Instructions

No change.

2.4 Issuance Claiming Batch

2.4.1 Overview

This batch job will process Issuances associated to replaced CalFresh Benefits that have a Status Reason of 'EBT Theft.'

2.4.2 Description of Changes

1. This process will identify all Issuances that meet the following criteria:
   - The Issuance is associated to the CalFresh program.
   - Issuance has a Status Reason of 'EBT Theft'.
   - Issuance has a Sub Type Category of "Replacement Benefit"
2. This process will set the Payment Amount as Non-Federal based on the Aid Code of the Issuance.

2.4.3 Programs Impacted

CalFresh.

2.4.4 Execution Frequency

No Change.

2.4.5 Key Scheduling Dependencies

No Change.

2.4.6 Counties Impacted

All 58 counties impacted.

2.4.7 Data Volume/Performance

No Change.

2.4.8 Failure Procedure/Operational Instructions

No Change.

2.5 Fund Code Determination

2.5.1 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 CalFresh EBT Theft Replacements. Recommendations 3 & 4 will add the appropriate funding codes and accounting strings for LA County for WTW/REP/CL Repayments/Refunds.

2.5.2 Description of Changes

1) Add the new Fund Codes in the system to store the accounting string information for CalFresh EBT Theft Replacements.
    a. **NOTE:** Please refer to the attached CA-236332 Fund Codes for EBT Theft Replacement.xlsx under **Section 3.0 #1** for the appropriate fund codes and accounting string information.
    b. Note: Stanislaus does not require fund code updates for this SCR.
2) Add the new Pay Code in the system for CalFresh EBT Theft Replacements.
    a. **NOTE:** Please refer to the attached CA-236332 Fund Codes for EBT Theft Replacement.xlsx under **Section 3.0 #1** for the appropriate fund codes and accounting string information.
3) Add WtW/REP/Cal-Learn Gain Repayment/Refunds to the Fund Code table for Los Angeles County only.
    a. **NOTE:** Please refer to the attached CA-236332 Fund Codes for WTW, RE, CL Repayment/Refunds.xlsx file under **Section 3.0 #2** for the appropriate fund codes and accounting string information for each county.
4) End Date 3 fund codes for WTW/REP/CL CalWORKs Repayments/Refunds for LA County only.
    a. **NOTE:** Please refer to the attached CA-236332 Fund Codes for WTW, RE, CL Repayment/Refunds.xlsx file under **Section 3.0 #2** for the appropriate fund codes and accounting string information for each county.

2.6 County Interface Partner Testing

2.6.1 Overview

Recommendation 1: County Interface Partner Testing for LA, Riverside, San Bernardino, Merced, and Migration Counties for new CF EBT Theft Replacement Fund Codes.
Recommendation 2: County Interface Partner Testing for new Fund Codes for WTW/REP/CL Repayments/Refunds for LA County only.

2.6.2 Description of Changes

1. Perform the interface file testing for LA County, Riverside, Merced, and San Bernardino's new fund codes.
    a. Perform interface file testing with auditor controller for Migration Counties using Kern's Fund Code.
2. Perform Interface Partner Testing for new WTW/REP/CL Repayment/Refund Fund Codes for LA County only.

2.6.3 Counties Impacted

Alameda, Alpine, Amador, Butte, Calaveras, Colusa, Contra Costa, Del Norte, El Dorado, Fresno, Glenn, Humboldt, Imperial, Inyo, Kern, Kings, Lake, Lassen, Los Angeles, Madera, Marin, Mariposa, Mendocino, Modoc, Mono, Monterey, Napa, Nevada, Orange, Placer, Plumas, Riverside, Sacramento, San Benito, San Diego, San Francisco, San Joaquin, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Sierra, Siskiyou, Solano, Sonoma, Sutter, Tehama, Trinity, Tulare, Tuolumne, Ventura, Yolo, Yuba

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Section 2.5	Fund Code Mapping Excel for CalFresh EBT Theft Replacements	CA-236332 Fund Codes for EBT Theft R
2	Section 2.5	Fund Code for WTW/REP/CL Repayments/Refunds	CA-236332 Fund Codes for WTW,RE,CL

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.4.4	The LRS shall include the ability to process a mass update that involves the development of new policy in response to changes in federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	This requirement is being met by this SCR as we are updating the CalSAWS system to send the ETRCB benefit type for EBT host-to-host interface and update the pages to have the required fields and Aid Code for new policy that is stated in ACL 21-133.

