

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243684

CAPL Sponsor Deeming Income Requirements

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	BAs, Build team, Test team, QA team

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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1 OVERVIEW

1.1 Current Design

The sponsor(s) of an immigrant is entered in CalSAWS as a person on the case. Their income and resources are entered into CalSAWS and considered by the Eligibility Determination and Benefit Calculation (EDBC). The income and resources of the spouse of the sponsor will be considered if the spouse signed the Affidavit of Support (I-864).

The worker uses the SOC 454 Worksheet to perform additional calculations when determining the amount of income and resource of the sponsor deemed to the immigrant. The final amount is entered into the CalSAWS system.

1.2 Requests

1. Add new field to the Sponsorship page.
2. Update CAPI EDDB to calculate the income and resources deemed to the immigrant based on the SOC 454.
3. Automate the SOC 454 in the Template Repository.

1.3 Overview of Recommendations

1. Add a new field to the Sponsorship Detail page to display the number of dependents of the sponsor.
2. Additional calculations will be performed when calculating the amount of income and resources of a sponsor deemed to the immigrant.
3. CAPI EDDB will display the final amount of income and resources after the additional calculations are performed.
4. The SOC 454 will be automated and the fields will populate based on the CAPI EDDB.

1.4 Assumptions

1. The logic that determines the income and resources of the sponsor(s) will not change.
2. Individual Sponsors are considered for CAPI.
3. No verbiage or generation updates will be made for the SOC 454, aside from the new variable population when generated from the Template Repository.
4. All variables populated on the SOC 454 will continue to be editable. If a SOC 454 is generated for the high-dated EDDB month, and the worker would like to populate with an older EDDB's values, they may edit the template generated from the Template Repository.
5. Information populated from the high-dated EDDB for the SOC 454 will not include manual or overridden EDDBs.

2 RECOMMENDATIONS

2.1 Sponsorship Detail Page

2.1.1 Overview

In order to have the number of dependents associated with a sponsor available on the Sponsorship Detail page for the purpose of Eligibility calculations a new field will be added to the Sponsorship Detail page. This field will allow for the entry and display of the number of dependents a given sponsor has.

2.1.2 CAPI Sponsorship Mockup

Sponsorship Detail

*- Indicates required fields

Edit

Close

Sponsor: Individual

Sponsored Non-Citizen's Name: *

Smith, Jane 19F

Sponsor's Name: *

Smith, John 27M

Sponsor's Phone Number:

Sponsor's Household Size: * 2

Total Number of Sponsored Non-Citizens: * 1

Total Number of Sponsor's Dependents: 1

Did the sponsor sign an I-864? * Date I-864 Signed:

Figure 2.1.1 – CAPI Sponsorship – View Mode Mockup

Sponsorship Detail

*- Indicates required fields

Save and Return

Cancel

Sponsor: Individual

Sponsored Non-Citizen's Name: *

Smith, Jane 19F

Sponsor's Name: *

Smith, John 27M

Sponsor's Phone Number:

Sponsor's Household Size: *

Total Number of Sponsored Non-Citizens: *

Total Number of Sponsor's Dependents:

Did the sponsor sign an I-864? * Date I-864 Signed:

Figure 2.1.1 – CAPI Sponsorship – Edit Mode Mockup

2.1.3 Description of Changes

1. Add a new field titled 'Total Number of Sponsor's Dependents'. This will require the following edits to the View and Edit mode of the Sponsorship Detail page:
 - a. View Mode:
 - i. The field should display directly below the 'Total Number of Sponsored Non-Citizens' field.
 - b. Edit Mode:
 - i. The field should display directly below the 'Total Number of Sponsored Non-Citizens' field. This input for this field will be a text box that accepts whole number inputs, styled similarly to the 'Total Number of Sponsored Non-Citizens' field.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer information**
- **Task: Sponsorship**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping for the new field

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Calculate Sponsor Income Used on SOC 454 Worksheet

2.2.1 Overview

The total amount of Sponsor income is calculated when CAPI EDBC is run.

2.2.2 Description of Changes

1. Sum total gross income (earned and unearned) of the sponsor(s) and the sponsor's spouse (if living together).

Note: This functionality exists in the system.

2. Calculate the allocation for sponsor(s).
 - a. Each sponsor's allocation is equal to the federal SSI rate for an individual.
 - b. If the co-sponsors are married (if living together), the total allocation is two times the federal SSI rate.

Note: Use the answer to the question on the Sponsor Detail page – “Has the spouse of the Sponsor signed a sponsorship affidavit?” and check the date the affidavit was signed on/before the benefit month.

Technical Note: Save this value to the database (budget_pers_misc) for generating the value on the SOC 454.

The federal SSI rate values are stored in code table 963.

3. Subtract the total gross income from the sponsor(s)' allocation.
 - a. This number is a non-negative number.
4. Calculate the allocation for dependent(s) of the sponsor.
 - a. For each dependent of the individual, the allocation is equal to one-half of the federal SSI rate.
 - b. A spouse who is not a co-sponsor receives the dependent allocation.
 - c. Use the new field on the Sponsorship Detail page to determine the number of dependents.

Technical Note: Save this value to the database (budget_pers_misc) for generating the value on the SOC 454.

The federal SSI rate values are stored in code table 963.

5. Subtract the previous result (3.) from the allocation for dependent(s) of the sponsor.
 - a. This number is a non-negative number.

6. Final amount is deemed to the immigrant as Unearned Income.

2.2.3 Programs Impacted

CAPI

2.2.4 Performance Impacts

N/A

2.3 Update CAPI EDBC to Display Sponsor Income with Additional Calculations from the SOC 454

2.3.1 Overview

CAPI EDBC displays the total amount of Sponsor income as Unearned Income after the additional calculations based on the SOC 454 Worksheet.

2.3.2 Description of Changes

1. Update CAPI EDBC to display the calculated final amount of income deemed to the immigrant as Unearned Income.

Regular Budget	Regular
Unearned Income	\$ 500.00

Figure 2.3.1 – Final Amount Deemed to the Immigrant as Unearned Income

EDBC Person Line Item Detail - Unearned Income

Name	Type	Description	Amount
Test, Sponsor 56M	Deemed Sponsor Income	(10/01/2022) \$500.00	\$ 500.00
Total			\$ 500.00

Figure 2.3.2 – Display of the Sponsor’s Income

2.3.3 Programs Impacted

CAPI

2.3.4 Performance Impacts

N/A

2.4 Calculate Sponsor Resource Used on SOC 454

2.4.1 Overview

The total amount of Sponsor resource is calculated when CAPI EDBC is run.

2.4.2 Description of Changes

1. Sum the total countable resources of the sponsor(s) and sponsor's spouse (if living together).
Note: This functionality exists in the system.
2. Calculate the allocation for sponsor(s). Each sponsor's allocation is:
 - a. equal to the SSI resource limit for an individual
OR
 - b. equal to the SSI resource limit for a couple when both members of the couple are living together and one member is not a co-sponsor
OR
 - c. equal to twice the individual resource limit if both members of the couple are co-sponsors.

Note: Use the answer to the question on the Sponsor Detail page – “Has the spouse of the Sponsor signed a sponsorship affidavit?” and check the date the affidavit was signed on/before the benefit month.

Technical Note: Save this value to the database (budget_pers_misc) for generating the value on the SOC 454. The SSI resource limit values are stored in code table 335 (C1, C2).

3. Subtract the allocation for sponsor(s) from the sum of total countable resources (1.).
 - a. This number is a non-negative number.
4. Final amount is deemed to the immigrant as Data Month/Benefit Month Property.

2.4.3 Programs Impacted

CAPI

2.4.4 Performance Impacts

N/A

2.5 Update CAPI EDBC to Calculate Sponsor Resource

2.5.1 Overview

CAPI EDBC displays the total amount of Sponsor resource after the additional calculations based on the SOC 454 Worksheet.

2.5.2 Description of Changes

1. Update CAPI EDBC to display the calculated final amount of property deemed to the immigrant as Resources.

Property Eligibility	Regular
Data Month Property:	\$ <u>0.00</u>
Benefit Month Property:	\$ <u>1,000.00</u>
Property Limit:	\$ 2,000.00
Result:	Pass

Figure 2.5.1 – Final Amount Deemed to the Immigrant

Property Detail

Owner	Property Type	Ownership	Value	Countable Amount
Test, Sponsor 56M		100.0%	\$1,000.00	\$1,000.00
			Total	\$1,000.00

Figure 2.5.2 – Display of the Sponsor's Resource

2.5.3 Programs Impacted

CAPI

2.5.4 Performance Impacts

N/A

2.6 Automate SOC 454 Variable Population

2.6.1 Overview

The SOC 454 Worksheet can currently be generated and filled in manually from the Template Repository only and has no automated variable population. This change will automate the SOC 454's variable population to pull information from the highest-dated EDBC with a CAPI program block, allowing a worker to easily access a filled-in worksheet and save it to the case record.

State Form: SOC 454 (4/99)

Current Programs: CAPI

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All Counties

Existing Languages: English

2.6.2 Update SOC 454 Variable Population

Update the SOC 454 to populate the worksheet's variables upon Online generation.

Variables will be populated in the Template Repository with the results of the highest-dated benefit month EDBC run with a CAPI program block and there is at least one sponsor associated with the case.

Form Body Variables:

Variable Name	Population	Formatting	Editable* / Field Type	Template Repository Population
Gross Income	The sponsor's and sponsor's spouse's gross income from EDBC. See Recommendation 2.2.2 #1. Example: \$5,500.45	Arial Font Size 10 \$X,XXX.XX	Y	Y
Allocation for Sponsors	The allocation for the sponsor(s). See	Arial Font Size 10	Y	Y

	<p>Recommendation 2.2.2 #2.</p> <p>Note: This calculation will be stored in as a new value in Budget_Pers_Misc. SSI Income Limits can be found in CT 963.</p> <p>Example: \$841.00</p>	\$X,XXX.XX		
Subtract Allocation	<p>Calculated by subtracting allocation from gross income. See Recommendation 2.2.2 #3.</p> <p>Example: \$4659.45</p>	<p>Arial Font Size 10 \$X,XXX.XX</p>	Y	Y
Allocation for Dependents	<p>Allocation for the dependents of the sponsor (children and spouse who is not a co-sponsor). See Recommendation 2.2.2 #4.</p> <p>Note: This calculation will be stored in as a new value in Budget_Pers_Misc. SSI Income Limits can be found in CT 963.</p> <p>Example: \$1261.50</p>	<p>Arial Font Size 10 \$X,XXX.XX</p>	Y	Y
Subtract Dependents Allocation	<p>Calculated by subtracting 'Allocation for Dependents' from previously calculated 'Subtract Allocation' value. See Recommendation 2.2.2 #5.</p> <p>Note: If the calculated value is negative, populate \$0.00</p>	<p>Arial Font Size 10 \$X,XXX.XX</p>	Y	Y

	Example: \$3,397.95			
Sponsor Resources	The total counted resources of the sponsor and sponsor's spouse from EDBC. See Recommendation 2.4.2 #1. Example: \$9,000.00	Arial Font Size 10 \$X,XXX.XX	Y	Y
Resource Allocation	Will populate \$2,000.00 / \$3,000.00 / \$4,000.00 (current SSI asset limit values) for individual sponsor / marries couple where one member is not a co-sponsor / both members are co-sponsors. See Recommendation 2.4.2 #2. Note: This calculation will be stored in as a new value in Budget_Pers_Misc. SSI Asset Limits can be found in CT 355_C1 (Individual) and CT 355_C2 (Couple). A scenario where a couple are both co-sponsors will populate with a value of double the individual limit. Example: \$4,000.00	Arial Font Size 10 \$X,XXX.XX	Y	Y
Subtract Resource Allocation	Subtract 'Resource Allocation' from 'Sponsor Resources'. See Recommendation 2.4.2 #3. Example: \$5,000.00	Arial Font Size 10 \$X,XXX.XX	Y	Y

Variables requiring translation: N/A

2.7 Automated Regression Test

2.7.1 Overview

Create new ART scripts to confirm the changes in this SCR.

2.7.2 Description of Changes

For each of the following scenarios, confirm the new field on the Sponsorship Detail page, and the sponsor income and sponsor resources on the EDBC Summary page.

1. Single sponsor
2. Couple sponsor with affidavit signed
3. Couple sponsor with affidavit not signed

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	SOC 454 Population Mockup	SOC 454 Mockup – Variables - EN

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-249920

Add Available Threshold Languages for CF 32 to CalSAWS.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Harshita S Bhat
	Reviewed By	Kavitha M R

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09/19/2022	1.0	Initial Draft	Harshita S Bhat

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1 OVERVIEW

This effort will add available Threshold Languages to CF 32(6/13) in CalSAWS Template Repository.

1.1 Current Design

Currently, CF 32 is only available in English and Spanish Languages in CalSAWS.

1.2 Requests

Implement the available threshold languages of the CF 32-CalFresh Request for Contact (6/13). The following threshold languages are missing in CalSAWS system and currently these are available in the CDSS website:

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

1.3 Overview of Recommendations

Add the CF 32 form in the following threshold languages.

Languages: Arabic, Armenian, Chinese, Farsi, Hmong, Korean, Lao, Russian, and Tagalog.

1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing English and Spanish forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Add Available Threshold Languages to CF 32 Form

2.1.1 Overview

This section will cover the requirements for adding the CF 32 forms in available threshold languages.

State Form: CF 32(6/13)

Current Programs: CalFresh

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

Template Description: This form is used for CalFresh cases when new employment record added to the participant in the case and the employment verification is not received.

Imaging Form Name: CF Request for Contact.

Imaging Document Type: Verification Requests.

2.1.2 Form Verbiage

Create CF 32 XDP's for Threshold Languages

Threshold Languages: Arabic, Armenian, Chinese, Farsi, Hmong, Korean, Lao, Russian, and Tagalog

Form Mockups/Examples: See Supporting Documents #1

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: No

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

Print Options:

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

Mailing Options:

Mailing Options	Option for CF 32 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	Worker's Office Address
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Additional Options:

Requirement	Option for CF 32 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CF 32 Threshold Languages	CF32_AR.pdf CF32_AE.pdf CF32_CH.pdf CF32_FA.pdf CF32_RU.pdf CF32_KO.pdf CF32_LA.pdf CF32_HM.pdf CF32_IG.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	CF 32 is being added In available threshold Languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

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Phase III - ACL 15-62 changes: NA 841, NA 845, WTW 29,
and WTW 32 with the latest versions in all threshold
languages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lianel Richwin
	Reviewed By	Kavitha M R

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1 OVERVIEW

This effort will add the NA 845, NA 841, WTW 32 and WTW 29 in all available threshold languages in CalSAWS Template Repository.

1.1 Current Design

Currently NA 845, NA 841, WTW 32, WTW 29 are available only in English and Spanish language in CalSAWS.

1.2 Requests

1. Update English, Spanish and add NA 845 (3/14) Notice Of Action - Sanction and Removal Of The Other Parent's Needs in all available threshold languages. Include NA 1239 SAR as continuation page.

Languages include:

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

2. Add NA 841 (3/14) Notice Of Action - Welfare-To-Work Plan in all available threshold languages.

Languages include:

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

3. Add WTW 32 (10/03) – Welfare-To-Work Compliance Plan in all available threshold languages.

Languages include:

Chinese, Russian and Vietnamese.

4. Add WTW 29 (8/15) - Plan To Meet Welfare-To-Work Rules And Get My Cash Aid Back in all available threshold languages.

Languages include:

Armenian, Cambodian, Chinese, Korean, Russian, Tagalog and Vietnamese.

1.3 Overview of Recommendations

1. Update English, Spanish and add NA 845 (3/14) Notice Of Action - Sanction and Removal Of The Other Parent's Needs in following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
2. Add NA 841 (3/14) Notice Of Action - Welfare-To-Work Plan in following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
3. Add WTW 32 (10/03) – Welfare-To-Work Compliance Plan in following threshold languages: Chinese, Russian and Vietnamese.

4. Add WTW 29 (8/15) - Plan To Meet Welfare-To-Work Rules And Get My Cash Aid Back in following threshold languages: Armenian, Cambodian, Chinese, Korean, Russian, Tagalog and Vietnamese.

1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Update English, Spanish and add NA 845 in all available Threshold Languages

2.1.1 Overview

This section will cover the requirements for adding the NA 845 form in English, Spanish and available threshold languages.

State Form: NA 845 (3/14)

Current Programs: CalWORKs, Welfare-to-Work, REP

Current Attached Forms: N/A

Current Forms Category: NOA

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

Template Description: This form is used when the first parent is sanctioned and the second parent is mandatory and he/she fails or refuses to cooperate with the GAIN requirements; fail to sign the Welfare to Work Plan, and schedule for a good cause determination interview appointment. It provides the participant with an appointment date, time and location as well as their hearing rights.

Imaging Form Name: Notice to 2nd Parent 1st Parent Sanction

Imaging Document Type: Notification/NOA

Include Continuation Page: NA 1239 SAR

2.1.2 Form Verbiage

Create NA 845 XDP's for Threshold Languages

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

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

Form Mockups/Examples: See Supporting Documents # 1

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: Yes

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

The CalSAWS will generate the NA 845 Form from Template Repository.

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

Print Options:

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

Mailing Options:

Mailing Options	Option for NA 845 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Additional Options:

Requirement	Option for NA 845 Form
Post to Self-Service Portal	N

2.2 Add NA 841 in all available Threshold Languages

2.2.1 Overview

This section will cover the requirements for adding the NA 841 form in available threshold languages.

State Form: NA 841 (3/14)

Current Programs: CalWORKs, Welfare-to-Work

Current Attached Forms: N/A

Current Forms Category: NOA

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

Template Description: This form is used when a volunteer GAIN participant fails or refuses to cooperate with the GAIN requirements for the first time and mandatory participant reduced their earnings and schedule a good cause determination interview appointment.

Imaging Form Name: GAIN Volunteer Suspension

Imaging Document Type: Notification/NOA

2.2.2 Form Verbiage

Create NA 841 XDP's for Threshold Languages

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

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

Form Mockups/Examples: See Supporting Documents #2

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: Yes

2.2.3 Form Variable Population

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

2.2.4 Form Generation Conditions

Update NA 841 Form generation batch job to generate threshold languages

Update batch job (PB00C898) to generate the NA 841 in all threshold languages.

Tech Note: Update CT942_133 (NA 841)

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

Print Options:

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

Mailing Options:

Mailing Options	Option for NA 841 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for NA 841 Form
Post to Self-Service Portal	N

2.3 Add WTW 32 in all available Threshold Languages

2.3.1 Overview

This section will cover the requirements for adding the WTW 32 form in available threshold languages.

State Form: WTW 32 (10/03)

Current Programs: Welfare-to-Work, REP

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

Template Description: It's completed by GAIN participant as a compliance plan to welfare-to-work.

Imaging Form Name: WTW Compliance Plan

Imaging Document Type: Welfare to Work (WTW)

2.3.2 Form Verbiage

Create WTW 32 XDP's for Threshold Languages

Threshold Languages: Chinese*, Russian and Vietnamese.

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

Form Mockups/Examples: See Supporting Documents #3

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: No

2.3.3 Form Variable Population

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

2.3.4 Form Generation Conditions

The CalSAWS will generate the WTW 32 Form from Template Repository.

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

Print Options:

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

Mailing Options:

Mailing Options	Option for WTW 32 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for WTW 32 Form
Post to Self-Service Portal	N

2.4 Add WTW 29 in all available Threshold Languages

2.4.1 Overview

This section will cover the requirements for adding the WTW 29 form in available threshold languages.

State Form: WTW 29 (8/15)

Current Programs: Welfare-to-Work, REP

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

Template Description: It's completed by GAIN participant to propose plan to stop Welfare-to-Work sanction.

Imaging Form Name: PLAN TO MEET WTW RULES GET CASH AID BACK

Imaging Document Type: Welfare to Work (WTW)

2.4.2 Form Verbiage

Create WTW 29 XDP's for Threshold Languages

Threshold Languages: Armenian, Cambodian, Chinese*, Korean, Russian, Tagalog and Vietnamese.

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

Form Mockups/Examples: See Supporting Documents #4

Form Header: CalSAWS Standard Header #3

Include NA BACK 9: No

2.4.3 Form Variable Population

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

2.4.4 Form Generation Conditions

The CalSAWS will generate the WTW 29 Form from Template Repository.

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

Print Options:

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

Mailing Options:

Mailing Options	Option for WTW 29 Form
Mail-To (Recipient)	N/A
Mailed From (Return)	N/A
Mail-back-to Address	N/A
Outgoing Envelope Type	N/A
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for WTW 29 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	NA 845 Threshold Languages	NA 845.zip
2	Form	NA 841 Threshold Languages	NA 841.zip
3	Form	WTW 32 Threshold Languages	WTW 32.zip
4	Form	WTW 29 Threshold Languages	WTW 29.zip

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	NA 845, NA 841, WTW 32, WTW 29 is being added in all available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-203445

Modify CW M40-181A (11/14) and Update the
Template Repository to newest State Version

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vamsi Davuluri
	Reviewed By	Richwin Lianel

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
21/09/2022	0.1	Initial Draft	Vamsi Davuluri

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1 OVERVIEW

The purpose of this change is to update the M40-181A (8/10) in CalSAWS to match the latest state version.

