California Statewide Automated Welfare System

Design Document

CA-235770

CW Household Members Eligible to TCF

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Yale Yee
	Reviewed By	Business Analysts, CW/CF Committee, Build and Test teams

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/24/2021	1.0	Initial Document	Yale Yee
8/15/2022	2.0	Updated document based on CW/CF committee	Yale Yee
1/25/2023	3.0	Updated document based on CRPC	Yale Yee

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1 OVERVIEW

A CalWORKs (CW) household will be eligible for Transitional CalFresh (TCF) when the household is discontinued from CW for certain status reasons.

TCF benefits are the same as the amount received in the previous month by the household prior to the discontinuance from CalWORKs. Also, TCF benefits are adjusted for the loss of the CalWORKs grant.

Per CRCP 2321, specific person and program closure reasons need to be updated when determining eligibility to TCF.

1.1 Current Design

When running CalFresh (CF) and CW EDBC (regular EDBC, negative action or batch EDBC) together, the system determines eligibility for TCF when the CW program is discontinued in the benefit month, based on the closure reason for the CW program and CW persons.

1. The following households are not eligible to receive TCF when:

a. The CW program is discontinued for any of the following reasons:
   - Inter-County Transfer
   - Gets Tribal TANF
   - QC Refused to Cooperate
   - QC Failed to Respond in 30 Days
   - QC Failed to Keep Appointment
   - QC Failed to Keep 2 Appointments
   - QC Failed to Sign Release
   - QC Failed to Return Signed Release
   - SAR 7 Incomplete
   - SAR 7 Not Received
   - CW RE Incomplete
   - CW RE Not Received
   - Failed to Complete Determination
   - Late Periodic Report SAR 72

Ex: CW household is discontinued for incomplete RE/SAR7. This case is not eligible for TCF.

Name	DOB	Role	Role Reason	Status	Status Reason
Test, Child 2F	01/01/2020	MEM		Discontinued	CW RE Incomplete
Test, Tcf 57M	01/01/1965	MEM		Discontinued	CW RE Incomplete

Figure 1.1.1 – Household failed for closure reason not eligible for TCF

Regular Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 09 - CalFresh

Program Status: Active

SUAS Eligible: No

Program Type: Regular

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Test, Tcf 57M	01/01/1965	MEM		Active	
Test, Child 2F	01/01/2020	MEM		Active	

Override Program Configuration

Figure 1.1.2 – Household is not eligible for TCF based on closure reason

b. The CW program is discontinued and all persons fail for any of the following or combination of the following person closure reasons:
   - Deceased
   - Not a California Resident
   - CW IPV/Fraud
   - CW Quality Control
   - WTW Not Accepting a Job
   - WTW Quit Job
   - WTW Not Participating in an activity
   - WTW Reduced Earnings
   - WTW Not signing the WTW Plan
   - Gets Tribal TANF

   Note: A CW case will not discontinue if an individual has an Medi-Cal Member Only (MMO) status and TCF will not be established.

Ex: CW AU = 2. CW household is discontinued for where both individuals have a CW person closure reason that is not eligible for TCF. This case is not eligible for TCF.

Name	DOB	Role	Role Reason	Status	Status Reason
Test, Child 17F	01/01/2006	MEM		Discontinued	Gets Tribal TANF
Test, Tcf 58M	01/01/1965	FRE	CW Non Part.	Discontinued	No Eligible Mem

Override Program Configuration

Name	DOB	Role	Role Reason	Status	Status Reason
Test, Child 17F	01/01/2006	MEM		Discontinued	Gets Tribal TANF
Test, Tcf 58M	01/01/1965	MEM		Discontinued	Gets Tribal TANF

Override Program Configuration

Figure 1.1.3 – Household failed for CW person closure reason not eligible for TCF

Regular Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 09 - CalFresh

Program Status: Active

SUAS Eligible: No

Program Type: Regular

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Test, Child 17F	01/01/2006	MEM		Active	
Test, Tcf 58M	01/01/1965	MEM		Active	

Override Program Configuration

Figure 1.1.4 – Household not eligible for TCF

Ex: CW AU = 1 (and one CW IPV/Fraud sanctioned individual). CFHH=2. CW household is discontinued for Over Income. This case is eligible for TCF.

Name	DOB	Role	Role Reason	Status	Status Reason
Test, Child 2F	01/01/2020	MEM		Discontinued	Over Income
Test, Tcf 57M	01/01/1965	MMO	CW IPV - #1	Discontinued	Over Income

Figure 1.1.5 – CW household failed for Over Income with an individual with WTW Sanction

Transitional Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 0F - TCF

Program Status: Active

SUAS Eligible: No

Program Type: Transitional

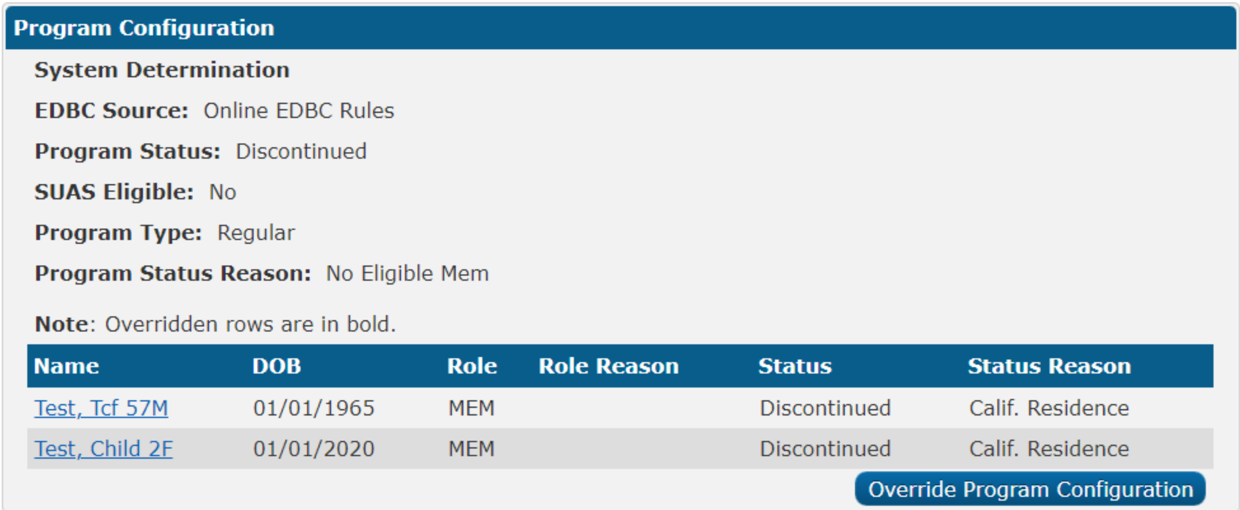
Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Test, Tcf 57M	01/01/1965	MEM		Active	
Test, Child 2F	01/01/2020	MEM		Active	

Override Program Configuration

Figure 1.1.6 – Household eligible for TCF

2. A household is not eligible to TCF if they are not a California resident.



Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Program Status: Discontinued

SUAS Eligible: No

Program Type: Regular

Program Status Reason: No Eligible Mem

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Test, Tcf 57M	01/01/1965	MEM		Discontinued	Calif. Residence
Test, Child 2F	01/01/2020	MEM		Discontinued	Calif. Residence

Override Program Configuration

Figure 1.1.7 – Household not eligible for TCF

1.2 Requests

1. Per CRCP 2321, the following updates will be implemented:

   a. Add the following program closure reason that will prevent a discontinued CW program from establishing TCF:
      - Failed to Provide Verification

   b. Remove the following program closure reasons from the existing list that prevents a discontinued CW program from establishing TCF:
      - QC Refused to Cooperate
      - QC Failed to Respond in 30 Days
      - QC Failed to Keep Appointment
      - QC Failed to Keep 2 Appointments
      - QC Failed to Sign Release
      - QC Failed to Return Signed Release

	Existing	Add	Remove
Inter-County Transfer	X		
Gets Tribal TANF	X		
QC Refused to Cooperate	X		X
QC Failed to Respond in 30 Days	X		X
QC Failed to Keep Appointment	X		X
QC Failed to Keep 2 Appointments	X		X
QC Failed to Sign Release	X		X
QC Failed to Return Signed Release	X		X
SAR 7 Incomplete	X		
SAR 7 Not Received	X		
CW RE Incomplete	X		
CW RE Not Received	X		
Failed to Complete Determination	X		
Late Periodic Report SAR 72	X		
Failed to Provide Verification		X	

Key
Existing list of closure reasons in CW not eligible to TCF
Add status reasons to existing list of closure reason in CW not eligible to TCF
Remove status reasons from existing list of closure reason in CW

Figure 1.2.1 – Updates to the list of program closure reasons

c. Add the following person closure reason to the existing list that prevents discontinued CW program from establishing TCF:
- WTW Chronic Truant
- Gets Duplicate Aid
- Fleeing Felon
- Probation/Parole Violator
- Excluded for Failing to Comply with ABAWD Requirements (3 Countable ABAWD Months Used)
- WTW Not Providing Proof of satisfactory Progress
- Sanctioned from CW for Child Support

d. Remove the following person closure reasons from the existing list that prevents a discontinued CW program from establishing TCF:
- Not a California Resident
- CW Quality Control

	Existing	Add	Remove
Deceased	X		
Not a California Resident	X		X
CW IPV/Fraud	X		
CW Quality Control	X		X
WTW Not Accepting a Job	X		
WTW Quit Job	X		
WTW Not Participating in an activity	X		
WTW Reduced Earnings	X		
WTW Not signing the WTW Plan	X		
Gets Tribal TANF	X		
WTW Chronic Truant		X	
Gets Duplicate Aid		X	
Fleeing Felon		X	
Probation/Parole Violator		X	
Excluded for Failing to Comply with ABAWD Requirements (3 Countable ABAWD Months Used)		X	
WTW Not Providing Proof of Satisfactory Progress		X	
Sanctioned from CW for Child Support		X	

Key
Existing list of closure reasons in CW not eligible to TCF
Add status reasons to existing list of closure reason in CW not eligible to TCF
Remove status reasons from existing list of closure reason in CW

Figure 1.2.2 – Updates to the list of person closure reasons

2. When the CW program is discontinued and individuals fails for a person closure reason (not in the Existing or Add column) not listed above, the individuals will be eligible for TCF.
   Individuals that fail for a person closure reason (in the Existing and Add column) listed above will not be eligible for TCF.

Ex: There are 3 individuals – mom, dad, and child. CW AU = 2 and a WTW Sanction individual. CW household is discontinued for Over Income. This case is eligible for TCF with a household of 2. The WTW Sanction individual will not be eligible to TCF.

3. A household that is not a California resident is eligible to TCF unless they are confirmed to have been receiving benefits from their new state.

1.3 Overview of Recommendations

1. Update the person/program closure reasons for CW when determining the eligibility for TCF.
2. When determining TCF for mixed households of eligible/ineligible CW household members, some CW household members are eligible to TCF.

1.4 Assumptions

1. If an individual has multiple status reasons, the highest priority will be displayed. When CW EDBC is run, all status reasons will be considered when determining TCF eligibility.
2. Mid period TCF closure reasons will not be impacted.
3. CA-255663 has been created to remove CalWORKs QC Non-Compliance Reasons.

2 RECOMMENDATIONS

2.1 Update Closure Reasons when Determining Eligibility to TCF

2.1.1 Overview

Program and person closure reason will prevent a discontinued CW program from establishing TCF.

2.1.2 Description of Changes

Add the following program closure reason that will prevent a discontinued CW program from establishing TCF:

- Failed to Provide Verification

Remove the following program closure reasons from the existing list that prevents a discontinued CW program from establishing TCF:

- QC Refused to Cooperate
- QC Failed to Respond in 30 Days
- QC Failed to Keep Appointment
- QC Failed to Keep 2 Appointments
- QC Failed to Sign Release
- QC Failed to Return Signed Release

Add the following person closure reason to the existing list that prevents discontinued CW program from establishing TCF:

- WTW Chronic Truant
- Gets Duplicate Aid

- Fleeing Felon
- Probation/Parole Violator
- Excluded for Failing to Comply with ABAWD Requirements (3 Countable ABAWD Months Used)
- WTW Not Providing Proof of satisfactory Progress
- Sanctioned from CW for Child Support

Remove the following person closure reason from the existing list that prevents a discontinued CW program from establishing TCF (these person closure reasons will be eligible to TCF):

- Not a California Resident
- CW Quality Control

2.1.3 Programs Impacted

TCF

2.1.4 Performance Impacts

N/A

2.2 Sanction Individuals Are Not Eligible to TCF

2.2.1 Overview

CW household members are not eligible to TCF for any of the added person closure reasons in the following list:

- WTW Chronic Truant
- Gets Duplicate Aid
- Fleeing Felon
- Probation/Parole Violator
- Excluded for Failing to Comply with ABAWD Requirements (3 Countable ABAWD Months Used)
- WTW Not Providing Proof of satisfactory Progress
- Sanctioned from CW for Child Support

The reasons above are in addition to the existing person closure reasons in the following list:

- Deceased
- CW IPV/Fraud
- WTW Not Accepting a Job
- WTW Quit Job
- WTW Not Participating in an activity
- WTW Reduced Earnings
- WTW Not signing the WTW Plan

- Gets Tribal TANF

If there is a mix household of eligible/ineligible CW household members when determining TCF, some CW household members are eligible to TCF.

Ex: There are 3 individuals – mom, dad, and child. CW AU = 2 and a WTW Sanction individual. CF HH = 2 and individual is sanctioned from CF for not complying with WTW. CW household is discontinued for Over Income. This case is eligible for TCF with a household of 2. The WTW Sanction individual will not be eligible to TCF.

Ex: There are 3 individuals – mom, dad, and child. CW AU = 2 and a WTW Sanction individual not sanctioned in CF. CF HH = 3 and the WTW sanctioned individual is on CF because an exemption is met. CW household is discontinued for Over Income. This case is eligible for TCF with a household of 2. The WTW Sanction individual will not be eligible to TCF.

2.2.2 Description of Changes

1. Update CF EDBC to grant TCF benefits when an individual does not have a sanction.

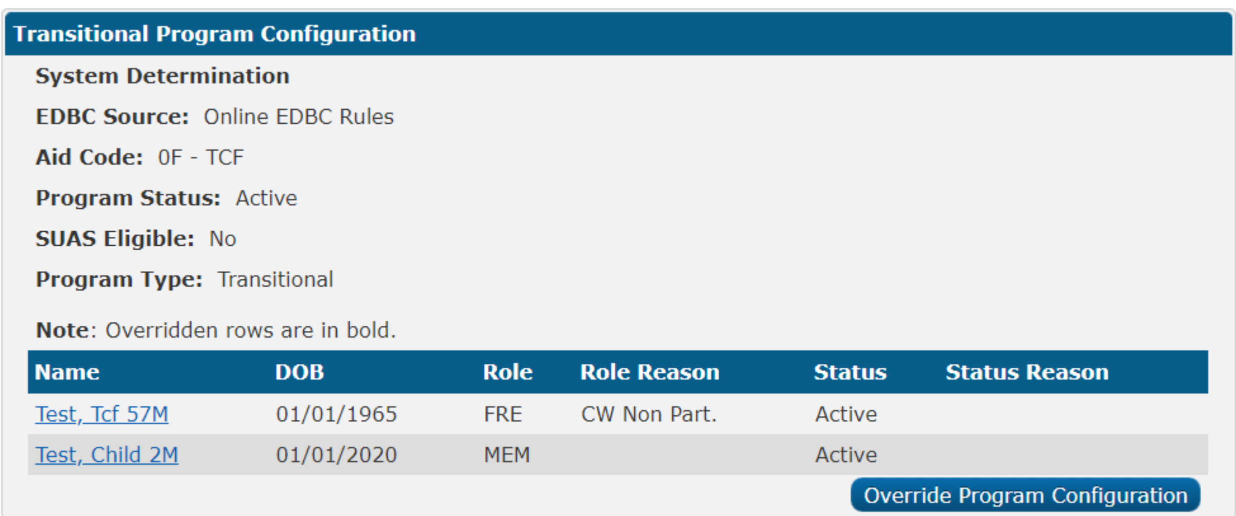


Figure 2.2.1 – Individual with a Sanction is not Eligible to TCF Benefits

2.2.3 Programs Impacted

TCF

2.2.4 Performance Impacts

N/A

2.3 Out of State Individual's Eligibility to TCF

2.3.1 Overview

A household that is not a California resident is eligible to TCF unless they are confirmed to have been receiving benefits from their new state.

2.3.2 Description of Changes

1. Update CF EDBC to grant TCF benefits when an individual is not a resident of California.

Note: If the individual who is not a resident of California is receiving benefits from their new state, the worker can perform a Negative Action for receiving aid on another case.

Residency Detail

*- Indicates required fields

Images Edit Close

Change Reason

Change Reason:
Intake

Reported Date:
01/01/2022

View

Name: *
Test, Tcf 57M

CA Resident: *
No

Migrant Seasonal Farm Worker? *
No

Begin Date: *
01/01/2022

End Date:

Verified: *
Verified View

Figure 2.3.1 – Out of State Individual

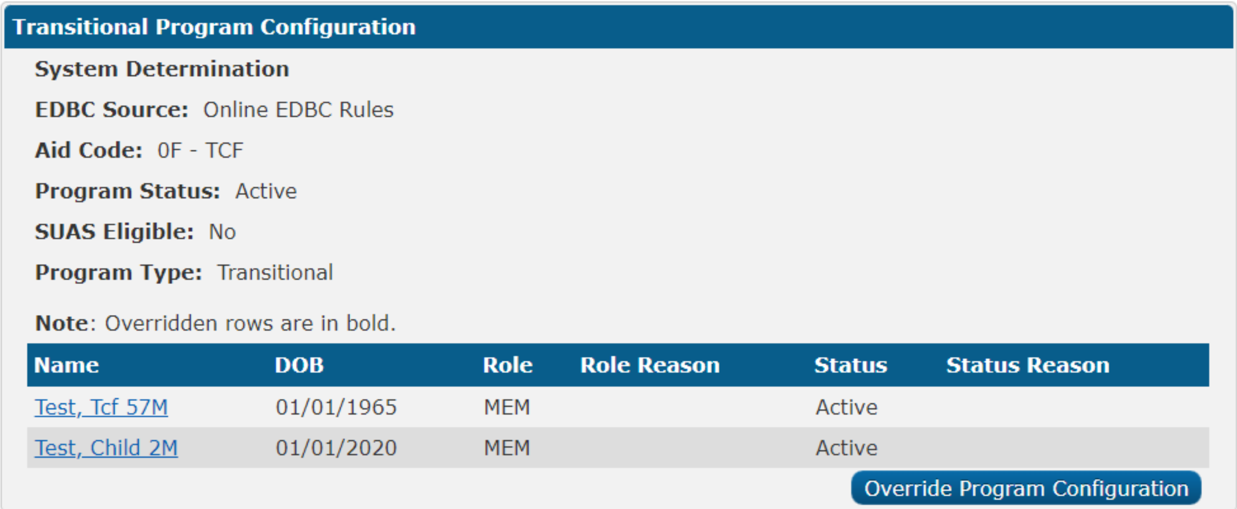


Figure 2.3.2 – Out of State Individual Receiving TCF Benefits

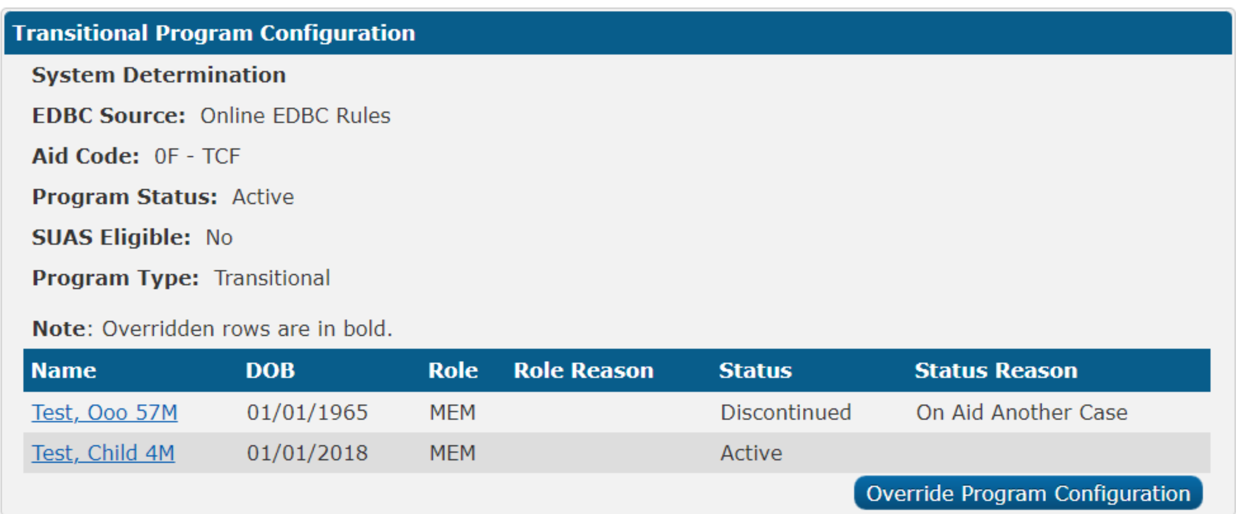


Figure 2.2.3 – Negative Action to Discontinue Out of State Individual Receiving Benefits

2.3.3 Programs Impacted

TCF

2.3.4 Performance Impacts

N/A

2.4 Automated Regression Test

2.4.1 Overview

Create new ART scripts to confirm the following changes.

2.4.2 Description of Change

For each of the newly added closure reasons, create a CW/CF case and fail the CW program for the given reason. TCF should not be granted.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-49417

Update WINS 1239 NOAs in threshold languages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Jensen
	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/18/2023	0.1	Initial Draft	Maria Jensen
01/25/2023	0.2	BA comment: Changed EN NOA title 'BENEFITS' word to 'BENEFIT'	Maria Jensen

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1 OVERVIEW

This SCR will update the WINS 1239 NOA in the CalSAWS system for all 58 counties, to match the newest State version of WINS 1239 (5/14).

1.1 Current Design

WINS is a mandatory program. The WINS program provides a ten dollar ($10) per month additional food supplement benefit for each WINS eligible CalFresh household. The WINS 1239 must be provided to an applicant/participant whenever there is a change in their WINS eligibility. Currently some of the WINS 1239 NOAs generate in English, and other NOAs generate in English and Spanish.

1.2 Requests

Add threshold languages to WINS 1239 NOAs so CalSAWS can generate the notices in the appropriate language whenever there is a change in WINS eligibility.

1.3 Overview of Recommendations

1. Add threshold languages to WINS 1239 NOAs so CalSAWS can generate the notices in the appropriate language whenever there is a change in WINS eligibility:
   a. WINS Approved - reason F470A
   b. WINS CF is terminated - F474T
   c. WINS: Moved out of State - reason F472T
   d. WINS: Work hours are less than minimum required - reason F476T.
2. Remove the Budget from NOAs containing F470A and F476T Reasons.

1.4 Assumptions

1. There will be no updates to the generation conditions of the existing WINS 1239 NOA Fragments with this effort.
2. Per existing functionality, a GEN 1365 is included in the same envelope with the WINS 1239 English version when the participant's primary language is a language other than the currently supported languages for this NOA.
3. The C-IV system handled regulations by aggregation. Currently the CalSAWS system handles regulations by concatenation. SCR CA-250358 will handle Regulations by aggregation in the CalSAWS system.
4. WINS program has no budget, so the WINS NOAs will have the budget removed.
5. This SCR was split to meet capacity. SCR CA-255296 will implement the following Reasons in Phase II: F473T, F478T, F471T, F479T.

2 RECOMMENDATIONS

2.1 Update the WINS Approved - F470A NOA Reason

2.1.1 Overview

Update the 'WINS Approved' NOA Reason to also generate in threshold languages for the WINS program.

Reason Fragment Name and ID: CF_AP_WINS_APPROVAL_F470 (Fragment ID: 7243)

State Form/NOA: Derived from WINS 1239 (Approval)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): WINS (CalFresh)

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

Existing Languages: English, Spanish

2.1.2 Form/NOA Verbiage

Update WINS Approved Reason Fragment XDP

Updated Languages: Armenian (new), Arabic (new), Cambodian (new), Chinese (new), Farsi (new), Hmong (new), Korean (new), Lao (new), Russian (new), Tagalog (new), Vietnamese (new)

NOA Mockups/Examples: See Supporting Documents #1

2.1.3 Form/NOA Variable Population

There are no variables to be updated in this fragment.

Variables Requiring Translations: None

1. **Add/Update Fragment Regulations**

Add Fragment Regulations in threshold languages based on the main form WINS 1239 (see Supporting Documents #5).

2. **Add/Update NOA Title Reference for new Reason**

Updated NOA Title: "CALFRESH NOTICE OF APPROVAL WORK INCENTIVE NUTRITIONAL SUPPLEMENT (WINS) BENEFIT" (English)

NOA Title Requires Translations: Yes. Add NOA Title in threshold languages for fragment CF_AP_NOA_TYPE_WINS (ID: 3126). See Supporting Documents #6.

2.1.4 Form/NOA Generation Conditions

N/A, there are no updates to the generation conditions for this fragment.

2.2 Update the WINS CF is terminated - F474T NOA Reason

2.2.1 Overview

Update the 'WINS CF is terminated' NOA Reason to also generate in threshold languages for the WINS program.

Reason Fragment Name and ID: CF_TN_WINS_CF_DISCONT_F474 (Fragment ID: 7247)

State Form/NOA: Derived from WINS 1239 (4^{th} Termination reason)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): WINS (CalFresh)

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

Existing Languages: English

2.2.2 Form/NOA Verbiage

Update WINS CF is terminated Reason Fragment XDP

Updated Languages: Armenian (new), Arabic (new), Cambodian (new), Chinese (new), Farsi (new), Hmong (new), Korean (new), Lao (new), Russian (new), Spanish (new), Tagalog (new), Vietnamese (new)

NOA Mockups/Examples: See Supporting Documents #2

2.2.3 Form/NOA Variable Population

There are no variables to be updated in this fragment.

Variables Requiring Translations: None

1. **Add/Update Fragment Regulations**

Add Fragment Regulations in threshold languages based on the main form WINS 1239 (see Supporting Documents #5).

2. **Add/Update NOA Title Reference for new Reason**

Updated NOA Title: "CALFRESH NOTICE OF TERMINATION WORK INCENTIVE NUTRITIONAL SUPPLEMENT (WINS) BENEFIT" (English)

NOA Title Requires Translations: Yes. Add NOA Title in threshold languages for fragment CF_TN_NOA_TYPE_WINS (ID: 3133). See Supporting Documents #6.