5 MIGRATION IMPACTS

None.

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-240478

ACL 14-49 - Do Not Remove Restaurant Meals Indicator When CF is Closed for Non-Financial Reason

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/09/2022	1.0	Initial Draft	Tom Lazio
11/10/2022	2.0	Content Revision to include Negative Action EDBC as part of SCR	Tom Lazio

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1 OVERVIEW

The purpose of this SCR is to prevent the Restaurant Meals indicator from being set to 'No' when EDBC discontinues a CalFresh (CF) program for non-financial reasons or a negative action and CF HH is still eligible for restaurant meals program.

1.1 Current Design

The CF EDBC sets the 'Restaurant Meals indicator' to 'Yes' when a CF household (HH) is eligible to the restaurant meals program for being homeless or has an elderly or disabled member. If the EDBC discontinues a CF program for non-financial causes such as non-compliance in the following month or user performs a Negative Action EDBC, the EDBC would skip the 'Restaurant Meals' eligibility determination and the 'Restaurant Meals indicator' would be defaulted to 'No'.

1.2 Requests

The CF EDBC logic needs to be updated to set the 'Restaurant Meals indicator' based on the prior recent EDBC determination when the CF program is discontinued for non-financial reasons or user does a Negative Action EDBC and the 'Restaurant Meals' eligibility determination is skipped.

1.3 Overview of Recommendations

1. Update CalFresh EDBC logic to set the Restaurant Meals indicator equal to the prior recent EDBC determination when the program is discontinued due to non-financial reasons and the 'Restaurant Meals' eligibility determination is skipped.

2. Update Negative Action EDBC logic to set the Restaurant Meals indicator equal to the prior recent EDBC determination when the program is discontinued.

1.4 Assumptions

1. No change to the existing EDBC rules for 'Restaurant Meal' eligibility determination.

2. Non-Financial rule check is before 'Restaurant Meal' eligibility determination in EDBC rule sets.

3. The Restaurant Meal' eligibility determination will be completed, and indicator set when EDBC fails for financial reasons.

4. Negative Action EDBC fails the whole program and both non-financials and financials logics are skipped.

5. Restaurant Meals indicator will not be set for Manual EDBCs.

2 RECOMMENDATIONS

2.1 CF EDBC – Restaurant Meals Indicator

2.1.1 Overview

When the CF program is discontinued for non-financial reasons such as non-compliance or a Negative Action EDBC is performed, the CF rules skip the 'Restaurant Meals' eligibility determination since there is no budget or budget persons calculated for the EDBC.

Therefore, if the EDBC skips the 'Restaurant Meals' eligibility determination due to discontinuing the CF program for non-financial reasons or user does a Negative Action EDBC, set the Restaurant Meals indicator equal to the recent prior EDBC determination value.

2.1.2 Description of Changes

1. Set the "Restaurant Meal' indicator value based on the recent previously 'Accepted and Saved' EDBC Restaurant Meals' indicator value when the current CalFresh program fails the non-financial rules.

2. Set the "Restaurant Meal' indicator value based on the recent previously 'Accepted and Saved' EDBC Restaurant Meals' indicator value when the current CalFresh program fails due to a Negative Action EDBC.

2.1.3 Programs Impacted

CF (includes TCF)

NB

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.29	The LRS shall include a method for COUNTY-specified Users to issue the following cards: a. EBT; b. Temporary paper BIC; and C. Pre-embossed EBT card.	This SCR will update the Restaurant Meals indicator based on the previous EDBC determination when a CalFresh (CF) program is discontinued for non-financial reasons or Negative Action EDBC is performed and CF HH is still eligible for restaurant meals program.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245084

Time Extension of RCA/TCVAP Programs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/04/2022	1.0	Initial Draft	Tom Lazio
08/17/2022	2.0	Updated regulations in Section 2.7.3.2	Phong Xiong
08/18/2022	3.0	Added two more regulation numbers to the denial part of Section 2.7.3.2	Phong Xiong
10/11/2022	4.0	Content Revision – Added new recommendation for one time mass mailer	Phong Xiong