1.1 Current Design

Currently, M40-181A (8/10) is available in English and threshold languages in CalSAWS in the Template Repository.

1.2 Requests

1. Update the M40-181A to match with the latest state version (11/14) in English and all available threshold languages in Template Repository.
Languages include:
English, Chinese, Russian, Spanish and Vietnamese.
2. Turn off the threshold languages of old version (8/10) in Template Repository which are not available in CDSS with latest version (11/14).
Threshold languages to be turned off: Korean, Cambodian, Tagalog, Armenian.
3. Update the automated M40-181A NOAs reason verbiage for A010T, A650T, A676T, A993T, A118T, A216T in English and available threshold languages to match the latest version.

1.3 Overview of Recommendations

1. Update the M40-181A to match with the latest state version (11/14) in English and following threshold languages: Chinese, Russian, Spanish, Vietnamese.
2. Turn off the threshold languages of old version (8/10) in Template Repository which are not available in CDSS with latest version (11/14).
Threshold languages to be turned off: Korean, Cambodian, Tagalog, Armenian
3. Update the M40-181A NOA reasons: A010T, A650T, A676T, A993T, A118T, A216T in English and available threshold languages to match the latest version.

1.4 Assumptions

1. The triggering conditions of the M40-181A NOA Fragments remains the same and are not being updated.
2. The existing variable population is not being updated with this effort.
3. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Update the M40-181A form to match with the latest state version (11/14) in English and all available threshold languages.

2.1.1 Overview

This requirement is to update the existing M40-181A form to match with the latest state version (11/14) in English and all available threshold languages and turn off the threshold languages of old version (8/10) in Template Repository which are not available in CDSS with latest version (11/14).

State Form: M40-181A (11/14)

Current Programs: CalWORKs

Current Attached Forms: N/A

Current Forms Category: NOA

Template Repository Visibility: All counties

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

Updated Template Description: This NOA tells the user their CalWORKs program is terminated for not providing required information during redetermination or any other time.

Imaging Form Name: NOA - CW TERMINATION.

Imaging Document Type: Notification/NOA.

2.1.2 Form Verbiage

Update the M40-181A (11/14) in English and all available threshold languages

Threshold Languages: Chinese*, Russian, Spanish and Vietnamese.

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

Form Mockups/Examples: See Supporting Documents #1

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: Yes

2.1.3 Form Generation Conditions

Form Print/Mailing Options

The following are the print and mailing requirements for M40-181A Notice of Action - CalWORKs TERMINATION.

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 Options:

Mailing Options	Option for M40-181A Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for M40-181A Form
Post to Self-Service Portal	Y

2.2 Update NOA M40-181A reason A010T - 'Unverified:Age' in English and Spanish Languages

2.2.1 Overview

Update NOA reason A010T (M40-181A) in English and Spanish Languages in CalSAWS to match the latest state version 11/14.

Reason Fragment Name and ID: CW_TN_AGE_UNVERIF_A010 (Fragment ID: 6191)

State Form/NOA: M40-181A (11/14)

Current Program(s): CalWORKs

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.2.2 Form/NOA Verbiage

Update NOA fragments in English and Spanish languages.

Updated Language: English, Spanish

NOA Mockups/Examples: Supporting Documents #2

Reason Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	We needed certain facts to check your eligibility. You did not help get them. We asked you to provide proof of the age of <Person>	We needed certain facts to check your eligibility. We asked you to provide proof of the age of <Person>. You did not do this and you did not ask the County for help getting the proof we need.	Arial Font Size 10

2.2.3 Form/NOA Variable Population

No Updates to this Section.

2.2.4 Form/NOA Generation Conditions

No Updates to existing trigger conditions.

2.3 Update NOA M40-181A reason A650T-Employment/Income in English and Spanish Languages

2.3.1 Overview

Update NOA M40-181A reason A650T in English and Spanish Languages in CalSAWS.

Reason Fragment Name and ID: CW_TN_NHR_COMPL_FAILED_A650
(Fragment ID: 6332)

State Form/NOA: M40-181A (11/14)

Current Program(s): CalWORKs

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.3.2 Form/NOA Verbiage

Update NOA fragments in English and Spanish languages.

Updated Language: English, Spanish

NOA Mockups/Examples: Supporting Documents #3

Reason Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	We needed certain facts to check your eligibility. We asked you to: Provide employment and/or income information. You did not do this.	We needed certain facts to check your eligibility. We asked you to: Provide employment and/or income information. You did not do this and you did not ask the County for help getting the proof we need.	Arial Font Size 10

2.3.3 Form/NOA Variable Population

No Updates to this Section.

2.3.4 Form/NOA Generation Conditions

No Updates to existing trigger conditions.

2.4 Update NOA M40-181A reason A676T - Employment/Income in English and Spanish Languages

2.4.1 Overview

Update NOA M40-181A reason A676T in English and Spanish Languages in CalSAWS.

Reason Fragment Name and ID: CW_TN_PVS_FAIL_A676 (Fragment ID: 6337)

State Form/NOA: M40-181A (11/14)

Current Program(s): CalWORKs

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.4.2 Form/NOA Verbiage

Update NOA fragments in English and Spanish languages.

Updated Language: English, Spanish

NOA Mockups/Examples: Supporting Documents #4

Reason Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	We needed certain facts to check your eligibility. We asked you to: Provide employment and/or income information. You did not do this.	We needed certain facts to check your eligibility. We asked you to: Provide employment and/or income information. You did not do this and you did not ask the County for help getting the proof we need.	Arial Font Size 10

2.4.3 Form/NOA Variable Population

No Updates to this Section.

2.4.4 Form/NOA Generation Conditions

No Updates to existing trigger conditions.

2.5 Update NOA M40-181A reason A993T-No Verif. After RD appt. was completed in English and available threshold Languages

2.5.1 Overview

Update NOA M40-181A reason A993T in English and available threshold Languages and turn off the threshold languages of old version (8/10) in CalSAWS which are not available in CDSS with latest version (11/14).

Reason Fragment Name and ID:

CW_TN_UNVERIF_AFTER_RD_APPT_COMPLETED_A993 (Fragment ID: 7330)

State Form/NOA: M40-181A (11/14)

Current Program(s): CalWORKs

Current Action Type: Termination

Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA
Existing Languages: English, Spanish, Chinese, Russian, Vietnamese, Korean, Tagalog, Cambodian, Armenian.

2.5.2 Form/NOA Verbiage

Update NOA fragments in English and Spanish languages.

Updated Language: English, Spanish, Russian, Vietnamese, Chinese.

Threshold languages to be turned off: Korean, Tagalog, Cambodian, Armenian.

NOA Mockups/Examples: Supporting Documents #5

Reason Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	We needed certain facts to check your eligibility. We asked you to < MissingVerifications>. You did not do this.	We needed certain facts to check your eligibility. We asked you to < MissingVerifications>. You did not do this and you did not ask the County for help getting the proof we need.	Arial Font Size 10

2.5.3 Form/NOA Variable Population

No Updates to this Section.

2.5.4 Form/NOA Generation Conditions

No Updates to existing trigger conditions.

2.6 Update NOA M40-181A reason A118T – Land/Real property in English and Spanish Languages

2.6.1 Overview

Update NOA M40-181A reason A118T in English and Spanish Languages in CalSAWS.

Reason Fragment Name and ID: CW_TN_PROP_VALUE_PRF_NOT_SUB_A118
(Fragment ID: 6203)

State Form/NOA: M40-181A (11/14)

Current Program(s): CalWORKs

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.6.2 Form/NOA Verbiage

Update NOA fragments in English and Spanish languages.

Updated Language: English, Spanish

NOA Mockups/Examples: Supporting Documents #6

Reason Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	We needed certain facts to check your eligibility. You did not help get them. We asked you to give us proof of the value of your land/real property.	We needed certain facts to check your eligibility. We asked you to give us proof of the value of your land/real property. You did not do this and you did not ask the County for help getting the proof we need.	Arial Font Size 10

2.6.3 Form/NOA Variable Population

No Updates to this Section.

2.6.4 Form/NOA Generation Conditions

No Updates to existing trigger conditions.

2.7 Update NOA M40-181A reason A216T – Earned Income in English and Spanish Languages

2.7.1 Overview

Update NOA M40-181A reason A216T in English and Spanish Languages in CalSAWS.

Reason Fragment Name and ID: CW_TN_MNTH_PAY_INC_UNVERIF_A216
(Fragment ID: 6209)

State Form/NOA: M40-181A (11/14)

Current Program(s): CalWORKs

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.7.2 Form/NOA Verbiage

Update NOA fragments in English and Spanish languages.

Updated Language: English, Spanish

NOA Mockups/Examples: Supporting Documents #7

Reason Fragment Verbiage:

Description	Existing Text	Updated Text	Formatting
<STATIC_SECTION>	We needed certain facts to check your eligibility. You did not help get them. We asked you to provide verification of your earned income.	We needed certain facts to check your eligibility. We asked you to provide verification of your earned income. You did not do this and you did not ask the County for help getting the proof we need.	Arial Font Size 10

2.7.3 Form/NOA Variable Population

No Updates to this Section.

2.7.4 Form/NOA Generation Conditions

No Updates to existing trigger conditions.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	M40-181A (11/14)	M40-181A_Chinese.pdf M40-181A_English.pdf M40-181A_Russian.pdf M40-181A_Spanish.pdf M40-181A_Vietnamese.pdf
2	NOA	A010T	Fragments verbiage.xlsx
3	NOA	A650T	Fragments verbiage.xlsx
4	NOA	A676T	Fragments verbiage.xlsx
5	NOA	A993T	Fragments verbiage.xlsx
6	NOA	A118T	Fragments verbiage.xlsx
7	NOA	A216T	Fragments verbiage.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	M40-181A (11/14) is updated in English and all available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227714

Update IEVS Tracking Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Phong Xiong, Vallari Bathala
	Reviewed By	Justin Dobbs, Priya Sridharan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/17/2022	1.0	Initial Draft	Phong Xiong
08/11/2022	2.0	Draft after moving SCR to new release	Phong Xiong

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1 OVERVIEW

This effort is to update the CW 63 form to have IEVS tracking functionality to allow the form to be tracked in the system when it is sent out.

1.1 Current Design

SCR CA-215097 replaced the PA 2494 (IEVS Applicant/Participant Contact Letter) with State form CW 63 (REQUEST FOR INCOME AND/OR RESOURCE VERIFICATION), which can be generated by a user from a button on the IEVS Applicant Detail page. The PA 2494 was a tracked form on the Document Detail page, and there was downstream batch EDBC sweep logic and EDBC logic that would close a program [CalWORKs (CW), CalFresh (CF), and Medi-Cal (CF)] if the PA 2494 form was not updated to reflect a Received Date.

The CW 63 State form is not a tracked form in CalSAWS. There are no current batch EDBC sweep logic and EDBC logic for the CW 63 to close a program (CW, CF, and MC).

Currently, the CW 63 is generated via a "Generate CW 63 Form" button on the Applicant IEVS Detail page. When the button is clicked, the form is generated in the Distributed Documents Page for viewing.

1.2 Requests

1. Update CalSAWS to enhance tracking of information requested on the CW 63 form.
2. Update the CW 63 generation logic to trigger the form as a pop-up.
3. Create a "Create Task" Automated Action that is triggered when a CW 63 document has not been Received within 10 business days of being generated.

1.3 Overview of Recommendations

1. Updates to CW 63 Logic
 - a. Update the CW 63 to have tracking functionality
 - b. Update the CW generation logic to trigger the form as a pop-up
2. Implement an Automated Action to be invoked when a CW 63 document has not been Received within 10 business days of being generated.
3. Implement a new Batch process to run daily and invoke the "Document Overdue: CW 63" Automated Action.

1.4 Assumptions

1. Applicant IEVS should be using the CW 2200 generated from the Verifications Page while Recipient IEVS should be using the CW 63 generated from the IEVS Applicant Detail Page.
2. The CW 63 form replaced the PA 2494 form with SCR CA-215097; however, it will have its own tracking functionality and will not follow the prior PA 2494 tracking functionality.
3. The CW 63 can be tracked through any form generation, whether through the 'Generate CW 63' button or through the Template Repository.
4. Any CW 63 form generated prior to the implementation of this design are not tracked and no one time tasks are created for those forms.

2 RECOMMENDATIONS

2.1 Updates to Existing CW 63 Form Recommendation

2.1.1 Overview

Adding tracking functionality to the form for IEVS and generate the form as a pop-up when it is triggered.

State Form: CW 63 (11/2020)

Current Programs: CalWORKs, CalFresh, & Medi-Cal

Current Attached Form(s): None

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

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

2.1.2 CW 63 Form Verbiage

There are no updates to this section.

2.1.3 CW 63 Form Variable Population

Make all pre-populated fields editable.

2.1.4 CW 63 Form Generation Conditions

1. Updates to Form Generation

Trigger the form as a pop-up when "Generate CW 63" button is clicked on the IEVS Applicant Detail page.

Remove Medi-Cal program from this form.

2. Add Form Control

The CW 63 form will have the following controls as shown below.

Due Date: 10 business days from generation date

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Add to CUST_RPT table:

- Type_Code = C63 (New type code to be added for CT329)

Add to CT329:

- CODE_NUM_IDENTIF = C63
- SHORT_DECODE_NAME = CW 63
- LONG_DECODE_NAME = CW 63 Request for Income And/Or Resource Verification Form

2.2 Document Overdue: CW 63 Automated Action

2.2.1 Overview

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

2.2.2 Automated Action Detail Mockup



The mockup shows a window titled "Automated Action Detail" with "Edit" and "Close" buttons in the top right. It is divided into two main sections: "Action Information" and "Task Information".

Action Information

Name: Document Overdue: CW 63	Type: Create Task	Status: * Inactive
Program(s): CF, CW	Run Date: Daily(Mon-Sat)	Source: Batch
Scenario: A CW 63 document has not been Received within 10 days of the document being generated.		

Task Information

Task Type: Document Overdue: CW 63	
Due Date: Default Due Date	Default Due Date: 5 business days
Initial Assignment: Default Assignment	Default Assignment: Office Distribution
Long Description: A CW 63 document is overdue.	

"Edit" and "Close" buttons are located in the bottom right corner of the window.

Figure 2.2.2.1 – Automated Action Detail

2.2.3 Description of Changes

Implement a Document Overdue: CW 63 Automated Action as follows:

1. Document Overdue: CW 63
 - a. Action Information
 - i. Name: Document Overdue: CW 63
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CF, CW
 - v. Run Date: Daily (Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A CW 63 document has not been Received within 10 business days of the document being generated.

The Automated Actions will have an initial status of Inactive and a blank Task Type. If a county Activates an Automated Action, a Task Type will be required at that time.

- b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: N/A
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 5 business days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Long Description: A CW 63 document is overdue.

2.2.4 Page Validations

N/A

2.2.5 Page Location

Automated Action Detail Page:

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin
Click on the hyperlink of the "Document Overdue: CW 63" Automated Action result displayed in the Automated Actions Search to navigate to the Automated Action Detail page. The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

N/A

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Document Overdue: CW 63 Automated Action Batch Job

2.3.1 Overview

1. This section describes the behavior of a new batch process that will invoke the "Document Overdue: CW 63" Automated Action.

2.3.2 Description of Change

Implement a new batch process to run daily and invoke the "Document Overdue: CW 63" Automated Action. It will be invoked when the batch date is 10 or more days after the date of generation and the current Status of the document is "Sent". If the Case has a task that originated from this Automated Action that is currently in an Assigned status, another task will not be created. Because the CW 63 is a person level document, the default task assignment processing will determine the highest priority program on the case and route the task to the worker assigned to that highest priority program.

2.3.3 Execution Frequency

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

2.3.4 Key Scheduling Dependencies

None.

2.3.5 Counties Impacted

All CalSAWS Counties.

2.3.6 Category

Non-Core.

2.3.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.3.8 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	CW 63 Mockup	CW_63_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.11 CAR- 1247	The LRS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	Generate the CW 63 form to be tracked.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-233168

ACL 21-137/ACL 21-137E Guaranteed Income
Pilot Program

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio, Maria Jensen, Esequiel Herrera-Ortiz, Vallari Bathala, Renee Gustafson
	Reviewed By	Michael Wu, Eugenio Garcia Velasco, Praveen Badabhagni, Sunitha Sampathkumar, Naga Chinduluru, Chitra Barsagade, Geetha Ramalingam, Maksim Volf

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/01/2022	1.0	Initial Draft	Tom Lazio
10/03/2022	1.1	CC updates: added spreadsheet name for Supp Doc; added CC Regression Tests	Maria Jensen
10/11/2022	1.2	Added Reports Section 2.9	Esequiel Herrera-Ortiz Tom Lazio
10/20/2022	1.3	Added the income types Guaranteed Income - Cash/MC Exempt and Guaranteed Income - MC Exempt to all Sections Updated income type Guaranteed Income - Cash/Food Exempt to Guaranteed Income - Cash/CalFresh Exempt	Tom Lazio Vallari Bathala
10/21/2022	1.4	Added MAGI Medi-Cal: Exempt Income' drop down to Section 2.1 Added Mockups to Sections 2.5 and 2.6.	Vallari Bathala Maria Jensen
10/24/2022	1.5	Added eHIT section 2.10 for 'MAGI Medi-Cal: Exempt Income'	Renee Gustafson
10/28/2022	1.6	Updated GA/GR Automated Solution County Parameter Detail Page for Online Added Section 2.5 to GA/GR Automated Solution update EDBC rules to include new income types	Vallari Bathala Tom Lazio
11/15/2022	1.7	Updated Guaranteed Income Types 'Guaranteed Income - MC Exempt' and 'Guaranteed Income - Unearned' to be 'Exempt' for Kin-Gap program	Tom Lazio

		Added assumption #7	
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1 OVERVIEW

Counties with Guaranteed Income (GI) projects can request that participants have their GI payments exempted from consideration as income for the purposes of CalWORKs (CW) and/or CalFresh (CF) eligibility and benefit determination.

Per ACL 21-137 and ACL 21-137E, effective December 1, 2021, payments from GI projects with income exempt approval will be excluded from CW and, under this option, payments from CalWORKs-approved GI projects and pilots that are funded by any amount of non-governmental funds must also be excluded for purposes of CalFresh.

Per ACIN I-35-22, payments from GI projects without income exempt approval will be treated as unearned income for the purposes of CW and CF eligibility and benefit calculations.

Per MEDIL I 22-23, payments from GI projects that are taxable are countable for MAGI Medi-Cal. Payments from GI projects are typically countable for Non-MAGI Medi-Cal unless an exemption applies; Disaster and emergency assistance payments from government or disaster/emergency relief organizations are exempt.

This SCR will add new income types for 'Guaranteed Income' as well as define the treatment of each of these income types by program.

1.1 Current Design

Currently in CalSAWS, there are no income types available for 'Guaranteed Income'.

1.2 Requests

Per ACL 21-137, ACL 21-137E and MEDIL I22-23, 'Guaranteed Income' will require new income types to be added into CalSAWS. The treatment of each income type will vary as some will be exempt from CalSAWS programs while others will count as unearned income.

1.3 Overview of Recommendations

1. Verify new 'Guaranteed Income' income type options on the Income Detail page.
2. Add optional 'MAGI Medi-Cal: Exempt Income' drop-down list on the Income Detail page for Unearned, Cash/CalFresh Exempt and Cash Exempt Guaranteed Income types.
3. Update 'Other' in the OCAT Referral Detail page to map the new Income Types.

4. Add new 'Guaranteed Income' income type options to County Parameter Detail page and set default values for GA/GR Automated Solution (GR) .
5. Add new 'Guaranteed Income' income types and configure treatment of the income types across different programs.
6. Add logic to GA/GR Automated Solution (GR) EDBC rules for new 'Guaranteed Income' income types.
7. Add threshold language translations for new 'Guaranteed Income' income types.
8. Regression testing specific forms and NOAs containing new 'Guaranteed Income' income types.
9. Update Form Status batch job to send new income types as part of the MC RE pre-population data.
10. Update the CA 253 CalWORKs report to map the Income Types of 'Guaranteed Income - Unearned' and 'Guaranteed Income - MC Exempt' to 'Line 5b. Benefits or pensions increased'.
11. Update eHIT logic to not send income in an EDR for Guaranteed Income when the 'MAGI Medi-Cal Exempt Income' is answered "Yes."

1.4 Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
2. The Adoptions Assistance Program (AAP) does not consider income and no treatment value is needed for the income types added with this SCR.
3. Per ACL 22-16, income is not evaluated for the Foster Care program and will be treated as 'exempt' for the income types added with this SCR.
4. CalWIN Counties will not be sending Guaranteed Income types to CalSAWS through eICT and CalWIN Counties will receive Guaranteed Income types as 'Other' through eICT.
5. There is no impact to IEVS interface with this SCR.
6. OCAT and ICT interfaces will be tested with this SCR.
7. Foster Care/Kin-GAP Exemption options will not be used for income types added with this SCR.

2 RECOMMENDATIONS

2.1 Income Detail Page

2.1.1 Overview

Verify the new Income Types under 'Government Settlements, Payments, Programs' Category on the Income Detail page.