2.2.4 Form/NOA Generation Conditions

N/A, there are no updates to the generation conditions for this fragment.

2.3 Update the WINS: Moved out of State - F472T NOA Reason

2.3.1 Overview

Update the 'WINS: Moved out of State' NOA Reason to also generate in threshold languages for the WINS program.

Reason Fragment Name and ID: CF_TN_WINS_OUT_OF_STATE_F472 (Fragment ID: 7245)

State Form/NOA: Derived from WINS 1239 (2^{nd} Termination reason)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): WINS (CalFresh)

Current Action Type: Discontinuance

Current Fragment Level: Program Person

Currently Repeatable: No

Includes NA Back 9: Yes

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

Existing Languages: English

2.3.2 Form/NOA Verbiage

Update WINS: Moved out of State Reason Fragment XDP

Updated Languages: Armenian (new), Arabic (new), Cambodian (new), Chinese (new), Farsi (new), Hmong (new), Korean (new), Lao (new), Russian (new), Spanish (new), Tagalog (new), Vietnamese (new)

NOA Mockups/Examples: See Supporting Documents #3

2.3.3 Form/NOA Variable Population

There are no variables to be updated in this fragment.

Variables Requiring Translations: None

1. **Add/Update Fragment Regulations**

Add Fragment Regulations in threshold languages based on the main form WINS 1239 (see Supporting Documents #5).

2. **Add/Update NOA Title Reference for new Reason**

Updated NOA Title: "CALFRESH NOTICE OF TERMINATION WORK INCENTIVE NUTRITIONAL SUPPLEMENT (WINS) BENEFIT" (English)

NOA Title Requires Translations: Yes. Add NOA Title in threshold languages for fragment CF_TN_NOA_TYPE_WINS (ID: 3133). See Supporting Documents #6.

2.3.4 Form/NOA Generation Conditions

N/A, there are no updates to the generation conditions for this fragment.

2.4 Update the WINS: Work hours are less than minimum required - F476T NOA Reason

2.4.1 Overview

Update the 'Work hours are less than minimum required' NOA Reason to also generate in threshold languages for the WINS program.

Reason Fragment Name and ID: CF_TN_WINS_WK_HRS_LESS_MIN_F476 (Fragment ID: 7248)

State Form/NOA: Derived from WINS 1239 (7th Termination reason)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): WINS (CalFresh)

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

Existing Languages: English, Spanish

2.4.2 Form/NOA Verbiage

Update Work hours are less than minimum required Reason Fragment XDP

Updated Languages: Armenian (new), Arabic (new), Cambodian (new), Chinese (new), Farsi (new), Hmong (new), Korean (new), Lao (new), Russian (new), Tagalog (new), Vietnamese (new)

NOA Mockups/Examples: See Supporting Documents #4

2.4.3 Form/NOA Variable Population

There are no variables to be updated in this fragment.

Variables Requiring Translations: None

3. **Add/Update Fragment Regulations**

Add Fragment Regulations in threshold languages based on the main form WINS 1239 (see Supporting Documents #5).

4. **Add/Update NOA Title Reference for new Reason**

Updated NOA Title: "CALFRESH NOTICE OF TERMINATION WORK INCENTIVE NUTRITIONAL SUPPLEMENT (WINS) BENEFIT" (English)

NOA Title Requires Translations: Yes. Add NOA Title in threshold languages for fragment CF_TN_NOA_TYPE_WINS (ID: 3133). See Supporting Documents #6.

2.4.4 Form/NOA Generation Conditions

N/A, there are no updates to the generation conditions for this fragment.

2.5 Update the CalFresh Approval NOA Budget

2.5.1 Overview

WINS Program has no Budget. The State version of the WINS 1239 form has no budget either. This effort will match that for NOAs based on WINS 1239.

Update the existing Budget for CalFresh Approval NOAs to not generate for NOAs containing F470A and F476T WINS Reasons.

State Form/NOA: Existing CalSAWS CF approval budget

Current NOA Template ID(s): CF_NOA_TEMPLATE (Fragment ID: 3027)

Budget Name: CalFresh Approval NOA (BUDGT_CF_APPROVAL_SAR, ID: 1285)

Current Program(s): CalFresh

Current Action Type: Approval, Discontinuance

Current Fragment Level: Program

Currently Repeatable: No

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

2.5.2 Form/NOA Verbiage

There are no updates to the verbiage.

2.5.3 Form/NOA Variable Population

There are no updates to the variable population.

2.5.4 Form/NOA Generation Conditions

Updates to Fragment Generation

Remove the Budget from NOAs containing F470A and F476T Reasons.

Tech Note: Disable the Budget creation in the Rules specific to these 2 reasons.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	NOA	F470A mockups (Threshold languages)	CA-49417 Reasons mockups in threshold languages.xlsx (tab 1)
2.	NOA	F474T mockups (Threshold languages)	CA-49417 Reasons mockups in threshold languages.xlsx (tab 2)
3.	NOA	F472T mockups (Threshold languages)	CA-49417 Reasons mockups in threshold languages.xlsx (tab 3)
4.	NOA	F476T mockups (Threshold languages)	CA-49417 Reasons mockups in threshold languages.xlsx (tab 4)
5.	NOA	WINS 1239 NOA Regulations (Threshold languages)	CA-49417 Regulations in threshold languages.xlsx
6.	NOA	WINS 1239 NOA Titles (Threshold languages)	CA-49417 Titles in threshold languages.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.2 CAR-1206	The LRS shall generate written material, including notices, NOAs, forms, flyers, letters, and stuffers, to applicants, participants, caregivers, sponsors, authorized representatives, and/or any other entities, in English, all threshold languages, and any other language for which the State has provided a translation.	With SCR CA-49417, the WINS 1239 NOAs will be updated in threshold languages in the CalSAWS system for all 58 counties, to match the newest State version of WINS 1239 (5/14).
2.18.1.1 CAR-1205	The LRS shall produce the NOA in a timely manner, in accordance with Turner waiver requirements, containing the following: a. Case and applicant/participant identifying information and address; b. The proposed action(s) being taken by the COUNTY department; c. The effective date of the proposed action(s); d. The reason(s) for the proposed action(s); e. Time periods covered, including retroactive periods; f. Turner format requirements as appropriate; g. The complete federal, State, or COUNTY manual section(s), including subsection(s) supporting the proposed action(s); h. The budget calculations/computations by program, including gross income test and net income test; i. The overpayment/underpayment and/or overissuance/under-issuance amount and/or calculations;	With SCR CA-49417, the WINS 1239 NOAs will be updated in threshold languages in the CalSAWS system for all 58 counties, to match the newest State version of WINS 1239 (5/14).

	j. The worker s name, file number, addressee, mailing address, sending Local Office Site s address, telephone number, email address, and hours of availability; k. Instructions regarding the filing of an appeal and appeals-specific contact information; l. Date and time of notification; m. Variable individual/case LRS Data including the name(s) of individual(s) affected by the authorized action, income reporting threshold amounts, and time on aid information; n. Freeform text based on County-specified user that was added to clarify the NOA, unless prohibited by federal and State regulations and COUNTY policies.; and o. Collection calculation and amount, if applicable.	

5 APPENDIX

Reason fragments to be updated:

Order on Form	ID	Snippet Code	File Name	Descr	Avail. Langs	Langs to add
Approval	7243	F470A	CF_AP_WINS_APPROVAL_F470	WINS Approved	EN, SP	all
Termination 4	7247	F474T	CF_TN_WINS_CF_DISCONT_F474	WINS CF is terminated	EN	all
Termination 2	7245	F472T	CF_TN_WINS_OUT_OF_STATE_F472	WINS: Moved out of State	EN	all
Termination 7	7248	F476T	CF_TN_WINS_WK_HRS_LESS_MIN_F476	WINS: Work hr is < minimum reqd	EN, SP	all

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-229043

Enable CalSAWS Capability For Counties to Mail Documents With Customized Contents to Clients

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ayman Hussein, Phong Xiong
	Reviewed By	Tiffany Huckaby, Lawrence Samy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/14/2022	1.0	Initial Draft	Ayman Hussein
02/13/2023	2.0	Revised Draft	Phong Xiong
02/16/2023	2.1	Updates to sections 2.1.2 and 2.1.3.	Phong Xiong

Contents

1 OVERVIEW

CalWIN counties currently have the capability to mail a document with customized content to a specified customer population, which is enabled by providing the CalWIN print vendor (DFS) with document metadata string. However, CalSAWS counties do not have this functionality.

1.1 Current Design

CalSAWS does not have PDF Bookmark Metadata added to Forms and NOAs.

1.2 Requests

Create a capability in CalSAWS that allows for the central print vendor to mail documents with customized content to a specified user group within a county. For instance, a county would have the capability in CalSAWS to mail a flyer explaining how to apply for emergency CalFresh benefits to customers in specific zip codes impacted by a wildfire.

1.3 Overview of Recommendations

1. Add PDF Bookmark Metadata String to CalSAWS Forms and NOAs.

1.4 Assumptions

1. The CORR_NUMBER value outlined in sections 2.1.2 and 2.1.3 can only be either a Form number or a NOA number.
2. The metadata inserted into the PDFs are only for CalSAWS generated PDFs. Any PDFs received from external sources are excluded from this effort; this includes PDFs from the GA/GR Solution.
3. Due to differences in LANG_CODE and Addressee Location used by CalSAWS and CalWIN, historical forms and NOAs from CalWIN that has been brought over to CalSAWS cannot be reprinted centrally but can be viewed or reprinted locally.
4. Metadata string values will be delimited by double quotes. For example, <NUM_PAGES V="3"/>

2 RECOMMENDATIONS

2.1 Add PDF Bookmark Metadata String to CalSAWS Forms and NOAs

2.1.1 Overview

This effort will be adding a PDF Bookmark Metadata String to CalSAWS Forms and NOAs. The effort will be adding the bookmark metadata to every correspondence PDF at the time of inserting the imaging barcode on each document.

Currently, CalSAWS has a FormBean.java file which contains information that can be used to populate some of the data on the Bookmark Metadata string. The missing bookmark data will need to be added to the FormBean.java file in CalSAWS so it can populate the PDF Bookmark Metadata String on each correspondence's PDF.

2.1.2 PDF Bookmark Metadata Variable Population - Existing

The following table contains the current TAGs in the FormBean.java file in CalSAWS and the corresponding metadata bookmark tag name that will need to be added on the Forms and NOAs PDF.

FormBean Tag (existing)	Bookmark Tag Name	Population	Formatting*
getTemplateNumIdentif	CORR_NUMBER*	This populates with the Form Number.	Arial Size 10 Font, in a text format. Example, <CORR_NUMBER V=' MC 215'/>
getTotalPageNumber	NUM_PAGES	This populates with Number of PDF pages for the correspondence.	Arial Size 10 Font, in a numeric format. Example, <NUM_PAGES V='3'/>
getCaseSerialNumId	CASE_NUMBER	This populates with Case Number of the generated correspondence.	Arial Size 10 Font, in a text format. Example,

			<CASE_NUMBER V=' SD4EHA9'/>
getProgramId	PROG_ID	This populates with the Case Program ID that generated correspondence.	Arial Size 10 Font, in a text format. Example, <PROG_ID V='815673854'/>
getWorkerNumIdentif	CASELOAD_NUMBER	This populates with the Case Worker Number.	Arial Size 10 Font, in a text format. Example, <CASELOAD_NUMBER V='19ESGR2B03'/>
getDate	SYSTEM_DATE	This populates with the Batch Cycle date when the correspondence was generated.	Arial Size 10 Font, in a date format. Example, <SYSTEM_DATE V='7/12/2022'/> *Technical note: The DOC_DATE value will need to be truncated to avoid populating the timestamp along with the date on the metadata bookmark. For example:* *6/7/2016 10:17:31 PM*
getImagingBarcodeValue	CORR_ID	This populates with a unique system generated Identifier for Forms and NOAs.	Arial Size 10 Font, in a numeric format. Example, <CORR_ID V=' 187866948'/>

*Note: CORR_NUMBER in this table is only referring to when the document generated is a form. The mapping for CORR_NUMBER for NOAs can be found in the table below in section 2.1.3.

2.1.3 PDF Bookmark Metadata Variable Population – To be Added

The following table contains the TAGs that will need to be added into the FormBean.java file in CalSAWS and the corresponding metadata bookmark tag name that will need to be added on the Forms and NOAs PDF.

FormBean Tag (new)	Bookmark Tag Name	Population	Formatting*
getPersonName	SENDING_LINE1	This populates with the Addressee full name (First, Middle, Last and Suffix when the addressee is an individual. Else use organization/Facility name. *Note: The SENDING_LINE1 will populate with the primary recipient’s full name whether that is an individual, an organization, or an authorized representative.*	Arial Size 10 Font, in a text format. Example, <SENDING_LINE1 V='John Doe'/> Other Example, <SENDING_LINE1 V='Sacramento Children’s Home'/>
getProviderName	SENDING_LINE1	**Only for Foster Care** This populates with the full name of the provider/resource/payee of the Foster Care case.	Arial Size 10 Font, in a text format. Example, SENDING_LINE1 V=’JANE DOE'/>
getPersonName	SENDING_LINE2	**Only for Foster Care** This populates with the full name of the addressee in the Foster Care case. “For <Individual name>” Leave null if case is not applicable. *Note: The Provider/Resource/Payee will populate in sending_Line1.*	Arial Size 10 Font, in a text format. Example, SENDING_LINE2 V='For John Doe'/> Or blank if case is not FC applicable <SENDING_LINE2 V=''/>

getAuthRepName	SENDING_LINE3	This populates with the full sending name line 3. Used for Care Of (C/O) or Auth Rep Leave null if case does not include a Care Of (C/O) or Auth Rep. *Note: The SENDING_LINE3 represents the authorized representative, He/She/It will receive a separate copy of the correspondence. When the Care Of (C/O) is populating in SENDING_LINE_3, the Addressee is populating in SENDING_LINE_1.*	Arial Size 10 Font, in a text format. Example, <SENDING_LINE3 V='for John Doe'/> Or blank if not applicable <SENDING_LINE3 V=''/>
getStreetAddress	STREET_ADDRESS	This populates with the Addressee's Mailing Address – Street Address. (Use database table ADDR to populate values: LINE_1_ADDR LINE_2_ADDR)	Arial Size 10 Font, in a text format. Example, <STREET_ADDRESS V='123 S Elan ST'/>
getCity	CITY	This populates with the Addressee's Mailing Address – City. (Use database table ADDR to populate value: CITY_NAME)	Arial Size 10 Font, in a text format. Example, <CITY V='Orange'/>
getState	STATE	This populates with the Addressee's Mailing Address – State. (Use database ADDR to populate value: STATE_CODE)	Arial Size 10 Font, in a text format. Example, <STATE V='CA'/>
getZip5 getZip4	ZIP5 ZIP4	This populates with the Addressee's Mailing Address – Zip + 4.	Arial Size 10 Font, in a numeric format.

		(Use database table ADDR to populate value: ZIP_CODE_NUM ZIP_CODE_SUFFIX) ZIP_CODE_SUFFIX can be null.	Example with suffix, <ZIP V='98987 5436'/> Example without suffix, <ZIP V=98987'/>
getCountyCode	COUNTY_ID	This populates with the County Code of the case that generated the correspondence. (Use database table CASE to populate value: COUNTY_CODE)	Arial Size 10 Font, in a numeric format. Example, <COUNTY_ID V='52'/>
getProgramCode	PROG_CODE	This populates with the Case Program Code that generated correspondence.	Arial Size 10 Font, in a text format. Example, <PROG_CODE V='CW'/>
getDocTemplateLangCode	LANG_CODE	This populates with the language in which the Form was rendered. (Use database table DOC_TEMPL_LANG to populate value: LANG_CODE)	Arial Size 10 Font, in a numeric format. Example, <LANG_CODE V='03'/>
getNOALangCode	LANG_CODE	This populates with the language in which the NOA was rendered. (Use database table NOA to populate value: LANG_CODE)	Arial Size 10 Font, in a numeric format. Example, <LANG_CODE V='03'/>
getNOANumber	CORR_NUMBER*	This populates with the Correspondence Number. For NOAs: (Use database NOA_SNIPPET_CONFIG to populate value: TEMPL_NAME)	Arial Size 10 Font, in a text format. Example, <CORR_NUMBER V=' MC-MAGI-C'/> Technical note: For correspondence numbers greater

			than 40 characters, value will need to be truncated to avoid populating such long number in the metadata string. For example: M40-171A (11/14)DENY-APPLICATION PROCESSING-FAILURE TO COOPERATE
getCorrespondenceType	CORR_TYPE	This populates with Correspondence Type. F – Form A – Notice Of Action *Note: Currently CalSAWS does not store this information in the database. This will need to be hardcoded based on the correspondence type being triggered.*	Arial Size 10 Font, in a text format. NOA Example, <CORR_TYPE V='A'/> Form Example, <CORR_TYPE V='F'/>
getOfficeNumId	OFFICE_ID	This populates with the Office ID to which the Caseload Number listed above has been attached. (Use database OFFICE to populate value: OFFICE_NUM_IDENTIF)	Arial Size 10 Font, in a text format. Example, <OFFICE_ID V='26'/>

*Note: CORR_NUMBER in this table is only referring to when the document generated is a NOA. The mapping for CORR_NUMBER for Forms can be found in the table above in section 2.1.2.

Variables Requiring Translations: N/A

3 APPENDIX

3.1.1 PDF Bookmark Metadata String Samples

The below examples are sample PDF Bookmark Metadata Strings for a form and a NOA with sample data. The highlighted values are the PDF string record and the corresponding tags that represents CalWIN application variables. These tags will be added into CalSAWS PDF bookmark metadata with applicable CalSAWS data as outlined in section 2.

Sample PDF Bookmark Metadata String for Forms:

<SENDING_LINE1 V=”John Doe”/><SENDING_LINE2 V=””/><SENDING_LINE3 V=""/><STREET_ADDRESS V="11290 Pyrites Way"/><CITY V="Rancho Cordova"/><STATE V="CA"/><ZIP V="95670"/><CORR_ID V="15070170"/><COUNTY_ID V="37"/><LANG_CODE V="03"/><CORR_NUMBER V="CW 2208"/><NUM_PAGES V="2"/><CORR_TYPE V="F"/><CASE_NUMBER V="F584200"/><PROG_ID V="815673854"/><PROG_CODE V="CW"/><CASELOAD_NUMBER V="1132"/><OFFICE_ID V="70"/><SYSTEM_DATE V="2020-07-16"/>

Sample PDF Bookmark Metadata String for NOAs:

<SENDING_LINE1 V="John Doe"/><SENDING_LINE2 V=""/><SENDING_LINE3 V=""/><STREET_ADDRESS V="11290 Pyrites Way"/><CITY V="Rancho Cordova"/><STATE V="CA"/><ZIP V="95670"/><CORR_ID V="15070170"/><COUNTY_ID V="37"/><LANG_CODE V="03"/><CORR_NUMBER V=" M82-820A (03/15)"/><NUM_PAGES V="2"/><CORR_TYPE V="A"/><CASE_NUMBER V="F584200"/><PROG_ID V="815673854"/><PROG_CODE V="CW"/><CASELOAD_NUMBER V="1132"/><OFFICE_ID V="70"/><SYSTEM_DATE V="2020-07-16"/>

3.1.2 CalSAWS Language code

The Languages in the CalSAWS database are stored in a language code format as identified below. These codes will be added into the CalSAWS PDF bookmark metadata string. For example, <LANG_CODE V='25'/>

02 – Spanish

03 – English

05 – Korean

06 – Tagalog/Filipino

08 – Other Chinese language

10 – Cantonese (also Chinese)

11 – Mandarin (also Chinese)

12 – Cambodian

13 – Armenian

16 – Hmong

17 – Lao

22 – Russian

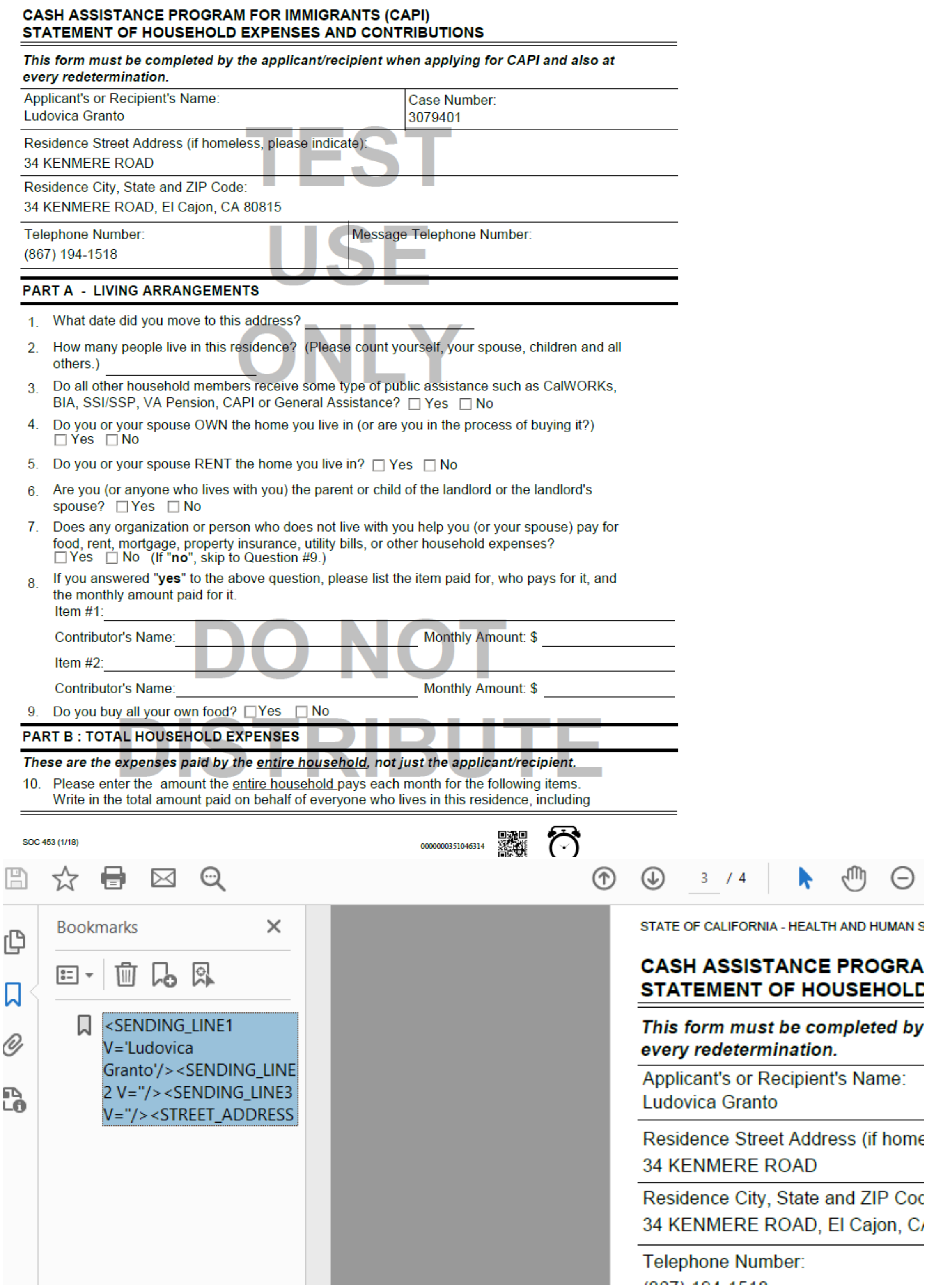
25 – Arabic

28 – Farsi

29 – Vietnamese

3.1.3 Screenshots

The metadata string will look as follows when the PDF is opened via Adobe (test data):



CASH ASSISTANCE PROGRAM FOR IMMIGRANTS (CAPI)
STATEMENT OF HOUSEHOLD EXPENSES AND CONTRIBUTIONS

This form must be completed by the applicant/recipient when applying for CAPI and also at every redetermination.

Applicant's or Recipient's Name: Ludovica Granto	Case Number: 3079401
Residence Street Address (if homeless, please indicate): 34 KENMERE ROAD	
Residence City, State and ZIP Code: 34 KENMERE ROAD, El Cajon, CA 80815	
Telephone Number: (867) 194-1518	Message Telephone Number:

TEST USE ONLY DO NOT DISTRIBUTE

PART A - LIVING ARRANGEMENTS

1. What date did you move to this address? ________
2. How many people live in this residence? (Please count yourself, your spouse, children and all others.) ________
3. Do all other household members receive some type of public assistance such as CalWORKs, BIA, SSI/SSP, VA Pension, CAPI or General Assistance? ☐ Yes ☐ No
4. Do you or your spouse OWN the home you live in (or are you in the process of buying it?) ☐ Yes ☐ No
5. Do you or your spouse RENT the home you live in? ☐ Yes ☐ No
6. Are you (or anyone who lives with you) the parent or child of the landlord or the landlord's spouse? ☐ Yes ☐ No
7. Does any organization or person who does not live with you help you (or your spouse) pay for food, rent, mortgage, property insurance, utility bills, or other household expenses? ☐ Yes ☐ No (If "**no**", skip to Question #9.)
8. If you answered "**yes**" to the above question, please list the item paid for, who pays for it, and the monthly amount paid for it.
   Item #1: ________
   Contributor's Name: ________ Monthly Amount: $ ________
   Item #2: ________
   Contributor's Name: ________ Monthly Amount: $ ________
9. Do you buy all your own food? ☐ Yes ☐ No

PART B : TOTAL HOUSEHOLD EXPENSES

These are the expenses paid by the entire household, not just the applicant/recipient.

10. Please enter the amount the entire household pays each month for the following items. Write in the total amount paid on behalf of everyone who lives in this residence, including

SOC 453 (1/18)

0000000351046314

4 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Bookmark Metadata	Current CalWIN Bookmark Metadata Format	CalWIN PDF CO Header Record Format.doc

5 REQUIREMENTS

5.1 Project Requirements

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

California Statewide Automated Welfare System

Design Document

CA-232436

Add Suppression Logic for NOAs from Code Table

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor Gorry
	Reviewed By	Tiffany Huckaby, Priya Shridharan, Himanshu Jain, Michelle Ramos

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/08/2023	1.0	Initial Creation	Connor Gorry
02/14/2023	1.1	Internal Review	Connor Gorry
02/16/2023	1.2	BA Review & Approval	Connor Gorry

Commented [CG1]: Feeling optimistic

Table of Contents

1 OVERVIEW

Add functionality that allows for NOA Suppression via a value of 'NOA Not Required'. Suppress Foster Care and Kin-GAP NOA for 'Application Opened in Error'.

1.1 Current Design

Currently in CalSAWS, NOAs generated via status reason must be manually suppressed. When Codes Table (CT) 10548 was created in CalSAWS, it migrated some former C-IV values of 'NOA not required' and 'Snippet set in rules' to the new table; However, these values are not used for suppression.