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1 OVERVIEW

Per All County Welfare Directors Letter (ACWDL) dated May 27, 2022, time on aid for Refugee Cash Assistance (RCA) and Trafficking and Crime Victims Assistance Program (TCVAP) programs have been extended from eight months to twelve months for recipients whose eligibility date is on or after October 1, 2021. This SCR will accommodate the need of extending time on aid for active RCA participants from 8 months to 12 months as well as update notices for RCA and TCVAP time extensions.

1.1 Current Design

Currently CalSAWS allows RCA and TCVAP eligible households (HH) up to 8 months of benefits calculated from the date of application (state funded person) or country entry date (federally funded person).

1.2 Requests

Per ACWDL dated May 27, 2022, CalSAWS EDBC logic must be updated to allow up to 12 months of cash aid instead of 8 months for the RCA programs aided on or after October 1, 2021. Additionally, RCA discontinuance batch sweep jobs and correspondence notices will be updated to reflect the extension of RCA program benefits from 8 months to 12 months.

1.3 Overview of Recommendations

1. Update RCA EDBC rules to close program after 12 months for programs aided on or after October 1, 2021.
2. Update RCA Discontinuance Sweep to find cases where RCA program has reached its 12^{th} month of eligibility instead of 8^{th} month.
3. Update RCA Federal Discontinuance Sweep to create eligibility triggers where RCA persons have completed 12 months of eligibility instead of 8 months.
4. Update RCA State Discontinuance Sweep to create eligibility triggers where TCVAP RCA persons have completed 12 months of eligibility instead of 8 months.
5. Add RS 36 Form to Template Repository.
6. Add new RCA Cash Aid Extension Informing Notice for ongoing RCA cases in a one-time mailer.
7. Update RCA Approval/Denial/Termination Reason Fragment verbiage to reflect 12 months of aid.
8. Create CalSAWS list of discontinued RCA cases due to over income.
9. Create CalSAWS list of discontinued RCA cases due to non-compliance.

1.4 Assumptions

1. The RS 36 form will only be implemented into the Template Repository for the scope of this SCR.

2. Per the ACWDL, county workers will manually rescind the case discontinuance for those who are facing termination at the 8th month of aid beginning May 2022 and for all subsequent time periods, ensuring the maximum (up to 12 months) of cash assistance is issued until this SCR is implemented.
3. The CSF 184 one-time mailer will be sent out in English only. All other languages needed will have the Gen 1365 attached.
4. For Los Angeles County, the auto generation of the REP program will not be impacted by this SCR.
5. SCR CA-248855 will implement the RS 3, RS 3A, and RS 18 forms into CalSAWS.
6. There will be no effective dating logic for the existing RCA Approval/Denial/Termination NOAs.

2 RECOMMENDATIONS

2.1 Update RCA EDBC Rules

2.1.1 Overview

Per ACWDL dated May 27, 2022, RCA EDBC rules that currently allow up to 8 months of cash aid for eligible recipients must be updated to allow up to 12 months for program persons who were aided on or after October 1, 2021.

2.1.2 Description of Changes

1. Update RCA EDBC rules to calculate time on aid based on 12 months instead of 8 months for federal and state funded program persons aided on or after October 1, 2021.

2.1.3 Programs Impacted

RCA

2.1.4 Performance Impacts

N/A

2.2 RCA Discontinuance Sweep job (PB00E128)

2.2.1 Overview

This batch sweep will find all cases where an RCA program has reached its 8th month of eligibility.

The batch will be updated to trigger EDBC after 12 months instead of 8 months.

2.2.2 Description of Change

1. Update the batch logic to trigger EDBC after the participant has been active for 12 months instead of 8 months.
2. Create a Batch Schedule Change Request (BSCR) to turn on the batch job.

2.2.3 Execution Frequency

Monthly – Batch 10-day cutoff.

2.2.4 Key Scheduling Dependencies

Before Batch EDBC.

2.2.5 Counties Impacted

CalSAWS counties.