2.1.2 Income Detail Page Mockup

The screenshot shows the 'Income Detail' form. At the top, there are three buttons: 'Save and Add Another', 'Save and Return', and 'Cancel'. Below these is a red asterisk icon with the text '* - Indicates required fields'. The form has a 'Name: *' field with a dropdown menu currently showing '- Select -'. Below the Name field is a 'Retrieve Information' button. The 'Category:' field is set to 'Government Settlements, Payments, Programs'. The 'Type: *' field has a dropdown menu open, displaying a list of income types. The following table represents the items in the 'Type' dropdown menu:

Income Type
- Select -
Adoption Assistance Subsidy
Agent Orange
Austrian Other Payments
Austrian Social Insurance Payments
Executive Volunteer Programs
Family Subsistence Allowance
Guaranteed Income - Cash/CalFresh Exempt
Guaranteed Income - Cash Exempt
Guaranteed Income - Cash/MC Exempt
Guaranteed Income - Exempt
Guaranteed Income - MC Exempt
Guaranteed Income - Unearned
HUD Payments
Japanese/Filipino Restitution
Low Income Energy Assistance
Nutrition Assistance Program
Radiation Exposure
Ricky Ray Hemophilia
Senior Citizen Volunteers

At the bottom left of the form, there is a 'Shared with RDP' button.

Figure 2.1.2-1 - Income Detail Page Mockup

Note: Actual sorting of the drop-down values may differ from what is shown here in 2.1.2-1.

Figure 2.1.2-2 - Income Detail Page Mockup with 'MAGI Medi-Cal Exempt Income?' drop down

2.1.3 Description of Changes

1. Verify the following income type options to the 'Type' field of "Government Settlements, Payments, Programs" income category on Income Detail page:
 - a. Guaranteed Income - Cash/CalFresh Exempt
 - b. Guaranteed Income - Cash Exempt
 - c. Guaranteed Income - Cash/MC Exempt
 - d. Guaranteed Income - Exempt
 - e. Guaranteed Income - MC Exempt
 - f. Guaranteed Income - Unearned
2. Add 'MAGI Medi-Cal Exempt Income?:' - Add new drop-down below the 'Type' drop-down list with the following values:
 - a. 'Blank' (Default)
 - b. No
 - c. Yes
3. Only display the "MAGI Medi-Cal Exempt Income?" drop-down list when the following Income Types are selected:
 - a. Guaranteed Income - Cash/CalFresh Exempt
 - b. Guaranteed Income - Cash Exempt
 - c. Guaranteed Income - Unearned
4. Update Income Types to be in alphabetical order within the income Type drop-down list selection.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Financial

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add page mapping for the new 'MAGI Medi-Cal: Exempt Income?:' drop- down list.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 OCAT Referral Detail Page

2.2.1 Overview

Update 'Other' in the OCAT Referral Detail page to map the new Income Types.

2.2.2 OCAT Referral Detail Page Mockup

Other Program Benefits		
OCAT Benefit Type	Amount or Value of Service	
CalFresh	372.00	
CalWORKs	696.00	
CAPIC	0.00	
Child Care	0.00	
Child Support	0.00	
Housing	0.00	
State Disability Insurance (SDI)	0.00	
Student Scholarships and Grants	0.00	
Supplemental Social Security	0.00	
Transportation	0.00	
Unemployment	0.00	
Veterans	0.00	
Other	0.00	
	Type	Amount
Receiving Medi-Cal or Covered CA:	R	
Yes	Guaranteed Income - Cash/CalFresh Exempt	0.00
Receive CalWORKs In this County or Other County Before:	If	
Yes	Guaranteed Income - Cash/MC Exempt	0.00
	Lc	
	Guaranteed Income - Cash Exempt	0.00
	Guaranteed Income - MC Exempt	0.00
	Guaranteed Income - Unearned	0.00
	Guaranteed Income - Exempt	0.00

Figure 2.2.2 - OCAT Referral Detail Page Mockup

2.2.3 Description of Changes

1. Other - mapped to the following income types in the Systems. The income amount value as of the OCAT referral date will be used in determining the Amount or Value of Services.
 - a. Guaranteed Income - Cash/CalFresh Exempt
 - b. Guaranteed Income - Cash/MC Exempt
 - c. Guaranteed Income - Cash Exempt
 - d. Guaranteed Income - MC Exempt
 - e. Guaranteed Income - Unearned
 - f. Guaranteed Income - Exempt

2.2.4 Page Location

- **Global: Empl. Services**
- **Local: Appraisal, Case Summary**
- **Task: OCAT (appears after Employment option)**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 County Parameter Detail Page

2.3.1 Overview

Add 'Guaranteed Income' types to the County Parameter Detail page so that GA/GR Automated Solution Counties can view and edit the parameters associated with the 'Guaranteed Income' types for the GR program.

NOTE: Updates to the County Parameter Detail page only impact the GA/GR Automated Solution program.

2.3.2 County Parameter Detail Page Mockup

The screenshot displays the CalSAWS interface for editing County Parameters. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The main header shows the user is logged in as 'Orange SYS1' and provides navigation for various modules like Case Info, Eligibility, and Fiscal. The left sidebar lists administrative functions such as Flag, County Announcements, and Automated Actions. The main content area is titled 'County Parameter Detail' and includes 'Save' and 'Cancel' buttons. Below this, a section for 'Government Settlements, Payments, Programs' shows the current county as 'Orange' and the view month as '10/2022'. A table lists various items with columns for 'Item', 'Value', 'Begin Month', and 'End Month'. The 'Guaranteed Income' entries are highlighted, and the 'Unearned' option is selected in the dropdown menu for the 'Guaranteed Income - Unearned' row.

Item	Value	Begin Month	End Month
Adoption Assistance Subsidy	Exempt		
Agent Orange	Exempt		
Austrian Other Payments	Exempt		
Austrian Social Insurance Payments	Exempt		
Executive Volunteer Programs	Earned		
Family Subsistence Allowance	Exempt		
Guaranteed Income - Cash/CalFresh Exempt	Exempt		
Guaranteed Income - Cash Exempt	Exempt		
Guaranteed Income - Cash/MC Exempt	Exempt		
Guaranteed Income - Exempt	Earned Exempt Unearned		
Guaranteed Income - MC Exempt	Unearned		
Guaranteed Income - Unearned	Unearned		

Figure 2.3.2.1 - County Parameter Detail (Guaranteed Income Types) -Edit Mode Mockup

2.3.3 Description of Changes

1. Add the following Items (Income Types **in bold**) to the County Parameter Detail page so that users with access rights can view and edit the 'Value', 'Begin Month' and 'End Month' fields:

County Parameter Category	County Parameter Type	Item
Income	Government Settlements, Payments, Programs	Guaranteed Income - Cash/CalFresh Exempt
		Guaranteed Income - Cash Exempt
		Guaranteed Income - Cash/MC Exempt
		Guaranteed Income - Exempt
		Guaranteed Income - MC Exempt
		Guaranteed Income - Unearned

2. The Value dropdown field will have three possible options:
 - a. 'Blank'
 - b. 'Earned'
 - c. 'Exempt'
 - d. 'Unearned'
3. The following values will be set as default for the 'Guaranteed Income' items for each GA/GR Automated Solution County:

NOTE: GA/GR Automated Solution counties can update these values as needed.

County	Guaranteed Income- Cash/CalFresh Exempt	Guaranteed Income - Cash Exempt	Guaranteed Income - Cash/MC Exempt	Guaranteed Income - Exempt	Guaranteed Income -MC Exempt	Guaranteed Income - Unearned
Alameda	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Contra Costa	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Fresno	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Orange	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Placer	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Sacramento	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Santa Barbara	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Santa Clara	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned

County	Guaranteed Income- Cash/CalFresh Exempt	Guaranteed Income - Cash Exempt	Guaranteed Income - Cash/MC Exempt	Guaranteed Income - Exempt	Guaranteed Income –MC Exempt	Guaranteed Income - Unearned
Santa Cruz	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
San Diego	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
San Francisco	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
San Luis Obispo	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
San Mateo	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Solano	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Sonoma	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Tulare	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Ventura	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned
Yolo	Exempt	Exempt	Exempt	Exempt	Unearned	Unearned

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: GA/GR County Admin > Grants/Income**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 EDBC Updates - New Guaranteed Income Types

2.4.1 Overview

Add the new 'Guaranteed Income' types and configure the treatment of these types across different programs. For GA/GR Automated Solution (GR) please see Section 2.4.

2.4.2 Description of Changes

1. Add new income type of 'Guaranteed Income - Cash/ CalFresh Exempt' under 'Government Settlements, Payments, Programs' income category and configure treatment of income across the different programs based on the following:

Program	Treatment
CW	Exempt
CF	Exempt
RCA	Exempt
Foster Care	Exempt
Kin-GAP	Exempt
CAPI	Exempt
Medi-Cal	Unearned Income
GA (LA Only)	Exempt
Immediate Need	Exempt
Diversion	Exempt
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	<i>null</i>
CalHEERS Outbound	MS
eICT Inbound/Outbound Codes	
eICT Inbound	<i>null</i>
eICT Outbound	41H

2. Add new income type of 'Guaranteed Income - Cash Exempt' under 'Government Settlements, Payments, Programs' income category and configure treatment of income across the different programs based on the following:

Program	Treatment
CW	Exempt
CF	Unearned Income
RCA	Exempt
Foster Care	Exempt
Kin-GAP	Exempt
CAPI	Exempt
Medi-Cal	Unearned Income

GA (LA Only)	Exempt
Immediate Need	Exempt
Diversion	Exempt
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	<i>null</i>
CalHEERS Outbound	MS
eICT Inbound/Outbound Codes	
eICT Inbound	<i>null</i>
eICT Outbound	41H

3. Add new income type of 'Guaranteed Income - Cash/MC Exempt' under 'Government Settlements, Payments, Programs' income category and configure treatment of income across the different programs based on the following:

Program	Treatment
CW	Exempt
CF	Unearned Income
RCA	Exempt
Foster Care	Exempt
Kin-GAP	Exempt
CAPI	Exempt
Medi-Cal	Exempt
GA (LA Only)	Exempt
Immediate Need	Exempt
Diversion	Exempt
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	<i>null</i>
CalHEERS Outbound	<i>null</i>
eICT Inbound/Outbound Codes	
eICT Inbound	<i>null</i>
eICT Outbound	41H

4. Add new income type of 'Guaranteed Income - Exempt' under 'Government Settlements, Payments, Programs' income category and configure treatment of income across the different programs based on the following:

Program	Treatment
CW	Exempt
CF	Exempt
RCA	Exempt
Foster Care	Exempt
Kin-GAP	Exempt
CAPI	Exempt
Medi-Cal	Exempt
GA (LA Only)	Exempt
Immediate Need	Exempt
Diversion	Exempt
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	<i>null</i>
CalHEERS Outbound	<i>null</i>
eICT Inbound/Outbound Codes	
eICT Inbound	<i>null</i>
eICT Outbound	41H

5. Add new income type of 'Guaranteed Income - MC Exempt' under 'Government Settlements, Payments, Programs' income category and configure treatment of income across the different programs based on the following:

Program	Treatment
CW	Unearned Income
CF	Unearned Income
RCA	Unearned Income
Foster Care	Exempt
Kin-GAP	Exempt
CAPI	Unearned Income
Medi-Cal	Exempt
GA (LA Only)	Exempt
Immediate Need	Unearned Income
Diversion	Unearned Income
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	<i>null</i>

CalHEERS Outbound	<i>null</i>
eICT Inbound/Outbound Codes	
eICT Inbound	<i>null</i>
eICT Outbound	41H

6. Add new income type of 'Guaranteed Income - Unearned' under 'Government Settlements, Payments, Programs' income category and configure treatment of income across the different programs based on the following:

Program	Treatment
CW	Unearned Income
CF	Unearned Income
RCA	Unearned Income
Foster Care	Exempt
Kin-GAP	Exempt
CAPI	Unearned Income
Medi-Cal	Unearned Income
GA (LA Only)	Exempt
Immediate Need	Unearned Income
Diversion	Unearned Income
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	<i>null</i>
CalHEERS Outbound	MS
eICT Inbound/Outbound Codes	
eICT Inbound	<i>null</i>
eICT Outbound	41H

2.4.3 Programs Impacted

CW, CF, RCA, FC, KG, CAPI, MC, GA (LA Only), IN, DV

2.5 GA/GR Automated Solution (GR) – EDBC Updates

2.5.1 Overview

Update GA/GR Automated Solution EDBC rules to include the new 'Guaranteed Income' types.

2.5.2 Description of Changes

1. Update existing GA/GR Automated Solution Unearned Income EDBC rules to include the following income types:

Category	Income Type
Government Settlements, Payments, Programs	Guaranteed Income - Cash/CalFresh Exempt
	Guaranteed Income - Cash Exempt
	Guaranteed Income - Cash/MC Exempt
	Guaranteed Income - Exempt
	Guaranteed Income - MC Exempt
	Guaranteed Income - Unearned

Technical Note: GAGR Opt In Guide Excel for Counties will need to be updated with the new Guaranteed Income types (Grants & Income Matrix). See section 2.3.3.2.

2.5.3 Programs Impacted

GA/GR Automated Solution (GR)

2.6 Correspondence - Add threshold language translations for new 'Guaranteed Income' income types

2.6.1 Overview

This effort will add threshold language translations for the new 'Guaranteed Income' income types. These translations will be used in the NOAs that are listed in section 2.6.2.

2.6.2 Description of Change

1. The following new income type options will be translated into the CalSAWS supported threshold languages
 - a. Guaranteed Income - Cash/CalFresh Exempt
 - b. Guaranteed Income - Cash/MC Exempt
 - c. Guaranteed Income - Cash Exempt
 - d. Guaranteed Income - MC Exempt
 - e. Guaranteed Income - Unearned
 - f. Guaranteed Income - Exempt

Language Name
Spanish
Armenian
Arabic
Cambodian
Chinese
Farsi
Tagalog
Hmong
Korean
Lao
Russian
Vietnamese

See supporting document #1 for the threshold language translations.

El condado terminará sus beneficios de CalFresh a partir de 10/31/2022.

La razón es la siguiente:

Usted no nos proporcionó pruebas de los ingresos no ganados que aparecen enseguida:

<Income Type variable in Spanish>

EBT: Guarde su tarjeta de plástico Golden State

Figure 2.5.2.1 Income Type variable placement in example of threshold language NOA

2.7 Correspondence - Regression Test Forms and NOAs

2.7.1 Overview

The new 'Guaranteed Income' income types to be added with this effort will need to have regression tests added for specific forms and NOAs containing them. These forms and NOAs automatically pull the Income Type for the 'Government Settlements, Payments, Programs' income category.

2.7.2 Description of Change

The following forms and NOAs will need to have regression tests:

1. Forms:
 - CW 2200
2. NOAs for Denial and Discontinuance that contain the following fragments, including their threshold language versions:
 - CF_DN_UNVERF_BUDMTH_UNERN_INC_F037,
CF_TN_UNVERF_BUDMTH_UNERN_INC_F037
 - H_DN_FAIL_REDETER_VERIF_H410, H_TN_FAIL_DETER_VERIF_H410

As of 10/31/2022, the County is stopping your CalFresh benefits.

Here's why:

You did not give us proof of the following unearned income:

<Income Type variable>

EBT: Keep your plastic Golden State Advantage card if

Figure 2.6.2.1 Income Type variable placement in example of English NOA

2.8 Update Form Status batch job to send new income types as part of the MC RE pre-population data

2.8.1 Overview

The Form Status batch job sends information to BenefitsCal related to a redetermination packet when the packet is generated in CalSAWS. The batch job will be modified to be able to send the new income types documented in this SCR when sending the pre-population data for MC RE forms (MC 210 RV, MC 216, and MC 217).

2.8.2 Description of Change

1. Modify the batch job when sending MC RE forms pre-population data to BenefitsCal to include the following income types when it exists for the case:
 - Guaranteed Income - Cash/CalFresh Exempt
 - Guaranteed Income - Cash/MC Exempt
 - Guaranteed Income - Cash Exempt
 - Guaranteed Income - MC Exempt
 - Guaranteed Income - Unearned
 - Guaranteed Income - Exempt

2.8.3 Execution Frequency

No Change. Daily (Mon-Sat).

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 Interface Partner

BenefitsCal Portal

2.8.8 Failure Procedure/Operational Instructions

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

2.9 CA 253 CalWORKs

2.9.1 Overview

The California Work Opportunity and Responsibility to Kids (CalWORKs) report reports on the reasons for Discontinuance of Cash Grant. The report is being updated to account for CalWORKs program that are discontinued for exceeding CalWORKs standard due to the new income types of Guaranteed Income - Unearned and Guaranteed Income - MC Exempt.

2.9.2 CA 253 Screenshot

COUNTY NAME		VERSION		REPORT MONTH AND YEAR				
San Bernardino		<input type="checkbox"/> INITIAL <input type="checkbox"/> REVISED		09/2022				
PART A. REASONS FOR DISCONTINUANCES OF CASH GRANT		Two Parent Families (A)	Zero Parent Families (B)	All Other Families (C)	TANF Timed-Out (D)	LT Sanction/SN/FF (E)		
1. Total cases discontinued during the month (Sum of Items 2 through 11) (Same as Item 9, CA 237 CW)		198	392	779	387	252		
2. Cases with no eligible child.....		13	75	69	24	25		
3. Cases with children no longer deprived of support or care.....		0	0	0	0	0		
4. Cases with resources that exceed limits.....		0	0	1	1	0		
5. Cases with income that exceeds standards (Sum of Items 5a through 5f).....		26	12	97	45	17		
a. Earnings increased.....		23	12	91	43	16		
b. Benefits or pensions increased.....		3	0	6	2	1		
c. Support from person inside home increased.....		0	0	0	0	0		
d. Support from person outside home increased.....		0	0	0	0	0		
e. Requirements reduced.....		0	0	0	0	0		

Note: The report mockup is not being updated as part of this SCR.

2.9.3 Description of Change

- Map the new Income Types of 'Guaranteed Income - Unearned' and Guaranteed Income - MC Exempt to line '5b. Benefits or pensions increased' of the CA 253 CW report.

Note: Without mapping the new Income Types, the cases will be incorrectly reported on line '5d. Support from person outside home' increased as it reports all unmapped income types.

2.9.4 Report Location

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

2.10 eHIT

2.10.1 Overview

Update eHIT logic to not send income in an EDR for Guaranteed Income when the 'MAGI Medi-Cal Exempt Income' is answered "Yes."

2.10.2 Description of Change

1. Add an exception to eHIT outbound logic to not send income in the EDR for Income Types 'Guaranteed Income - Cash/CalFresh Exempt', 'Guaranteed Income - Cash Exempt', 'Guaranteed Income - Unearned' when the 'MAGI Medi-Cal Exempt Income' is answered "Yes" for the Income Detail record.

Note: The income record will be included in the EDR per the recommendation 2.4.2 when the answer to 'MAGI Medi-Cal Exempt Income' is blank or "No" for the income types above.

2.10.3 Interface Partner

CalHEERS

2.10.4 Schema Version

eHIT Schema Version 18

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	Threshold translations for new 'Guaranteed Income' income types	CT186_Guaranteed_Income_translations.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.1	The LRS shall fully automate and perform all aspects of the eligibility determination process and benefit level calculations for all categories of public assistance in a single pass without manual intervention.	This SCR updates automated EDBC to comply with GI pilot income requirements detailed under ACL 21-137 and ACL 21-137E.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-233619

Add Threshold Languages to

CF1239 NOA

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Kavitha M R
	Reviewed By	DS Nagesha

DATE	DOCUMENT VERSION	REVISION DESCRIPTION kkk	AUTHOR
07/21/2022	1.0	Initial Document	Kavitha M R

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1 OVERVIEW

The purpose of this change is to Add Threshold languages for CF1239 NOA.

1.1 Current Design

Currently CF1239 (12/20) NOA is available in English and Spanish Languages in CalSAWS.

1.2 Requests

Add Threshold languages to Eligibility Reasons TCF Approved, CF Approved & TCF Fail, and CW restored TCF Fail to match with the state version.

Languages include:

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

1.3 Overview of Recommendations

1. Add threshold Languages for the Eligibility Reasons TCF Approved with reason code F615A.
2. Add threshold Languages for the CW Approved & TCF Fail with a reason code F619T.
3. Add threshold Languages for the CW restored TCF Fail with reason code F631T.
4. Add threshold languages for the TCF Approved NOA Title.
5. Add threshold languages for the CF Approved & TCF Fail NOA Title.
6. Add threshold languages for the TCF Approved NOA Action.
7. Update existing threshold languages for the CW restored TCF Fail and CF Approved & TCF Fail NOA Action.
8. Add threshold languages for CW restored TCF Fail and CF Approved & TCF Fail NOA Action.
9. Add threshold languages for the TCF Approved NOA Message.

1.4 Assumptions

1. The triggering conditions of the Common NOA Fragments for Threshold Generation remains the same and are not being updated.
2. The NOA template remains the same and is not being updated.
3. The existing variable population is not being updated with this effort.