SCR CA-207152 updated the EDBC logic to allow for the failure reason of 'Application Opened in Error' when there does not exist a payee for Foster Care and Kin-GAP.

1.2 Requests

1) Add logic to suppress NOAs for EDBC reasons that should not generate an NOA.
2) Suppress NOA generation when Foster Care or Kin-GAP fails for 'Application Opened in Error'

1.3 Overview of Recommendations

1) Add global logic for CT 10548 Table to suppress 'NOA Not Required' NOAs
2) Create a CTCR to clean historical text entries.
3) Suppress Foster Care and Kin-GAP NOAs for 'Application Opened in Error'

1.4 Assumptions

1) CT 10548 REF_TBL columns are not required values, and can remain blank.
2) C-IV used CT73_REF_TBL_5 to track when a NOA was generated via rules, and for mapping NOA Fragments to Status Reasons. In CalSAWS, these columns will only be leveraged to indicate when a NOA is not required.

2 RECOMMENDATIONS

2.1 Add global logic to allow CT 10548 to indicate 'NOA Not Required'

2.1.1 Overview

This change will add functionality to CalSAWS to suppress NOAs created from CT 10548 when their reference table value(s) are set to 'NOA Not Required'.

There are some columns in the CalSAWS table that had this value migrated from C-IV. These values will be cleared as a part of this SCR (see Section 2.2).

2.1.2 Update logic that pulls CT10548 values to suppress for 'NOA Not Required'

Update logic to suppress NOA when a CT 10548 has an indicator of 'NOA Not Required' for the specific action type.

Column	REF_TBL_3	REF_TBL_4	REF_TBL_5	REF_TBL_6
Fragment ID Action Type	Approval	Change	Denial	Discontinuance

These columns contain Fragment IDs generated for EDBC status reasons. If instead an entry is populated with 'NOA Not Required', the NOAs will be suppressed for that reason action type.

Note: Logic should check the specific action type. If the approval version has 'NOA Not Required' but has a Fragment ID for the change version, it would be expected that only the approval version of the NOA would be suppressed. This cannot be tested in this effort as only the Application Opened in Error is being updated with this effort and it will be suppressed for all action types. However, it will be tested in the future if/when a reason needs to be suppressed for specific action types.

2.2 Create CTCR to remove historical text entries

2.2.1 Overview

Codes Table 10548 has historical entries from C-IV. These values are currently not being used in CalSAWS. Since this effort will add functionality to suppress NOAs using this table, this table will need historical values removed to prevent suppression of NOAs based on old C-IV values that may no longer apply.

2.2.2 Update Codes Table 10548

Create a CTCR to make to following updates to the CT 10548 table:

Clear cells with existing values of 'NOA Not Required' or 'Snippet set in rules' (four code table entries). These values will be left blank. See Supporting Document 1 for values that require updates.

2.3 Update 'Application Opened in Error' Codes Table 10548 entry to suppress NOA

2.3.1 Overview

Application Opened in Error is automatically triggered by EDBC when there is no payee on Foster Care or Kin-GAP. When this happens the NOA should also be suppressed as there is no payee to send the NOA to.

2.3.2 Update Codes Table 10548 for Application Opened in Error

Update EDBC reason 'Application Opened in Error' (code_num_identif = 'A1') to 'NOA Not Required' for Foster Care and Kin-GAP. This update is for the Approval, Change, Denial, and Discontinuance columns (refer_table_4_descr through refer_table_6_descr).

3 SUPPORTING DOCUMENTS

3.1 Supporting Documents

Number	Functional Area	Description	Attachment
1	Client Correspondence	CT 10548 Fragments to clear	CT 10548 Entries to Clear

4 PROJECT REQUIREMENTS

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1232 **2.18.2.10**	The CalSAWS shall include a user-friendly method for suppression of a NOA at the point that a LRS Data change is entered and shall queue the appropriate screens for completion of a manual NOA by COUNTY-specified Users.	Automatically suppress 'Application Opened in Error' NOA. Creates simple method for future NOA suppression via code table.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237436

Update WTW 2 in Spanish

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ramya HS
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/06/2023	1.0	Initial Draft	Ramya HS

Table of Contents

1 OVERVIEW

The purpose of this SCR is to update WTW 2 in Spanish to match the latest state version.

1.1 Current Design

Currently WTW 2 Spanish language is available in 12/12 version in CalSAWS Template Repository.

1.2 Requests

Update WTW 2 in Spanish language to match the latest state version (5/21) in CalSAWS Template Repository.

1.3 Overview of Recommendations

Update WTW 2 in Spanish language to match the latest state version (5/21) in CalSAWS Template Repository.

1.4 Assumptions

1. All fields (blank or prepopulated) will be editable.
2. Supporting Documents section references attachments found on JIRA.

2 RECOMMENDATIONS

2.1 Update WTW 2 Spanish in CalSAWS to match the latest state version

2.1.1 Overview

Update WTW 2 Spanish in CalSAWS to match the latest state version.

State Form: WTW 2 (5/21)

Programs: WTW, REP

Forms Category: Forms

Template Repository Visibility: All counties

Form Title (Document List Page Displayed Name):

Welfare-to-Work Activity Assignment

Imaging Form Name: WTW Activity Assignment

Imaging Document Type: Welfare to Work (WTW)

Imaging Case/Person: Case

Existing Languages: English, Spanish.

2.1.2 Form Verbiage

<u>**Update WTW 2 Spanish XDP to match state version**</u>

Update Spanish xdp to the latest state version (5/21).

Form Header: CalSAWS Standard Header (HEADER_3 -1)

Include NA Back 9: No

Form Mockups/Examples: See supporting documents #1

2.1.3 Form Generation Conditions

<u>**Update WTW 2 XDP in Spanish to match state version in Template Repository**</u>

The WTW (5/21) WELFARE-TO-WORK PLAN ACTIVITY ASSIGNMENT – update only to Template Repository

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

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

The following are the print and mailing requirements for WTW 2.

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 WTW 2
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
Mail Priority	N/A

Add Form Control

Add an imaging barcode for WTW 2.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for WTW 2 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	WTW 2 Spanish language	WTW_2_Spanish.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;	WTW 2 Spanish language is being updated to latest state version (5/21).

	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.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237464

SOC 158A Form Update

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ramya HS
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/01/2023	1.0	Initial Draft	Ramya HS

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1 OVERVIEW

The purpose of this SCR is to update the SOC 158A Template Repository Visibility only to Los Angeles County and update the form version number.

1.1 Current Design

Currently SOC 158A Template Repository Visibility is set to all counties.

1.2 Requests

1. Update the form to only be accessible to Los Angeles County, in the Template Repository.
2. Update SOC 158A Foster Child's Data Record And AFDC-FC Certification to match the state version (Rev. 02/2005)

1.3 Overview of Recommendations

1. Update SOC 158A Template Repository Visibility only to Los Angeles County
2. Update SOC 158A to match the state version (Rev. 02/2005)

1.4 Assumptions

1. All fields (blank or prepopulated) will be editable.
2. No updates to the variable population logic.
3. Supporting Documents section references attachments found on JIRA.

2 RECOMMENDATIONS

2.1 Update SOC 158A in CalSAWS Template Repository to match the latest state version and county visibility to Los Angeles.

2.1.1 Overview

Update SOC 158A in CalSAWS Template Repository to match the latest state version and county visibility to Los Angeles.

State Form: SOC 158A (Rev. 02/2005)

Programs: Foster Care

Forms Category: Forms

Template Repository Visibility: Los Angeles

Form Title (Document List Page Displayed Name):

FOSTER CHILD'S DATA RECORD AND AFDC-FC CERTIFICATION

Imaging Form Name: Foster Childs Data Record AFDC-FC Certif

Imaging Document Type: Foster Care (FC)

Existing Languages: English.

2.1.2 Form Verbiage

Update SOC 158A XDP to match state version

Updated XDP will have 3 impressions. 1st impression is the cover page, 2nd impression is blank page and 3rd impression is SOC 158A form matching the latest state version.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Include NA Back 9: No

Form Mockups/Examples: See supporting documents #1

2.1.3 Form Generation Conditions

Update SOC 158A (Rev. 02/2005) to Template Repository in all available languages

The SOC 158A (Rev. 02/2005) FOSTER CHILD'S DATA RECORD AND AFDC-FC CERTIFICATION added only to Template Repository.

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

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for

FOSTER CHILD'S DATA RECORD AND AFDC-FC CERTIFICATION

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 SOC 158A
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

Mailing Options	Option SOC 158A
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Add Form Control

Add an imaging barcode for SOC 158A.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for SOC 158A Form
Post to Self-Service Portal	N

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	SOC 158A	SOC158A_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	CalSAWS 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;	SOC 158A (11/2012) is being updated in English to match latest state version and form is made accessible only to Los Angeles County in Template Repository.

	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.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-241871

Validate E-mail Addresses Added into Contact Detail

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Andrea Rodriguez
	Reviewed By	Michael Wu, Naga Chinduluru, Himanshu Jain, Chitra Barsagade, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/11/2022	1.0	Initial	Andrea Rodriguez, Eric Perkins
2/21/2023	1.1	Updated Section 2.1.3.1.b.iii.	Andrea Rodriguez
2/28/2023	1.2	Updated Section 2.1.3.1.b.iii.	Andrea Rodriguez

Table of Contents

1 OVERVIEW

This SCR will expand the logic on the Contact Detail pages to verify the entered E-mail addresses for Contacts who allow E-mail reminders.

1.1 Current Design

There is no validation in place in CalSAWS that validates participant E-mail addresses when ‘Allow E-mail Reminder’ is checked on the Contact Detail page. Only participants with BenefitsCal accounts who are opted-in to receive E-notifications have an E-mail validation process.

1.2 Requests

Update CalSAWS to create a process to validate a participant's E-mail address when the participant would like to receive E-mail from CalSAWS and is not opt-ed into E-Notifications through a BenefitsCal account.

1.3 Overview of Recommendations

1. Update the Contact Detail page to validate participant E-mail information when the ‘Allow E-mail Reminder’ option is checked.
2. Send a one-time validation e-mail to certain existing active participants that currently have the ‘Allow E-mail Reminder’ option checked, but do not have a Verified E-mail.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically called out by this document.
2. Due to existing functionality, Contact Detail records on cases marked with a Domestic Violence Case Flag and/or Domestic Violence Confidentiality record are unable to receive E-mail reminders and the worker will receive a page validation when attempting to save the record when the ‘Allow E-mail Reminder’ box is checked.
3. E-mail Reminder verification process and functionality implemented with this SCR will apply a similar verification process to the existing Opt-In for E-Notifications E-mail verification process implemented in CA-234545 for the ‘Allow E-mail Reminder’ field.
4. The E-mail Reminder verification process implemented with this SCR will use a BenefitsCal website verification link to verify the E-mail for the participant that does not have a BenefitsCal account. This process does not create an account for the participant.
5. If the worker resends a verification e-mail, the link in the prior verification e-mail will no longer be valid and the customer will need to click the link in the latest verification e-mail to be able to successfully complete the verification.

2 RECOMMENDATIONS

2.1 Contact Detail

2.1.1 Overview

The Contact Detail page allows the worker to create, view, and edit a customer's contact information. This page allows the worker to allow E-mail reminders for a participant. This SCR will expand the logic on the Contact Detail page to have the participant verify the E-mail address entered for E-mail reminders.

2.1.2 Contact Detail Mockup

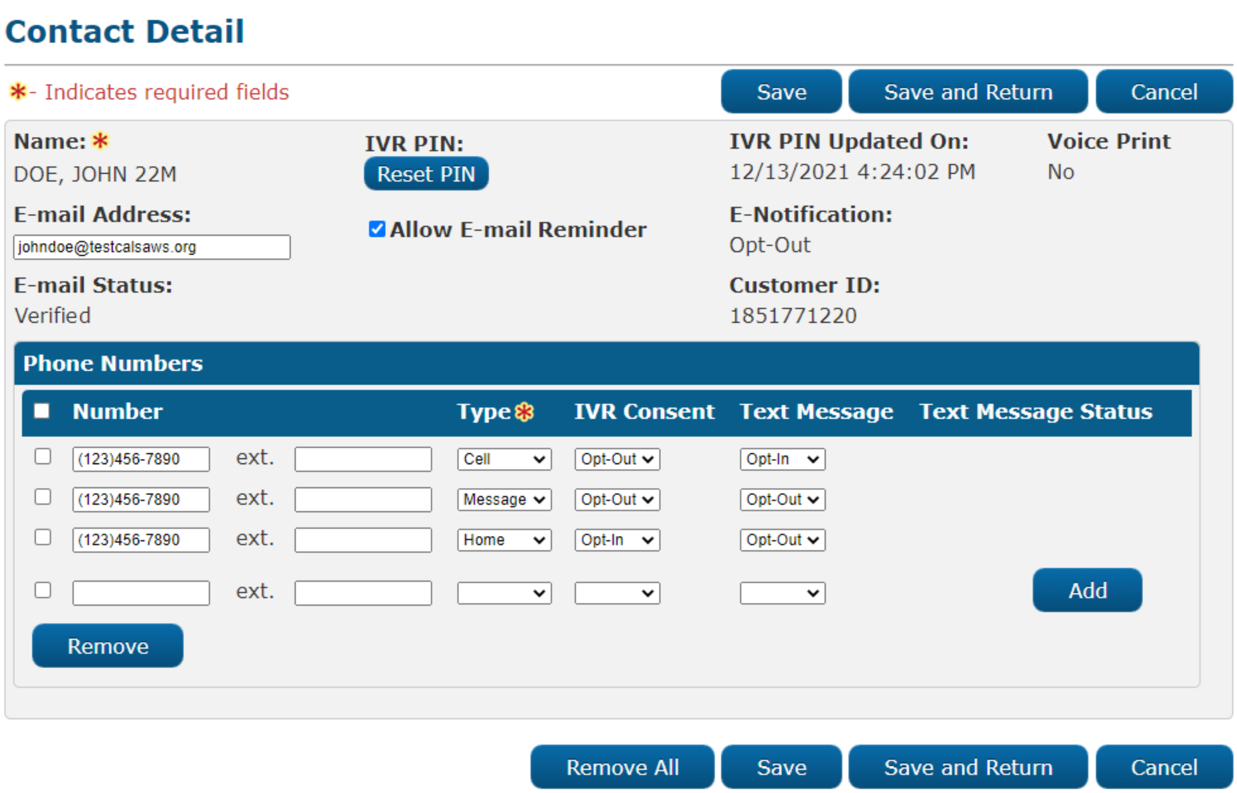


Figure 2.1.1 – Contact Detail page with Verified E-mail Address

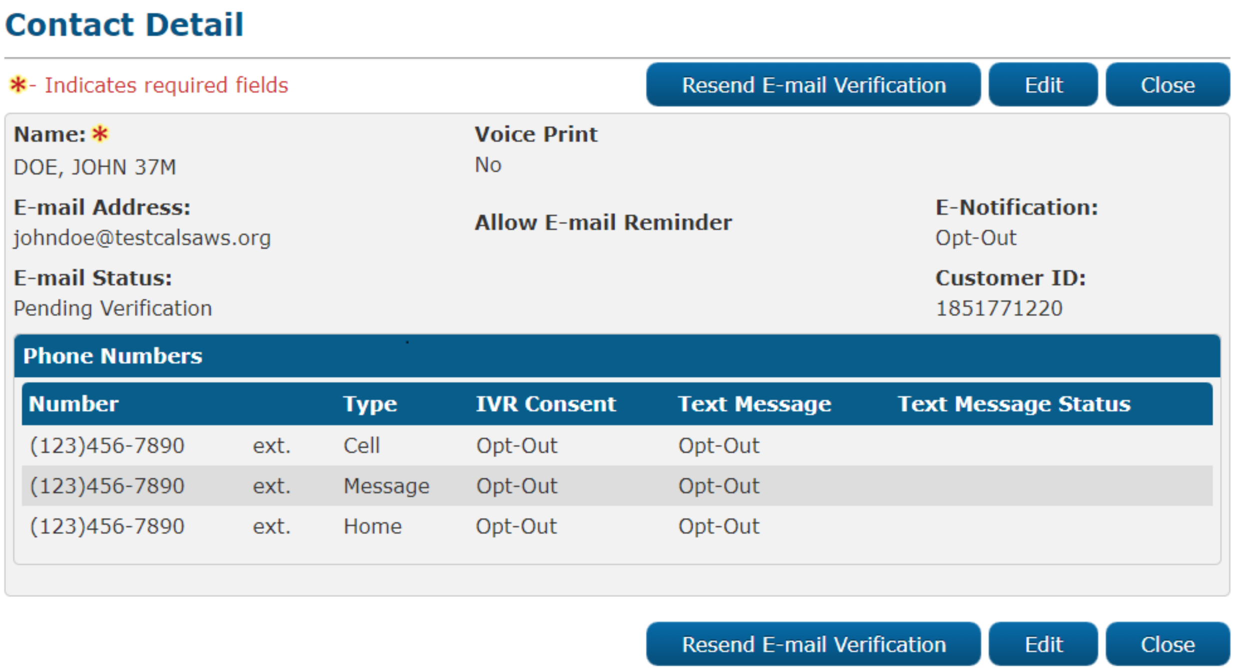


Figure 2.1.2 – Contact Detail page with E-mail Address Pending Verification

2.1.3 Description of Changes

1. Update the Contact Detail page logic to also verify the E-mail Address for E-Mail Reminders.
    a. Initiate a verification E-mail to the customer when all of the following conditions are met:
        i. 'Allow E-mail Reminder' is checked.
        ii. 'E-Notification' is not 'Opt-In'.
        iii. The 'E-mail status' is not 'Verified'.
        iv. The 'E-mail Address' field value is populated, and the value entered is a properly formatted E-mail address.
        v. The worker clicks the 'Save' button or the 'Save and Return' button in edit mode, or the worker clicks the 'Resend Verification' button in view mode.
        vi. The 'E-mail Address' field value has changed since the last time the record was saved when the 'Save' button or 'Save and Return' button is clicked.
    b. The verification E-mail will contain the following information:
        i. To: <E-mail Address On Contact Detail Page E-mail Field>
        ii. Subject
        English:
        CalSAWS E-mail Verification

        Spanish:
        Verificación del correo electrónico de CalSAWS

iii. Body
English:
Thanks for signing up for CalSAWS E-mail reminders. In order to receive E-mail reminders, we must verify your E-mail address.

Please click the following link to verify your E-mail address. The link will expire in 5 days.
<BenefitsCal Verification Link>

Spanish:
Gracias por registrarse para recordatorios por correo electrónico. Para recibir recordatorios por correo electrónico, debe verificar su dirección de correo electrónico.

Por favor, haga clic en el siguiente enlace para verificar su dirección de correo electrónico. El enlace caducará después de 5 días.
<Enlace de Verificación de BenefitsCal>

c. The default language for the E-mail is in English. When the participant's preferred written language is Spanish, the verification E-mail subject and body will be translated to Spanish, as shown above.
d. The Verification Link is a unique hyperlink tied to the customer that is used for opting-in to E-mail reminders.
    i. The verification link is only available for 5 days.
    ii. When the worker resends another verification email before the 5 days have passed, the link will no longer be active on the prior e-mail.
    iii. The URL will consist of the following: "https://benefitscal.com/verify-email/" followed by a unique code.
e. When the verification E-mail is sent successfully, set the E-mail Status to 'Pending Verification'.
f. When the verification E-mail does not get sent successfully, set the E-mail Status to 'Verification Not Sent'.
g. When the participant clicks the latest verification link before it has expired, set the 'E-mail Status' to 'Verified'.
h. To restart the E-mail verification process, the worker will need to modify the E-mail field to have a different e-mail address and save the record or click the 'Resend E-mail Verification' button to restart the process on the existing e-mail.
i. When the E-mail address is modified upon saving, the E-mail status is cleared. E-mail verification process will be re-initiated if conditions are met as stated in 2.1.3.1.a.
j. When the verification E-mail Status is updated, update the verification E-mail status date.

Note: The E-mail status date is not viewable on the front-end.

2. Display buttons titled 'Resend E-mail Verification' next to the 'Edit' buttons (as shown in Figure 2.1.2).
    a. The buttons will only display in view mode and will be protected by the same edit rights that allow the worker to edit the Contact Detail page.
    b. The buttons will only display when the E-mail Status is either 'Pending Verification' or 'Verification Not Sent', 'Allow E-mail Reminders' is checked, and 'E-Notification' is not 'Opted-In.'
    c. Send only one verification e-mail within two minutes. Display a validation when the worker clicks the 'Resend E-mail Verification' button more than once within a two-minute period.
        i. The validation will display the following message "E-mail Verification has been sent. Please wait 2 minutes before sending an additional E-mail Verification."
        ii. To bypass the validation message, the worker will need to click the 'Resend Verification' button when the two-minute period has passed or click the blue 'Close' button which will return the worker back to the Contact Summary page.

    Note: If the worker resends a verification e-mail, the prior e-mail will no longer be valid and the customer will need to click the link in the latest verification e-mail to be able to successfully complete the verification.

3. Update the 'Allow E-Mail Reminder' checkbox title text to instead display 'Allow E-mail Reminder'.

Note: The 'E-Notification' field is used only for participants with BenefitsCal accounts and is separate from the 'Allow E-mail Reminders' field. If the 'E-mail Status' is Verified and Opted-In for 'E-Notifications,' then another verification E-mail will not be sent when the 'Allow E-mail Reminders' option is checked.

Note: Due to existing functionality, contacts on cases marked with a Domestic Violence Case Flag and/or Domestic Violence Confidentiality are unable to receive E-mail reminders and will receive a page validation preventing the worker from saving the record.

Note: Updates made to the customer's contact information is stored as a historical record and is viewable in the Transaction History.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Contact

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping to reflect the changes being made to the Contact Detail page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Customer Contact History

2.2.1 Overview

The Customer Contact History page allows the worker to access instances where a participant/beneficiary has contacted a County. This SCR will log records when a verification E-mail is sent to customers who allow E-mail reminders.

2.2.2 Customer Contact History Mockup

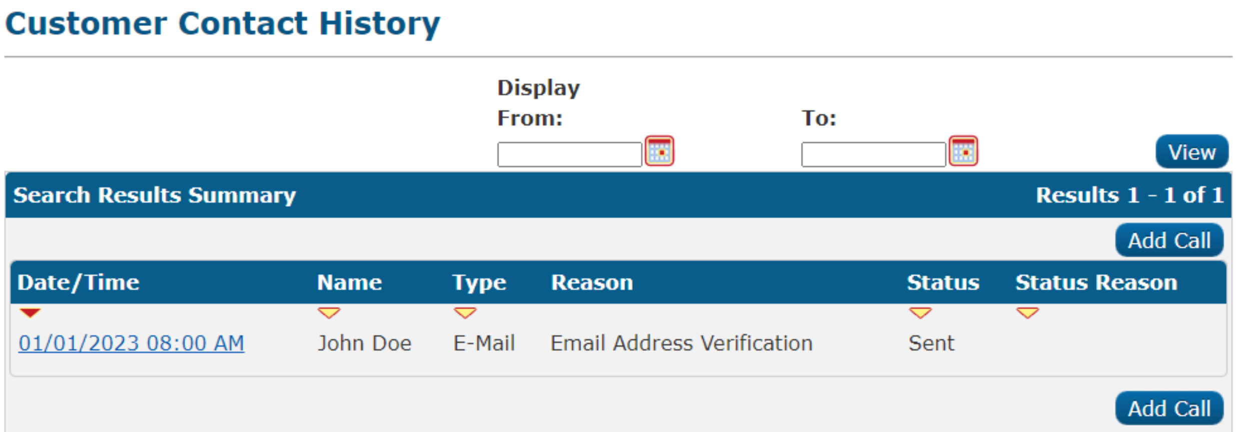


Figure 2.2.1 – Customer Contact History page when E-mail Verification is Sent

2.2.3 Description of Changes

1. Create a Customer Contact History record after a verification E-mail is sent to customers who allow E-mail reminders (as shown in Figure 2.2.1). It will contain the following field values:
    a. Date/Time
        i. This will be a hyperlink of the date/time the record was created that will lead to the Contact Detail page for the respective customer.
    b. Name
        i. This will be the name of the customer who was sent the E-mail.
    c. Type
        i. This will display 'E-Mail' as the type of contact.
    d. Reason
        i. This will display 'Email Address Verification' as the reason for contact.
    e. Status
        i. This will display 'Sent' when the verification E-mail was sent.
    f. Status Reason

i. This field will not display a value.
Note: This field is currently used to capture the status reason code for text messages.

Note: Customer Contact History records are case-level records.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Customer Contact History

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 Email Reminder Verification Batch

2.3.1 Overview

Send a one-time validation e-mail to existing participants that currently have the "Allow E-Mail Reminder" option checked, but do not have a Verified e-mail. These emails will be triggered through batch.

2.3.2 Description of Change

1. Create a new batch job that does the follow:

   a. Identifies the following target population:

      i. Contact Detail page identifies the contact person with all the following:

         1. The 'Allow E-mail Reminder' field is checked.
         2. The E-mail verification status is not "Verified", not "Pending Verification", and is not empty/blank.

            Notes: A "Pending Verification" status implies that the Contact Detail page recently triggered a verification email to be sent. Contacts should not be sent additional verification emails if they already have one that has not expired yet.

3. The E-mail Address field is not empty.

ii. Contact person's E-Notification dropdown is set to "Opt-Out"

iii. Contact person meets one or more of the following conditions:
- Scenario #1
  a. The person is in any program, where their person-status on the program is "Active", "Ineligible", or "Pending"
  b. The person-status on the program is currently effective or is effective at any point in the future.

- Scenario #2
  a. The person has **<u>no</u>** programs where their person-status on the program is Active, Ineligible, or Pending
  b. The person has any program that their person-status has been Active, Ineligible, or Pending in the past year, starting from the date when the target population is being identified.

- Scenario #3
  a. The person is associated to any program that was created within the last year, starting from the date when the target population is being identified.

ii. Contact person's email address is in a valid format.

<u>Note:</u> Reproduce the same email format validation that already exists on the Contact Detail page. The existing validation is <u>not</u> part of this design document. The Contact Detail page's validation should have already been performed on the email address' format. However, the same validation is required to be triggered again just before any email is sent to the target email address. This is a security standard.

b. Sends a verification email to everyone in the target population. Each contact person in the target population will get a separate email.

<u>Note</u>: Send the same email as defined in the Contact Detail page change recommendations. That includes but is not limited to how to populate the email fields, generate the verification code, and what languages to support.

c. Update the verification status on the Contact Detail page to reflect the success or failure of sending a verification email.