2.2.6 Category

Core job.

2.2.7 Data Volume/Performance

N/A.

2.2.8 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…)

2.3 RCA Federal Discontinuance Sweep (PB00E126)

2.3.1 Overview

This batch sweep will create eligibility triggers for active RCA persons with aid code as '01' and have completed 8 months from the date of entry.

The batch will be updated to trigger EDBC when approaching 12 months instead of 8 months of benefits.

2.3.2 Description of Change

1. Update the batch logic to trigger EDBC after the participant has been active for 12 months instead of 8 months.
2. Create a BSCR to turn on the batch job.

2.3.3 Execution Frequency

Monthly – Batch 10-day cutoff.

2.3.4 Key Scheduling Dependencies

Before Batch EDBC.

2.3.5 Counties Impacted

CalSAWS counties.

2.3.6 Category

Core job.

2.3.7 Data Volume/Performance

N/A.

2.3.8 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…)

2.4 RCA State Discontinuance Sweep (PB00E125)

2.4.1 Overview

This batch sweep will create eligibility triggers for Active RCA persons with Aid Code=1V and the program has been active for 8 months.

The batch will be updated to trigger EDBC approaching 12 months instead of 8 months of benefits.

2.4.2 Description of Change

1. Update the batch logic to trigger EDBC after the participant has been active for 12 months instead of 8 months.
2. Create a BSCR to turn on the batch job.

2.4.3 Execution Frequency

Monthly – Batch 10-day cutoff.

2.4.4 Key Scheduling Dependencies

Before Batch EDBC.

2.4.5 Counties Impacted

CalSAWS counties.

2.4.6 Category

Core job.

2.4.7 Data Volume/Performance

N/A.

2.4.8 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…)

2.5 Add New RS 36 Form Recommendation

2.5.1 Overview

This form is used informing the customer of the RCA program. It must be signed by the applicant to show that the rights and responsibilities as an RCA applicant have been explained and understood.

State Form: RS 36 (03/08)

Programs: RCA

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: English

2.5.2 Form Verbiage

Create Form XDP

The form is used to inform an RCA applicant of the RCA program.

Form Header: CalSAWS Standard Header (Header_1)

Form Title (Document List Page Displayed Name): Employment and Training Requirements For Refugee Cash Assistance (RCA)

Form Number: RS 36

Include NA Back 9: No

Imaging Form Name: Employment and Training Req for RCA

Imaging Document Type: Rights and Responsibilities

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #1

2.5.3 Form Variable Population

There is no variable population logic for this form.

2.5.4 Form Generation Conditions

1. **Add Form to Template Repository**

   Add this form to the Template Repository.

   Required Document Parameters: Case Number, Customer Name, Program, Language

2. **<u>Add Form Control</u>**

The form will contain the following barcodes.

Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

~~Note: Customers with electronic communications will still receive a paper copy of this correspondence in the mail so that they are also provided a return envelope.~~

3. **<u>Add Form Print Options and Mailing Requirements</u>**

This form will have the following print options:

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

Mailing Requirements:

Mail-To (Recipient): Customer Name selected from Document Parameters

Mailed From (Return): Sending Office

Mail-back-to Address: None

Outgoing Envelope Type: Standard Size Mail

Return Envelope Type: None

Additional Requirements:

Special Paper Stock: None

Enclosures: None

Electronic Signature: Yes

Electronic Signature (IVR/Text): Yes

Check to Sign: No

Post to Self Service Portal (SSP): Yes

2.6 Add New CSF 184 - RCA Cash Aid Extension Information Notice Recommendation

2.6.1 Overview

This notice will be sent out in a mass mailer to inform customers of the extension of their RCA benefits from 8 to 12 months.