2 RECOMMENDATIONS

2.1 Add threshold Languages for the Eligibility Reasons TCF Approved with reason code F615A.

2.1.1 Overview

Add threshold languages for CF_AP_TFS_APPROVED NOA reason Fragments in CalSAWS.

Reason Fragment Name and ID: CF_AP_TFS_APPROVED_F615 (Fragment ID: 7216)

State Form/NOA: CF 1239(12/20)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Approved

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English and Spanish

2.1.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA reason.

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

NOA Mockups/Examples: Supporting Documents #2

2.1.3 Form/NOA Variable Population

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

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2 Add threshold Languages for the CW Approved & TCF Fail with a reason code F619T.

2.2.1 Overview

Add threshold languages for CW Approved & TCF Fail NOA reason Fragments in CalSAWS.

Reason Fragment Name and ID: CF_TN_APPRVD_CF_FAILED_TFS_F619
(Fragment ID: 6485)

State Form/NOA: CF 1239(12/20)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.2.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA reason.

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

NOA Mockups/Examples: Supporting Documents #3

2.2.3 Form/NOA Variable Population

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

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.3 Add threshold Languages for the CW restored TCF Fail with reason code F631T.

2.3.1 Overview

Add threshold languages for CW restored TCF Fail NOA reason Fragments in CalSAWS.

Reason Fragment Name and ID: CF_TN_CW_RSTR_TCF_FAIL_F631
(Fragment ID: 6114)

State Form/NOA: CF 1239(12/20)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.3.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA reason.

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

NOA Mockups/Examples: Supporting Documents #4

2.3.3 Form/NOA Variable Population

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

2.3.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.4 Add threshold languages for the TCF Approved NOA Title

2.4.1 Overview

Add threshold languages for TCF Approved NOA Title

Title Fragment Name and ID: TCF_AP_NOA_TYPE (Fragment ID: 3130)

State Form/NOA: CF 1239(12/20)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Approved

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.4.2 Form/NOA Verbiage

Create threshold fragment xdfs for NOA Title.

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

NOA Mockups/Examples: Supporting Documents #1

2.4.3 Form/NOA Variable Population

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

2.4.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.5 Add threshold languages for the CF Approved & TCF Fail NOA Title

2.5.1 Overview

Add threshold languages for CF Approved & TCF Fail NOA title

Title Fragment Name and ID: TCF_TN_NOA_TYPE (Fragment ID: 3132)

State Form/NOA: CF 1239(12/20)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.5.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA Title.

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

NOA Mockups/Examples: Supporting Documents#1

2.5.3 Form/NOA Variable Population

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

2.5.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.6 Add threshold languages for the TCF Approved NOA Action

2.6.1 Overview

Add threshold languages for the TCF Approved NOA Action fragment.

Title Fragment Name and ID: CF_AP_ACTION6 (Fragment ID: 4061)

State Form/NOA: CF 1239(12/20)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Approved

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.6.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA Action.

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

NOA Mockups/Examples: Supporting Documents #1

2.6.3 Form/NOA Variable Population

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

2.6.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.7 Update existing threshold languages for the CW restored TCF Fail and CF Approved & TCF Fail NOA Action

2.7.1 Overview

Update threshold languages for CF_TN_ACTION2 fragment.

Title Fragment Name and ID: CF_TN_ACTION2 (Fragment ID: 4011)

State Form/NOA: CF 1239(12/20)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog and Vietnamese.

2.7.2 Form/NOA Verbiage

Update threshold xdps for NOA Action.

Threshold languages: Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog and Vietnamese.

NOA Mockups/Examples: Supporting Documents #1

2.7.3 Form/NOA Variable Population

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

2.7.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.8 Add threshold languages for the CW restored TCF Fail and CF Approved & TCF Fail NOA Action

2.8.1 Overview

Add threshold languages for CF_TN_ACTION2 fragment.

Title Fragment Name and ID: CF_TN_ACTION2 (Fragment ID: 4011)

State Form/NOA: CF 1239(12/20)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog and Vietnamese.

2.8.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA Action.

Add Threshold languages: Arabic, Hmong, and Lao

NOA Mockups/Examples: Supporting Documents #1

2.8.3 Form/NOA Variable Population

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

2.8.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.9 Add threshold languages for the TCF Approved NOA Message

2.9.1 Overview

Add threshold languages for TCF Approved NOA Fragments.

Title Fragment Name and ID: CF_AP_MESSAGE4 (Fragment ID: 5025)

State Form/NOA: CF 1239(12/20)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Approved

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.9.2 Form/NOA Verbiage

Add CalFresh NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents#1

2.9.3 Form/NOA Variable Population

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

2.9.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.10 Update and Add threshold languages for the CF Approved & TCF Fail NOA Message

2.10.1 Overview

Update and Add threshold languages for CF Approved & TCF Fail Message fragment.

Threshold languages include:

Arabic, Armenian, Cambodian, Farsi, Korean, Hmong, Lao, Tagalog, and Vietnamese

Title Fragment Name and ID: CF_TN_MESSAGE6 (Fragment ID: 5095)

State Form/NOA: CF 1239 (12/20)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA:

Existing Languages: English, Spanish, Chinese and Russian

2.10.2 Form/NOA Verbiage

Update and Add CalFresh NOA fragments in Threshold languages.

Update Threshold languages: Chinese and Russian

Add Threshold languages: Arabic, Armenian, Cambodian, Farsi, Korean, Hmong, Lao, Tagalog, and Vietnamese

NOA Mockups/Examples: Supporting Documents #1

2.10.3 Form/NOA Variable Population

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

2.10.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	TCF APPROVED NOA- This Includes updated reason and message fragments and Title in English language for reference	TCF APPROVED NOA.pdf FragmentsVerbiage.xlsx
2.	Correspondence	CF APRVD AND TCF FAIL NOA	CF APRVD AND TCF Fail.pdf FragmentsVerbiage.xlsx
3.	Correspondence	CW APRVD AND TCF FAIL NOA	CW APRVD AND TCF Fail.pdf FragmentsVerbiage.xlsx
4.	Correspondence	CW Restored TCF Fail NOA	CW Restored TCF Fail.pdf FragmentsVerbiage.xlsx

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	F615A, F619T, F631T Reason Codes are added in threshold languages.

	<p>authorized representative of a change in worker, telephone hours or Local Office Site;</p> <ul style="list-style-type: none">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; andv. CSC PIN notices.	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-244833

Obsolete the DFA 377.5

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sagar Karnawadi
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/25/2022	1.0	Initial Revision	Sagar Karnawadi

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1 OVERVIEW

The scope of this SCR is to obsolete DFA 377.5 from CalSAWS. The DFA 377.5 was replaced with the CF 377.5 CR with ACL 14-37. Subsequently, the CF 377.5 CR was obsoleted from the system when Change Reporting was eliminated for the CalFresh program with ACL 15-90/ACL 15-90E.

1.1 Current Design

The DFA 377.5 (8/06) is available in the CalSAWS.

1.2 Requests

Obsolete the DFA 377.5 (8/06) from CalSAWS. The DFA 377.5 was replaced with the CF 377.5 CR with ACL 14-37 but this change was never updated in the system.

1.3 Overview of Recommendations

Obsolete the DFA 377.5 (8/06) from CalSAWS.

1.4 Assumptions

Not Applicable

2 RECOMMENDATIONS

2.1 Obsolete the DFA 377.5 from CalSAWS System

Remove the below forms from the CalSAWS System. This form must be removed from all languages which are mentioned below.

Form Number	Form Name	Language(s)
DFA 377.5	CalFresh Household Change Report (DFA 377.5)	English, Spanish

3 SUPPORTING DOCUMENTS

Not Applicable

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR- 1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	DFA 377.5 form will be removed from CalSAWS System.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-249712

Update and add Available Translations for
M16-701 (08/08) version to CalSAWS Template
Repository

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ajay Agrawal
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/19/2022	1.0	Initial Draft	Ajay Agrawal

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1 OVERVIEW

This effort will update English, Spanish and available threshold languages of the M16-701 (08/08) in CalSAWS Template Repository.

1.1 Current Design

Currently M16-701 (08/08) EBT Adjustment Advice is available in English and Spanish languages in CalSAWS Template Repository.

1.2 Requests

Update English, Spanish and add available threshold languages for M16-701 (08/08) EBT Adjustment Advice to CalSAWS Template Repository.

Languages Include: Chinese, Russian, Vietnamese.

1.3 Overview of Recommendations

Update English, Spanish and add available threshold languages for M16-701 (08/08) EBT Adjustment Advice to CalSAWS Template Repository.

Languages Include: Chinese, Russian, Vietnamese.

1.4 Assumptions

1. Print options for threshold forms will remain the same as the print option for English form.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing English and Spanish form.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Update English, Spanish and add available threshold languages of the M16-701 (08/08) EBT Adjustment Advice in CalSAWS.

2.1.1 Overview

Update English, Spanish and add available threshold languages of the M16-701 (08/08) EBT Adjustment Advice in CalSAWS. English and Spanish verbiage will be updated to match the state version.

State Form: M16-701 (08/08)

Updated Programs: CalWORKs, RCA, CAPI, GR/GA

Current Attached Forms: N/A

Updated Template Description: This form is used to notify the participant that their EBT account will be adjusted to account for a system error.

Current Forms Category: NOA

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish.

2.1.2 Form Verbiage

Create M16-701 (08/08) XDP

Create M16-701 (08/08) XDP's for threshold languages.

Threshold Languages: Chinese*, Russian, Vietnamese.

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

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): EBT Adjustment Advice

Include NA Back 9: Yes

Imaging Form Name: EBT Adjustment Advice

Imaging Document Type: Notification/NOA

Form Mockups/Examples: See supporting document #1

2.1.3 Form Generation Conditions

1. **Update English, Spanish and add available threshold languages of the M16-701 (08/08) EBT Adjustment Advice to Template Repository**

The M16-701 (08/08) EBT Adjustment Advice form is added only to the Template Repository.

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

2. **Add Form Control**

Add an imaging barcode for M16-701 (08/08).

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for M16-701 (08/08) EBT Adjustment Advice.

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 Options:

Mailing Options	Option for M16-701
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for M16-701
Post to Self-Service Portal	N

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	M16-701 (08/08)	M16_701_English.pdf M16_701_Spanish.pdf M16_701_Chinese.pdf M16_701_Russian.pdf M16_701_Vietnamese.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; 	M16-701 (08/08) are being updated and added in all available threshold languages

<ul style="list-style-type: none">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; andv. CSC PIN notices.	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-249714

Add Available Translations for NA 823 to CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Abhijit Tiwari
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/16/2022	1.0	Initial Draft	Abhijit Tiwari

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1 OVERVIEW

This effort will add the NA 823 (8/00) in all available threshold languages to CalSAWS.

1.1 Current Design

Currently NA 823 (8/00) is available in English and Spanish languages in CalSAWS.

1.2 Requests

Add NA 823 (8/00) Notice Of Action - Ancillary Expenses Approval/Denial in available threshold languages to CalSAWS.

Languages include:

Chinese, Farsi, Russian, Vietnamese

1.3 Overview of Recommendations

Add NA 823 (8/00) Notice Of Action - Ancillary Expenses Approval/Denial in following threshold languages: Chinese, Farsi, Russian, Vietnamese

1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Add Available Translations for NA 823 to CalSAWS

2.1.1 Overview

This section will cover the requirements for adding the NA 823 forms in available threshold languages.

State Form: NA 823 (8/00)

Current Programs: WTW, Cal-Learn, REP

Current Attached Forms: N/A

Current Forms Category: NOA

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish.

Template Description: This form is used to inform the client they have been denied or approved for an Ancillary or Work-Related Expense. The form explains the reasoning along with the means to respond to the notice via an NA Back 9 form.

Imaging Form Name: Approval/Denial of Ancillary

Imaging Document Type: Notification/NOA

2.1.2 Form Verbiage

Create NA 823 XDP's for Threshold Languages

Threshold Languages: Chinese, Farsi, Russian and Vietnamese

Form Mockups/Examples: See Supporting Documents # 1

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: Yes

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

Update NA 823 Form generation batch job to generate threshold languages

Update batch job (PB00R6500) to generate the NA 823 in all threshold languages.

Tech Note: Update CT942_211 (NA 823)

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

Print Options:

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

Mailing Options:

Mailing Options	Option for NA 823
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for NA 823
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	NA 823 Threshold Languages	NA823_CH.pdf NA823_FA.pdf NA823_RU.pdf NA823_VI.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	NA823 is being added in all available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-249719

Add Available Threshold Languages for SAR 72
to CalSAWS.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shaik Shahul
	Reviewed By	Ds, Nagesha

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/16/2022	1.0	Initial Draft	Shaik Shahul

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	4.1 Project Requirements.....	8

1 OVERVIEW

Currently the "SAR 72 - SPONSOR'S SEMI-ANNUAL INCOME AND RESOURCES REPORT (3/13)" is available in the CalSAWS Template Repository in English and few threshold languages. This effort will add the remaining available threshold languages for the SAR 72 form in CalSAWS.

1.1 Current Design

Currently the "SAR 72 - SPONSOR'S SEMI-ANNUAL INCOME AND RESOURCES REPORT (3/13)" is available in the CalSAWS Template Repository in English and threshold languages.

1.2 Requests

Add the "SAR 72 - SPONSOR'S SEMI-ANNUAL INCOME AND RESOURCES REPORT (3/13)" to the Template Repository in CalSAWS.

Languages include: Arabic, Farsi, Hmong, Lao.

1.3 Overview of Recommendations

Add available threshold languages to the CalSAWS for the SAR 72 form.

Languages include: Arabic, Farsi, Hmong, Lao.

1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Add available threshold languages to CalSAWS For SAR 72 (3/13)

2.1.1 Overview

This section will cover the requirements for adding the SAR 72 form in all available translations.

State Form: SAR 72 (3/13)

Form Number: SAR 72

Current Programs: CalWORKs, CalFresh

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All counties

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

Imaging Form Name: Sponsors SAR Income and Resources

Imaging Document Type: Customer Reporting

2.1.2 Form Verbiage

Create SAR 72 XDP's for available Threshold Languages

Threshold Languages: Arabic, Farsi, Hmong, Lao.

Form Mockups/Examples: See Supporting Documents # 1

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: No

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

Print Options:

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

Mailing Options:

Mailing Options	Option for SAR 72 Form
Mail-To (Recipient)	Participant Mailing Address.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	Worker's Office Address
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Additional Options:

Requirement	Option for SAR 72 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	SAR 72 available threshold Languages	SAR72_Farsi.pdf SAR72_Hmong.pdf SAR72_Lao.pdf SAR72_Arabic.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	SAR 72 is being added in available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-250218

MEDS: Add new MEDS alerts 8507, 9598, 9599,
9600

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti
	Reviewed By	Himanshu Jain, Angela Zhao

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/15/2022	1.0	Initial Doc	Howard Suksanti

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3	Requirements.....	Error! Bookmark not defined.
	3.1 Project Requirements.....	Error! Bookmark not defined.

1 OVERVIEW

Add the following new MEDS Alerts in CalSAWS.

1. 8507 SSN-VER REQUEST WAS RESUBMITTED BY MEDS
2. 9598 MCIEP ACTIVE - EW32 REQUIRED
3. 9599 EXTENDED ELIGIBLE DUE TO MCIEP & NO INCARCERATION STATUS
4. 9600 MCIEP ACTIVE - EW32 REQUIRED

1.1 Current Design

Currently CalSAWS does not list MEDS alerts 8507, 9598, 9599 and 9600 on the MEDS Alert Search page and MEDS Alert Admin Search page.

Under the MEDS Network Change Cycle 482 Installed:

- Alert 8507 is created

Under the MEDS Network Change Cycle 484 Installed:

- Alerts 9598, 9599 and 9600 are created.

1.2 Requests

Add new MEDS alerts 8507, 9598, 9599 and 9600 to MEDS Alert Search page and MEDS Alert Admin Search page.

1.3 Overview of Recommendations

Add new MEDS alerts 8507, 9598, 9599 and 9600 to MEDS Alert Search page and MEDS Alert Admin Search page.

1.4 Assumptions

N/A.

2 RECOMMENDATIONS

2.1 Add new MEDS Alerts.

2.1.1 Overview

This SCR will setup the External # 8507, 9598, 9599 and 9600 alerts in The System so user can view those alerts from the application.

2.1.2 Description of Change

Add the following MEDS alerts into CalSAWS.

1. Alert #8507 (Internal #0842).

Alert Description (TITLE_DESCR)	SSN-VER REQUEST WAS RESUBMITTED BY MEDS
Explanation (TEXT_DESCR)	MEDS records with active eligibility that have an unverified SSN-VER, or where the SSN-VER has been removed will generate a new SVES requests during Renewal.
Automation	No.
Task Creation	No.
Alert Type	Alert
Action (ACTN_DESCR)	None

2. Alert #9598 (Internal #0839).

Alert Description (TITLE_DESCR)	MCIEP ACTIVE - EW32 REQUIRED
Explanation (TEXT_DESCR)	Medi-Cal Inmate Eligibility Program (MCIEP) eligibility has been added to the MEDS record. The incarceration needs to be reported using the EW32 transaction.
Automation	No.
Task Creation	No.
Alert Type	Urgent
Action (ACTN_DESCR)	Obtain the actual date of incarceration and submit the EW32 with the Incarceration Date. If the individual has been released from incarceration, obtain the actual date of incarceration and actual date of release, and submit that information on the EW32 transaction.

3. Alert #9599 (Internal #0840).

Alert Description (TITLE_DESCR)	EXTENDED ELIGIBLE DUE TO MCIEP & NO INCARCERATION STATUS
Explanation (TEXT_DESCR)	Alert 9598 has been generated for twelve consecutive months due to Medi-Cal Inmate Eligibility Program (MCIEP) eligibility being added to the MEDS record. This indicates an incarceration. However, the incarceration has not

	been reported with the EW32 transaction as required.
Automation	No.
Task Creation	No.
Alert Type	Critical
Action (ACTN_DESCR)	Obtain the actual date of incarceration and submit the EW32 with the Incarceration Date. If the individual has been released from incarceration, obtain the actual date of incarceration and actual date of release, and submit that information on the EW32 transaction.

4. Alert #9600 (Internal #0841).

Alert Description (TITLE_DESCR)	MCIEP ACTIVE - EW32 REQUIRED
Explanation (TEXT_DESCR)	This alert is sent to the State MCIEP team. It is generated once at the first Renewal after Medi-Cal Inmate Eligibility Program (MCIEP) eligibility is added to a MEDS record with active Medi-Cal eligibility. The incarceration needs to be reported using the EW32 transaction.
Automation	No.
Task Creation	No.
Alert Type	Urgent
Action (ACTN_DESCR)	If the incarceration has not been reported to MEDS, State MCIEP staff should send a reminder to the County of Responsibility to report the incarceration by submitting the EW32 transaction.

- Set MEDS Alerts 8507, 9598, 9599 and 9600 to 'Active' on the MEDS_ALERT_CONFIG table.
- Set the following default values for the Task Information on the MEDS Alert Admin Detail page for the new MEDS Alerts:
 - a. Status: Inactive
 - b. Type: Blank
 - c. Long Description: MEDS Alert {Alert ID} – {Alert Description} has been received.
 - d. Due Date: Default Due Date
 - e. Default Due Date: 10 Days
 - f. Initial Assignment: Default Assignment
 - g. Default Assignment: MEDS Alert Task Distribution

2.1.3 Counties Impacted

All Counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-250230

Task Management - Sibling Task Assignment

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Justin Dobbs; Sarah Cox, Dymas Pena, Carlos Albances

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/16/2022	1.0	Initial Revision	Vallari Bathala

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to allow the System to automatically assign newly created tasks based on Workers who are already assigned “sibling” Tasks for the same Case.

1.1 Current Design

CalSAWS Task Management functionality provides various configuration options for assignment of automated Tasks. These options include routing of Tasks to the program worker or to a Task Bank. The CalSAWS System also includes Task bundling functionality which will include additional Tasks associated to the same Case during a Task Reassignment action.

The CalSAWS System does not include Task assignment processing to route a new Task based on a Worker who may already hold one or more “sibling” Tasks for the same Case.

1.2 Requests

Introduce “sibling” Task assignment as a configuration option for automated Tasks in the CalSAWS System. This processing will evaluate Tasks which already exist for the Case and attempt to route new Tasks based on existing Task assignments.

1.3 Overview of Recommendations

1. Add “sibling” Task assignment logic which will attempt to automatically assign a new task to a Worker who is already assigned an existing task for the same Case.
2. Update the Automated Action Detail page to include the option to turn on, or off, the Sibling Assignment functionality.
3. Update the Document Routing Rule Program Detail page to include the option to turn on, or off, the Sibling Assignment functionality.
4. Update the MEDS Alert Admin Detail page to include the option to turn on, or off, the Sibling Assignment functionality.
5. Update Task Upload templates to include an option to utilize the Sibling Task Assignment functionality.
6. Update the Worker Suggestions page to display a suggested worker based on Sibling Task Assignment logic.

1.4 Assumptions

1. Existing assignment processing for automated Tasks will not be modified. Sibling Task assignment processing is just an assignment method that can be applied prior to evaluating existing assignment configurations. All other functions will not be affected and will process normally.