   Note: Follow the same verification status change requirements as defined in the Contact Detail page change recommendations.

d. Send a maximum of 100K verification emails per day. If there are remaining verifications email to send for the target population, wait until the following scheduled batch run to process more of the population.

   Note: The CalSAWS email service has a maximum daily cap of 275K emails that can be sent during the same day. Anything over that and the email service will throw errors. To limit the potential of causing CalSAWS to no longer be able to send emails for other services, the full load of verification emails may have to be sent over multiple different days.

e. Send a maximum of 20 emails per second.

   Note: The CalSAWS email service can only process sending 25 emails a second. By limiting the verification emails to 20 per second that leaves some space for other functional areas to use the email service too.

2. Run the new batch job only one time a day, during nightly batch.
   a. Stagger the job's runs over multiple days, if the target population is larger than the maximum emails the batch job is permitted to send in a single day. Each night will process a subset of the total target population until the entire population is processed.

2.3.3 Partner Integration Testing

N/A

2.3.4 Execution Frequency

Once daily, until all the target population has been sent a verification email.

2.3.5 Key Scheduling Dependencies

N/A – No dependencies required.

2.3.6 County Impacts

All counties.

2.3.7 Category

CORE

2.3.8 Data Volume/Performance

Sends an estimated 240,000 verification emails total. Limited to 100K emails per day and limited to sending 20 emails per second.

2.3.9 Interface Partner

N/A

2.3.10 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e. rerunning the job, delaying the run, contacting appropriate parties for server issues, etc.)

2.4 Appointment Email Reminders

2.4.1 Overview

Regression test some features of batch Appointment E-mail Reminders, from SCR CA-207130. CA-207130 introduced a new batch job functionality to send E-mail Reminders to customers with upcoming appointments. The appointment reminders are dependent on the customer's email being verified.

2.4.2 Description of Change

1. Regression Test the following aspects of the Appointment Email Reminder batch job:
    a. When a sent email bounces back as "Undeliverable," all the following occurs on the customer's Customer Contact Detail page:
        i. Update the 'Allow E-mail Reminder' checkbox to unchecked.
        ii. Update the 'E-Notification' dropdown to 'Opt-Out'
        iii. Update the email verification status to 'Undeliverable' (UD).
    b. When a sent email bounces back as "Undeliverable," a journal is written stating the customer's email was undeliverable and the customer has been opted out of E-mail reminders and notifications

2.4.3 Partner Integration Testing

N/A

2.4.4 Execute Frequency

N/A

2.4.5 Key Scheduling Dependencies

N/A

2.4.6 County Impacts

N/A

2.4.7 Data/Volume/Performance

N/A

2.4.8 Interface Partner

N/A

2.4.9 Failure Procedure/Operational Instructions

N/A

2.5 Automated Regression Test

2.5.1 Overview

Create a new automated regression test script to verify that after a verification email is sent, a matching record displays on the Customer Contact History page.

2.5.2 Description of Change

1. Create a new regression script(s) to send a verification e-mail through the Contact Detail page and verify that a record with the appropriate details displays on the Customer Contact History page.
   Technical Note #1: The new script(s) should cover verification e-mails that are triggered by both of the following actions:
   a. Clicking either the 'Save' or 'Save and Return' button on the Contact Detail page in edit mode
   b. Clicking the 'Resend Verification' button on the Contact Detail page in view mode

   Technical Note #2: Neither verification that the e-mail is successfully delivered, nor the content of the e-mail message are in scope for these scripts.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.20	The LRS shall support multiple means of communicating appointments, appointment reminders, and critical dates and/or information that may affect a participant's eligibility, using the following means: a. E-Mail; b. Text messaging; d. Automated phone reminder; e. USPS mail	This SCR will update the process to allow a participant to receive e-mail reminders.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-242755

Run Batch EDBC with 2023 FPL Values

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Cynthia Ridley
	Reviewed By	Renee Gustafson, Geetha Ramalingam, William Baretsky,

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/09/2023	.01	Created Document	Cynthia Ridley
01/20/2023	.02	Submitted for Build/Test Review	Cynthia Ridley
01/19/2023	.03	Submitted for Review with Consortium Analysts	Cynthia Ridley
01/27/2023	1.0	Updated ACWDL Information in Supporting Document section and sent to Analysts for Committee FYI	Cynthia Ridley

Table of Contents

1 OVERVIEW

With release 23.02.09, The System was updated with the 2023 Federal Poverty Level (FPL) values based on ACWDL 23-03. Any 2023 Medi-Cal EDBC run prior to the update used the previous 2022 Federal Poverty Level (FPL) values. This SCR will automate re-running Medi-Cal EDBC for 2023 benefit months to update the budget to use the 2023 values per the directive in the ACWDL.

1.1 Current Design

With CA-242754:

CalSAWS recently updated the 2023 FPL values based on ACWDL 23-03. Any 2023 Medi-Cal EDBC run prior to the update used the 2022 FPL values per ACWDL 22-03.

For FPL COLA – Current Batch EDBC functionality allows Batch EDBC with Sub-Type Code 'PL' to automatically add a standard Journal Entry to cases processed by Batch EDBC with:

Short Description: Batch EDBC ran for [MONTH/YEAR].

Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the Medi-Cal program for the following reasons: Annual FPL Limit Changes.

For SSA COLA- A standard Journal Entry will be created automatically based on the Sub Type Code = 'CT942-SA' – Annual SSA COLAs and Related Changes when the batch is run.

1.2 Requests

1. Run Batch EDBC for Medi-Cal cases in accordance with ACWDL 23-03 so that the new FPL values are correctly applied. The effective date of the 2023 FPL values vary as follows:
   - Effective retroactively to January 01, 2023
     - Applicants and recipients in Specified Low-Income Medicare Beneficiary (SLMB) who do not receive Title II – Retirement, Survivors and Disability Insurance (RSDI) income.
   - Effective retroactively to March 01, 2023
     - Applicants and recipients in SLMB who are receiving Title II – RSDI Income
   - Effective April 01, 2023
     - Applicants in an active, Non-MAGI program not included in the group above.
2. Provide lists of cases to the county when a case or individual is discontinued from Medi-Cal, a Medi-Cal EDBC is Read-Only, a case is not processed through Batch EDBC for any skip reason except "EDBC has not been run since conversion" or when an individual was denied or discontinued prior to the FPL value updates.

1.3 Overview of Recommendations

1. On February 18, 2023, after scheduled batch completes run Batch EDBC to apply updated FPL COLA values to Medi-Cal programs. Generate lists to aid the counties after Batch EDBC complete.

1.4 Assumptions

1. Batch EDBC will use the existing MAGI Determination which is relevant to the benefit month and will not trigger a new Eligibility Determination Request (EDR) to CalHEERS.
2. Batch EDBC process will skip any overridden budgets.
3. With CA-215211, Negative Impacts in Batch EDBC were prevented for Medi-Cal Beneficiaries due to Public Health Crisis/Natural Disaster which saves EDBC as 'Read-Only' with Read-Only Reason of "Protection due to Public Health Crisis/Natural Disaster".
4. Cases that have a yellow banner requiring case review as a result of the benefit match process will skip if a worker has not processed EDBC since conversion. These cases will show on the Batch Eligibility Report with a reason of "EDBC has not been run since conversion".

2 RECOMMENDATIONS

2.1 Run Batch EDBC to apply FPL COLA values to Medi-Cal Programs

2.1.1 Overview

1. Identify cases for which Batch EDBC must run for 2023 benefit months as described in Section 1.2 Requests to apply the updated amounts. Insert the identified cases into SYS_TRANSACT for Batch EDBC processing.

2. Operationally execute Batch EDBC. Batch EDBC will run only for cases identified.

2.1.2 Description of Change

1. Identify cases for Batch EDBC processing by inserting a record into SYS_TRANSACT for Medi-Cal Program(s) only with below mentioned Run Reason and Sub Type Code for the specified benefit months processed until come-up month for all Active Medi-Cal programs that meet the following requirements (A-C):

Run Reason	Code Table	Sub Type Code
Medi-Cal FPL COLA	CT744 ML	PL

A. <u>Benefit Months: January and February 2023</u>

i. Medi-Cal EDBC has not been processed since updated 2023 FPL values have been deployed to production with CA-242754.

ii. There is a Regular Medi-Cal EDBC for the program for the month being run where there exists at least one individual receiving aid from SLMB.

iii. None of the SLMB beneficiaries are receiving Title II – Retirement, Survivors and Disability Insurance (RSDI) income.

B. <u>Benefit Months: March 2023</u>

i. Medi-Cal EDBC has not been processed since updated 2023 FPL values have been deployed to production with CA-242754.

ii. There is a Regular Medi-Cal EDBC for the program for the month being run where there exists at least one individual receiving aid from SLMB.

C. <u>Benefit Month: April 2023</u>

i. Medi-Cal EDBC has not been processed since updated 2023 FPL values have been deployed to production with CA-242754.

ii. There exists at least one individual on the program receiving Non-MAGI Medi-Cal aid.

iii. There are no individuals on the Medi-Cal program receiving aid with an Express Lane aid code.

2. Generate lists to aid the counties after batch EDBC completes. Refer to section 4 'Outreach' for further details.

2.1.3 Execution Frequency

One Time Change only.

2.1.4 Key Scheduling Dependencies

Expected start of Batch EDBC processing is on February 18, 2023 during Regular Batch Operation hours.

2.1.5 Data Volume/Performance

Batch EDBC will run approximately below mentioned Medi-Cal EDBCs for the months of January 2023 through April 2023 for the 2023 FPL COLA updates.

Benefit Month	Processed MC EDBCs
January 2023	1,102
February 2023	1,105
March 2023	86,715
April 2023	891,729
Total	980,651

2.1.6 Operational Instructions

1. Identify cases for Batch EDBC processing as mentioned in section 2.1.2.1 (A-C) and 2.1.2.2.
2. Operationally execute Batch EDBC processing.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	ACWDL 23-03	ACWDL 23-03.pdf
2	Eligibility	2023 Monthly FPL Chart	Enclosure 1 Monthly FPL Chart FINAL.pdf
3	Eligibility	2023 Annual FPL Chart	Enclosure 2 Annual FPL Chart FINAL.pdf

4 OUTREACH

4.1 Lists

Generate lists to aid the counties after batch EDBC completes.

All lists will have the standard list columns to display on the listings.
Standard Columns:

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

1. **List Name: Closed Program**
   Generate a list of cases in which Batch EDBC resulted in the closure of the Medi-Cal program. Counties can use this list to verify that the program's discontinuance is appropriate. If available, display the closure reason (for example: Over Income).
   Additional Column(s): Closure Reason, Benefit Month
   County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate.

2. **List Name: Closed Individual**
   Generate a list of cases in which Batch EDBC resulted in an individual being discontinued from Medi-Cal but the Medi-Cal program remains open. Counties can use this list to verify that the individual's discontinuance is appropriate. If available, display the closure reason.
   Additional Column(s): Individual Name, CIN, Closure Reason, Benefit Month
   County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close individuals, review these cases to verify the closure was accurate.

3. **List name: Read-Only EDBC**
   Generate a list of cases in which Batch EDBC resulted in a Read-Only Medi-Cal EDBC with all the Read-Only Reasons except the Read-Only Reason of "Protection due to Public Health Crisis/Natural Disaster". Counties can use this list to run Medi-Cal EDBC for those cases and take the appropriate action.
   Additional Column(s): Read-Only Reason, Benefit Month
   County Action: Since Batch EDBC couldn't automatically apply the intended change to these cases, users may process EDBC to apply intended changes if applicable.

4. **List Name: Batch EDBC skipped with a reason**
   Generate a list of cases skipped in the Batch EDBC run excluding cases with a skip reason of 'EDBC has not been run since conversion'. These cases will be the responsibility of the worker to address.
   Additional Column(s): Skip Reason, Benefit Month
   County Action: Batch could not process these cases because of the skip reasons listed in the list. Review each case and take appropriate action based on the skip reason.

5. **List Name: Denials and Discontinuance for January – April 2023**
   Generate a list of cases for individuals that were denied or discontinued prior to the FPL value updates although may be eligible with the latest updated 2023 FPL values.
   Additional Column(s): Individual Name, CIN, Benefit Month
   County Action: Review all denials and discontinuances and re-evaluate eligibility based on the 2023 FPL values.
   Criteria:
   i. Medi-Cal EDBC was processed prior to the updated 2023 FPL Values (CA-242754) being deployed.
   ii. One of the following failed income budgets exists in the EDBC for January-April 2023:
      a. QMB
      b. SLMB
      c. QI-1
   iii. One of the following failed income budgets exists in the EDBC for April 2023:
      a. ABD FPL
      b. 250% Working Disabled
   iv. There is a denied or discontinued individual who is also in one of the failed income budgets identified above.
   v. The income value of the failed budget is less than the 2023 FPL value for the appropriate effective month. (Refer to the Technical Note)
   vi. The latest EDBC processed was for the denied or discontinued individual for any of the months January through April 2023. (Refer to the Technical Note for budget type corresponding to the benefit month).
      Technical Note:
      The "Total net non-exempt income" value of the failed budget is less than the 2023 FPL "Maintenance Need" value.
      Refer to recommendation 2.1.2.1 (A-C) for corresponding benefit month and criteria (For example, RSDI income, Budget type)
      Budget Type – FPL % reference
      QMB – 100% FPL
      SLMB – 120% FPL
      QI-1 – 135% FPL
      ABD FPL – 138% FPL
      250% Working Disabled – 250% FPL

The lists will be posted on February 21st, 2023, after the Batch EDBC process is completed to the following location: *CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-242755*

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-247709

Design of Release of Information for CBOs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gillian Noelle Bendicio, Jennifer Muna, Farhat Ulain, Phong Xiong
	Reviewed By	Connie Buzbee, Dymas Pena, Melissa Mendoza, Jason Horton

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/19/2022	.1	Initial Revision	Gillian Noelle Bendicio, Jennifer Muna, Farhat Ulain, Phong Xiong
01/11/2023	.2	Updated design per Committee Review	Jennifer Muna
01/17/2023	.3	Added ForgeRock requirements in section titled 'ForgeRock – CBO Organization API'	Jennifer Muna
01/25/2023	.4	Added mailing requirements in section 2.13.4	Phong Xiong
02/01/2023	.5	• Added additional page mock-ups and details for Release of Information Search requirements section • Added Select Person Page section • Added additional mock-ups and details for Release of Information Detail section • Added mock-up update and additional requirements for Case Summary section • Updated the Select Community Based Organization section and Select CBO Managers & Assisters for Medi-Cal section on how these pages are being accessed. • Added additional update requirement to Case Inquiry API section • Added Security Matrix under the Support Document section	Jennifer Muna, Erika Kusnadi

02/20/2023	.6	Design updates to: • Include new column for DOC_TEMPL_LANG table • Add additional CBO-Case Detail API requirements to exclude Minor Consent Cases	Phong Xiong, Jennifer Muna
2/24/2023	.7	Added additional details to CBO - Notices API requirements	Jennifer Muna

Table of Contents

1 OVERVIEW

This System Change Request (SCR) will document the changes in CalSAWS to support the Release of Information (ROI) feature in the Self-Service Portal. This feature will allow the applicant/recipient to release their case information to a Community Based Organization (CBO) through the Self-Service Portal.

Per All County Letter (ACL) 16-02, non-privileged, non-confidential documents in a case record can only be accessed by the client who is the subject of the case record. However, a client may provide a written authorization through a ROI for another person or group to gain access to the case information. This guidance applies to the CBO Application Assisters (AAs) who assist clients in applying for and retaining their benefits. Currently, the ABCDM 228, Applicant's Authorization for Release of Information, is used when clients wish to grant access to case-level information to an agency, institution, or individual.

Per SCERFRA 22-524, the State is introducing a form called 'ABCDM 229 - Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal'. This form is a formal agreement from the customer to the County to grant a CBO access, via the Self-Service Portal, to specific case information.

1.1 Current Design

CalSAWS only sends case information and notices to the Self-Service portal for a primary applicant on a program. There is no supported Application Programming Interface (API) to allow CalSAWS to send case information to a CBO's Self-Service Portal account. The CalSAWS Forms API does not support the 'ABCDM 229 - Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal' document type in the Hyland imaging system.

CalSAWS does not have the online feature to view or create an applicant's CBO Release of Information (ROI) in the System. The 'ABCDM - Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal' state form does not exist in the CalSAWS Template Repository.

1.2 Requests

1. Create a new API to support the Self-Service Portal implementation of the CBO Release of Information form submitted through a digital form, via document upload, and/or by paper submission.
2. Update the Forms API to accept the new CBO ROI form and upload to the imaging system.
3. Create new page(s) in CalSAWS to enable a county worker to add/create, view, and edit a customer's CBO ROI information for BenefitsCal.
4. Create a new API to call the ForgeRock webservice in real-time to pull approved CBO names, managers, and/or assisters.
5. Create a new API to send a customer's specified case information to the Self-Service portal based on the information provided on the CBO ROI form.

6. Add the 'ABCDM 229 - Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal' form to the Template Repository in CalSAWS. Set the "Send to BCAL" flag to "Y".
7. Create an automatic Journal entry when an Approved, Pending or Revoked CBO ROI status is received via the API.

1.3 Overview of Recommendations

1. Create an API that will save the CBO ROI information, update the Status of the CBO ROI and retrieve the CBO ROI information.
2. Create an API that will retrieve the Customer's case information for the CBO based on what the applicant/recipient indicated in their CBO ROI form.
3. Create an API that retrieves the applicant/recipient's notices for the CBO based on what the applicant/recipient indicated in their CBO ROI form.
4. Create a new endpoint to the Forms API that will generate the CBO ROI form in PDF format, map the applicant/recipient's answers to the PDF, and upload the PDF to the imaging system.
5. Add the ABCDM 229 CBO ROI form to the Template Repository in CalSAWS. The CBO ROI form's XML Data Package (XDP) must allow data to be mapped onto the form.
6. Create an online search page that allows a worker to view, add/create, and edit ROI detail records.
7. Create an ROI detail page that displays the CBO ROI information entered by the worker or created through the Self-Service portal API.
8. Create a series of online pages that will allow the User to search for the CBO identified by the Customer by making a call to ForgeRock webservice.
9. Update the Case Summary page to display the CBO name for the Customer's active CBO ROIs, for the County.
10. Create an automatic Journal Entry when an Approved, Pending or Revoked ROI status is received via the API.
11. Add document type for CBO ROI form to the imaging system when received via document upload.
12. Create a new batch job to automatically set an ROI detail status to 'Expired' based on the end date of the CBO ROI.
13. Modify the Imaging 'View' URL to point to CBO ROI documents associated to a customer, in the imaging solution.

1.4 Assumptions

1. The updates detailed in this SCR are exclusive to the 'ABCDM 220 - Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal' form. All other Release of Information forms are not supported in this SCR.
2. CBO managers will be the only ones to have access to the case information, for the selected CBO, with a CBO ROI form for CalWORKs (CW) and CalFresh (CF) with the implementation of this SCR. If Medi-Cal (MC) is selected, the customer has the option to indicate the assister's or CBO Manager's name for

the ROI. If the assister's name field for Medi-Cal is blank, we assume that all CBO managers for the provided organization will have access to the customer's information for Medi-Cal.

3. Person IDs and organization mapping exists in ForgeRock. CBO agreements will continue to exist in ForgeRock. The County's ForgeRock delegated Admin will have to manually maintain the list of CBOs with the county specific contracts/agreements.
4. This SCR will only encompass the initial load of State and or County agreements with a CBO. Any CBO agreement updates after implementation will be addressed as a future enhancement.
5. In the occasion of an Inter-County Transfer (ICT), the customer will be responsible for initiating a new ROI in the new county. The existing ROI in the previous county will remain active until it expires, unless specified instructions from customer to 'Revoke' is communicated to the county worker or sent through the API.
6. The CBO ROI form will only be available for Medi-Cal, CalWORKs, and CalFresh programs, as indicated in the ABCDM 229 form.
7. The CalSAWS ROI API will pass the customer's ROI details and display on the Release of Information Detail page given the customer's unique identifier passed from the Self-Service Portal.
8. The date of signature will be the date used to pull the client case data and send to the Self-Service Portal.
9. Any historical NOAs generated before the ROI Signature date will not be returned in the client data shared to the Self-Service Portal.
10. For performance efficiency, CalSAWS will display a maximum of 1 years' worth of ROIs at a time when applying a search criterion on the Release of Information and CBO search pages.
11. Termination reasons are the only additional data to display as the case history to BenefitsCal in CBO's dashboard. All other case information sent to the CBO's dashboard will be defined by the Customer.
12. County workers can accept and review a paper CBO ROI form outside of Self-Service portal. The CBO ROI (ABCDM 229) form will be available in the Template Repository in CalSAWS for workers to generate for the customer.
13. The new CBO ROI (ABCDM 229) form will not be pre-populated or automatically generated via Batch, in CalSAWS.
14. The new form is only implemented in English and Spanish until the other threshold languages are made available by the State. Other languages will be implemented in a future SCR once they are available.
15. Task creation from the receipt/image of documents are accomplished with Document Routing Rule functionality. There are no Task Management modifications necessary with this enhancement.
16. Document routing rule tasks functionality will remain unchanged. CalSAWS counties will be able to configure a document routing rule task based on the ROI document type.
17. All existing functionalities will remain unchanged unless called out as part of this SCR.

2 RECOMMENDATIONS

2.1 Release of Information Search

2.1.1 Overview

In the Self-Service portal, customers and CBOs have an option to initiate a Release of Information (ROI). The ROI will allow the CBOs to access the permissible case information of the customer. Release of Information Search page will allow the user to search for the ROIs associated to the selected person. Users can view, edit and add a CBO ROI from this page. Users will be able to view a list of ROI records on the Release of Information Search page.

2.1.2 Release of Information Search – Task Navigation

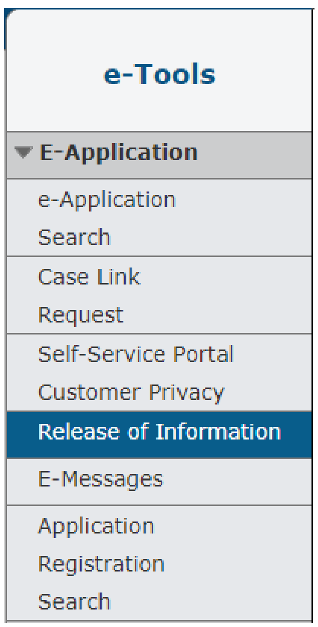
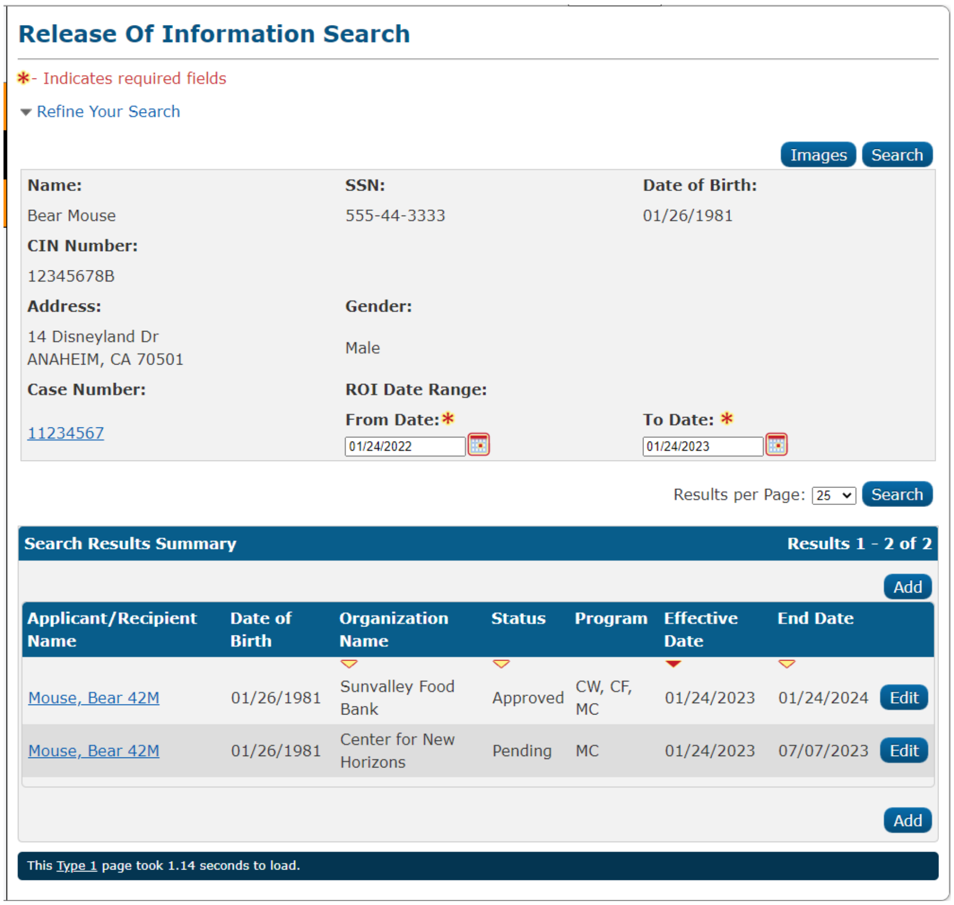


Figure 2.1.2-1 - Release of Information-Task Navigation



Release Of Information Search

*- Indicates required fields

▾ Refine Your Search

Images Search

Name:	SSN:	Date of Birth:
Bear Mouse	555-44-3333	01/26/1981
CIN Number:		
12345678B		
Address:	Gender:	
14 Disneyland Dr ANAHEIM, CA 70501	Male	
Case Number:	ROI Date Range:	
	From Date:*	To Date: *
11234567	01/24/2022	01/24/2023

Results per Page: 25 Search

Search Results Summary — **Results 1 - 2 of 2**

Add

Applicant/Recipient Name	Date of Birth	Organization Name	Status	Program	Effective Date	End Date	
Mouse, Bear 42M	01/26/1981	Sunvalley Food Bank	Approved	CW, CF, MC	01/24/2023	01/24/2024	Edit
Mouse, Bear 42M	01/26/1981	Center for New Horizons	Pending	MC	01/24/2023	07/07/2023	Edit

Add

This Type 1 page took 1.14 seconds to load.