State Form/NOA: Attached to ACWDL dated May 27, 2022

Programs: RCA

Attached Forms: None

Forms Category: Form

Template Repository Visibility: All Counties

Languages: English

2.6.2 Form Verbiage

Create Form XDP

An XDP will need to be created for this new form. It will contain the text as displayed in the table below:

Form Header: CalSAWS Standard Header (HEADER_1)

Form Title (Document List Page Displayed Name): Refugee Cash Assistance (RCA) Cash Aid 12-Month Extension Notice

Form Number: CSF 184 ~~(05/2022)~~

Include NA Back 9: No

Imaging Form Name: RCA Cash Aid 12-Month Extension Notice

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #2

2.6.3 Form Variable Population

1. **Add Form Variable Population**

   This new reason fragment contains one variable as shown in the table below:

Variable Name	Population	Formatting*	Editable*/Field Type	Template Repository Population	Populates with Form Generation
Program	Populates with "Refugee Cash Assistance (RCA)" if the person has aid code "01 – RCA" or	Arial Font Size 10	Y/Text field	Yes	Yes, batch

	"Trafficking and Crime Victims Assistance Program (TCVAP)" if the person has aid code "1V - RCA - TCVAP (State)" ***Note:*** *Latest aid code on the case will be pulled from the AID_CODE table to populate.*				

2.6.4 Form Generation Conditions

1. **Add Form Generation**

   The CSF 184 will only be generated for the one time mailer to the Primary Applicant of a case.

   The CSF 184 will be sent for all active RCA cases.

2. **Add Fragment to Template Repository**

   The CSF 184 will be added into the Template Repository.

   Required Document Parameters: Case Number, Customer Name, Program, Language

3. **Add Form Control**

   The form will contain the following barcodes.

   Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

~~Note: Customers with electronic communications will still receive a paper copy of this correspondence in the mail so that they are also provided a return envelope.~~

4. **Add Form Print Options and Mailing Requirements**

This form will have the following print options:

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

Mailing Requirements:

Mail-To (Recipient): Customer Name selected from Document Parameters if generated from Template Repository; otherwise, if generated for one-time mailer, then send to Primary Applicant

Mailed From (Return): Sending Office

Mail-back-to Address: None

Outgoing Envelope Type: Standard Size Mail

Return Envelope Type: None

Additional Requirements:

Special Paper Stock: None

Enclosures: None

Electronic Signature: No

Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): Yes

2.7 Mass Mailer for CSF 184 to all Active RCA Cases

2.7.1 Overview

The new form introduced in section 2.6 will be sent out in a one-time mass mailer to all active RCA cases to inform them of the eligibility extension from 8 months to 12 months.

2.7.2 Description of Change

Send the CSF 184 in a one-time mass mailer who meet the following conditions:

1. The program is RCA,
2. The person is the Primary Applicant, and
3. The status of the program is Active

Note 1: Estimated count of active RCA cases is roughly 10,000 cases in CalSAWS.

Note 2: The mass mailer will run on the weekend of 01/28/2023 – 01/29/2023.

2.8 Update RCA Approval/Denial/Termination Reason Fragments Recommendation

2.8.1 Overview

The RCA Approval/Denial/Termination reason fragments are used for their respective action on an RCA case. Each fragment informs the customer of their RCA benefits and the duration of they are covered.

Reason Fragment Name and ID:

- RC_AP_OVER_EIGHTH_MONTHS_R002 & 7471
- RC_DN_OVER_EIGHTH_MONTHS_R002 & 7470
- RC_TN_OVER_EIGHTH_MONTHS_R002 & 7469

State Form/NOA:

- RC_AP_OVER_EIGHTH_MONTHS_R002 from M69-202P (11/05)
- RC_DN_OVER_EIGHTH_MONTHS_R002 from NA 290 RCA Denial
- RC_TN_OVER_EIGHTH_MONTHS_R002 from M69-202T (11/05)

Current NOA Template: RC_NOA_TEMPLATE

Current Program(s): RCA

Current Action Type:

- RC_AP_OVER_EIGHTH_MONTHS_R002 for Approvals
- RC_DN_OVER_EIGHTH_MONTHS_R002 for Denials
- RC_TN_OVER_EIGHTH_MONTHS_R002 for Terminations

Current Fragment Level: Case

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA 1239 SAR budget generates with RC_AP_OVER_EIGHTH_MONTHS_R002

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

2.8.2 NOA Verbiage

Update Fragment XDPs

This effort will be to update the verbiage of the following fragments as shown in the table below:

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

NOA Mockups/Examples: See supporting document 3, 4, 5

Fragment	Description	Existing Text	Updated Text	Formatting*
RC_AP_OVER_EIGHTH_MONTHS_R002	Static	Federal law limits the number of months of RCA you can get. You cannot get RCA after you have been in the United States longer than (8) months. The month you entered the United States or the month you were granted asylum, is counted as the first month. You (and all eligible family) will get cash aid under the Refugee Cash Assistance Program (RCA). Your first day of aid is <EffectiveApprovalDate>. Your first month's cash aid amount is <GrantAmount>. This amount if based on your full monthly cash aid amount figured on this notice. The ineligible household member(s) may be able to get	Federal law limits the number of months of RCA you can get. You cannot get RCA after you have been in the United States longer than (12) months. The month you entered the United States or the month you were granted asylum, is counted as the first month. You (and all eligible family) will get cash aid under the Refugee Cash Assistance Program (RCA). Your first day of aid is <EffectiveApprovalDate>. Your first month's cash aid amount is <GrantAmount>. This amount is based on your full monthly cash aid amount figured on this notice. The ineligible household member(s) may be able to get	Arial Font Size 10

		cash aid in another program. The household member(s) must apply. This program will help you find a job. If you have questions call your worker.	cash aid in another program. The household member(s) must apply. This program will help you find a job. If you have questions call your worker.	
RC_DN_OVER_EIGHTH_MONTHS_R002	Static	Federal law limits the number of months of RCA you can get. You cannot get RCA after you have been in the United States longer than (8) months. You have lived in the United States longer than eight (8) months. You may be able to get cash aid in another program. You must apply. If you have questions, call your worker.	Federal law limits the number of months of RCA you can get. You cannot get RCA after you have been in the United States longer than (12) months. You have lived in the United States longer than twelve (12) months. You may be able to get cash aid in another program. You must apply. If you have questions, call your worker.	Arial Font Size 10
RC_TN_OVER_EIGHTH_MONTHS_R002	Static	Federal law limits the number of months of RCA you can get. You cannot get RCA after you have been in the United States longer than eight (8) months. You have lived in the United States longer than eight (8) months. You may be able to	Federal law limits the number of months of RCA you can get. You cannot get RCA after you have been in the United States longer than twelve (12) months. You have lived in the United States longer than twelve (12) months. You may	Arial Font Size 10

		get cash aid in another program. If you have questions call your worker.	be able to get cash aid in another program. If you have questions call your worker.	

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

2.8.3 NOA Variable Population

1. **Update NOA Title and Footer Reference Reason Fragment**

   DCR to update NOA_SHORT_DESCR as described below:

Fragment	Existing NOA_SHORT_DESCR	New NOA_SHORT_DESCR
RC_AP_OVER_EIGHTH_MONTHS_R002	RCA Partial Approval Notice - In U.S. longer than 8 months	RCA Partial Approval Notice - In U.S. longer than 12 months
RC_DN_OVER_EIGHTH_MONTHS_R002	RCA Denial - In U.S. over 8 months	RCA Denial - In U.S. over 12 months

2. **Update Fragment Regulations**

   Update RC_AP_OVER_EIGHTH_MONTHS_R002 regulations to the following: 'MPP: 69-210, 69-202.4, 69-205.24(D), 69-202.41, 70-105.122, 70-105.123, & 70-105.124'

   Update RC_DN_OVER_EIGHTH_MONTHS_R002 regulations to the following: 'MPP: 69-202.41, 69-205.24(D), 69-210.1, 69-210.12, 70-105.122, 70-105.123, & 70-105.124'

   Update RC_TN_OVER_EIGHTH_MONTHS_R002 regulations to the following: 'MPP: 69-202.41, 69-205.24(D), 69-210.1, 69-210.2, 70-105.122, 70-105.123, & 70-105.124'