2 RECOMMENDATIONS

2.1 Sibling Task Assignment Processing

“Sibling” Task Assignment is the processing to route automated Tasks to a Worker who already holds a Task for the Case during Task creation. A “Sibling” Task is a Task in a status of “Assigned” or “In Process” for the Case that is assigned to a Worker.

When Sibling Task Assignment is configured, processing will apply the Sibling Task Assignment logic first to identify a sibling Task and Worker to route the new Task to. If a sibling Task/Worker is not identified by Sibling Task Assignment rules, the Task processing will continue as normal to evaluate the remaining assignment configurations.

This assignment processing also strictly targets Workers/Positions for assignment of the new Task, it will not route new Tasks into Task Banks. Task Banks are often configured to house specific types of Tasks based on assignment/reassignment configurations; Sibling Task Assignment processing will not route new Tasks into Task Banks so as not to interfere with specific Task Bank purpose/configuration. Note that the “Bundle Case Tasks” feature is available for use while reassigning existing Tasks to/from a Task Bank.

Sibling Task Assignment processing only applies to Automated Tasks, it does not apply to Tasks that are manually created. The Task being processed during Task creation must be associated to a Case and Program. Sibling Task Assignment processing will not be applied to Tasks which do not have a Case/Program association, for example “Clearance” Tasks. See Appendix 5.1 for Automated Actions which will not allow editing of the Sibling Task Assignment configuration option for this reason.

Document Routing Rule Task processing as described in enhancement CA-247248 performs an evaluation after Program Based Rules are processed to determine Task assignment for each program. If a single Worker would receive more than one Task from this processing, a program hierarchy is applied so that a single Task is only created for a Worker from a single imaged document. Sibling Task Assignment processing will not impact this processing as the Sibling Task Assignment logic will be applied as part of the Worker determination, which is prior to the consolidation logic described in CA-247248.

Sibling Task Assignment processing is as follows:

1. Look for an existing sibling Task in an “Assigned” or “In Process” Status that is assigned to a Worker and associated to the same Case and Program of the Task being created.

- a. If one or more sibling Tasks are found and all sibling Tasks are assigned to the same Worker, assign the new Task to the same Worker holding the sibling Task(s).
 - b. If multiple sibling Tasks are found that are distributed across 2 or more Workers, assign the new Task to the same Worker holding the sibling Task with the most recent Assigned Date.
 - i. If multiple sibling tasks are found that are distributed across 2 or more Workers and the same Assign Date, assign the new Task to the same Worker holding the sibling Task with the most recent Created Date.
2. If Step 1 does not identify a sibling Task for the same Case/Program of the Task being created, look for an existing sibling Task in an "Assigned" or "In Process" Status that is assigned to a Worker and associated to the same Case of the Task being created. In this scenario, processing is looking for sibling Tasks for the same Case that are associated to a different program from the Task being created.
 - a. If one or more sibling Tasks are found and all sibling Tasks are assigned to the same Worker, confirm that the Worker's Position is configured to receive the Program of the Task being created. If the Worker's Position can receive the program of the Task being created, assign the new Task to the same Worker holding the sibling Tasks(s).
 - b. If multiple sibling Tasks are found that are distributed across 2 or more Workers, evaluate which of these Workers have Positions configured to receive the Program of the Task being created. At this point, if a single Worker is identified, assign the new Task to this Worker. If there are still multiple candidate Workers at this stage, apply the Program Hierarchy logic to identify the highest priority program of the sibling Tasks and assign the new Task to the Worker assigned to the highest priority program sibling Task with the most recent Assigned Date.
 - i. If multiple sibling tasks are found that are distributed across 2 or more Workers after the Program Hierarchy is applied and the Workers identified have the same Assign Date, assign the new Task to the same Worker holding the sibling Task with the most recent Created Date.
3. If the Sibling Task Assignment processing fails to identify a Worker to route the new Task to, Task processing will proceed normally per the required assignment configurations (i.e., Automated Action, Document Routing Rule etc.)

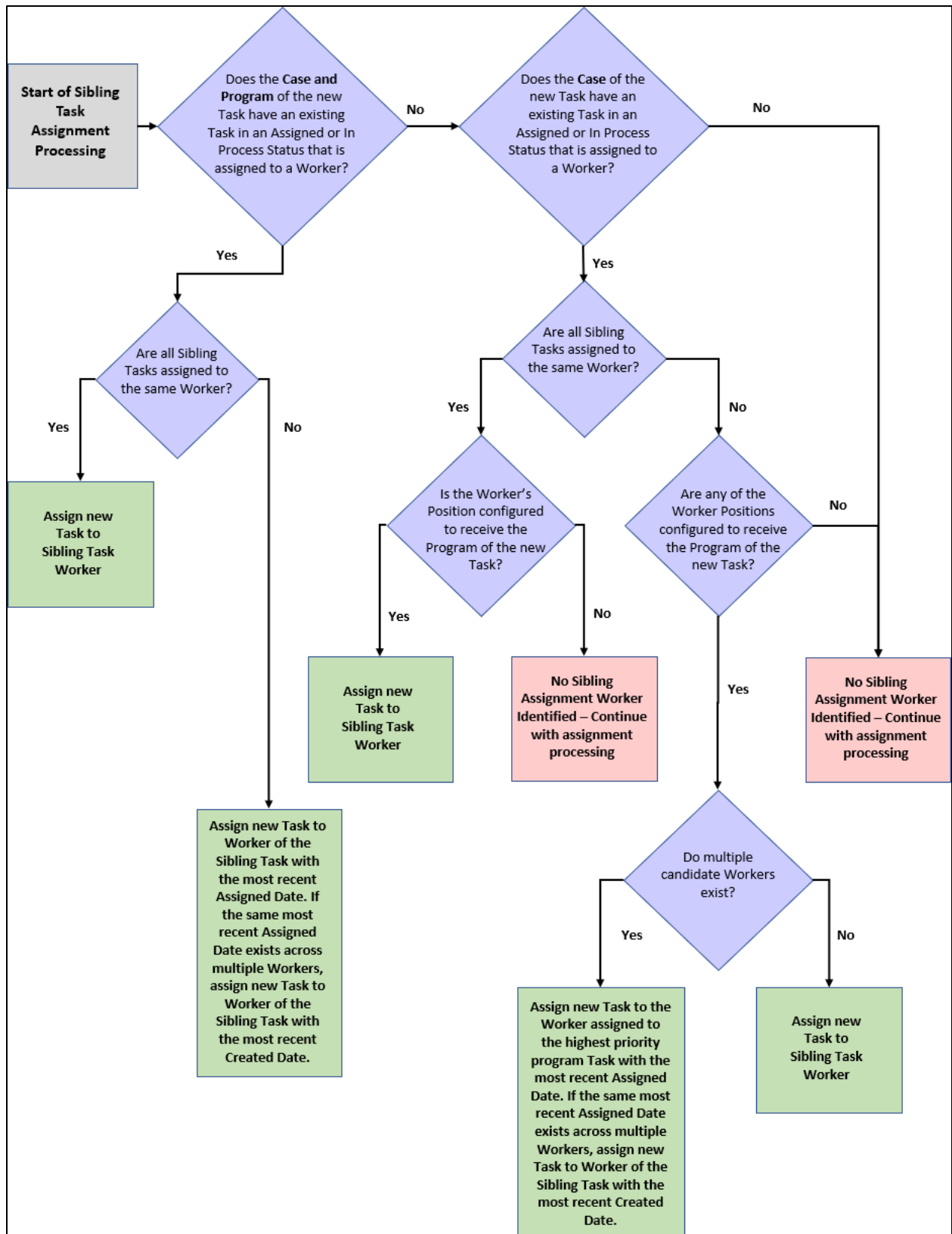


Figure 2.1 – Sibling Task Assignment Flow

Example Scenarios:

For each of the below examples, a new Task is being processed with Sibling Task Assignment that is associated to the CalWORKs program for Case 123.

Example 1:

Case 123 has a CalWORKs, CalFresh and Medi-Cal program. The CalWORKs program has an existing Task assigned to Worker A and the CalFresh program has an existing Task assigned to Worker B. These Tasks have a status of Assigned.

Program	Task	Task #	Task Assignment
CalWORKs	Yes	1	Worker A
CalFresh	Yes	2	Worker B
Medi-Cal	No		

Result: Step 1 of Sibling Task Assignment processing will evaluate Case 123 for a Task associated to the CalWORKs program because the new Task is also associated to the CalWORKs program. Processing will identify the single CalWORKs sibling Task that is assigned to Worker A. The new Task will be assigned to Worker A.

Example 2:

Case 123 has a CalWORKs, CalFresh and Medi-Cal program. The CalWORKs and Medi-Cal programs do not have existing Tasks. The CalFresh program does have an existing Task assigned to Worker B. This Task has a status of Assigned. The Position Detail page for Worker B indicates that Worker B can accept CalWORKs programs.

Program	Task	Task #	Task Assignment
CalWORKs	No		
CalFresh	Yes	1	Worker B
Medi-Cal	No		

Result: Step 1 of Sibling Task Assignment processing will evaluate Case 123 for a Task associated to the CalWORKs program because the new Task is also associated to the CalWORKs program. Because a sibling Task does not exist for the CalWORKs program, the Sibling Task Assignment processing will move to Step 2. Step 2 will identify the sibling Task associated to the CalFresh program and assigned

to Worker B. Processing will then evaluate the Position Detail page for Worker B and confirm that Worker B can accept CalWORKs programs. In this scenario, Worker B can accept CalWORKs program so the new Task will be assigned to Worker B.

Example 3:

Case 123 has a CalWORKs, CalFresh and Medi-Cal program. The CalWORKs program has 3 existing Tasks each assigned to a unique Worker. The CalFresh program has a single Task assigned to Worker B. These Tasks have a status of Assigned.

Program	Task	Task #	Task Assignment	Task Assigned Date
CalWORKs	Yes	1	Worker A	10/15/2022
CalWORKs	Yes	2	Worker C	10/17/2022
CalWORKs	Yes	3	Worker D	10/05/2022
CalFresh	Yes	4	Worker B	10/07/2022
Medi-Cal	No			

Result: Step 1 of Sibling Task Assignment processing will evaluate Case 123 for a Task associated to the CalWORKs program because the new Task is also associated to the CalWORKs program. Processing identifies the 3 sibling Tasks (Task #s 1, 2 and 3). Because multiple Tasks exist that are assigned to multiple workers, processing continues to Step 1b and will identify the sibling Task with the latest assigned date. In this case, Task #2 assigned to Worker C has the most recent assigned date of 10/17/2022. Processing will assign the new Task to Worker C.

Example 4:

Case 123 has a CalWORKs, CalFresh and Medi-Cal program. The CalWORKs program does not have any Tasks. The CalFresh program has 3 existing Tasks, each assigned to a unique worker. The Medi-Cal program does not have any Tasks. These Tasks have a status of Assigned.

Workers B's Position Detail page is NOT configured to receive CalWORKs programs. Workers C and D are configured to receive CalWORKs programs.

Program	Task	Task #	Task Assignment	Task Assigned Date
CalWORKs	No			
CalFresh	Yes	1	Worker B	10/17/2022
CalFresh	Yes	2	Worker C	10/05/2022
CalFresh	Yes	3	Worker D	10/07/2022
Medi-Cal	No			

Result: Step 1 of Sibling Task Assignment processing will evaluate Case 123 for a Task associated to the CalWORKs program because the new Task is also associated to the CalWORKs program. Because a sibling Task does not exist for the CalWORKs program, the Sibling Task Assignment processing will move to Step 2. Step 2 will identify the 3 sibling Tasks (Task #s 1, 2 and 3) associated to the CalFresh program assigned to Workers B, C and D. Processing will then identify that only Workers C and D are configured to receive CalWORKs programs. Lastly, Task #s 2 and 3 for Workers C and D are evaluated to identify the Task with the latest assigned Date. Task #3 has the most recent assigned date of 10/7/2022 so the new Task is assigned to Worker D.

Example 5:

Case 123 has a CalWORKs, CalFresh and Medi-Cal program. The CalWORKs program does not have any Tasks. The CalFresh program has 2 existing Tasks, each assigned to a unique worker. The Medi-Cal program has 1 existing Task. These Tasks have a status of Assigned.

Workers B, C and D are all configured to receive CalWORKs programs on the Position Detail page.

Program	Task	Task #	Task Assignment	Task Assigned Date
CalWORKs	No			
CalFresh	Yes	1	Worker B	10/17/2022
CalFresh	Yes	2	Worker C	10/05/2022
Medi-Cal	Yes	3	Worker D	10/05/2022

Result: Step 1 of Sibling Task Assignment processing will evaluate Case 123 for a Task associated to the CalWORKs program because the new Task is also associated to the CalWORKs program. Because a sibling Task does not exist for the CalWORKs program, the Sibling Task Assignment processing will move to Step 2. Step 2 will identify sibling Tasks (Task #s 1, 2 and 3) associated to the CalFresh and Medi-Cal programs. Because Workers B, C and D are all configured to receive CalWORKs program, processing will apply the program hierarchy logic and identify CalFresh as the highest priority program. Because the CalFresh program has 2 sibling Tasks and both Workers B and C can receive CalWORKs programs, processing will identify Task #1 as the sibling Task with the most recent assigned date which is assigned to Worker B. The new Task will be assigned to Worker B.

2.2 Automated Action Detail Page

2.2.1 Overview

This section outlines the modifications to the Automated Action Detail page to include a configuration option to enable Sibling Task assignment processing for an Automated Action.

2.2.2 Automated Action Detail Mockup

Automated Action Detail

Save And Return Cancel

Action Information

Name: Activity Closed: Service Arrangements Open	Type: Create Task	Status: * Active ▼
Program(s): WT, FT, CW, CL, CC	Run Date: Real Time	Source: Online

Scenario:
A customer activity has been closed with open service arrangements. Review service arrangements and program requirements.

Task Information

Task Type: *
Review ▼

Due Date: Default Due Date ▼	Default Due Date: Immediately
Initial Assignment: Default Assignment ▼	Default Assignment: Current Program Worker

Sibling Assignment:
No ▼

Long Description:
Customer Activity {Activity Number} has the following Service Arrangements {Service Arrangement Number} still open.

Save And Return Cancel

Figure 2.2.2-1 – Automated Action Detail – Edit Mode

Automated Action Detail		
<input type="button" value="Edit"/> <input type="button" value="Close"/>		
Action Information		
Name: Activity Closed: Service Arrangements Open	Type: Create Task	Status: * Active
Program(s): WT, FT, CW, CL, CC	Run Date: Real Time	Source: Online
Scenario: A customer activity has been closed with open service arrangements. Review service arrangements and program requirements.		
Task Information		
Task Type: * Review		
Due Date: Default Due Date	Default Due Date: Immediately	
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker	
Sibling Assignment: No		
Long Description: Customer Activity {Activity Number} has the following Service Arrangements {Service Arrangement Number} still open.		
<input type="button" value="Edit"/> <input type="button" value="Close"/>		

Figure 2.2.2-2 – Automated Action Detail – View Mode

2.2.3 Description of Changes

- Sibling Assignment dropdown - Add dropdown to the Automated Action Detail page in the Task Information section with the following options:
 - No (Default)
 - Yes
- Update Automated Action Task processing to process Sibling Assignment per Section [2.1 "Sibling" Task Assignment Processing](#).

2.2.4 Page Validations

N/A

2.2.5 Page Location

Task Type Detail Page:

- Global:** Tools

- **Local:** Admin
- **Task:** Tasks > Task Admin

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

Update page mapping for the Sibling Assignment dropdown.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Document Routing Rule Program Detail Page

2.3.1 Overview

This section outlines the modifications to the Document Routing Rule Program Detail page to include a configuration option to enable Sibling Task assignment processing for a Document Routing Rule - Program Based Rule.

2.3.2 Document Routing Rule Program Detail Mockup

Document Routing Rule Program Detail

* - Indicates required fields

Save And Return Cancel

Program Information

Program: *
- Select -
CalFresh
Cal-Learn
CalWORKs
CAPI
CFET
Child Care
Foster Care
General Assistance (Non-Mar
GA/GR Employment Services
Medi-Cal

Program Status:
-Select-
Active
Denied
Deferred
Deregistered
Discontinued
Exempt
Good Cause
Ineligible
Non-Comp
Pending

Distribution Type: *
Program Worker and/or Bank

Program Worker:
[Dropdown]

Bank:
Specific Bank

Bank ID:
[Text] Select

Sibling Assignment:
No

Save And Return Cancel

Figure 2.3.2-1 – Document Routing Rule Program Detail – Add Mode

Document Routing Rule Program Detail

* - Indicates required fields

Save And Return Cancel

Program Information

Program: *
CalWORKs

Program Status:
Active

Distribution Type: *
Program Worker and/or Bank

Program Worker:
[Dropdown]

Bank:
Specific Bank

Bank ID:
[Text] Select

Sibling Assignment:
No

Save And Return Cancel

Figure 2.3.2-2 – Document Routing Rule Program Detail – Edit Mode

2.3.3 Description of Changes

1. Sibling Assignment dropdown - Add a dropdown to the Document Routing Rule Program Detail page in the Task Information section with the following options:
 - a. No (Default)
 - b. Yes
2. Update Document Routing Rule Task processing to process Sibling Assignment per Section [2.1 "Sibling" Task Assignment Processing](#).

2.3.4 Page Validations

N/A

2.3.5 Page Location

Task Type Detail Page:

- **Global:** Tools
- **Local:** Admin
- **Task:** Tasks > Document Routing

2.3.6 Security Updates

N/A

2.3.7 Page Mapping

Update page mapping for the Sibling Assignment dropdown.

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 MEDS Alert Admin Detail Page

2.4.1 Overview

This section outlines the modifications to the MEDS Alert Admin Detail page to include a configuration option to enable Sibling Task assignment processing for MEDS Alert Task processing.

2.4.2 MEDS Alert Admin Detail Mockup

MEDS Alert Admin Detail

*- Indicates required fields

Save and Return Cancel

MEDS Alert Information

Alert ID: 9044	Alert Description: SSA CITIZENSHIP VERIFIED BY SSA - POSTED TO MEDS
Alert Type:	Alert Status: Active ▼

Case Update Information

Case Update: Automation performs SSA verified updates to the person CIN; automation is performed when the C-Doc type of person is 2Z (SSA confirmed U.S. Citizenship).	Case Update Status: * Inactive ▼
Journal Entry: DRA Citizenship verified by SSA for CIN {cinNo}.	

Task Information

Type: ▼	Status: * Inactive ▼
Due Date: Default Due Date ▼	Default Due Date: 10 days
Initial Assignment: Default Assignment ▼	Default Assignment: MEDS Alert Task Distribution
Sibling Assignment: No ▼	
Long Description: MEDS Alert {Alert ID} - {Alert Description} has been received.	

History

Save and Return Cancel

Figure 2.4.2-1 – MEDS Alert Admin Detail – Edit Mode

MEDS Alert Admin Detail

* - Indicates required fields

Edit Close

MEDS Alert Information

Alert ID: 9044	Alert Description: SSA CITIZENSHIP VERIFIED BY SSA - POSTED TO MEDS
Alert Type:	Alert Status: Active

Case Update Information

Case Update: Automation performs SSA verified updates to the person CIN; automation is performed when the C-Doc type of person is 2Z (SSA confirmed U.S. Citizenship).	Case Update Status: * Inactive
Journal Entry: DRA Citizenship verified by SSA for CIN {cinNo}.	

Task Information

Type:	Status: * Inactive
Due Date: Default Due Date	Default Due Date: 10 days
Initial Assignment: Default Assignment	Default Assignment: MEDS Alert Task Distribution
Sibling Assignment: No	
Long Description: MEDS Alert {Alert ID} - {Alert Description} has been received.	

History

Edit Close

Figure 2.4.2-2 – MEDS Alert Admin Detail – View Mode

2.4.3 Description of Changes

1. Sibling Assignment dropdown - Add dropdown to the MEDS Alert Admin Detail page in the Task Information section with the following options:
 - a. No (Default)
 - b. Yes
2. Update MEDS Alert Task processing to process Sibling Assignment per section [2.1 "Sibling" Task Assignment Processing](#).

2.4.4 Page Validations

N/A

2.4.5 Page Location

Task Type Detail Page:

- **Global:** Tools
- **Local:** Admin
- **Task:** Tasks > MEDS Alert Admin

2.4.6 Security Updates

N/A

2.4.7 Page Mapping

Update page mapping for the Sibling Assignment dropdown.

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 Task Upload: Templates

2.5.1 Overview

This section outlines the modifications to the Task Upload templates to include a configuration option to enable Sibling Task assignment processing for Task Upload.