Figure 2.1.2-2 – Release of Information Search Page - Upon loading

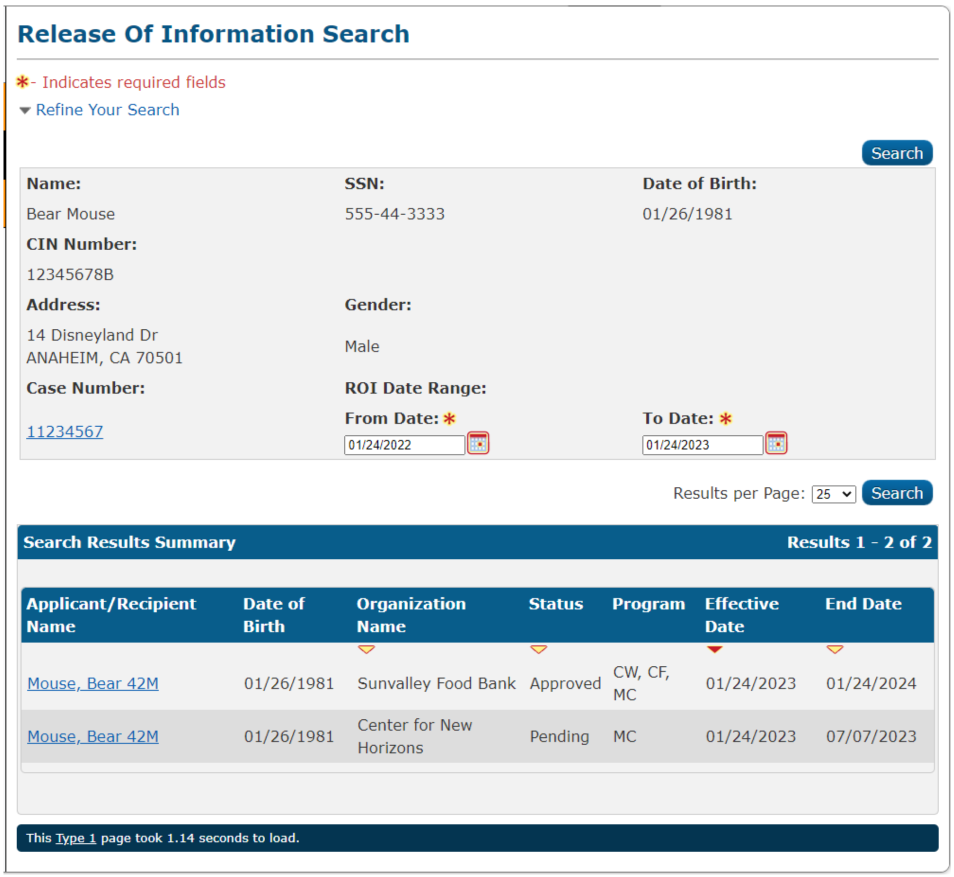
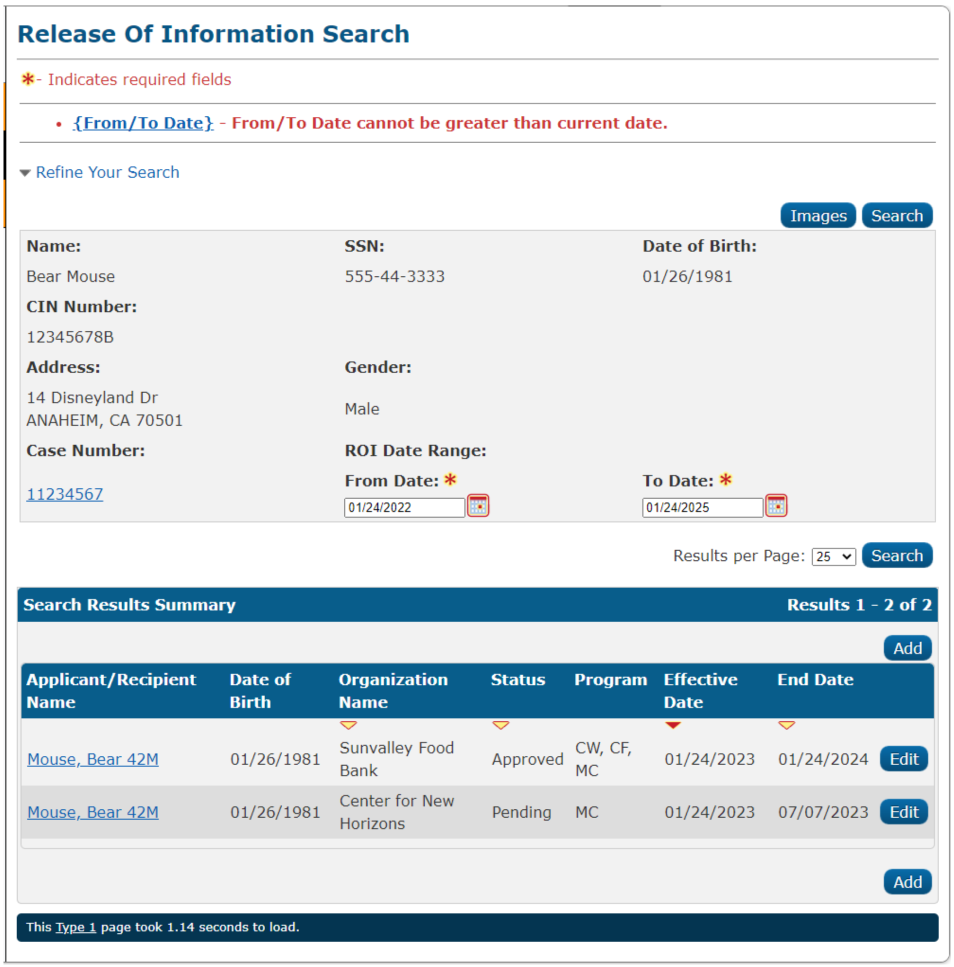


Figure 2.1.2-3 – Release of Information Search Page – No Imaging security right and Edit security right.



Release Of Information Search

*- Indicates required fields

- {From/To Date} - From/To Date cannot be greater than current date.

Refine Your Search

Images Search

Name: Bear Mouse
SSN: 555-44-3333
Date of Birth: 01/26/1981
CIN Number: 12345678B
Address: 14 Disneyland Dr ANAHEIM, CA 70501
Gender: Male
Case Number: 11234567
ROI Date Range:
From Date: * 01/24/2022
To Date: * 01/24/2025

Results per Page: 25 Search

Search Results Summary **Results 1 - 2 of 2**

Add

Applicant/Recipient Name	Date of Birth	Organization Name	Status	Program	Effective Date	End Date	
Mouse, Bear 42M	01/26/1981	Sunvalley Food Bank	Approved	CW, CF, MC	01/24/2023	01/24/2024	Edit
Mouse, Bear 42M	01/26/1981	Center for New Horizons	Pending	MC	01/24/2023	07/07/2023	Edit

Add

This Type 1 page took 1.14 seconds to load.

Figure 2.1.2-4 – Release of Information Search Page – Cannot be greater than system Date Validation

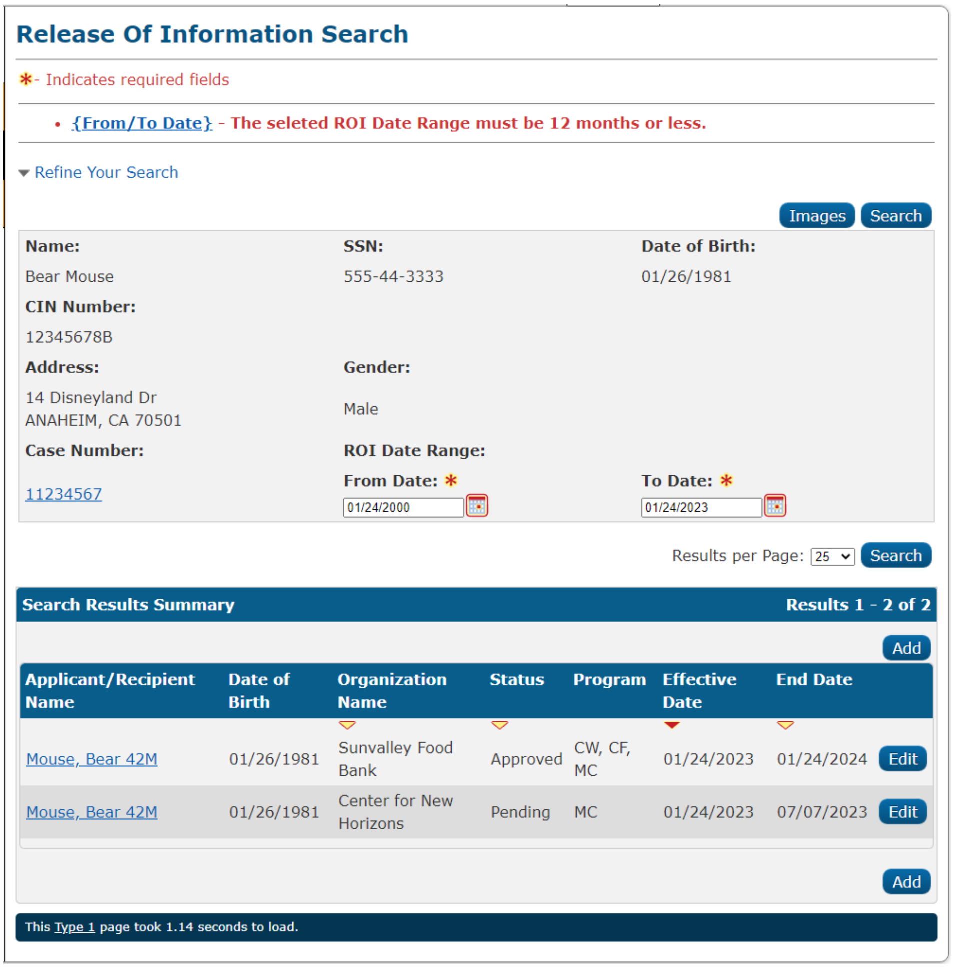


Figure 2.1.2-5 – Release of Information Search Page – Cannot be more than 12 months Validation

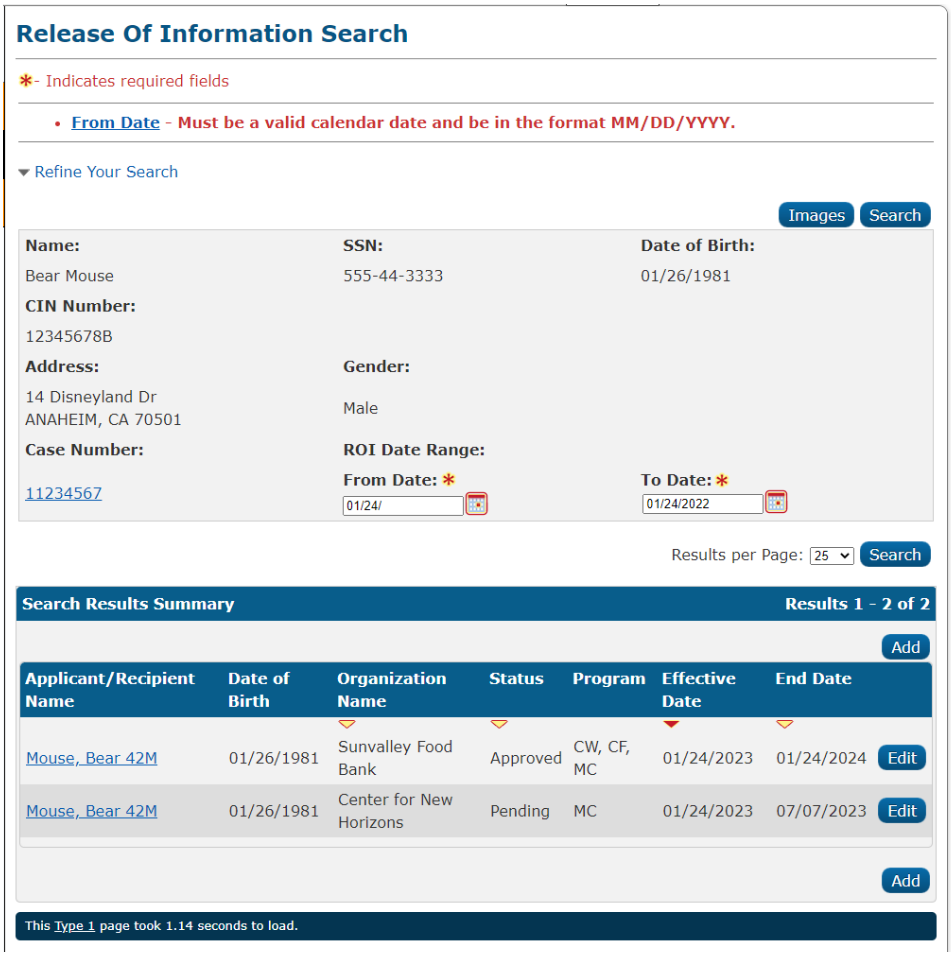


Figure 2.1.2-6 – Release of Information Search Page – From Date need to be in the correct format Validation

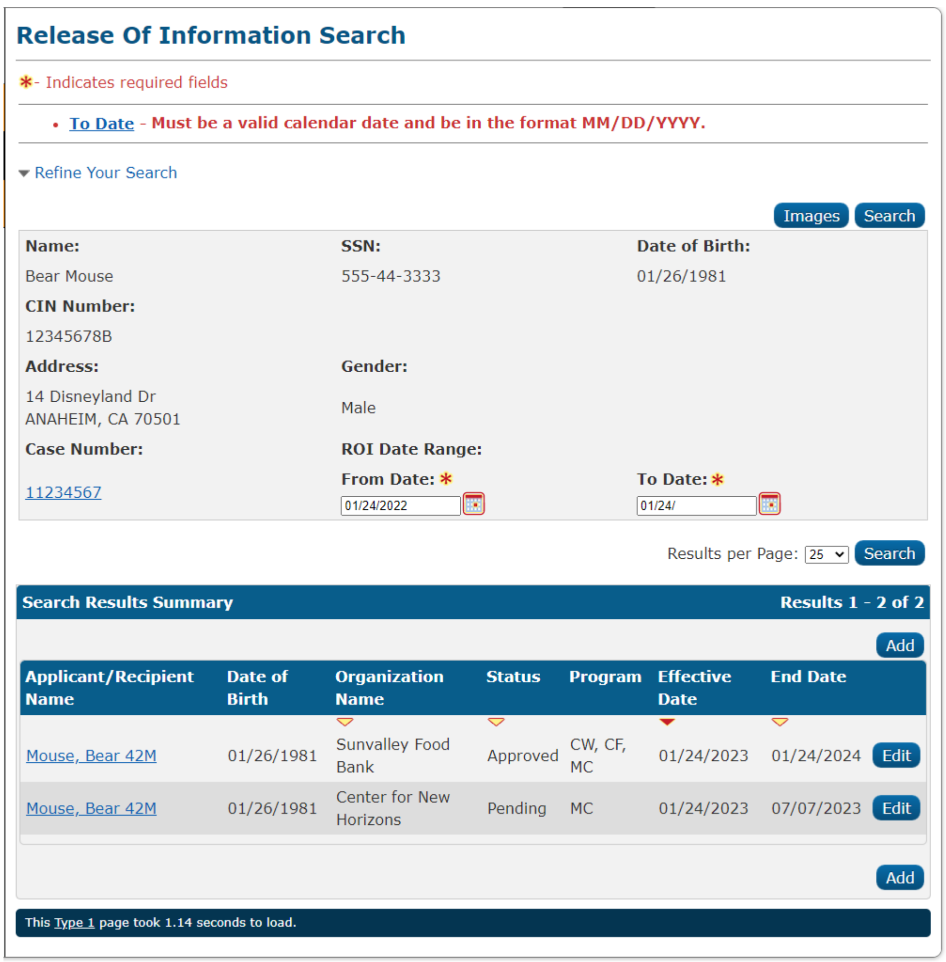


Figure 2.1.2-7 – Release of Information Search Page – To Date need to be in the correct format Validation

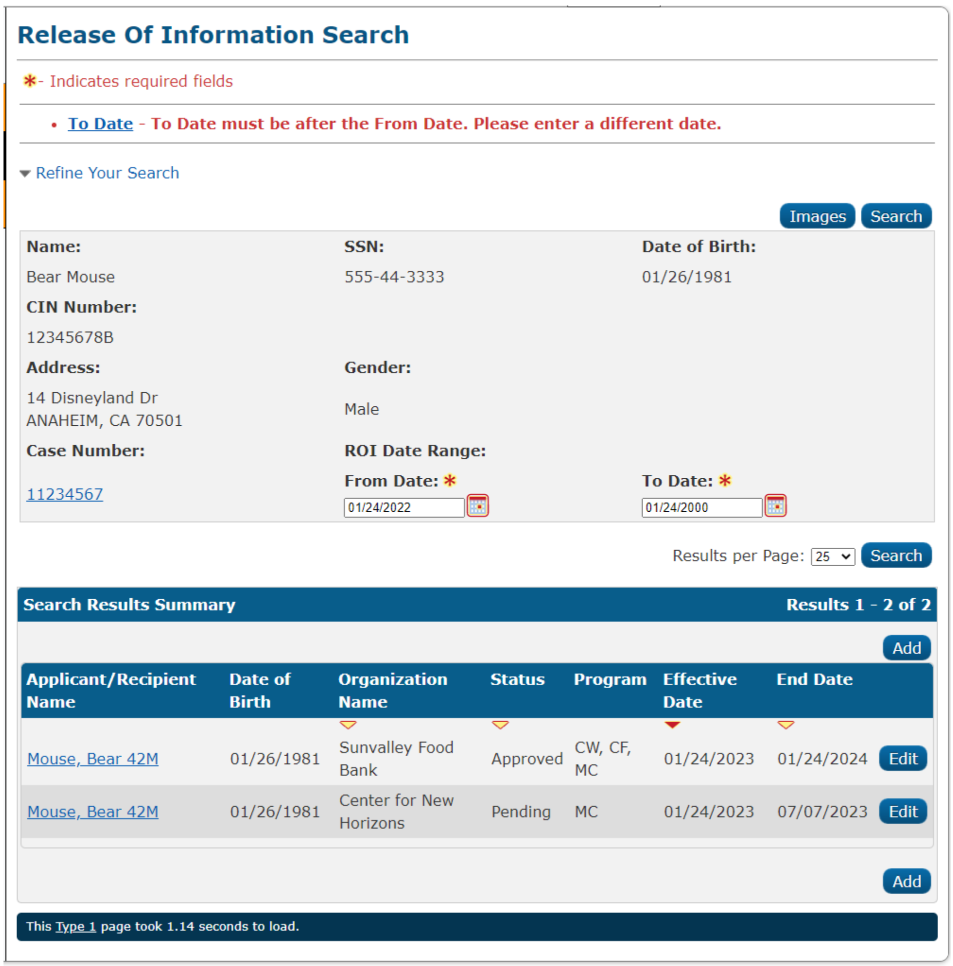


Figure 2.1.2-8 – Release of Information Search Page – To Date need to be after the From Date Validation

2.1.3 Description of Changes

1. Add a new Navigation Task to the e-Tools Local Navigator.
   a. New Navigation task will be titled 'Release of Information' and will be located below 'Self-Service Portal Customer Privacy' as shown on Figure 2.1.2-1.
   b. Clicking on the 'Release of Information' navigation task will direct the user to the 'Select Person' page.

Note: This will work similarly to the 'Self-Service Portal Customer Privacy' navigation task.

c. The 'Release of Information' navigation task will only be visible for users that are assigned to the 'ReleaseofInformationSearchView' security right or the 'ReleaseofInformationSearchEdit' security right.

2. Create a new 'Release of Information Search' page.
    a. This page will be accessible by clicking on the newly created 'Release of Information' navigation task and selecting a person through the 'Select Person' page.
    b. Upon loading, the 'Release of Information Search' page will display the following information
        i. Refine Your Search section
            1. The Refine Your Search section will be visible with the following parameters prepopulated:
                a. Name
                    i. This field will not be editable and will automatically be populated with the name of the person that was selected from the 'Select Person' page.
                    ii. Name will be in the format of First Name Last Name (Example: Tom Bradley)
                b. SSN
                    i. This field will not be editable and will automatically be populate with the Social Security Number of the person that was selected from the 'Select Person' page.
                    ii. SSN will be in the format of XXX-XX-XXXX.
                c. Date of Birth
                    i. This field will not be editable and will automatically be populated with the Date of Birth of the person that was selected from the 'Select Person' page.
                    ii. Date of Birth will be in the format of MM/DD/YYYY
                d. CIN Number
                    i. This field will not be editable and will automatically be populated with the CIN of the person that was selected from the 'Select Person' page.
                e. Address
                    i. This field will not be editable and will automatically be populated with the

Mailing address of the person that was selected from the 'Select Person' page.

ii. Address will be in the format of
Address Line 1
Address Line 2 (if one is available)
City, State Postal Code.

f. Gender
   i. This field will not be editable and will automatically be populated with the Gender of the person that was selected from the 'Select Person' page.
g. Case Number
   i. This field will not be editable and will automatically be populated with a list of Case Numbers for the selected person.
      1. The list of Case Numbers displayed will only be for cases that are in the same county of the logged in user.
      2. Case Number will display as a hyperlink. Clicking the hyperlink will take the user to the Case Summary page.
h. ROI Date Range:
   i. The date range refers to the creation date of the ROI regardless if it's created through the Self-Service Portal or worker created.
   ii. The From Date: and To Date: fields are required fields.
   iii. From Date:
      1. The user can enter their desired From date or click on the calendar icon to select the date.
      2. From Date will need to be in the format of: MM/DD/YYYY (Example: 12/25/2022)
      3. The field will automatically be populated with the date of 12 months prior to the current system date when the page initially loads.

iv. To Date:
    1. The user can enter their desired To Date or click on the calendar icon to select the date.
    2. To Date will need to be in the format of: MM/DD/YYYY (Example: 12/31/2022)
    3. The field will automatically be populated with the current system date when the page initially loads.
v. The ROI date range can only be 12 months or less.
vi. Create the following validation messages to be triggered upon clicking the Search button:
    1. From Date – Must be a valid calendar date and be in the format MM/DD/YYYY.
        a. This validation is triggered when the value entered on the From Date is not in the correct format (MM/DD/YYYY) or is not a valid calendar date
    2. To Date – Must be a valid calendar date and be in the format MM/DD/YYYY.
        a. This validation is triggered when the value entered on the To Date is not in the correct format (MM/DD/YYYY) or is not a valid calendar date
    3. To Date – To Date must be after the From Date. Please enter a different date.
        a. This validation is triggered when the value on the To Date is after the From Date

4. {From/To Date} – Date cannot be greater than current date.
    a. This validation is triggered when the From Date and/or the To Date is after the current date
5. {From/To} Date – The selected ROI Date Range must be 12 months or less.
    a. This validation is triggered when the date range entered on the From and To Date is longer than 12 months.

i. Results per Page:
    i. This dropdown limits how many records pulled per results per page.
    ii. The options are:
        1. 25 (default)
        2. 50
        3. 75
        4. 100

j. Search button
    i. Clicking this button loads the search results, based on the search parameters.

ii. Search Results Summary section
1. Applicant/Recipient Name
    a. This will display the name of the Primary Applicant of the ROI supported program. Note: This will be the name of the Person for whom the ROI record is created.
    b. It will have the format of Last Name, First Name, Age, Gender (Example: Duck, Donald 50M)
    c. The name of the Primary applicant will be a hyperlink.
        i. Clicking the hyperlink will direct the user to the 'Release of Information Detail' page for this ROI record in view mode.
2. Date of Birth
    a. This is a sortable column that display the date of birth of the primary applicant (the

date of birth of the person that the ROI record was created for).
    b. This will display in the format of MM/DD/YYYY.
3. Organization Name
    a. This is a sortable column that display the name of the Community-Based Organization recorded on the Release of Information Detail page.
        i. Clicking on the sortable arrow will order the Search Result Summary Section by the Organization name
4. Status
    a. This is a sortable column that will display the status of the ROI (Release of Information) record.
        i. Clicking on the sortable arrow will order the Search Result Summary Section by the Status.
5. Program
    a. This will display the list of selected programs that is associated to the ROI record.
        i. The list of programs will be separated by commas and will be in the order of CW, CF, MC.
            1. Example: CW, CF, MC
            2. Example 2: CF, MC
            3. Example 3: CW, MC
6. Effective Date
    a. This is a sortable column that will display the effective date of the ROI record.
        i. This will be the Signature Date that is entered on the Signature Information block on the Release of Information Detail page.
        ii. Clicking on the sortable arrow will order the Search Result Summary Section by the Effective Date.
    b. Effective Date will be in the format of MM/DD/YYYY.
7. End Date
    a. This is a sortable column that will display the end date of the ROI record.
        i. This will be the End Date on the Signature Information block on the Release of Information Detail page.

            ii. Clicking on the sortable arrow will order the Search Result Summary Section by the End Date.
        b. End Date will be in the format of MM/DD/YYYY.
    8. Edit button
        a. Clicking the Edit button will direct the user to the Release of Information Detail page for this ROI record in Edit mode.
        b. The Edit button will only display for users that are assigned to the 'ReleaseofInformationSearchEdit' security right.
    9. Upon loading, the page will automatically display the ROI records that were created in the past 12 months from the system date for the selected person under the Search Result Summary section.
        a. Result will only display ROI records that were created for a case that belongs to the same county as the logged in user.
        b. The initial search result pulled is ordered by the Effective Date in descending order.

iii. Add button
    1. Clicking this button will navigate the user to the Release of Information Detail page in Create mode.
    2. This button will only display for users that are assigned to the 'ReleaseofInformationSearchEdit' security right.

iv. Images button
    1. Clicking this button will open the Hyland imaging solution in a new window.
    2. This button will only display to users that are assigned to either the 'ImagingSearchCase' security right or the 'ImagingSearchPerson' security right.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** Release of Information

2.1.5 Security Updates

Security Right	Right Description	Right to Group Mapping
ReleaseofInformationView	Ability to search for and view the Release of Information Detail pages.	Release of Information View
ReleaseofInformationEdit ReleaseofInformationView	Ability to search for, view and add Release of Information Detail pages.	Release of Information Edit

Security Group	Group Description	Group to Role Mapping
Release of Information View	Ability to search for and view the Release of Information Detail pages.	Clerical Supervisor, Eligibility Staff, Eligibility Supervisor, Employment Services Supervisor, Hearings Staff, Hearings Supervisor, Help Desk Staff, Quality Assurance Staff, Quality Assurance Supervisor, Regional Call Center Staff, Regional Call Center Supervisor, Special Investigations Staff, Special Investigations Supervisor
Release of Information Edit	Ability to search for, view and add Release of Information Detail pages.	Eligibility Staff, Eligibility Supervisor

2.1.6 Page Mapping

Create page mapping for the Release of Information Search page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Select Person Page

2.2.1 Overview

The Select Person page allows users to search and select person(s) known to the system. This SCR will update the Select Person page to only return results where the person(s) is associated to cases that belongs to the same county as the logged in user when the page is accessed through the Release of Information task navigation.