   Note: *There are no translations required for these regulations.*

2.8.4 NOA Generation Conditions

There are no updates to this section for any of the fragments.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	RS 36 Mockup	RS36_EN.pdf
2	NOA	RCA Cash Aid 12-Month Extension Notice	CSF184_EN.pdf
3	NOA	RCA Reason Fragment verbiage for Approval NOA	RC_AP_OVER_EIGHTH_MONTHS_R002_EN.pdf
4	NOA	RCA Reason Fragment verbiage for Denial NOA	RC_DN_OVER_EIGHTH_MONTHS_R002_EN.pdf
5	NOA	RCA Reason Fragment verbiage for Termination NOA	RC_TN_OVER_EIGHTH_MONTHS_R002_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.13	The LRS shall determine the effective date of change for all eligibility related changes for all individuals for all applicable programs.	This SCR will extend time on aid for active RCA/ TCVAP participants from 8 months to 12 months for recipients whose eligibility date is on or after October 1, 2021.
2.18.3.1 CAR-1237	The LRS shall automatically generate the following correspondence online or in the batch process, as a result of individual and/or case action initiated by the LRS or by COUNTY-specified Users, except when exempt due to program requirements: a. Adverse notices (includes: decrease, collection, denial, or termination of benefits); b. Non-adverse notices (includes: approval, increase in benefits, no change, and rescission); and c. Non-approval notices (includes: cancellation, withdrawal, informational, and benefit issuance).	Generating the CSF 184 via batch process for mass mailing.

5 OUTREACH

5.1 Lists

The lists below capture the RCA cases that were discontinued due to over income or non-compliance.

List Name: List of RCA cases discontinued for over income
List Criteria:

a) There was an active program person 10/2021 or later with '01' aid code from last active month and a Citizenship record valid 10/01/2021 or later.

b) There was an active program person 10/2021 or later with '1V' aid code from last active month and their earliest aided Application Date is 10/01/2021 or later.

AND the program was closed with a status reason of Over Income.

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- Latest Aid Code
- Earliest BDA of Disc Persons
- Discontinuance Date

Frequency: One-time

List Name: List of RCA cases discontinued for non-compliance
List Criteria:
a) There was an active program person 10/2021 or later with '01' aid code from last active month and a Citizenship record valid 10/01/2021 or later.
b) There was an active program person 10/2021 or later with '1V' aid code from last active month and their earliest aided Application Date is 10/01/2021 or later.

AND the program or a person was closed with one of the following status reasons:

- Chronic Truant
- CW >$5K
- CW - No Elig Child
- CW $2K to 5K
- CW <$2K
- CW Duplicate Aid
- CW Duplicate Appl. #1
- CW Duplicate Appl. #2
- CW Duplicate Appl. #3
- CW Fraud >$10K
- CW IPV - #1
- CW IPV - #2
- CW IPV - #3
- CW Non Part.
- CW Non Part. # 2
- CW Non Part. # 3
- Didn't Add Newborn
- Didn't Sign SOF
- Didn't Sign WTW
- Didn't Sign WTW # 2
- Didn't Sign WTW # 3
- Drug Felon (CW & CF)

- Fleeing Felon
- FTP Age Verification
- FTP Graduate by 19
- FTP Immunization
- FTP Income
- FTP INS Document
- FTP Multiple Vehicles
- FTP Name/Identity
- FTP One Vehicle
- FTP Property
- FTP Sponsor Dependents
- FTP Sponsor Income
- FTP Sponsor Property
- FTP Sponsor SOF
- Irregular School Attend.
- Not Attending School
- Probation/Parole Violator
- QC Failed to Keep 2 Appointments (CW)
- QC Failed to Keep Appointment (CW)
- QC Failed to Respond in 30 Days (CW)
- QC Failed to Return Signed Release (CW)
- QC Failed to Sign Release (CW)
- QC Refused to Cooperate (CW)
- Quit Job
- Quit Job #2 (CW)
- Quit Job #3
- Reduced Earnings
- Reduced Earnings #2
- Reduced Earnings #3
- Refused Assign Supp Rights
- Refused DIB
- Refused Inc-Collect Debt
- Refused Inc-Life Ins
- Refused Job
- Refused Job #2
- Refused Job #3
- Refused Military Ben
- Refused Retirement
- Refused SDI
- Refused UIB
- Refused VA
- Refused Wkr Cmp
- Refusing to be fingerprinted
- SSN Enumeration
- Striker
- Transferred Income
- Transferred Property

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- Latest Aid Code
- Earliest BDA of Disc Persons
- Discontinuance Date

Frequency: One-time

The lists will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-245084