2.5.2 Task Upload Mockup

Case Number	Program	Task Type	Task Sub-Type	Start Days	Due Days	Assignment	Worker ID	Bank ID	Assignment	Long Description (2000 max)
									Yes	

Figure 2.5.2.1 – Task Upload - Standard

5	First Name	Last Name	Date of Birth	Social Security Number	CIN	Case Number	Program	Task Type	Task Sub-Type	Start Days	Due Days	Automated Assignment	Manual Assignment - Worker ID	Manual Assignment - Bank ID	Sibling Assignment	Long Description
6																
7																
8																
9																
10																
11																
12																
13																
14																
15																
16																
17																
18																
19																

Figure 2.5.2.2 – Task Upload – County Death Match

Instructions		
Column	Required	Instructions
Do not enter any more than 10,000 rows of information in the "Tasks" worksheet. Only the first 10,000 rows will be processed.		
Case Number	Yes	Enter a 7 digit CalSAWS Case Number that is valid for the county. If a value is entered, a value must be entered in the Program field. If the Task will not be associated to a Case, this field and the Program field must be blank.
Program	Yes	Enter a Program Code OR Program Name of the Program the Task will be associated to. Upper/lower case does not matter. For example, "CW", "CalWORKs" or "CALWORKS" are all acceptable entries to indicate the CalWORKs program. The value entered must be a single program that is valid for the entered Case Number. If a value is entered for this field, the Case Number field must also have a value.
Task Type	Yes	Enter the name of a Task Type that is valid for the county. Upper/lower case does not matter. This value must match a Task Type name as displayed on the Task Type List page.
Task Sub-Type	No	If applicable, enter the Name of a Task Sub-Type that is valid for the entered Task Type value and county. Upper/lower case does not matter. This value must match a Task Sub-Type as displayed on the Task Type Detail page for the selected Task Type.
Start Days	No	This field is optional. If the task is to start in the future, enter a non-negative number.
Sibling Assignment	No	An entry in this field with a simultaneous entry in the "Manual Assignment - Worker ID" field is acceptable. In this case, the Task will be assigned to both the Worker ID and Bank ID. If Sibling Assignment is applicable, enter a "Yes" in this field. If entering one or both of the Manual Assignment options and/or the Automated Assignment option, Sibling Task Assignment processing will occur first. If the Sibling Task Assignment processing identifies a valid assignment for the Task, assignment processing will stop. If Sibling Task Assignment processing does not identify a valid assignment for the Task, processing will continue normally to evaluate the Automated and Manual assignment options. If a Task cannot find a Sibling Task, then the Manual and/or Automated Assignment options will apply.
Long Description	No	If applicable, enter a text description no longer than 2,000 characters. This value will be associated to the Long Description attribute of the Task. At the time of Task creation, if this value exceeds 2,000 characters, only the first 2,000 characters will be associated to the Task. Do not use the "<" or ">" characters in this value or they will be removed from the text during Task Creation.

Figure 2.5.2.3 – Task Upload - Standard: Instructions

2.5.3 Description of Changes

1. "Sibling Assignment" column – Add column with dropdown option to the Task Upload templates with the following options:
 - a. Blank (Default)
 - b. Yes
2. Update Instructions tab to include Sibling Assignment:

Column	Required	Instructions
Sibling Assignment	No	<p>If Sibling Assignment is applicable, enter a "Yes" in this field.</p> <p>If entering one or both of the Manual Assignment options and/or the Automated Assignment option, Sibling Task Assignment processing will occur first. If the Sibling Task Assignment processing identifies a valid assignment for the Task, assignment processing will stop. If Sibling Task Assignment processing does not identify a valid assignment for the Task, processing will continue normally to evaluate the Automated and Manual assignment options.</p> <p>If a Task cannot find a Sibling Task, then the Manual and/or Automated Assignment options will apply.</p>

3. Apply the changes from above to each of the following templates: County Death Match, Jail Incarceration Match and Jail Release Referral. The templates are attached to the section [3. Supporting Documents](#). The "Standard" option is the default option for this dropdown on load of the page.

2.5.4 Page Validations

N/A

2.5.5 Page Location

Task Type Detail Page:

- **Global:** Tools
- **Local:** Admin
- **Task:** Tasks > Task Upload

2.5.6 Security Updates

N/A

2.5.7 Page Mapping

N/A

2.5.8 Page Usage/Data Volume Impacts

N/A

2.6 Task Upload: Preview Errors Page

2.6.1 Overview

The Preview Errors page is within the Task Upload Pop-Up page and displays errors detected during the Task Upload preview processing. This section will specifically describe the function of this page when User clicks on the field: "Tasks with Errors" within the "Preview Information" panel.

2.6.2 Preview Errors Page Mockup

Row Number	Case Number	Program	Task Type	Task Sub-Type	Start Days	Due Days	Automated Assignment	Worker ID	Bank ID	Sibling Assignment	Error Message
6	12345*7	CalWorks	Review		1	1	Office Distribution			Yes	Invalid Case Number, Program

Figure 2.6.2.1 – Preview Errors Page Mockup: View Mode - Standard Template

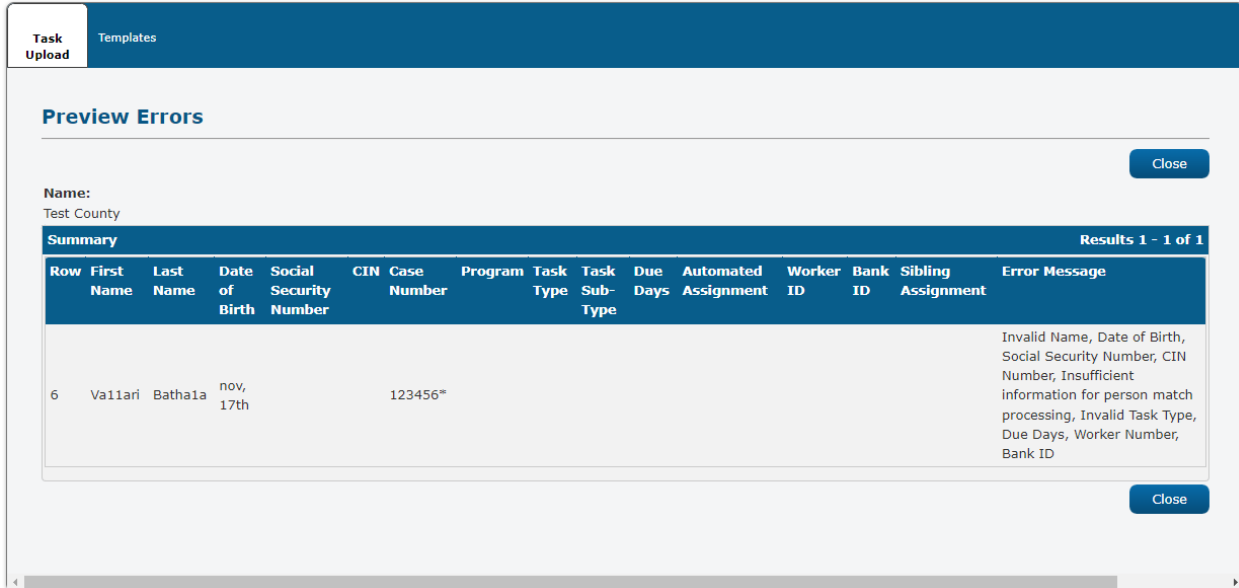


Figure 2.6.2.2 – Preview Errors Page Mockup: View Mode - County Death Match Template

2.6.3 Description of Changes

Add a Sibling Assignment field to the Preview Errors page for all four templates: Standard, County Death Match, Jail Incarceration Match and Jail Release Referral.

This page is accessed by clicking the "Tasks with Errors" hyperlink within the Preview Information panel from the Task Upload Detail page.

1. Summary

- a. Sibling Assignment - The Sibling Assignment attribute for the row.

2.6.4 Page Validations

N/A

2.6.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Upload

Click one of the hyperlinks or buttons available on the Task Upload List Page to access the Task Upload Detail page. Then, when the Status is Preview Complete or Upload Complete, click on the hyperlink next to the field "Tasks with Errors" within the Preview Information panel.

2.7 Worker Suggestions Page

2.7.1 Overview

This section outlines the modifications to the Worker Suggestions page to include a suggested worker based on Sibling Task Assignment processing.

2.7.2 Worker Suggestions Mockup

The mockup displays a 'Worker Suggestions' interface. At the top right is a 'Cancel' button. Below it is a 'Search Results Summary' bar showing 'Results 1 - 25 of 230' and a pagination link '1 2 3 4 5 6 7 8 9 10 Next'. A 'Select' button is located to the right of the summary bar. The main content is a table with the following columns: Name, Worker ID, Section ID, Classification Title, Assignment Category, and Additional Information. The first row is selected, showing 'Arie Brot' with Worker ID '19DP70000B', Section ID '5V', Classification Title 'Eligibility Worker II', Assignment Category 'Sibling Task Worker', and Additional Information 'Matched by Language'. Other rows include 'Akhat Cheese', 'Kris Stabber', and 'Mari Bruel', all with 'Matched by Language' in the Additional Information column. A 'Select' button is at the bottom right of the table area, and another 'Cancel' button is at the bottom right of the entire page. A status bar at the bottom left indicates 'This Type 1 page took 0.47 seconds to load.'

Name	Worker ID	Section ID	Classification Title	Assignment Category	Additional Information
<input checked="" type="radio"/> Arie Brot	19DP70000B	5V	Eligibility Worker II	Sibling Task Worker	Matched by Language
<input type="radio"/> Akhat Cheese	19DP00002E	5S	Eligibility Worker II	Case Carrying Worker - Unit	Matched by Language
<input type="radio"/> Kris Stabber	19DP70000B	5V	Eligibility Worker II	Case Carrying Worker - Unit	Matched by Language
<input type="radio"/> Mari Bruel	19DP02692C	5S	Eligibility Worker II	Case Carrying Worker - Unit	Matched by Language

Figure 2.7.2 – Worker Suggestions Mockup

2.7.3 Description of Changes

1. Update the logic of the Worker Suggestions page to Sibling Task Assignment logic. If a worker is determined from Sibling Task Assignment processing, display a row for the Worker at the top of the results with an "Assignment Category" value of "Sibling Task Worker". If Sibling Task Assignment logic does not determine a worker, the additional row in the results will not display.

2.7.4 Page Validations

N/A

2.7.5 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option.

2.8 Task Upload: Preview Processing

Data Validity Preview Processing/Error Evaluation:





The following table illustrates the evaluations that will take place for the Sibling Assignment attribute within the Task Upload templates. This section will describe the Preview Processing for the new field available in the Templates/Task Upload Types associated to this enhancement. Reference the initial Task Upload designs, CA-214901 and CA-214905, for the additional processing logic for each of the remaining fields on the template as the logic for the additional fields will not be modified.

Field	Validation	Error Message
Sibling Assignment	1. Confirm the value is either Blank or "Yes".	Invalid Sibling Assignment
Sibling Assignment	2. If Sibling Assignment is the only attribute provided for assignment (the manual or automated assignment options are left blank) and sibling Task assignment processing does not identify a valid assignment for the Task.	No valid Worker identified for assignment

The error messages determined during the preview processing will be presented in the Errors column of the Preview Errors Page. If a particular row contains error messages for multiple fields, the error message will concatenate the messages together separated by a comma.

3 SUPPORTING DOCUMENTS

3.1 Task Upload Templates

Number	Functional Area	Description	Attachment
1	Task Management	Standard Template	 Standard Template.xlsx
2	Task Management	County Death Match Template	 County Death Match Template.xlsx
3	Task Management	Jail Incarceration Match Template	 Jail Incarceration Match Template.xlsx
4	Task Management	Jail Release Referral Template	 Jail Release Referral Template.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.2.22.2	The LRS shall allow Users based on security profile to establish and save rules for alerts, reminders, and controls for future User sessions and/or as a default.	Introduce "sibling" Task assignment as a configuration option for automated Tasks in the CalSAWS System. This processing will evaluate Tasks which already exist for the Case and attempt to route new Tasks based on existing Task assignments.

5 APPENDIX

5.1 Automated Actions that will not allow editing of the Sibling Assignment attribute

The Following Automated Actions will display a read only version of the Sibling Assignment attribute defaulted as "No"

- Clearance
- Clearance: e-Application
- Clearance CalHEERS
- Clearance: CMIPSII
- Clearance: ICT
- Intake
- Customer Appointment: Scheduled
- Portal: CBO Account Request
- Self Service Portal: Message Received
- Self Service Portal: Action Completed

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-250952

Update Task display to indicate Append

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Sarah Cox, Justin Dobbs, Dymas Pena, Carlos Albances

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/05/2022	1.0	Initial Revision	Vallari Bathala

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to include a data point to easily identify if/when a Task has been appended to.

1.1 Current Design

Currently, when Task Append functionality appends to an existing Task, the Task pages do not display an attribute or data point allowing users to easily identify if a Task has been appended to. Append activity must either be identified by evaluating the Task Detail page for each individual Task, or by monitoring the My Watchlist page for recent activity for Tasks the logged in user is watching.

1.2 Requests

Add an attribute to the Task Pop-Up: Task Search and Task Pop-Up: My Tasks pages to indicate the most recent date that a Task has been appended to (if available).

1.3 Overview of Recommendations

1. Update the Task Pop-Up: My Tasks page to include a new date column to indicate the most recent date that a Task was appended to.
2. Update the Task Pop-Up: Task Search page to include a new date column to indicate the most recent date that a Task was appended to.
3. Update the Task Export template to include a new date column to indicate the most recent date that a Task was appended to.

1.4 Assumptions

1. Once this enhancement is implemented, the Date Appended column will populate for both historical and ongoing Tasks that have been appended to at least one time.

2 RECOMMENDATIONS

2.1 Task Pop-Up: My Tasks

2.1.1 Overview

This section outlines the modifications to the Task Pop-Up: My Tasks page to display an attribute indicating if a Task has been appended to.

2.1.2 My Tasks Mockup

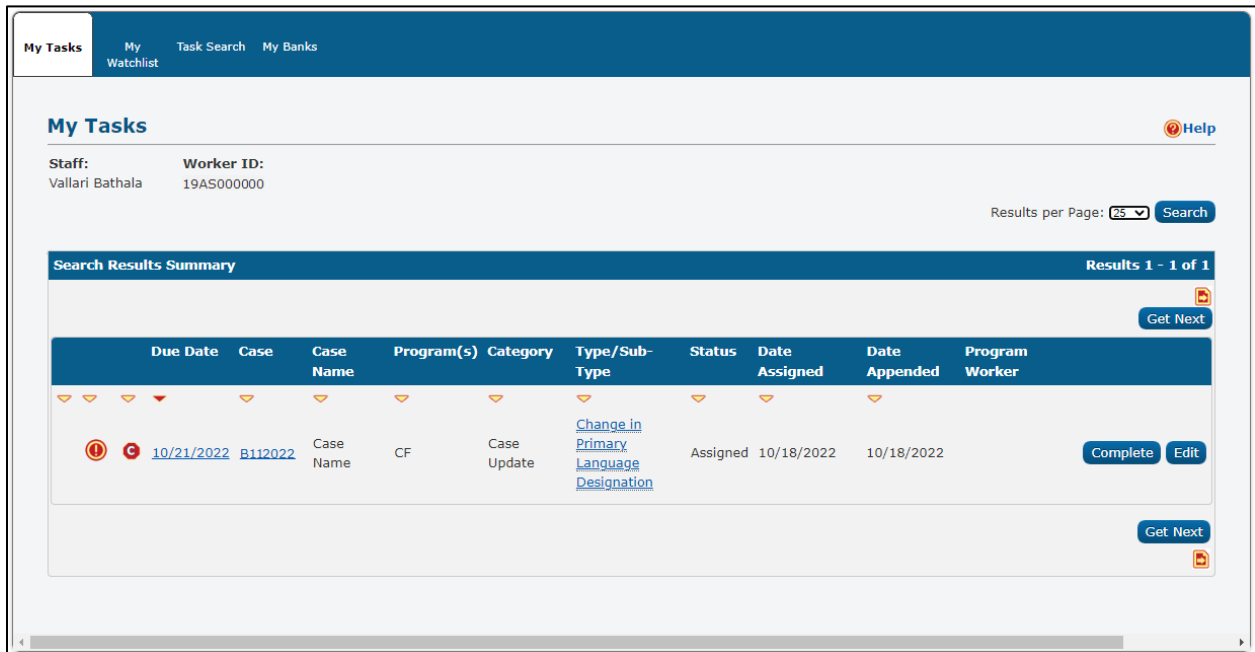


Figure 2.1.2 – My Tasks Mockup

2.1.3 Description of Changes

1. Date Appended - Add a new column in the Search Results Summary section of the My Tasks page. See mockup for layout and column placement. If a Task has been appended to, this column will display the most recent date that the Task has been appended to formatted as MM/DD/YYYY. If a Task has not been appended to, this column will be blank.

2.1.4 Page Validations

N/A

2.1.5 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through the Utility bar's Tasks Option.

2.1.6 Security Updates

N/A

2.1.7 Page Mapping

Update the page mapping for the Date Appended field.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Task Pop-Up: Task Search

2.2.1 Overview

This section outlines the modifications to the Task Pop-Up: Task Search page to display an attribute indicating if a Task has been appended to.

2.2.2 Task Search Mockup

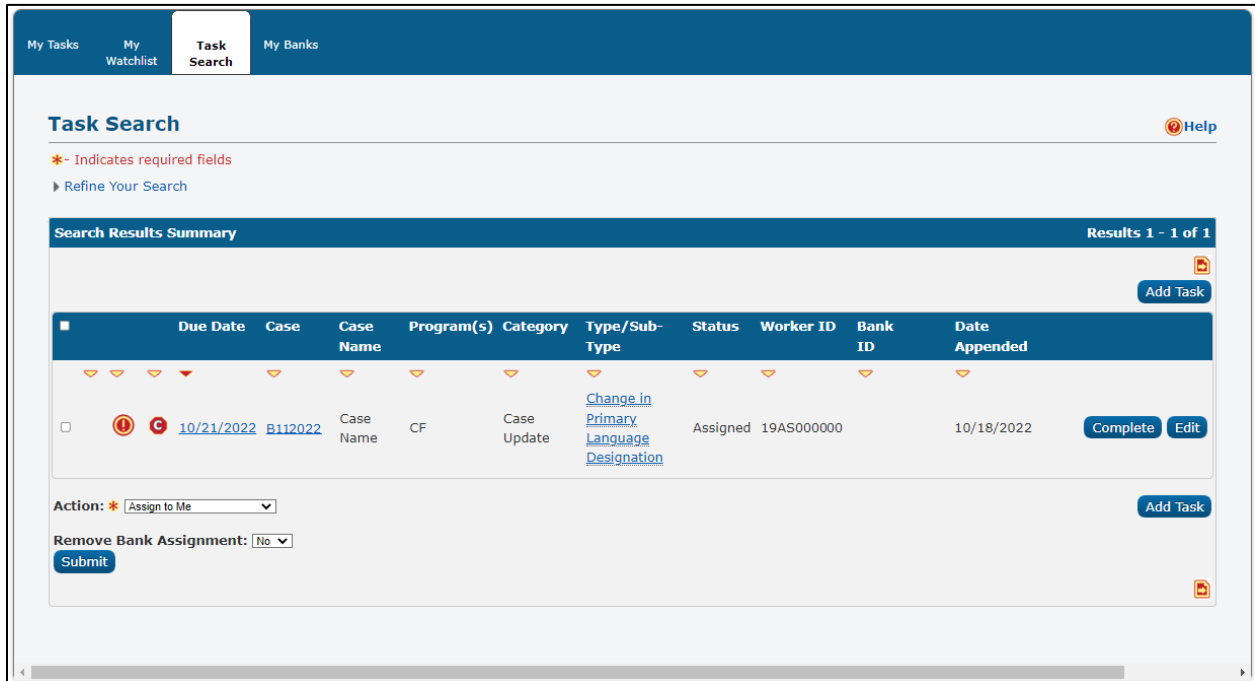


Figure 2.2.2 – Task Search Mockup

2.2.3 Description of Changes

1. Date Appended - Add a new column in the Search Results Summary section of the Task Pop-Up: Task Search page. See mockup for layout and column placement. If a Task has been appended to, this column will display the most recent date that the Task has been appended to formatted as MM/DD/YYYY. If a Task has not been appended to, this column will be blank.

2.2.4 Page Validations

N/A

2.2.5 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option.

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

Update the page mapping for the new Date Appended field.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Task Export Template

2.3.1 Overview

This section outlines the modifications to the Task Export Template to display an attribute indicating if a Task has been appended to.

2.3.2 Task Export File Mockup

1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	Case Numb	Case Name	Program	Start Date	Due Date	Category	Type	Sub-Type	Status	Priority	Expedited	Worker Assigned	Bank Assign	Data Create	Date Appended	Work
2																
3																
4																
5																
6																
7																
8																
9																
10																
11																
12																
13																
14																
15																
16																
17																
18																
19																
20																
21																

Figure 2.3.2 – Task Export File Mockup

2.3.3 Description of Changes

1. Date Appended - Add a new column in the Task Export Template. See mockup for layout and column placement. If a Task has been appended to, this column will display the most recent date that the Task has been appended to formatted as MM/DD/YYYY. If a Task has not been appended to, this column will be blank.

2.3.4 Page Validations

N/A

2.3.5 Page Location

- **Global:** N/A
- **Local:** N/A

- **Task:** N/A

File is exported from the Task Pop-Up: My Tasks and Task Pop-Up: Task Search pages which are accessible through Utility bar's Tasks Option.