2.2.2 Select Person Page Mockup

N/A

2.2.3 Description of Changes

1. Update the Select Person page to only return person(s) that match the search parameters and are associated to cases that belong to the same county as the logged in user.
    a. This will only apply when the Select Person page is accessed through the Release of Information navigation task.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** Release of Information → Select Person

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

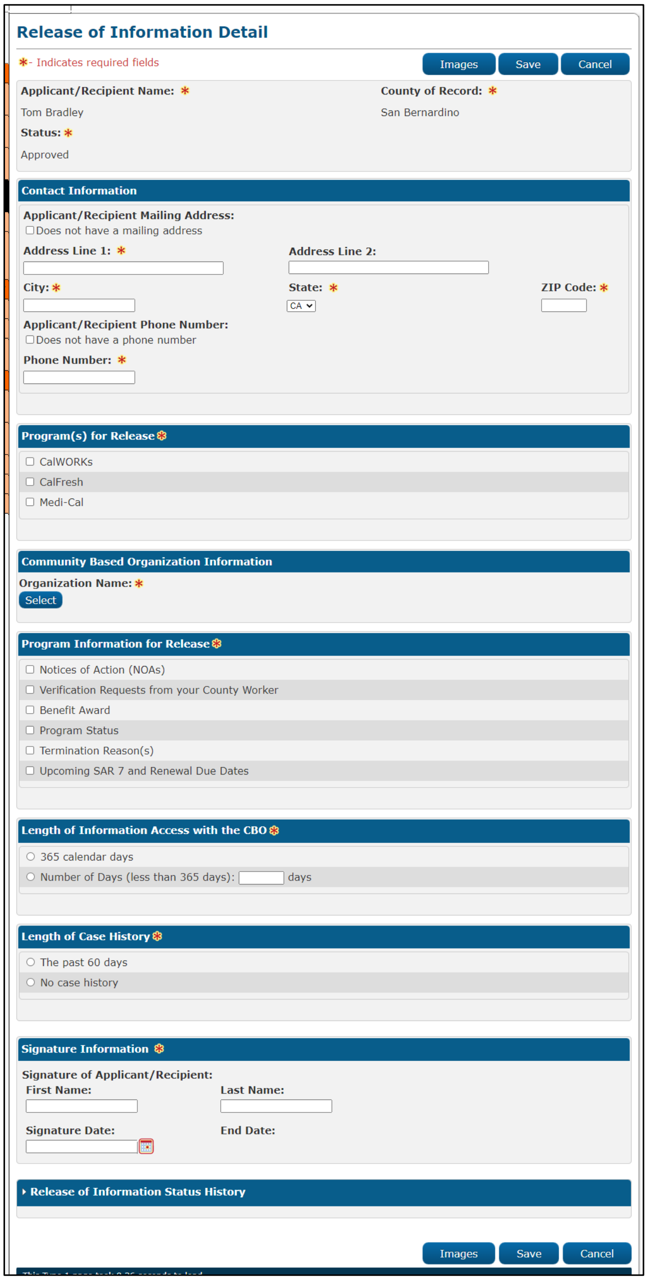
N/A

2.3 Release of Information Detail

2.3.1 Overview

The new Release of Information Detail Page will allow the worker to create, edit, and view a CBO ROI record. If the CBO ROI is initiated by a customer using their Self-Service Portal account, the page will only be available in edit and view mode. The worker can also access a scanned version of the CBO ROI form through the Images button on this page that is uploaded in the imaging solution.

2.3.2 Release of Information Detail – Mockups


Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

Applicant/Recipient Name: *
Tom Bradley
Status: *
Approved

County of Record: *
San Bernardino

Contact Information

Applicant/Recipient Mailing Address:
☐ Does not have a mailing address
Address Line 1: *
Address Line 2:
City: *
State: *
CA
ZIP Code: *
Applicant/Recipient Phone Number:
☐ Does not have a phone number
Phone Number: *

Program(s) for Release *

☐ CalWORKs
☐ CalFresh
☐ Medi-Cal

Community Based Organization Information

Organization Name: *
Select

Program Information for Release *

☐ Notices of Action (NOAs)
☐ Verification Requests from your County Worker
☐ Benefit Award
☐ Program Status
☐ Termination Reason(s)
☐ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

○ 365 calendar days
○ Number of Days (less than 365 days): ____ days

Length of Case History *

○ The past 60 days
○ No case history

Signature Information *

Signature of Applicant/Recipient:
First Name:
Last Name:
Signature Date:
End Date:

Release of Information Status History

Images | Save | Cancel

Figure 2.2.2-1 – Release of Information Detail Page – (Create Mode – Upon loading)

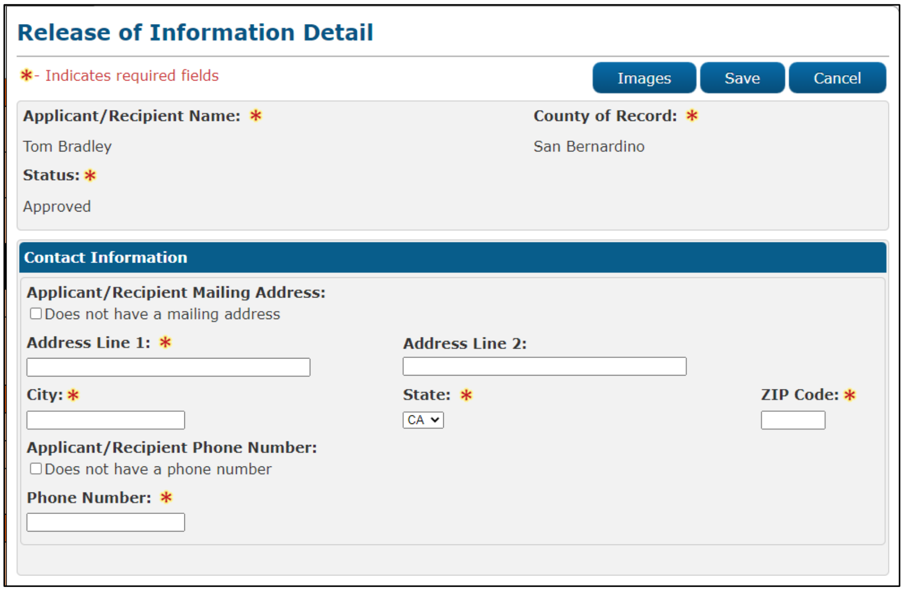


Figure 2.2.2-2 – Release of Information Detail Page – (Create Mode 1)

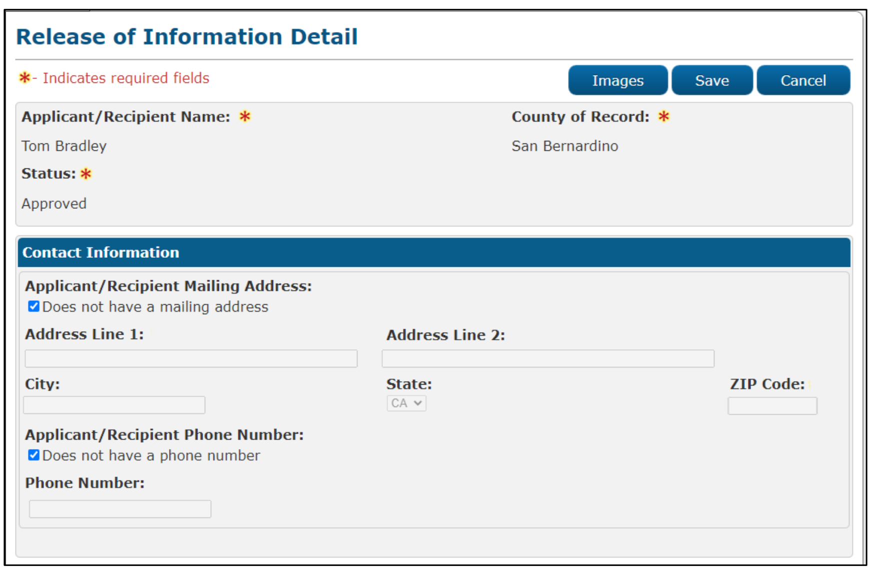


Figure 2.2.2-3 – Release of Information Detail Page – (Create Mode 1A)

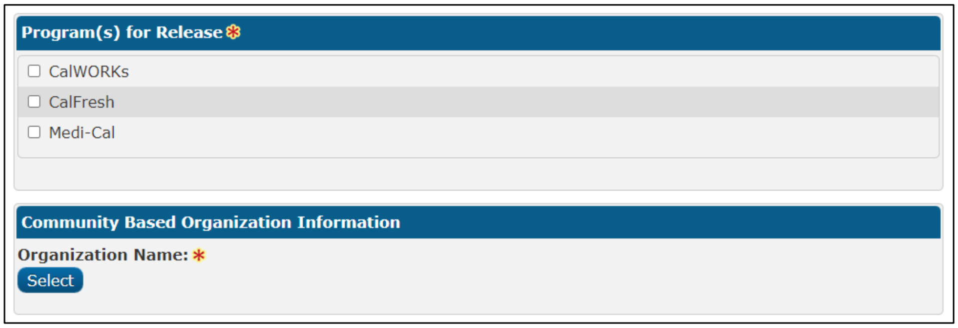


Figure 2.2.2-4 – Release of Information Detail Page – (Create Mode 2)

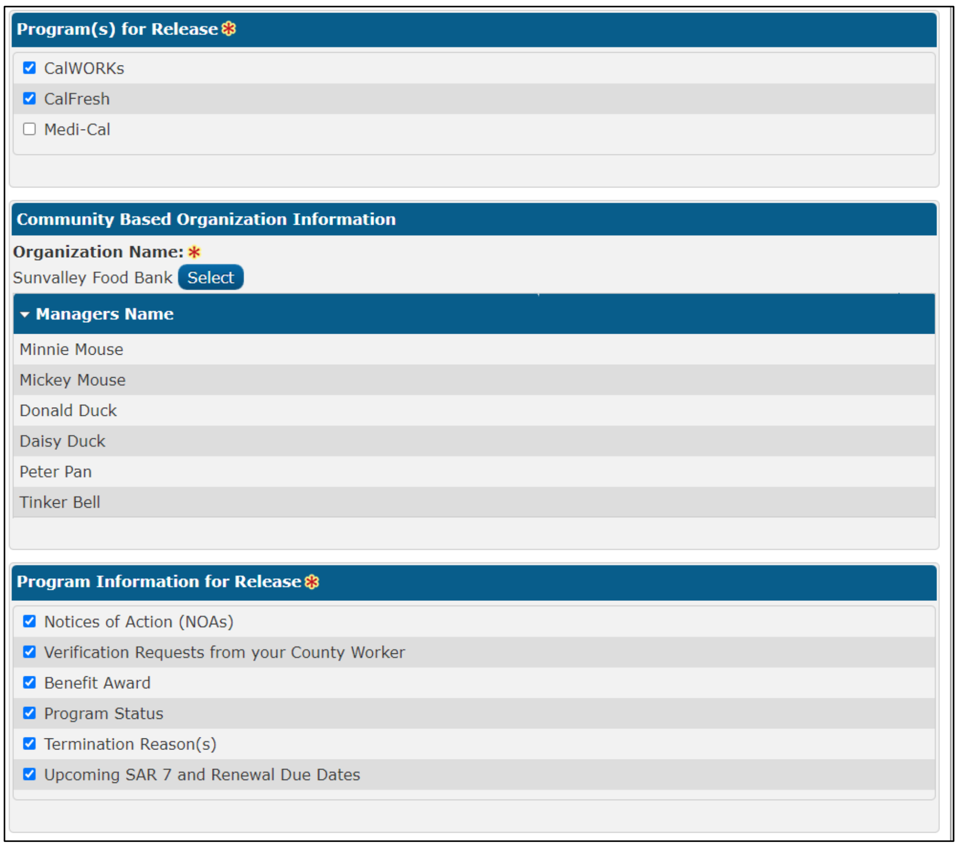


Figure 2.2.2-5 – Release of Information Detail Page – (Create Mode 2A)

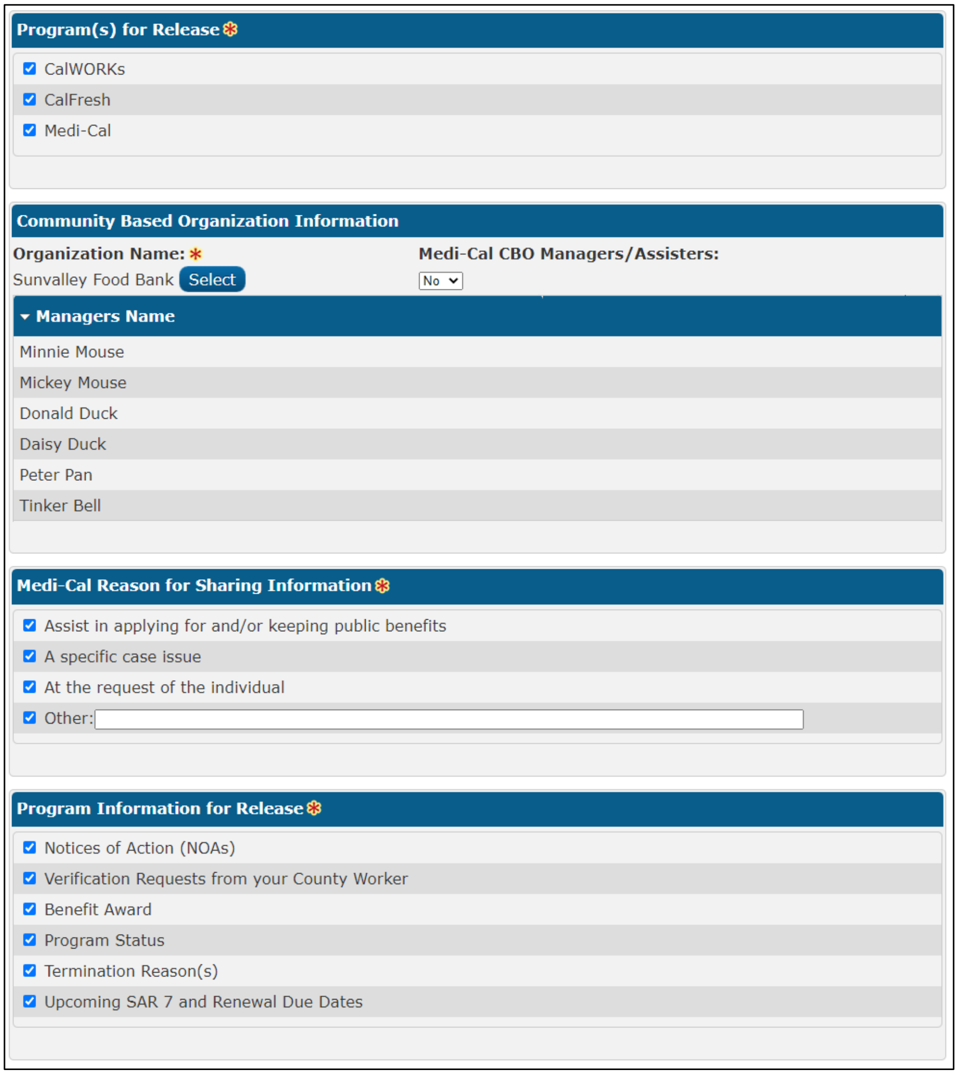
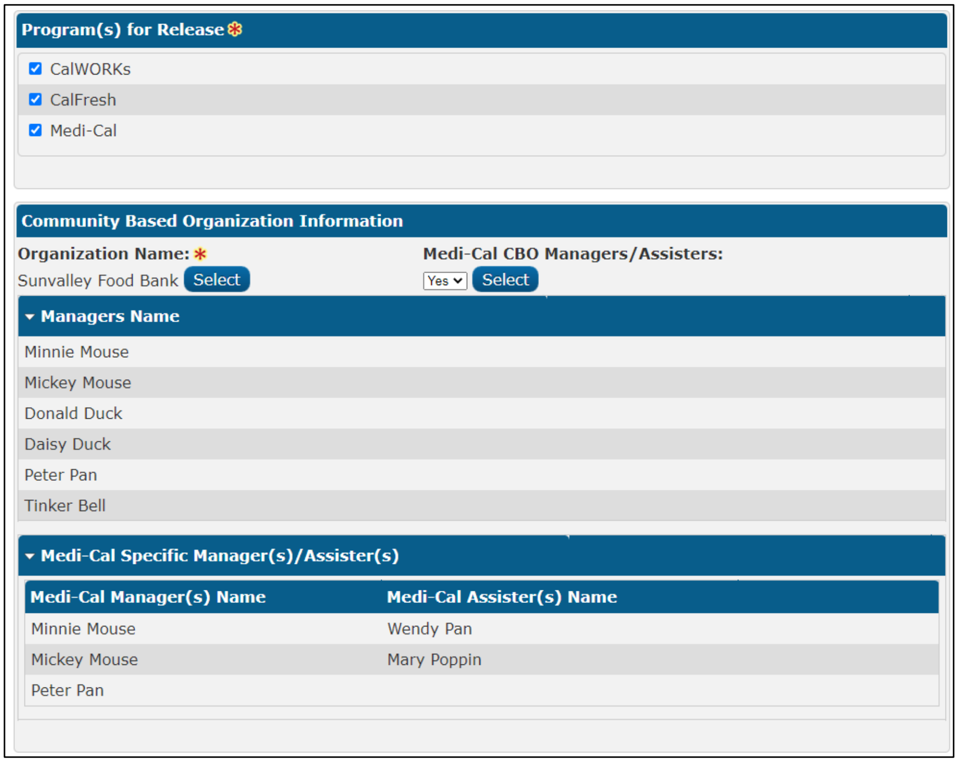


Figure 2.2.2-6 – Release of Information Detail Page – (Create Mode 2B)


Program(s) for Release

- [x] CalWORKs
- [x] CalFresh
- [x] Medi-Cal

Community Based Organization Information

Organization Name: *
Sunvalley Food Bank Select

Medi-Cal CBO Managers/Assisters:
Yes Select

Managers Name

Managers Name
Minnie Mouse
Mickey Mouse
Donald Duck
Daisy Duck
Peter Pan
Tinker Bell

Medi-Cal Specific Manager(s)/Assister(s)

Medi-Cal Manager(s) Name	Medi-Cal Assister(s) Name
Minnie Mouse	Wendy Pan
Mickey Mouse	Mary Poppin
Peter Pan	

Figure 2.2.2-7 – Release of Information Detail Page – (Create Mode 2C)

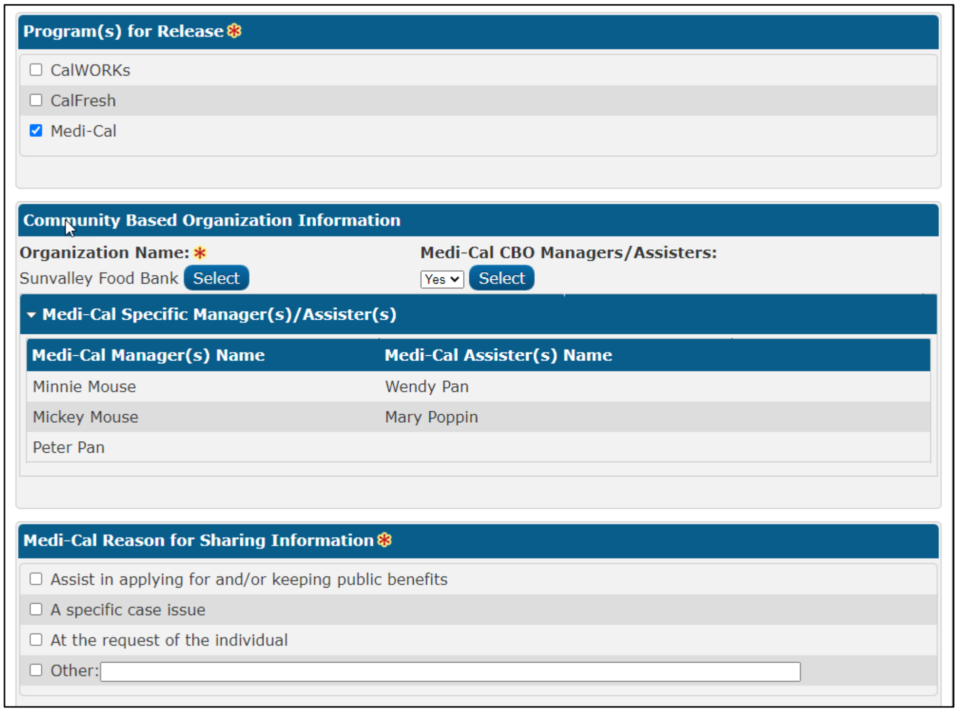


Figure 2.2.2-8 – Release of Information Detail Page – (Create Mode 2D)

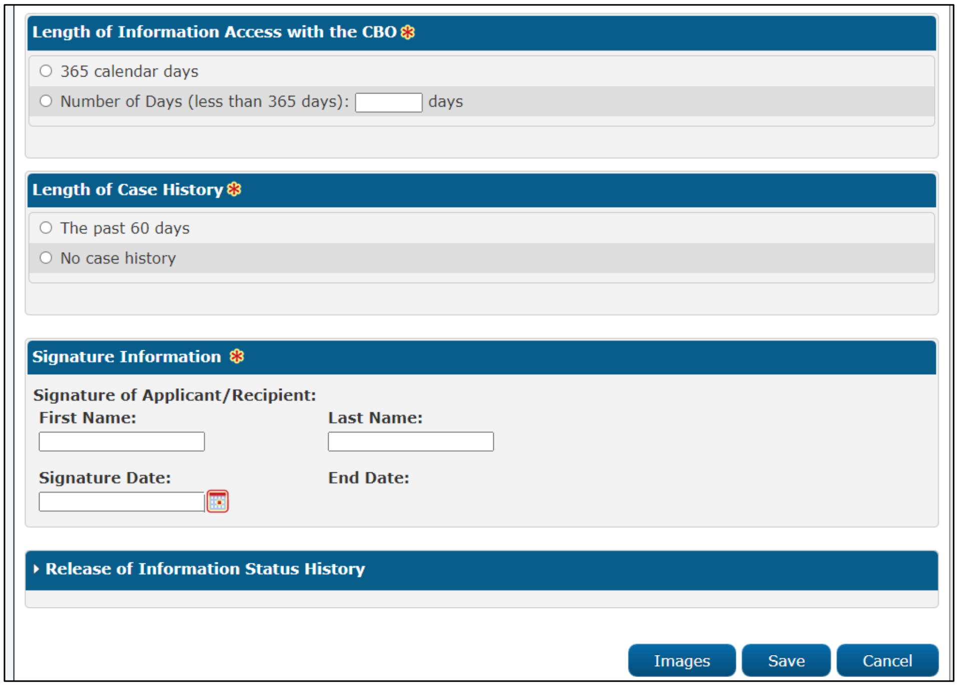


Figure 2.2.2-9 – Release of Information Detail Page – (Create Mode 3 CF program only)

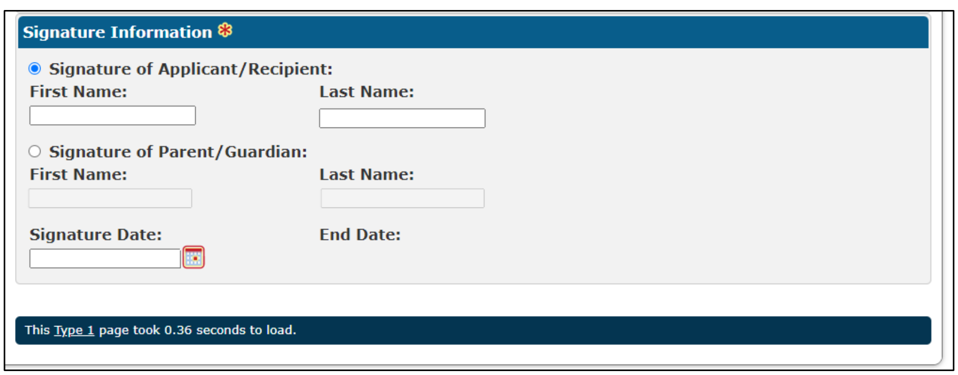


Figure 2.2.2-10 – Release of Information Detail Page – (Create Mode 4_Signature Block when CW/MC selected)

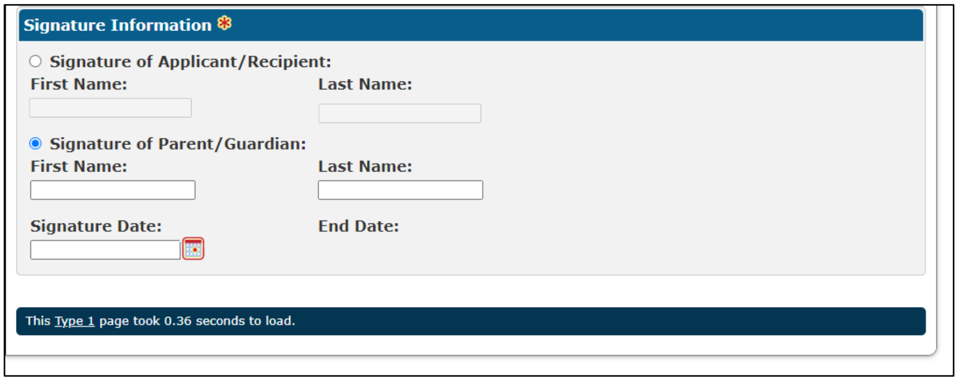


Figure 2.2.2-11 – Release of Information Detail Page – (Create Mode 4A_Signature Block when CW/MC selected)

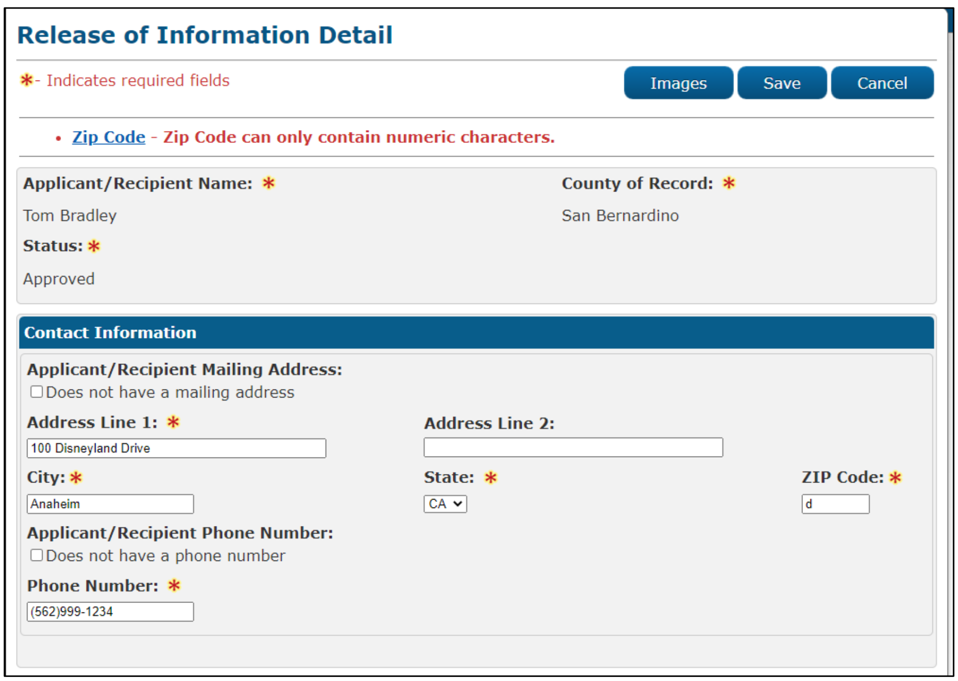


Figure 2.2.2-12 – Release of Information Detail Page – (Create Mode Validation1)

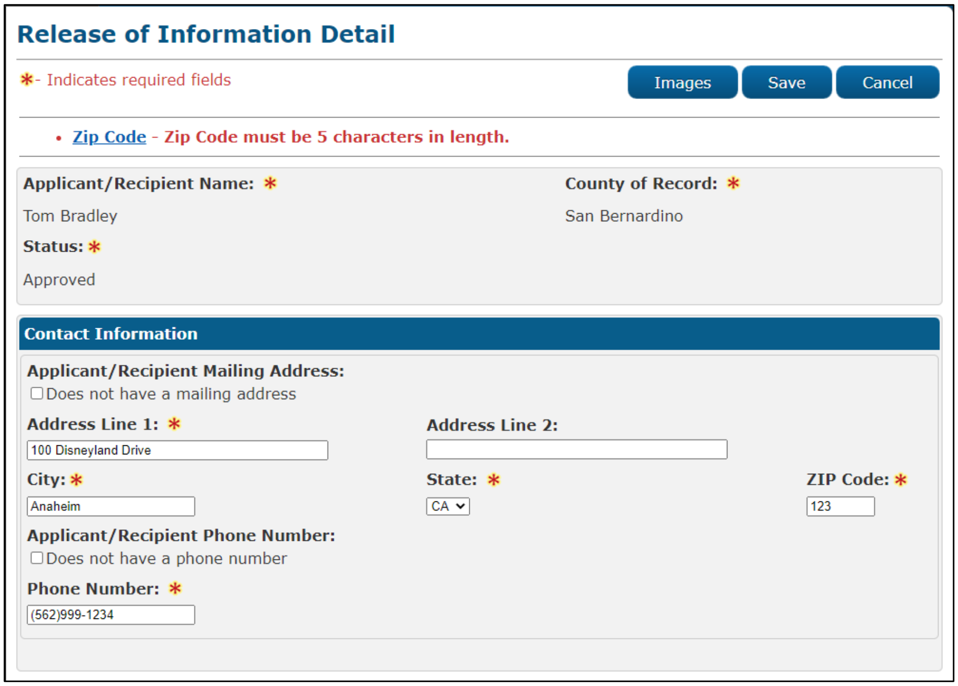


Figure 2.2.2-13 – Release of Information Detail Page – (Create Mode Validation2)

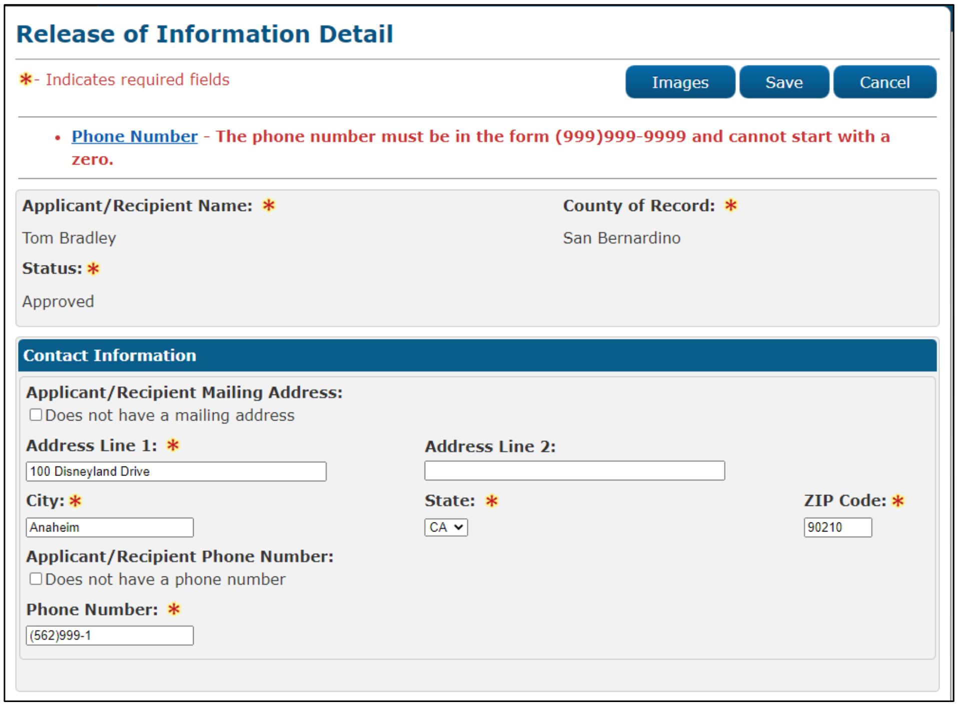
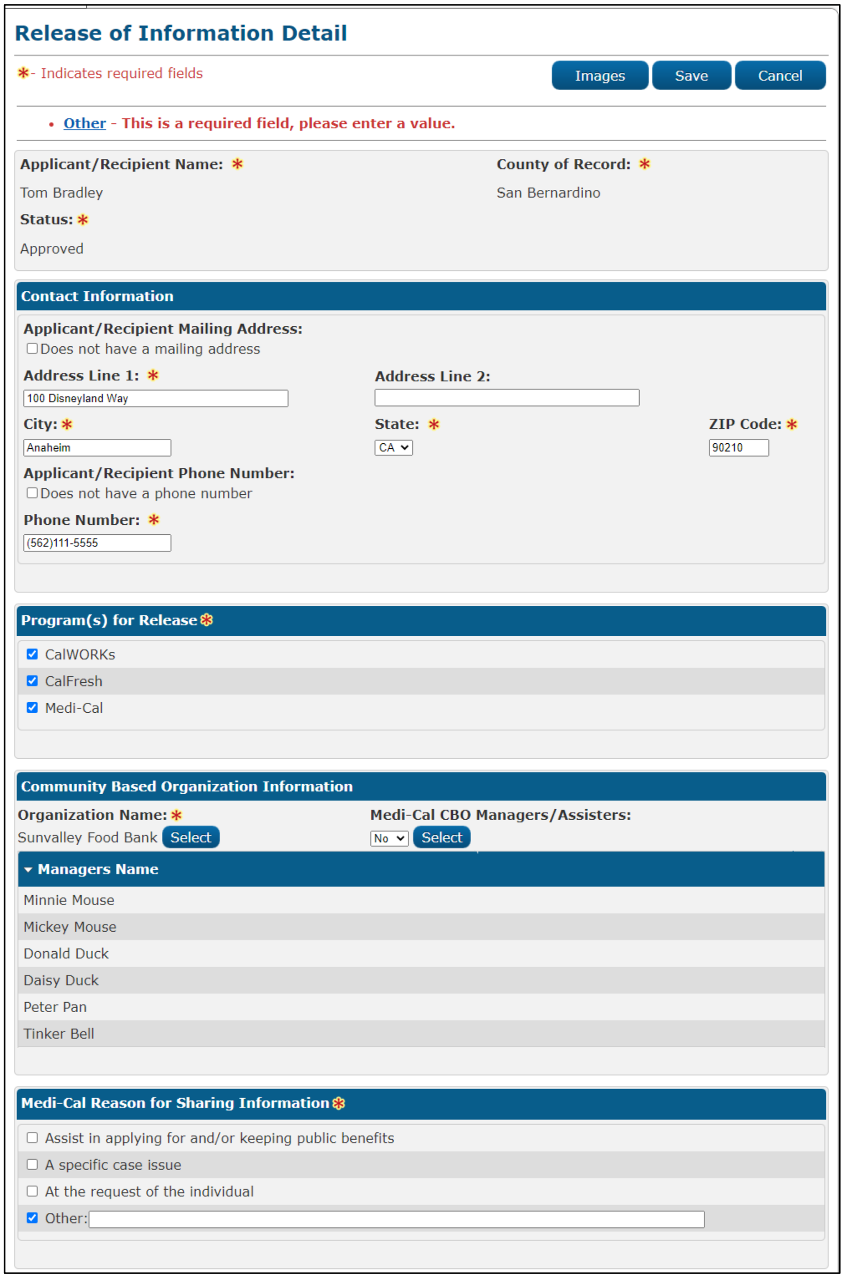


Figure 2.2.2-14 – Release of Information Detail Page – (Create Mode Validation3)



Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Other - This is a required field, please enter a value.

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Contact Information

Applicant/Recipient Mailing Address:

☐ Does not have a mailing address

Address Line 1: *

100 Disneyland Way

Address Line 2:

City: *

Anaheim

State: *

CA

ZIP Code: *

90210

Applicant/Recipient Phone Number:

☐ Does not have a phone number

Phone Number: *

(562)111-5555

Program(s) for Release *

☑ CalWORKs

☑ CalFresh

☑ Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank Select

Medi-Cal CBO Managers/Assisters:

No Select

Managers Name

Minnie Mouse

Mickey Mouse

Donald Duck

Daisy Duck

Peter Pan

Tinker Bell

Medi-Cal Reason for Sharing Information *

☐ Assist in applying for and/or keeping public benefits

☐ A specific case issue

☐ At the request of the individual

☑ Other:

Figure 2.2.2-15 – Release of Information Detail Page – (Create Mode Validation4)

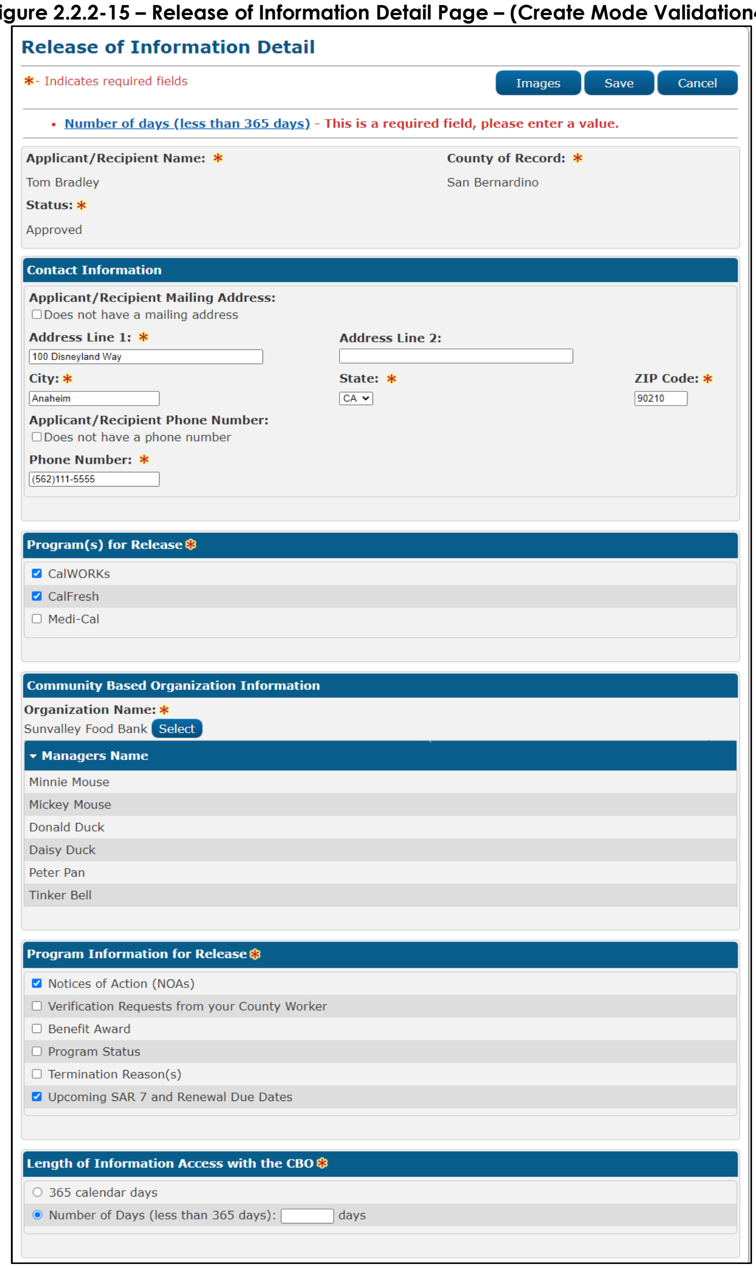
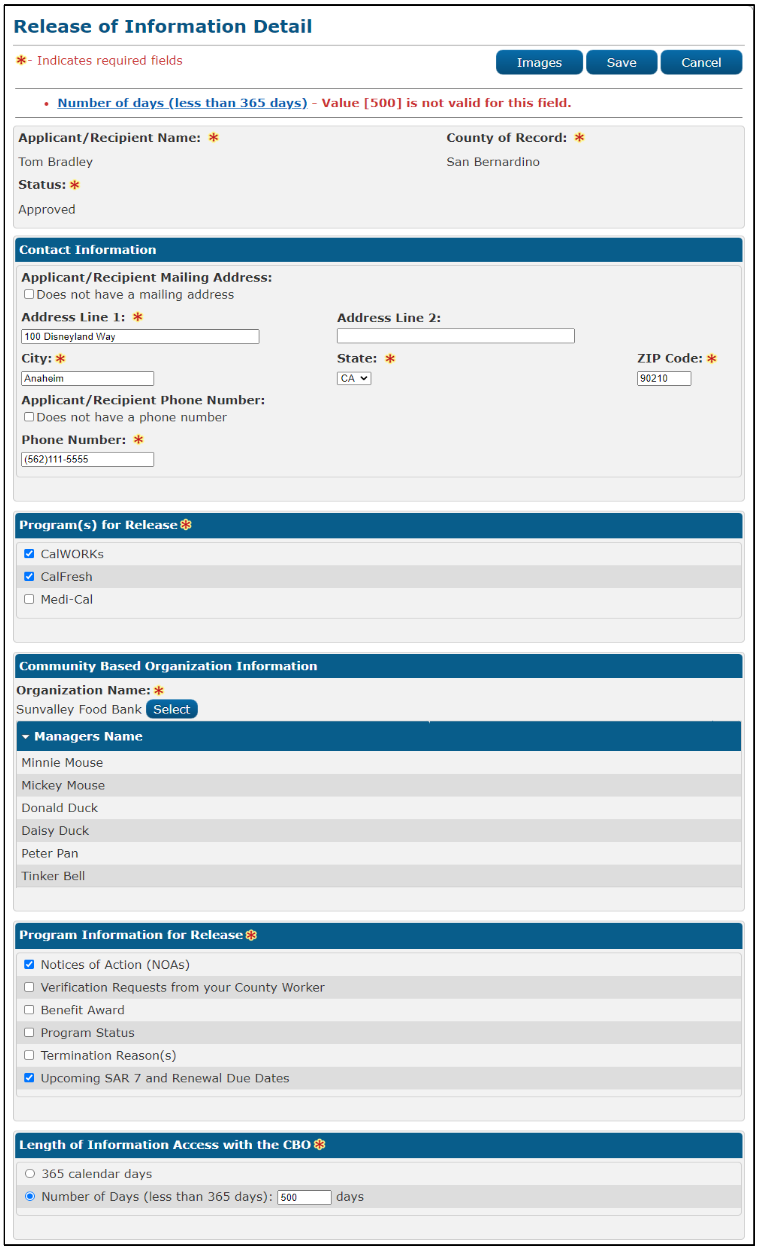


Figure 2.2.2-16 – Release of Information Detail Page – (Create Mode Validation5)



Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Number of days (less than 365 days) - Value [500] is not valid for this field.

Applicant/Recipient Name: *
Tom Bradley

County of Record: *
San Bernardino

Status: *
Approved

Contact Information

Applicant/Recipient Mailing Address:
☐ Does not have a mailing address

Address Line 1: * 100 Disneyland Way

Address Line 2:

City: * Anaheim

State: * CA

ZIP Code: * 90210

Applicant/Recipient Phone Number:
☐ Does not have a phone number

Phone Number: * (562)111-5555

Program(s) for Release *

☑ CalWORKs
☑ CalFresh
☐ Medi-Cal

Community Based Organization Information

Organization Name: *
Sunvalley Food Bank Select

Managers Name

Minnie Mouse
Mickey Mouse
Donald Duck
Daisy Duck
Peter Pan
Tinker Bell

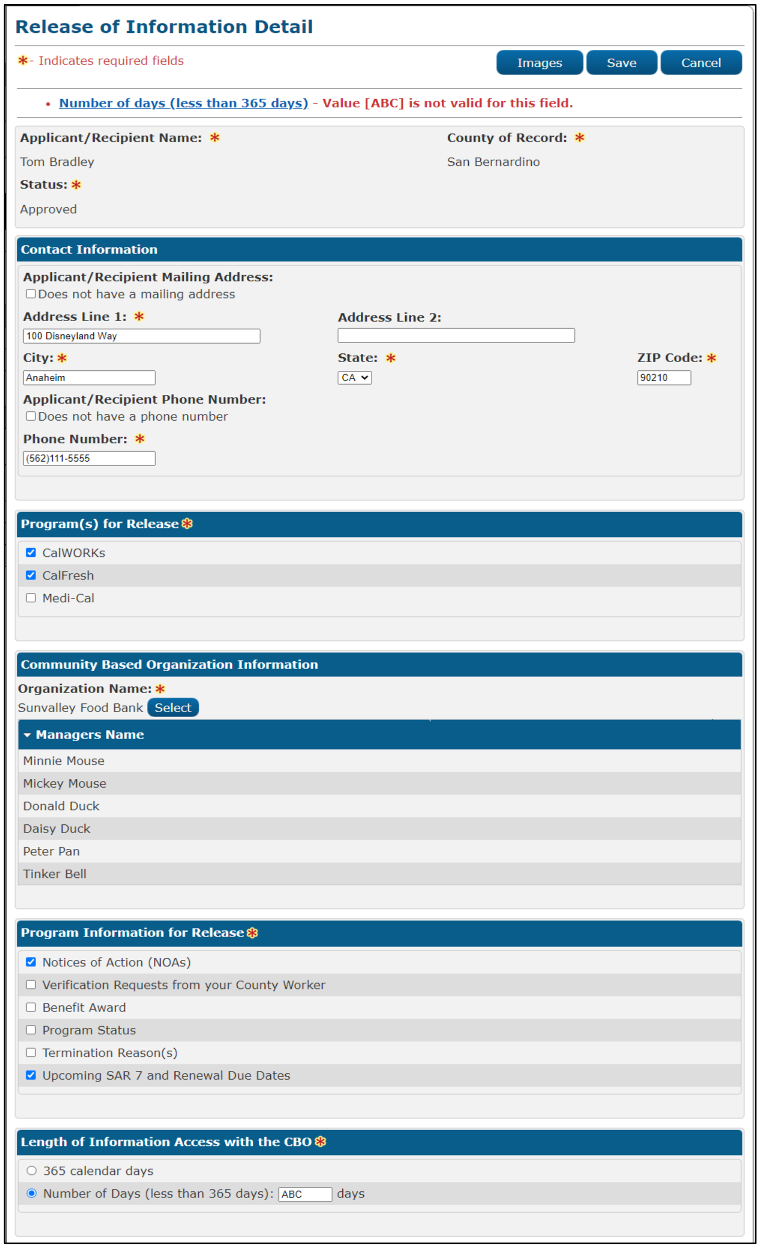
Program Information for Release *

☑ Notices of Action (NOAs)
☐ Verification Requests from your County Worker
☐ Benefit Award
☐ Program Status
☐ Termination Reason(s)
☑ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

○ 365 calendar days
◉ Number of Days (less than 365 days): 500 days

Figure 2.2.2-17 – Release of Information Detail Page – (Create Mode Validation6)



Release of Information Detail

*- Indicates required fields

Images | Save | Cancel

- Number of days (less than 365 days) - Value [ABC] is not valid for this field.

Applicant/Recipient Name: *
Tom Bradley

County of Record: *
San Bernardino

Status: *
Approved

Contact Information

Applicant/Recipient Mailing Address:
☐ Does not have a mailing address

Address Line 1: * 100 Disneyland Way

Address Line 2:

City: * Anaheim

State: * CA

ZIP Code: * 90210

Applicant/Recipient Phone Number:
☐ Does not have a phone number

Phone Number: * (562)111-5555

Program(s) for Release *

- ☑ CalWORKs
- ☑ CalFresh
- ☐ Medi-Cal

Community Based Organization Information

Organization Name: *
Sunvalley Food Bank Select

Managers Name

- Minnie Mouse
- Mickey Mouse
- Donald Duck
- Daisy Duck
- Peter Pan
- Tinker Bell

Program Information for Release *

- ☑ Notices of Action (NOAs)
- ☐ Verification Requests from your County Worker
- ☐ Benefit Award
- ☐ Program Status
- ☐ Termination Reason(s)
- ☑ Upcoming SAR 7 and Renewal Due Dates

Length of Information Access with the CBO *

- ○ 365 calendar days
- ◉ Number of Days (less than 365 days): ABC days

Figure 2.2.2-18 – Release of Information Detail Page – (Create Mode Validation7)

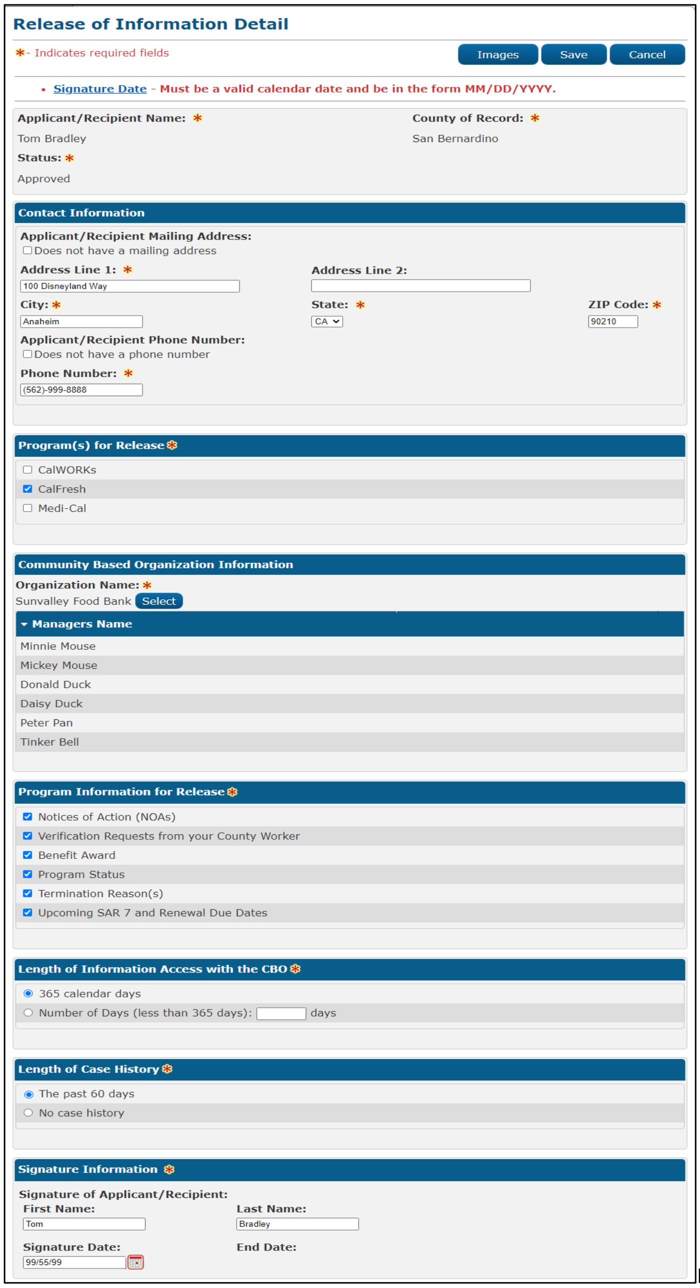


Figure 2.2.2-19 – Release of Information Detail Page – (Create Mode Validation8)

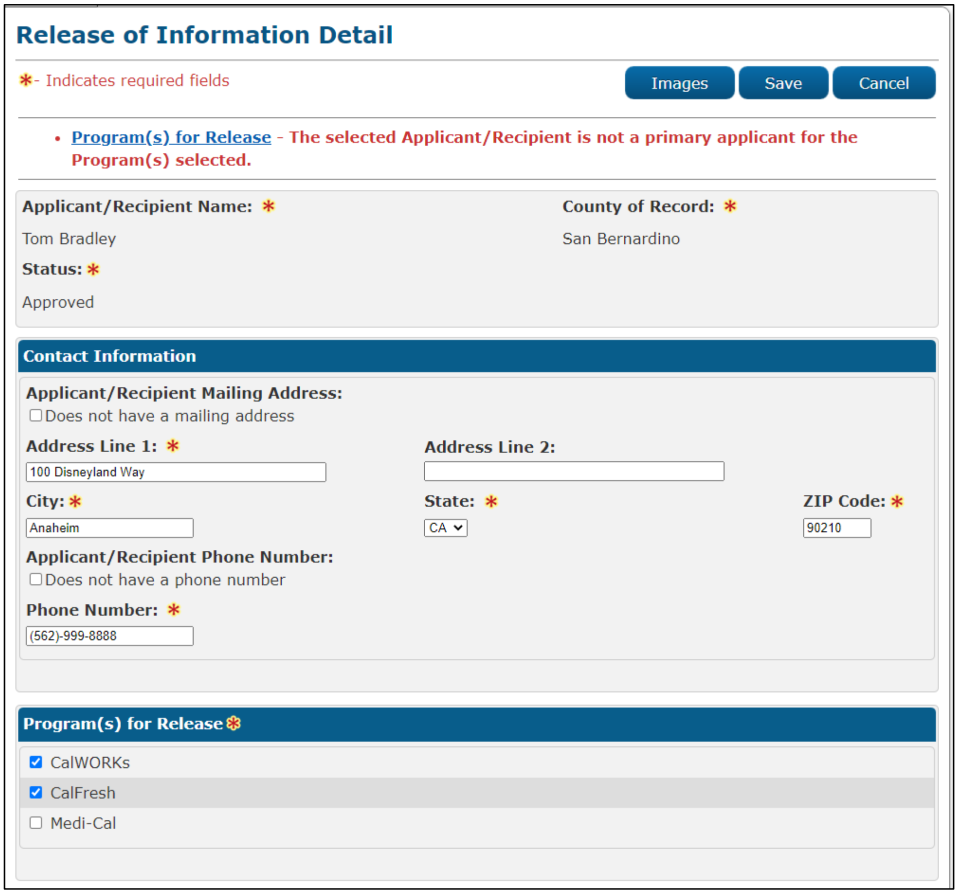


Figure 2.2.2-20 – Release of Information Detail Page – (Create Mode Validation9)