2.3.6 Security Updates

N/A

2.3.7 Page Mapping

N/A

2.3.8 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.5	<p>"The LRS shall allow COUNTY-specified Users to access alerts, reminders, and controls by using the following criteria in order to initiate a search:</p> <ul style="list-style-type: none">a. All alerts, reminders, and controls on a case or a file;b. A specified due date or a range of due dates;c. Type of alert, reminder, or control; andd. Status of alert, reminder, or control."	<ol style="list-style-type: none">1. Update the Task Pop-Up: My Tasks page to include a new date column to indicate the most recent date that a Task was appended to.2. Update the Task Pop-Up: Task Search page to include a new date column to indicate the most recent date that a Task was appended to.3. Update the Task Export template to include a new date column to indicate the most recent date that a Task was appended to.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-251903

Update the Converted Case Review Dashboard
to add new columns

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Susanna Martinez
	Reviewed By	Thao Ta, Ravneet Bhatia, Gokul Suresh

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/04/2022	1.0	Initial Document	Susanna Martinez

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1 OVERVIEW

The Converted Case Review Dashboard was created to review the converted cases in CalSAWS from counties that migrated from the C-IV and CalWIN systems. This dashboard tracks the converted cases where EDBC still needs to be run in CalSAWS for these cases. A new EDBC run in CalSAWS is crucial for the continuation of the cases in CalSAWS over time. The dashboard captures a daily snapshot of the outstanding converted caseload that still has not had an EDBC run in CalSAWS and tracks the counts over time by various dimensions (distinct case counts, program code, etc.).

The Converted Case Review Dashboard will need to be updated to include the following additional columns in the “Details” table:

- MISMATCH_REASON
- RE_DUE_DATE
- REPORTING_TYPE
- PGM_STAT_RSN_CODE
- PRIORITY
- SSA_INCOME
- SSI_SSP_OPA
- NON_MAGI_FPL

1.1 Current Design

The Converted Case Review Dashboard does not include the following columns in the “Details” table:

- MISMATCH_REASON
- RE_DUE_DATE
- REPORTING_TYPE
- PGM_STAT_RSN_CODE
- PRIORITY
- SSA_INCOME
- SSI_SSP_OPA
- NON_MAGI_FPL

1.2 Requests

Add the following columns to the Converted Case Review Dashboard in the “Details” table:

- MISMATCH_REASON
- RE_DUE_DATE
- REPORTING_TYPE
- PGM_STAT_RSN_CODE
- PRIORITY
- SSA_INCOME

- SSI_SSP_OPA
- NON_MAGI_FPL

1.3 Overview of Recommendations

1. Update the Converted Case Review Dashboard to add the following columns in the "Details" table:
 - a. MISMATCH_REASON
 - b. RE_DUE_DATE
 - c. REPORTING_TYPE
 - d. PGM_STAT_RSN_CODE
 - e. PRIORITY
 - f. SSA_INCOME
 - g. SSI_SSP_OPA
 - h. NON_MAGI_FPL

1.4 Assumptions

1. The Converted Case Review dashboard will continue to use the existing filters and dimensions in place for the pivot tables, line graphs and bar chart within the report. This SCR will only be adding additional detail columns to the "Details" table in the "Daily Snapshot" sheet.
2. The SQL logic to select and populate the additional columns mentioned is provided and maintained by the Conversion Team and will be leveraged to incorporate these additional columns in the existing Converted Case Review Dashboard logic. Any changes or updates to the SQL logic which defines and pulls the information for these additional columns, as provided by the Conversion Team, will directly impact the Converted Case Review Dashboard.

2 RECOMMENDATIONS

2.1 Converted Case Review Dashboard

2.1.1 Overview

The Converted Case Review Dashboard tracks the converted cases where EDBC has not been run in CalSAWS for migrated counties to review. The dashboard captures a daily snapshot of the outstanding converted caseload through the Daily Snapshot sheet and tracks the counts over time by various dimensions (distinct case counts, program code, etc.) through the Aggregate Trending sheet.

2.1.2 Converted Case Review Dashboard Mockup

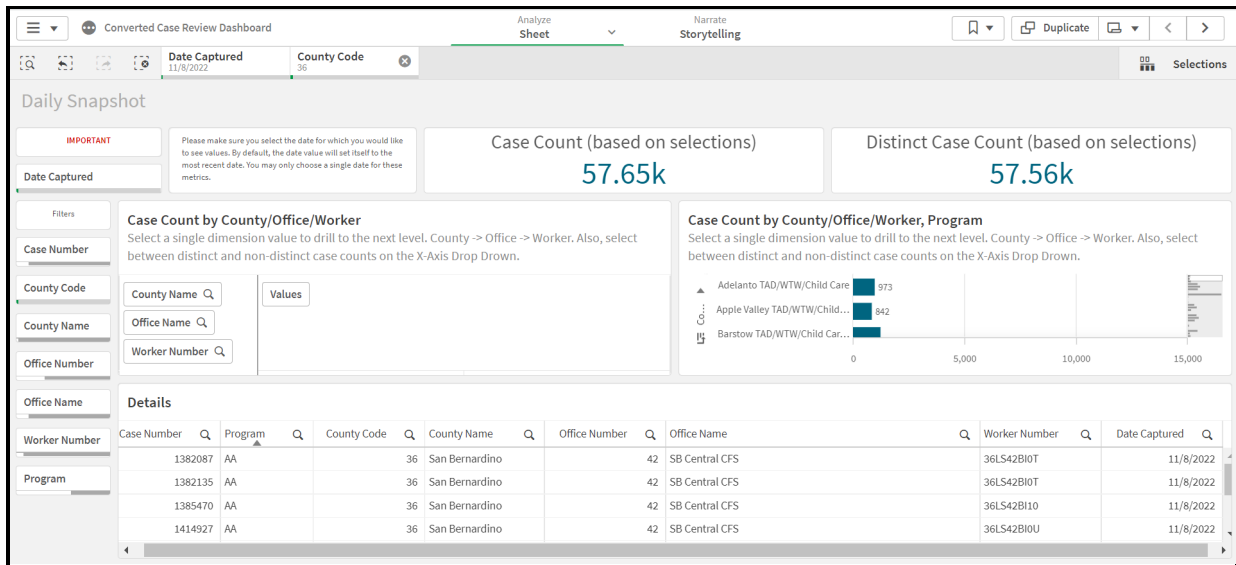


Figure 2.1.2.1 – Daily Snapshot Sheet

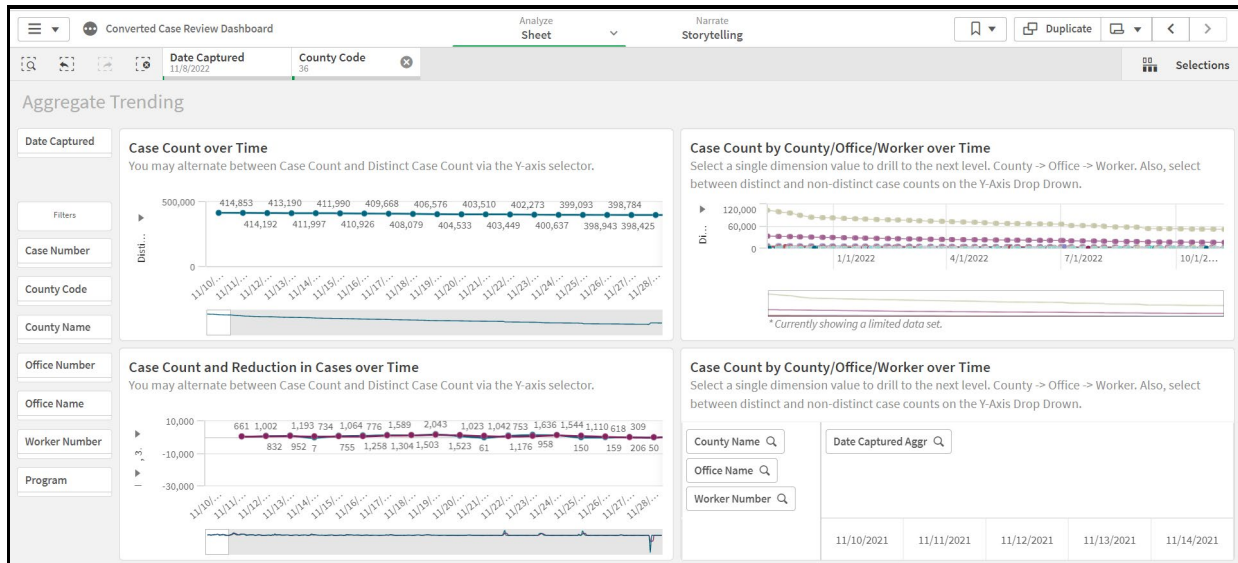


Figure 2.1.2.2 – Aggregate Trending Sheet

Note: Full mockup can be found in the Supporting Documents section.

Case Number	Program	County Code	County Name	Office Number	Office Name	Worker Number	Date Captured
1382087	AA	36	San Bernardino	42	SB Central CFS	36LS42BIOT	11/8/2022
1382135	AA	36	San Bernardino	42	SB Central CFS	36LS42BIOT	11/8/2022
1385470	AA	36	San Bernardino	42	SB Central CFS	36LS42BI10	11/8/2022
1414927	AA	36	San Bernardino	42	SB Central CFS	36LS42BI0U	11/8/2022

Figure 2.1.2.3 – Details Table Before Addition of Columns

Case Number	Program	County Code	County Name	Office Number	Office Name	Worker Number	Match Reason	RE Due Date	Reporting Type	Program Status Reason	Priority	SSA Income Change	SSI/SSP/OPA Change	Non-MAGI/FPL Change	Date Captured
2008957	AA	04	Butte	02	Butte - CEC-O	04LS23904	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2009183	AA	04	Butte	02	Butte - CEC-O	04LS23904	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2009184	AA	04	Butte	02	Butte - CEC-O	04LS23904	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2009177	AA	04	Butte	02	Butte - CEC-O	04LS23904	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2009157	AA	04	Butte	02	Butte - CEC-O	04LS23904	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2102028	AA	04	Butte	02	Butte - CEC-O	04LS23904	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2102026	AA	04	Butte	02	Butte - CEC-O	04LS23904	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2102017	AA	04	Butte	02	Butte - CEC-O	04LS23904	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2102018	AA	04	Butte	02	Butte - CEC-O	04LS23904	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2004047	AA	06	Colusa	01	Colusa Main Office	06LS01501	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022
2004010	AA	06	Colusa	01	Colusa Main Office	06LS01501	Program Discontinued	10/31/2022	Quarterly Reporting	No Elig. Child	1	Yes	Yes	-	10/24/2022

Figure 2.1.2.4 – Details Table After Addition of Columns

Note: Full mockup can be found in the Supporting Documents section.

2.1.3 Description of Change

1. Update the Converted Case Review dashboard with the following columns in the 'Details' table within the 'Daily Snapshot Sheet':

Technical Note: The SQL logic to pull the information for the below columns is provided and maintained by the Conversion Team. Please

see the *Appendix* section for the logic that is to be leveraged for this SCR.

a.

Column	Description
Mismatch Reason	<p>The mismatch reason provided when the associated case's CalSAWS Batch EDBC results do not match with the last CalWIN/C-IV converted EDBC results saved in the CalSAWS system.</p> <p>If no benefit mismatch reason is present for the associated case then the column value will default to 'Full Case Review'.</p>
RE Due Date	<p>The Due Date of the redetermination for the associated case's program.</p>
Reporting Type	<p>The reporting type of the associated case's program.</p> <p>If no reporting type is present for the associated case's program, the column value will be represented as 'N/A'.</p>
Program Status Reason	<p>The reason for the associated case's program status.</p>
Priority	<p>The priority of the associated case based upon the benefit mismatch reason.</p> <p>Possible values for this column are: '1', '2', or '3'</p> <ul style="list-style-type: none"> • The 'Priority' column value will be '1' if the 'Mismatch Reason' column value is any of the following: <ul style="list-style-type: none"> ○ Program Discontinued ○ Program Person Status Mismatch ○ Recoupment Mismatch • The 'Priority' column value will be '2' if the 'Mismatch Reason' column value is the following: <ul style="list-style-type: none"> ○ Program Person Role Mismatch • The 'Priority' column value will be '3' if the 'Mismatch Reason' column value is anything other than the 'Mismatch Reason' values stated above for priorities '1' and '2'

SSA Income Change	This indicates whether there is a change in Social Security Administration (SSA) income for the associated program. Possible values are 'Yes' to indicate a change or blank denoted by '-' to indicate no change.
SSI/SSP/OPA Change	This indicates whether there is a change in Social Security Income (SSI)/State Supplemental Program (SSP) or Other Program Assistance (OPA) income for the associated program. Possible values are 'Yes' to indicate a change or blank denoted by '-' to indicate no change.
Non-MAGI FPL Change	This indicates whether there is a change in the Non-MAGI Federal Poverty Level (FPL) income for the associated program. Possible values are 'Yes' to indicate a change or blank denoted by '-' to indicate no change.

2.1.4 Report Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: Operations Reports**

2.1.5 Counties Impacted

Migration counties will be impacted by the changes outlined in this SCR.

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
N/A	N/A	N/A


2. Security Groups

Security Group	Group Description	Group to Role Mapping
N/A	N/A	N/A

2.1.7 Report Usage/Performance

No significant change in report usage or performance is expected.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Business Intelligence	Converted Case Review Dashboard Mockup	 Converted Case Review Dashboard.do

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.2	The CalSAWS shall produce reports that provide the detail CalSAWS Data that will be used to complete the reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	The Converted Case Review Dashboard shall be updated with additional details to support the counties with their transition into CalSAWS to identify cases that still need EDBC to be run on.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
N/A	N/A	N/A	N/A

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
N/A	N/A	N/A	N/A	N/A	N/A

6 APPENDIX

The SQL logic to find and populate the columns being added to the Converted Case Review Dashboard is provided by the Conversion Team. The below query will be leveraged with the existing dashboard logic to populate the dashboard with the additional columns addressed in this SCR.

```
SELECT stg.county_code,
       (SELECT SHORT_DECODE_NAME
        FROM pr_lrs.CODE_DETL
        WHERE  CATGRY_ID = 15
              AND CODE_NUM_IDENTIF = stg.county_code
              AND TRUNC (SYSDATE) BETWEEN BEG_DATE AND END_DATE)
       county_name,
       O.OFFICE_NUM_IDENTIF,
       O.OFFICE_NAME,
       NVL (SW.WRKR_NUM_IDENTIF, 'Unassigned')
       Worker_number,
       stg.serial_num_identif
       AS case_number,
       (SELECT SHORT_DECODE_NAME
        FROM pr_lrs.CODE_DETL
        WHERE  CATGRY_ID = 18
              AND CODE_NUM_IDENTIF = stg.pgm_code
              AND TRUNC (SYSDATE) BETWEEN BEG_DATE AND END_DATE)
       PROGRAM,
       NVL (
           (SELECT SHORT_DECODE_NAME
            FROM pr_lrs.CODE_DETL
            WHERE  CATGRY_ID = 10468
```

```

benefit_mismatch_rsn_code
AND CODE_NUM_IDENTIF =
AND TRUNC (SYSDATE) BETWEEN
BEG_DATE AND END_DATE),
'Full Case Review')
MISMATCH_REASON,
NVL ((SELECT MAX(DUE_DATE)
FROM pr_lrs.REDETER
WHERE REDETER.PGM_ID = STB.PGM_ID),
TO_DATE('12319999','MMDDYYYY'))
RE_DUE_DATE,
NVL ((SELECT CD.SHORT_DECODE_NAME
FROM pr_lrs.CODE_DETL cd, PR_LRS.PGM_DETL
PD
WHERE CD.CATGRY_ID = 542
AND CD.CODE_NUM_IDENTIF =
PD.REPORTING_TYPE_CODE
AND TRUNC (SYSDATE) BETWEEN
CD.BEG_DATE AND CD.END_DATE
AND pd.pgm_id = stg.pgm_id
AND TRUNC (SYSDATE) BETWEEN
PD.BEG_DATE AND PD.END_DATE), 'N/A')
Reporting_Type,
(SELECT SHORT_DECODE_NAME
FROM pr_lrs.CODE_DETL
WHERE CATGRY_ID = 73
AND CODE_NUM_IDENTIF = stg.PGM_STAT_RSN_CODE
AND TRUNC (SYSDATE) BETWEEN BEG_DATE AND END_DATE)
PGM_STAT_RSN_CODE,
(CASE
WHEN benefit_mismatch_rsn_code IN ('PD','RM', 'SM', 'CM') THEN 1 -- Benefit Amount
Mismatch, Recoupment Mismatch
WHEN benefit_mismatch_rsn_code IN ('PM') THEN 2 --Program Person Role Mismatch,
Program Person Status Mismatch, Aid-Code Mismatch
ELSE 3
END)
Priority,
(select distinct 'Yes' from pr_lrs.pgm_pers pp, pr_lrs.inc i, pr_lrs.inc_amt_detl iad
where pp.pgm_id = stg.pgm_id and pp.pers_id = i.pers_id and i.cat_code = '04'
and i.id = iad.inc_id and iad.end_date = high_date
) ssa_income,

```

```

(select distinct 'Yes' from pr_lrs.pgm_pers pp, pr_lrs.OTHER_PGM_ASSIST opa
 where pp.pgm_id = stg.pgm_id and pp.pers_id = opa.pers_id and opa.pgm_code in ('SI', 'SP', 'SS')
 and opa.end_date = high_date
) ssi_ssp_opa,
(select distinct 'Yes'
 from edbc e, budget b
 where e.pgm_id = stg.pgm_id
 and e.end_date = high_date
 and e.edbc_source_code = 'BE'
 and not exists (select 1 -- This EDBC lacks Express Lane benefits
                  from budget exp_ln_b
                  where e.id = exp_ln_b.edbc_id
                  and exp_ln_b.result_code = 'PS' --Passing
                  and exp_ln_b.class_code = '01' --Valid
                  and exp_ln_b.MC_TEST_CAT_CODE = '87' -- Express Lane
                )
 and e.id = b.edbc_id
 and b.result_code = 'PS' --Passing
 and b.class_code = '01' --Valid
 AND B.MC_TEST_CAT_CODE IN
 (
  '01', -- Waiver
  '02', -- Minor Consent
  '03', -- LTC
  '04', -- Pickle
  '05', -- Pickle Spouse
  '13', -- 4 Month Continuing
  '14', -- TMC
  '15', -- AFDC-MN U-Parent
  '18', -- MC Income
  '19', -- MC Income Sneeede
  '21', -- 100% FPL
  '22', -- 133% FPL
  '23', -- 200% FPL
  '24', -- 100% FPL Sneeede
  '25', -- 133% FPL Sneeede
  '26', -- 200% FPL Sneeede
  '27', -- Aged and Disabled
  '28', -- Working Disabled

```

'29', -- CE
 '30', -- CEC
 '31', -- Bridging
 '32', -- 200% Pregnancy
 '33', -- Dialysis
 '34', -- TPN
 '35', -- Tuberculosis
 '36', -- Postpartum
 '37', -- QDWI
 '38', -- MPPP - MC
 '39', -- MPPP - SSI
 '53', -- Ten Day w/Added Member(s)
 '54', -- Ten Day w/o Added Member(s)
 '55', -- Ten Day Added Member SOC
 '60', -- Auto Test Medi-Cal
 '62', -- 200% Pregnancy - Second Test
 '63', -- A and D - Individual Spouse
 '64', -- Edwards
 '67', -- CMSP Income
 '68', -- CMSP Income Sneede
 '70', -- MC TLI/FPL Child-H3
 '71', -- MC TLI/FPL Child-H3 Sneede
 '72', -- MC TLI/FPL Child-H5
 '73', -- MC TLI/FPL Child-H5 Sneede
 '80', -- FC/KG/AAP
 '92', -- Former Foster Youth
 '93', -- MC TLI/FPL Child-H1
 '94', -- MC TLI/FPL Child-H1 Sneede
 '95', -- MC TLI/FPL Child-H2
 '96', -- MC TLI/FPL Child-H2 Sneede
 '97', -- MC TLI/FPL Child-H4
 '98', -- MC TLI/FPL Child-H4 Sneede
 'DS', -- Deemed Protection with SOC
 '74' -- Postpartum Non MAGI

)

) Non_MAGI_FPL

FROM pr_bkp_tbl_lrs.EDBC_RPT_EDBC_BENEFIT_MATCH_STG stg,
 pr_bkp_tbl_lrs.sys_transact_bkp stb,
 pr_lrs.pgm_assign pa,

```
pr_lrs.POS          P,  
pr_lrs.OFFICE       O,  
pr_lrs.STAFF_WRKR   SW  
WHERE  STG.benefit_match_switch = 'N'  
AND stg.PGM_ID = stb.PGM_ID  
AND STG.PGM_ID = PA.PGM_ID  
AND PA.ID = (SELECT MAX (ID)  
              FROM pr_lrs.PGM_ASSIGN PA2  
              WHERE PA2.PGM_ID = STG.PGM_ID)  
AND PA.POS_ID = P.ID  
AND P.OFFICE_ID = O.ID  
AND P.ID = SW.POS_ID(+)  
ORDER BY stg.county_code, PRIORITY ASC, RE_DUE_DATE ASC;
```

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-252905

Virtual Assistant Expansion – Release 1

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gray Guzman, Uzochi Oparaji
	Reviewed By	Krista Arbolinda, Gerald Limbrick, Sarah Cordano

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/22/2022	1.0	Original Draft	Gray Guzman, Uzochi Oparaji

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1 OVERVIEW

Release 1 of the Virtual Assistant (VA) Expansion Project consists of the initial launch of the new CalSAWS Virtual Assistant. The VA will allow CalSAWS workers to access a series of pre-defined questions (use cases) for the CalFresh, Medi-Cal, and CalWORKs programs. These use cases (UCs) are designed to provide workers information on CalSAWS functionalities and instructions on how to perform certain job functions. This document covers all items related to the internal design of the VA, as opposed to the design of the VA within the CalSAWS application.

1.1 Current Design

Currently there is no VA to help CalSAWS workers complete their tasks. When a worker needs support, they can reach out to their supervisors or utilize the “Help” and “Resources” pages within the CalSAWS application.

1.2 Requests

Once the CalSAWS user is in the VA pop-up window (entry point details can be found in SCR CA-252905 and the assumptions section below), the user will be able to access frequently asked questions and Job Aids by clicking through the menu buttons or typing their question into the free-type feature.

1.3 Overview of Recommendations

In Release 1 of the CalSAWS VA, we will release components related to the overall look & design of the VA and UCs within the VA. The recommendation below captures the following overall look and design items:

1. User Icons
2. Colors
3. Free-Type Functionality
4. Stationary Main Menu Button
5. Chat Window Name

The recommendation below also captures the following content items:

1. Menu Branches
2. Free Responses
3. All Questions Library
4. Give Feedback Option

1.4 Assumptions

1. Release 1 will go live with SCR CA-250886.
2. To chat with the VA, the user would click the orange chat icon in the bottom right corner of the website (shown below).

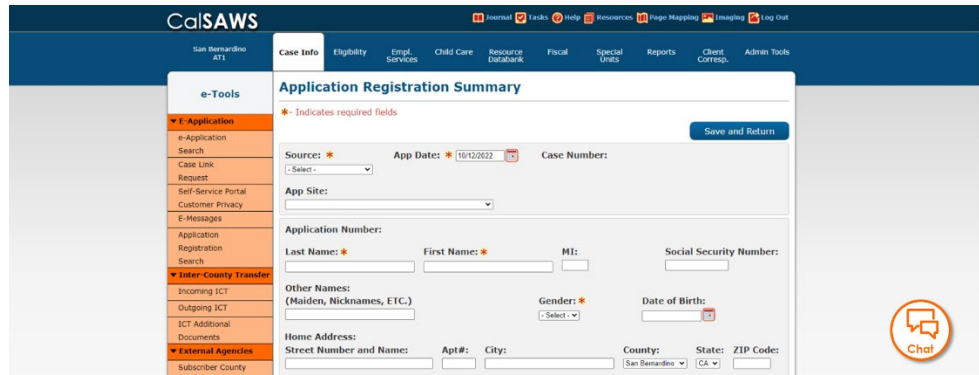


Figure 1.4.1 - VA Chat Icon

3. Once clicked, the VA will open as a pop-up window with the URL: virtualassistant.calsaws.net.
4. VA state will be maintained as the user navigates through the application, meaning that the conversation history will remain in the VA window until the user closes the window – navigating between different websites and applications will not affect VA chat history.

2 RECOMMENDATIONS

2.1 Internal VA Items

2.1.1 Overview

Once a user clicks on the chat icon and the VA pop-up window appears, the Main Menu/Welcome message will be immediately sent by the VA. Then, the user can begin interacting with the VA by clicking through the menu buttons or engaging the free-type feature. Users can return to main menu by clicking the stationary main menu button, located above the free-type box.

In this initial release, the VA will have functionality-based UCs helping CalSAWS workers as they navigate through certain CalFresh, CalWORKs, and Medi-Cal processes.

2.1.2 CalSAWS VA Mockups

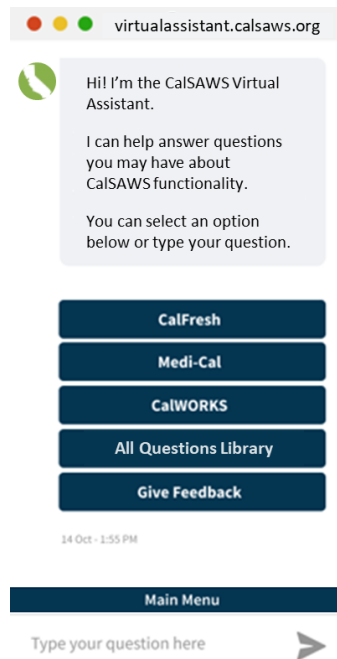


Figure 2.1.2.1 - VA Window

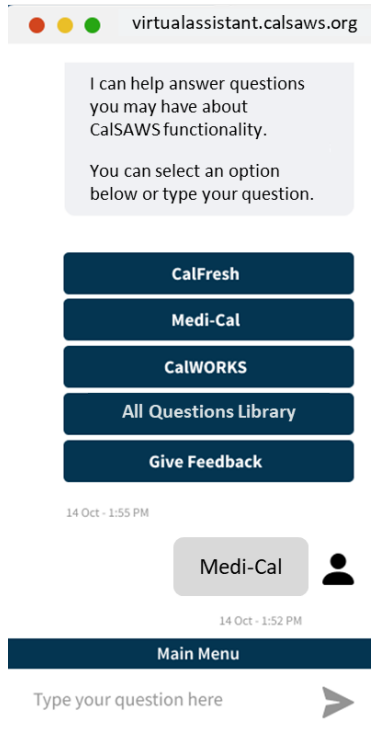


Figure 2.1.2.2. – User selects a program

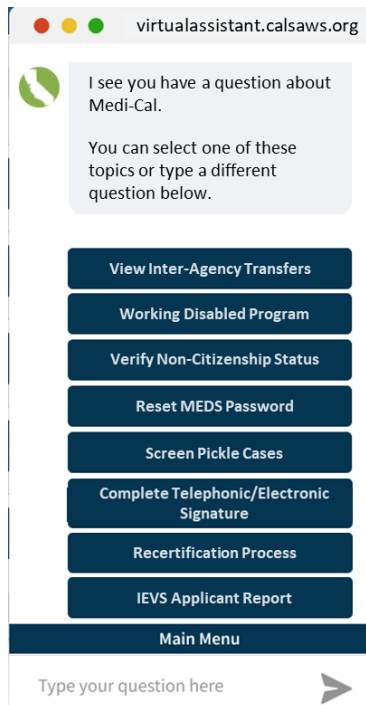


Figure 2.1.2.3 – User is presented UC buttons from the Program selected

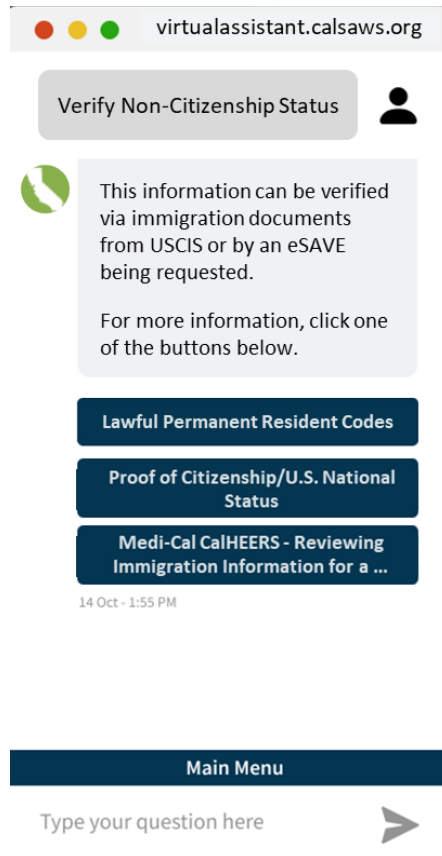


Figure 2.1.2.4 – User selects a Use Case

2.1.3 Description of Changes

1. Overall Look & Interface Design

- a) User Icons

Users will be able to differentiate between their chat text and the VA through different user icons. The VA will have a CalSAWS related icon and users will have a generic avatar.
- b) Colors

The buttons within the VA will be the same shade of blue as the CalSAWS application header, with bold, white text within them.
- c) Free-Type Functionality

The VA will allow users to access UCs through the free-type functionality. Keywords will trigger the appropriate UC – for example, if a user types “CalFresh”, the VA will respond with the CalFresh sub-menu UC.
- d) Stationary Main Menu Button

There will be a stationary main menu button available to the user at any point during their conversation with the VA. When this button is clicked, the welcome message and main menu buttons will be sent again.
- e) Chat Window Name

The VA window's title will be "CalSAWS Virtual Assistant"

2. Content

a) Menu Branches

The VA will initially include main menu branches for CalFresh, Medi-Cal, CalWORKs, Give Feedback, and an All Questions Library. These will be accessible as buttons that are sent with the welcome message.

Below is a table containing all menu-based Use Cases in Release 1:

Program	Question	Answer	Buttons
CalFresh	How to process a CalFresh Expedited Service (CFES) request?	<p>Eligible CalFresh households may qualify for Expedited Service at initial application or recertification.</p> <ul style="list-style-type: none"> • EDBC evaluates CalFresh applications for Expedited Service eligibility • If the household qualifies, the system will issue the second month of CalFresh benefits along with first month if the application date is after the 15th of the month • Determines if the verifications for getting CalFresh indicate Postponed Expedited Service (ES) <p>To indicate a CalFresh Expedited Service (CFES) request, go to the CalFresh Detail page. For step-by-step instructions on the most common scenarios, follow the link below.</p>	Button: CFES Instructions
CalFresh	How to add SUA to a CalFresh case?	To add a SUA to a case, first navigate to the Expense List Page: Eligibility → Customer Information → Financial → Expenses. On this page select Utility Allowance from the Expense Category	Button: Add SUA Instructions

		<p>dropdown and click the Add button.</p> <p>On the Expense Detail page, add Contributors from the case and <Start Date> and click Save.</p> <p>On the Utility Allowance Type Detail page, select Yes for "Does this person have heating or cooling expenses?" Fill out the Begin Month field and Select <Status> from the Verified drop list. Finally, click Save and Return.</p> <p>For more detailed instructions, click the button below.</p>	
CalFresh, Medi-Cal, CalWORKs	How to complete an electronic signature?	<p>Electronic Signature is a method of capturing a participant's signature or intent through electronic options rather than signing a physical piece of paper.</p> <p>For step-by-step instructions, follow the link below.</p>	<p>Button: Electronic Signature Instructions</p> <p>Button: CalSAWS Forms Inventory</p>
CalFresh, Medi-Cal, CalWORKs	How to verify non citizenship citizenship status?	<p>This information can be verified via immigration documents from USCIS or by an eSAVE being requested.</p> <p>For more information, click one of the buttons below.</p>	<p>Button: Lawful Permanent Resident Codes</p> <p>Button: Noncitizen Eligibility Guide (CalFresh)</p> <p>Button: Proof of Citizenship/U.S. National Status</p>

			Button (only to be added to Medi-Cal Program branch): Medi-Cal CalHEERS - Reviewing Immigration Information for a MAGI Determination
CalFresh, Medi-Cal, CalWORKs	How to reset MEDS password?	To reset your MEDS password, follow your county's specific guidelines and processes.	Button: CFES Instructions
CalFresh, Medi-Cal, CalWORKs	How to process a Recertification/Redetermination?	<p>In order to process any re-evaluation, you must have first received the Re-Evaluation (RE) Packet. Review county policy to determine packet generation dates.</p> <p>To access the completed RE Packet, you must navigate to the customer reporting page. Be sure you are in the context of a case and then access the page via Global Eligibility → Local Reporting → Customer Reporting List.</p> <p>For instructions on how to process a CalFresh Recertification, a Transitional CalFresh Recertification, or a CalWORKs redetermination, click the relevant button below. For information on the automated Medi-Cal Redetermination process, click the relevant button below.</p>	<p>Button: CalWORKs CalFresh Re-Evaluation and Periodic Reporting</p> <p>Button: Medi-Cal Renewal Packets</p> <p>Button: Change Reason</p>
CalFresh, Medi-Cal, CalWORKs	How to request an IEVS Applicant Report?	An IEVS Applicant Report is automatically requested via batch when a new	Button: IEVS Applicant

		<p>person is added to a case and/or program. The IEVS Applicant Request List page allows you to request IEVS manually and Systematic Alien Verification for Entitlement (SAVE) at any time.</p> <p>Navigate to the IEVS Applicant List page via Eligibility → Customer Information → Financial → IEVS Applicant. To request an IEVS manually, select Send Request.</p> <p>For more detailed instructions on processing an IEVS Report, click the button below.</p>	<p>Abstracts and SAVE</p> <p>Button: IEVS Applicant Detail</p> <p>Button: IEVS Abstract</p>
CalFresh, Medi-Cal, CalWORKs	How to disposition an IEVS Applicant Report?	<p>To clear an IEVS Applicant Report:</p> <ol style="list-style-type: none"> 1. Access the IEVS Applicant Detail page in Edit mode 2. Select "Yes" or "No" from the Discrepancy drop list 3. Enter comments in the Comments field, if applicable 4. Click the Save and Return button <p>For more detailed instructions, click the button below and scroll to the "Add a Discrepancy to the IEVS Applicant Detail Page" section.</p>	Button: IEVS Applicant Detail
CalFresh	How to determine CalFresh student eligibility?	<p>A student is any person who meets all of the following conditions:</p> <ul style="list-style-type: none"> • age 18 through 49 • physically and mentally fit for employment 	<p>Button: CF 6177 Form</p> <p>Button: CDSS LPIE List</p>

		<ul style="list-style-type: none"> • enrolled at least half-time in an institution of higher education <p>If the person meets the above criteria, the system will consider them a student for CalFresh purposes. The person will not receive benefits if they are not working at least 20 hours a week or 80 hours a month (unless they meet a student exemption).</p>	
CalFresh, CalWORKs	How to create a recovery account?	<p>Recovery accounts in CalSAWS are used to manage overpayments (cash aid) or over-issuances (CalFresh) discovered and being collected by the County. EDBC determines if an overpayment or an over-issuance was made based on information on the data collection pages. There are some instances where you'll need to set up an external recovery account. For more detailed information on creating a recovery account, click the relevant button below.</p> <p>The Recovery Account Search page allows you to search for a Recovery Account by the following criteria:</p> <ul style="list-style-type: none"> •Case •Recovery Account •Discovery Date •Responsible Party •LEADER Claim Number 	<p>Button: Creating External Recovery Accounts for Non-Fraud Overpayments</p> <p>Button: Recovery Account - Internal - Create</p> <p>Button: Recovery Account - External - Create</p>
Medi-Cal	How to view an inter-agency transfer from CalHEERS?	The IAT summary page allows you to view linked referrals from CalHEERS.	Button: Medi-Cal MAGI Referrals and

		<p>To access this page, be sure you are in the context of a case. Click Case Info → Case Summary → IAT Summary.</p> <p>For more information, click one of the buttons below.</p>	<p>Eligibility Determination</p> <p>Button: Medi-Cal CalHEERS Case Linkage</p> <p>Button: Processing CalHEERS Referrals</p>
Medi-Cal	What is the 250% Working Disabled Medi-Cal program?	<p>This program provides full-scope Medi-Cal to working disabled individuals with countable income below 250% of the federal poverty level (FPL). There are three requirements for the program:</p> <ol style="list-style-type: none"> 1. Must have disability status from social security administration/DDSD 2. Must have earned income 3. Eligible to receive Supplemental Security Income/State Supplementary program benefits if it were not for your earned income <p>Program enrollment is done at the local county welfare department.</p>	N/A
Medi-Cal	How to screen a Pickle case?	<p>The Pickle Program provides full scope medical care without a Share of Cost to persons who are terminated from SSI/SSP because of a Social Security Cost of Living Adjustment (COLA).</p> <p>To access the Pickle Eligibility fields, navigate to the income detail page.</p>	<p>Button: Income Management</p> <p>Button: Income Categories and Types in the System</p>

		On this page there is a section for Pickle Eligibility for the Medi-Cal program that is collapsed by default. To access, expand the caret next to Pickle Eligibility. Once the questions in this section are filled out, CalSAWS EDBC will assess if a person is eligible.	Button: Medi-Cal - Income In-Kind - Unearned
CalWORKs	What is and how to issue Temporary Homeless Assistance (THA) and Permanent Homeless Assistance (PHA)?	<p>The CalWORKs Homeless Assistance (HA) Program was established to help families in the CalWORKs program meet the costs of securing or maintaining permanent housing or to provide emergency shelter when a family is experiencing homelessness.</p> <ul style="list-style-type: none"> • Temporary HA helps families pay the costs of temporary shelter. • Permanent HA helps families secure housing or prevent eviction. <p>For step-by-step instruction on how to process HA, follow the link below.</p>	Button: Process HA Instructions

a) Free Responses

The VA will include multiple responses that are not accessible through the menu branches. Instead, these UCs will only be triggered if a user types a keyword through the free-type functionality.

Below is a table containing all Free Response Use Cases in Release 1:

Situation	Answer
Fallback Response – When the VA is unable to understand the text that a worker types into the free type box	I'm sorry, I didn't quite get that. Please try rephrasing the question in a few short words and ask again.
Thank You Response – When someone expressed gratitude to the VA	Anytime! Feel free to keep asking me questions.

Negative Response – When a worker says something mean, disrespectful, or vulgar to the VA	I'm sorry I haven't found your answer yet. Please try rephrasing your question in a few short words and ask again.
Help Response – When someone asks for more help because the VA does not give a sufficient answer	I'm sorry for not answering your question, I'm still learning and may have an answer in the future. Please ask your supervisor or assigned support staff.

b) All Questions Library

Users will have the option to scroll through a list of all the questions programmed into the VA by selecting the "All Questions Library" menu option. The All Questions Library option will also allow users to input question suggestions if they cannot find what they are looking for.

c) Give Feedback Option

The VA allows for users to submit feedback, triggered by clicking the "Give Feedback" button (in the "thank you" message or main menu) or by inactivity.

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

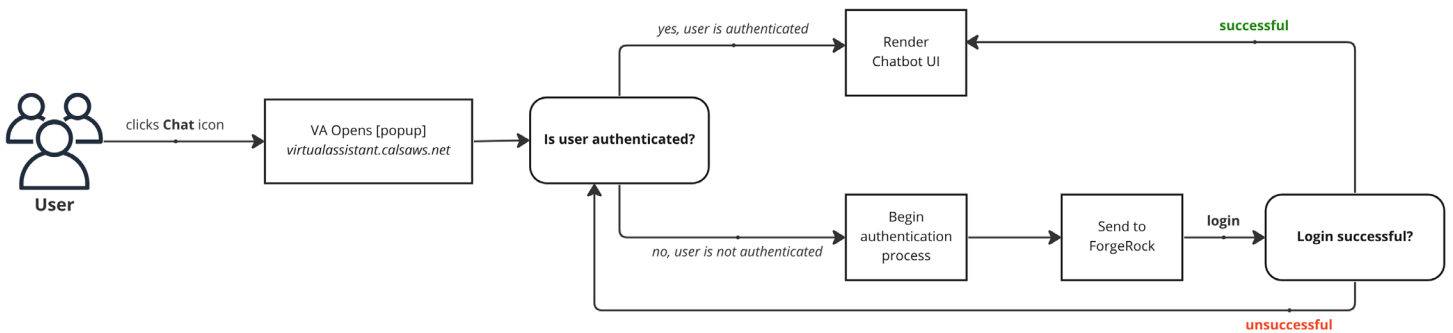
2.2 ForgeRock Integration

2.2.1 Overview

The VA shall be integrated with ForgeRock to comply with CalSAWS Security Standards. The purpose of this integration is to ensure the VA can only be used by the intended audience [county workers] and prevent unauthorized access.

2.2.2 Description of Change

1. ForgeRock Ops Team will create a client ID and secret for the VA application to use.
2. Authentication cookie set during login to CalSAWS core application will carry over to the pop-up window when users select **Chat**.
3. When the pop-up window loads [<https://virtualassistant.calsaws.net>] the VA will fetch the authentication cookie from browser local storage.
4. VA will pass cookie to ForgeRock to ensure the session is valid.



2.2.3 Integration Testing

Both teams [VA + ForgeRock] will collaborate to run end-to-end tests of the integration flow.

2.2.4 Execution Frequency

The integration logic is executed every time a user opens the VA window.

2.2.5 Counties Impacted

This integration is applicable to all counties.

2.2.6 Interface Partner

ForgeRock is the integration partner in this scenario.

2.2.7 Failure Procedure/Operational Instructions

Contact both VA + ForgeRock teams in failure scenarios to determine and resolve root cause. There are no operational requirements or instructions for this integration as it is built into the VA software.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Design	Release Tracker	VirtualAssistant_Release1Tracker.xlsx
2	Design	Miro Board – VA flow and use cases are documents	VirtualAssistant_Release1.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.2.1	5. The LRS shall include Show me how to features, coaches, and expert systems along with What's this? activation to facilitate User access to more detailed online Help functions.	The VA is an included coach and expert system.

5 OUTREACH

N/A

6 APPENDIX

N/A