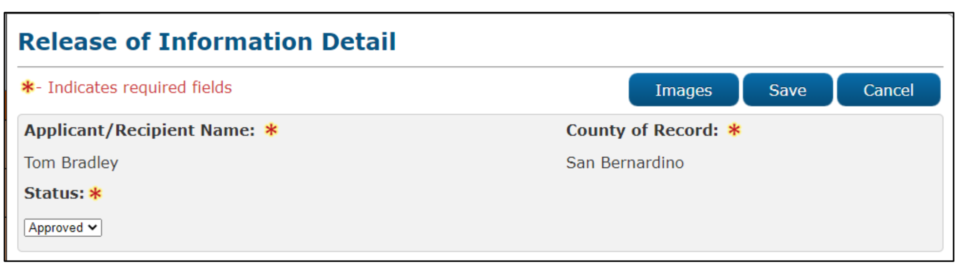


Figure 2.2.2-21 – Release of Information Detail Page – (Edit Mode Approved)

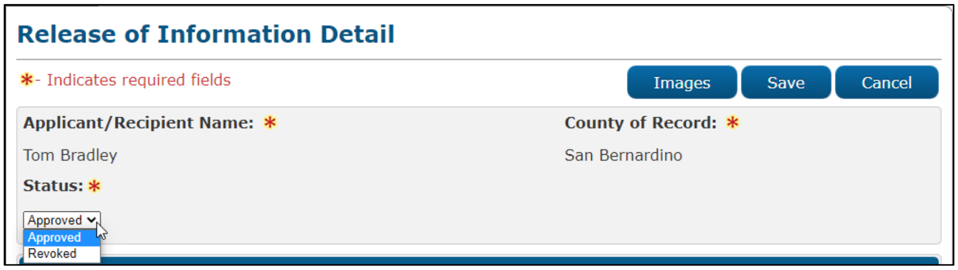


Figure 2.2.2-22 – Release of Information Detail Page – (Edit Mode Approved 1)

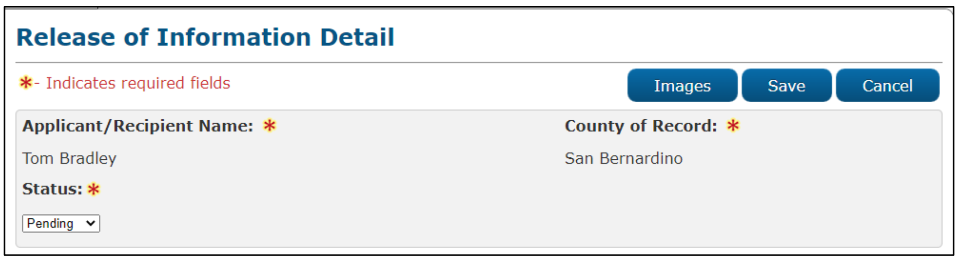


Figure 2.2.2-24 – Release of Information Detail Page – (Edit Mode Pending 1)

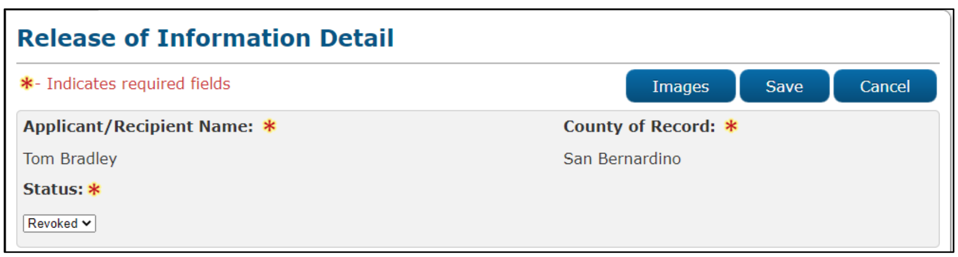


Figure 2.2.2-25 – Release of Information Detail Page – (Edit Mode Revoked)

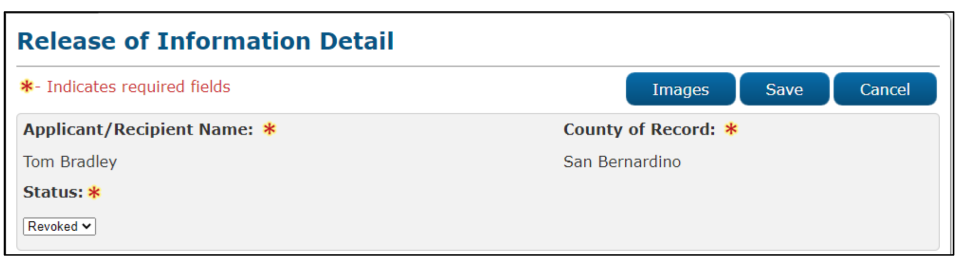
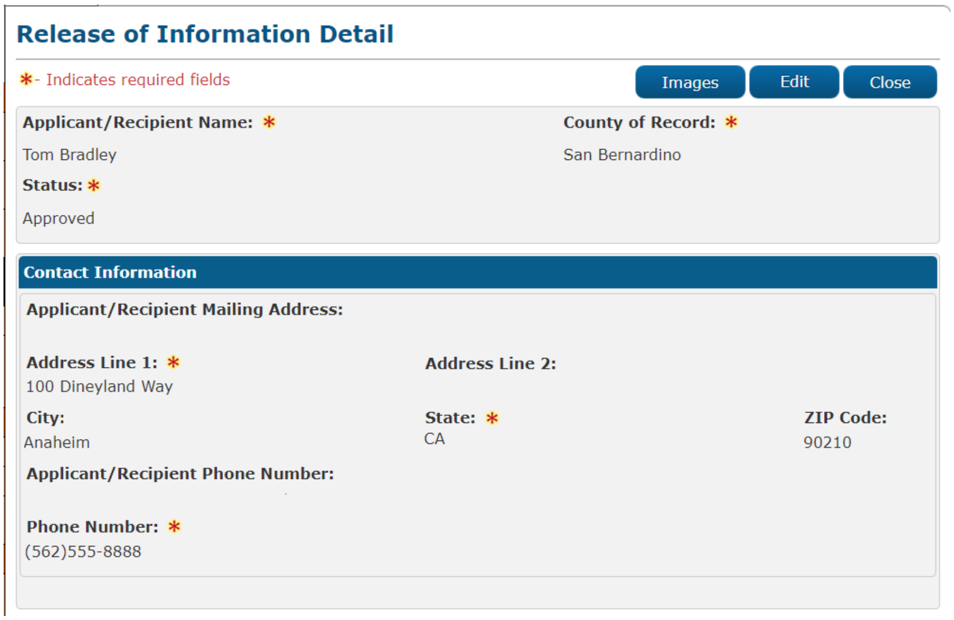


Figure 2.2.2-26 – Release of Information Detail Page – (Edit Mode Revoked 1)



Release of Information Detail

*- Indicates required fields

Images | Edit | Close

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Contact Information

Applicant/Recipient Mailing Address:

Address Line 1: *

100 Dineyland Way

Address Line 2:

City:

Anaheim

State: *

CA

ZIP Code:

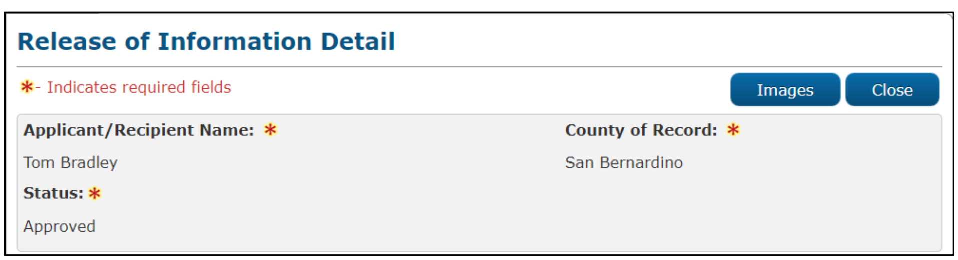
90210

Applicant/Recipient Phone Number:

Phone Number: *

(562)555-8888

Figure 2.2.2-27 – Release of Information Detail Page – (View Mode)



Release of Information Detail

*- Indicates required fields

Images | Close

Applicant/Recipient Name: *

Tom Bradley

County of Record: *

San Bernardino

Status: *

Approved

Figure 2.2.2-28 – Release of Information Detail Page – (View Mode – With no ReleaseofInformationEdit Security Right)

Figure 2.2.2-29 – Release of Information Detail Page – (View/Edit Mode-Contact)

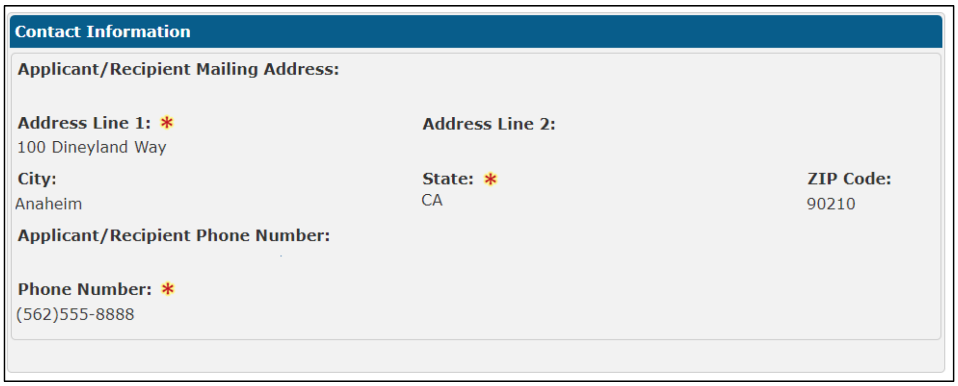
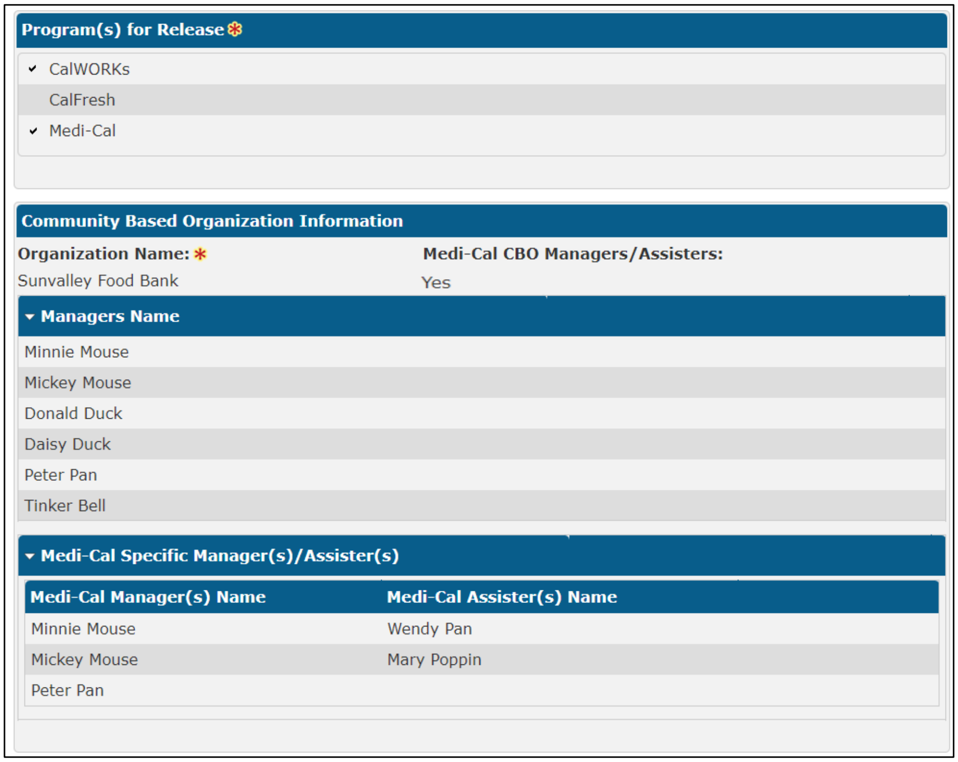


Figure 2.2.2-30 – Release of Information Detail Page – (View/Edit Mode-Contact 1)



Program(s) for Release

- ✔ CalWORKs
- CalFresh
- ✔ Medi-Cal

Community Based Organization Information

Organization Name:	Medi-Cal CBO Managers/Assisters:
Sunvalley Food Bank	Yes

Managers Name
Minnie Mouse
Mickey Mouse
Donald Duck
Daisy Duck
Peter Pan
Tinker Bell

Medi-Cal Specific Manager(s)/Assister(s)

Medi-Cal Manager(s) Name	Medi-Cal Assister(s) Name
Minnie Mouse	Wendy Pan
Mickey Mouse	Mary Poppin
Peter Pan	

Figure 2.2.2-31 – Release of Information Detail Page – (View/Edit Mode)

Program(s) for Release *

CalWORKs
CalFresh
✓ Medi-Cal

Community Based Organization Information

Organization Name: *	Medi-Cal CBO Managers/Assisters:
Sunvalley Food Bank	Yes

▾ Medi-Cal Specific Manager(s)/Assister(s)

Medi-Cal Manager(s) Name	Medi-Cal Assister(s) Name
Minnie Mouse	Wendy Pan
Mickey Mouse	Mary Poppin
Peter Pan	

Medi-Cal Reason for Sharing Information *

✓ Assist in applying for and/or keeping public benefits
A specific case issue
✓ At the request of the individual
✓ Other: Testing ROI

Figure 2.2.2-32 – Release of Information Detail Page – (View/Edit Mode-1)

Program(s) for Release *

- ✔ CalWORKs
- CalFresh
- Medi-Cal

Community Based Organization Information

Organization Name: *

Sunvalley Food Bank

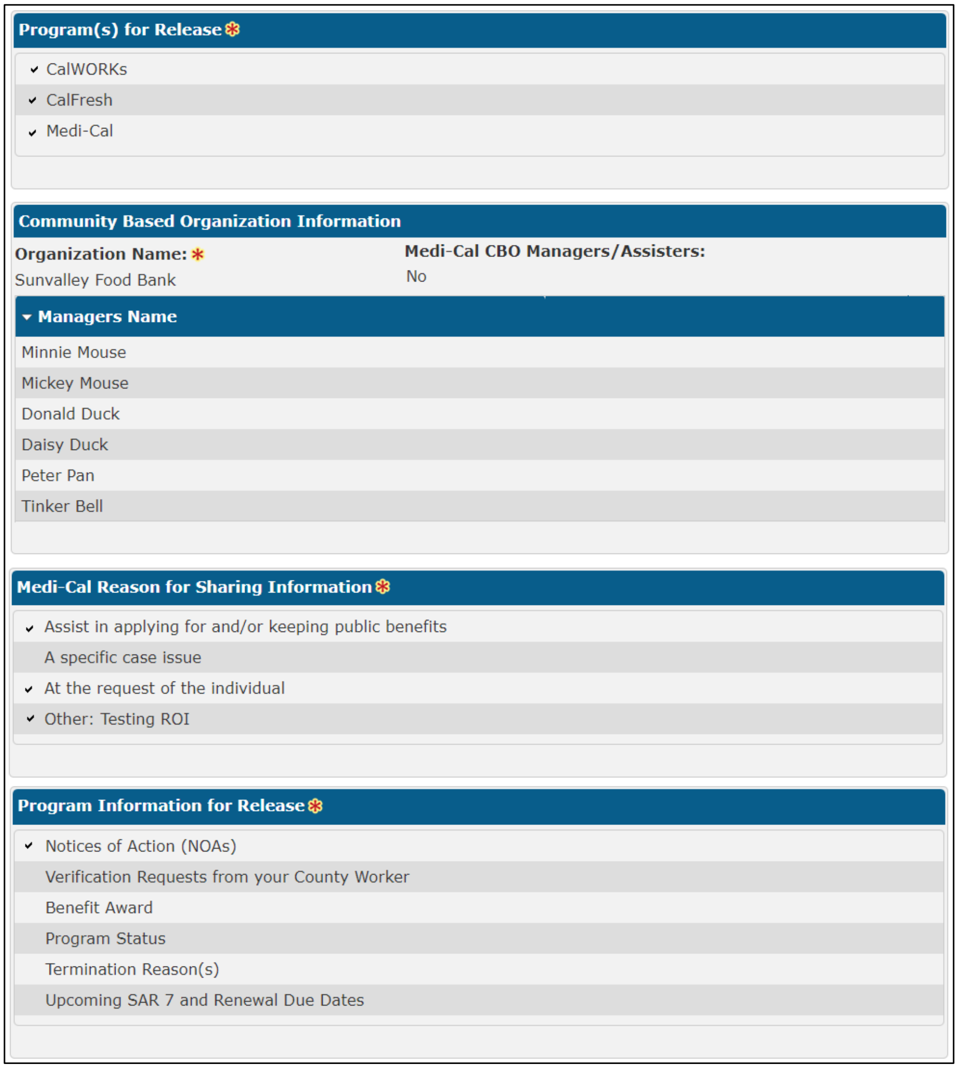
Managers Name

- Minnie Mouse
- Mickey Mouse
- Donald Duck
- Daisy Duck
- Peter Pan
- Tinker Bell

Program Information for Release *

- ✔ Notices of Action (NOAs)
- Verification Requests from your County Worker
- Benefit Award
- Program Status
- Termination Reason(s)
- Upcoming SAR 7 and Renewal Due Dates

Figure 2.2.2-33 – Release of Information Detail Page – (View/Edit Mode-2)



Program(s) for Release *

- ✔ CalWORKs
- ✔ CalFresh
- ✔ Medi-Cal

Community Based Organization Information

Organization Name: *
Sunvalley Food Bank

Medi-Cal CBO Managers/Assisters:
No

Managers Name
Minnie Mouse
Mickey Mouse
Donald Duck
Daisy Duck
Peter Pan
Tinker Bell

Medi-Cal Reason for Sharing Information *

- ✔ Assist in applying for and/or keeping public benefits
- A specific case issue
- ✔ At the request of the individual
- ✔ Other: Testing ROI

Program Information for Release *

- ✔ Notices of Action (NOAs)
- Verification Requests from your County Worker
- Benefit Award
- Program Status
- Termination Reason(s)
- Upcoming SAR 7 and Renewal Due Dates

Figure 2.2.2-34 – Release of Information Detail Page – (View/Edit Mode-3)

Length of Information Access with the CBO

365 calendar days

Length of Case History

The past 60 days

Figure 2.2.2-35 – Release of Information Detail Page – (View/Edit Mode-4)

Signature Information

Signature of Applicant/Recipient:

First Name:	Last Name:
Tom	Bradley
Signature Date:	**End Date:**
01/31/2023	01/31/2024

Figure 2.2.2-36 – Release of Information Detail Page – (View/Edit Mode-Signature Information of Applicant/Recipient or when CF only)

Signature Information

Signature of Parent/Guardian:

First Name:	Last Name:
Tom	Bradley
Signature Date:	**End Date:**
01/31/2023	01/31/2024

Figure 2.2.2-37 – Release of Information Detail Page – (View/Edit Mode-Signature Information of Parent/Guardian)

Release of Information Status History

Status	Updated On	Updated By
Revoked	02/01/2023	1234867
Approved	01/30/2023	1234867
Pending	01/15/2023	1114781

Figure 2.2.2-38 – Release of Information Detail Page – (View/Edit Mode-Release of Information -1)

Release of Information Status History

Status	Updated On	Updated By
Revoked	02/01/2023	1234867
Approved	01/30/2023	1234867

Figure 2.2.2-39 – Release of Information Detail Page – (View/Edit Mode-Release of Information -2)

2.3.3 Description of Changes

1. Create a new Release of Information Detail page that will be accessible from the Release of Information Search page.
    a. The Release of Information Detail page will have the following elements:
        i. Applicant/Recipient Name
            1. This is a required field and will not be editable field (in both Create and Edit mode) and it will auto populate with the name of the person that was selected through the Select Person page.
            2. This will be in the format of First Name Last Name (Example: Tom Bradley).
        ii. Status
            1. This will be a required field.
            2. When in create mode (when the worker is trying to create the ROI record directly through CalSAWS) the field will automatically default to 'Approved', and it will not be editable.
            Note: The ROI record will save with a status of 'Approved' when it's created directly through CalSAWS application.
            3. In Edit mode, the Status field will be an editable drop-down field.
                a. When the page first opens in Edit mode, the drop-down field will default to the latest status.
                    i. The drop-down field will have the following values when the latest status is 'Approved'.
                        1. Approved
                        2. Revoked
                Note: ROI record will automatically be in 'Approved' status when it is created through CalSAWS application. Please see Section 2.7of the design document for further details on how

an ROI record will automatically have a status of Approved when it comes in through the API.

ii. The drop-down field will have the following values when the latest status 'Pending'.
    1. Approved
    2. Pending
    3. Revoked

Note: The status of 'Pending' will only be possible when the ROI record was created through the API. Please reference Section 2.7 of the design document for further details on how an ROI record will automatically have a status of Pending when it comes in through the API.

iii. The drop-down field will have the following values when the latest status is 'Revoked'.
    1. Revoked

Note: Please reference Section 2.7 of the design document for further details on how an ROI record will automatically have a status of Revoke when it comes through the API.

Note: The Status will automatically be updated to Expired based on the End Date of the ROI record. Please refer to Section 2.13 since this status will be updated through a new batch job.

iii. County of Record
    1. This will be a required field and will not be editable. The page will automatically default to the county of the logged in user.
iv. Contact Information block
    1. The Contact Information block will have the following fields that are not editable when the page is in Edit mode.
        a. Applicant/Recipient Mailing Address
            i. Does not have a mailing address
                1. This field will have a check box
                2. Clicking on the check box will gray out the Address Line1,

Address Line 2, City, State and Zip Code field.

3. When the check box on this field is checked off, the system will not save any information that are entered on the Address Line 1, Address Line 2, City, State, and Zip Code
4. The check box will not be checked off when in Create mode when the page initially loads.
5. This field will not display in Edit and View mode if it's not selected.

Commented [CB1]: If I come in Edit mode and want to change the address or phone to Does not have one, how can I do that if the checkbox is not visible?

Commented [EK2R1]: At this time, only the status can be updated in Edit mode. All other fields are not editable. However, we have a meeting to discussed opening all fields to be editable in Edit mode after the county response. Design Document will need to be updated accordingly (if needed) after the meeting to discuss this further.

ii. Address Line 1:
1. This will be a required text field and the maximum amount of characters is 50.
2. Once the maximum amount of character is reached, no further characters can be added.
3. When the 'Does not have a mailing address' is checked off, the field will be greyed out and will no longer be required.
4. This field will not display in Edit and View mode when the 'Does not have a mailing address' is checked off.

iii. Address Line 2:
1. This will be a text field and the maximum amount of characters is 60
2. Once the maximum amount of character is reached, no further characters can be added.
3. When the 'Does not have a mailing address' is checked off, the field will be greyed out.
4. This field will not display in Edit and View mode when the

'Does not have a mailing address' is checked off.

iv. City
   1. This will be a required text field and the maximum amount of characters is 50
   2. Once the maximum amount of character is reached, no further characters can be added.
   3. When the 'Does not have a mailing address' is checked off, the field will be greyed out and will no longer be required.
   4. This field will not display in Edit and View mode when the 'Does not have a mailing address' is checked off.

v. State
   1. This will be a required drop-down field and will list all 50 states (in abbreviation) and will be ordered in alphabetical order.
   2. In create mode the field will default to 'CA'.
   3. When the 'Does not have a mailing address' is checked off, the field will be greyed out and will no longer be required.
   4. This field will not display in Edit and View mode when the 'Does not have a mailing address' is checked off.

vi. Zip Code:
   1. This will be a text field and the maximum amount of characters is 5.
   2. Once the maximum amount of character is reached, no further characters can be added.
   3. When the 'Does not have a mailing address' is checked off, the field will be greyed

out and will no longer be required.
4. This field will not display in Edit and View mode when the 'Does not have a mailing address' is checked off.
5. Create two new validations:
    a. "Zip Code – Zip Code can only contain numeric characters."
        i. Validation will be triggered when the user clicks Save and the value entered contains alpha characters are entered on the Zip Code field.
    b. Zip Code – Zip Code must be 5 characters in length."
        i. Validation will be triggered when the user clicks Save, and value entered is not in the correct 5 characters length.

b. Applicant/Recipient Phone Number
    i. Does not have a phone number
        1. This field will have a check box
        2. Clicking on the check box will gray out the Phone Number field.
        3. When check box on this field is checked off, the system will not save any information that's entered on the Phone Number field.
        4. The check box will not be checked off when in Create mode when the page initially load.

            5. This field will not display in Edit and View mode if it's not selected.
        ii. Phone Number:
            1. This will be a required text field and the maximum number of characters is 13.
            2. Once the maximum amount of character is reached, no further characters can be added.
            3. The system will automatically format the value as (xxx)xxx-xxxx upon saving when the value entered is only 10 characters long.
            4. When the 'Does not have a phone number' is checked off, the field will be greyed out and will no longer be required.
            5. This field will not display in Edit and View mode when the 'Does not have a Phone Number' is checked off.
            6. Create one new validation:
                a. "Phone Number – The phone number must be in the form (999)999-9999 and cannot start with a zero.
                    i. Validation will be triggered when the user clicks Save and the value entered contains alpha characters, it is not a minimum of 10 characters length, or it starts with '0'.

v. Program(s) for Release block
    1. This will be a required and will not be editable when in Edit mode. Users will need to select at least one of the available options.

2. Display the following options with a select box. Users will be able to select all 3 options.
    a. CalWORKs
    b. CalFresh
    c. Medi-Cal
3. Select boxes will not be checked off when the page initially loads in Create mode.

vi. Community Based Organization Information block
1. This block will not be editable when the page is in Edit mode.
2. When the page initially loads in Create mode the block will have a required field titled ‘Organization Name’ along with a Select button.
    a. Clicking the Select button will call the CBO-Organization API (reference Section 2.8 for details on how this API will work) and will direct users to the Select Community Based Organization page (refer to Section 2.4 for more details on how the page will work).
    b. After an organization is selected, the user will be directed back to the Release of Information page and will now display the following information:
        i. The name of the selected organization along with the Select button (clicking the Select button again will make another call the CBO Organization API and will direct the user to the Select Community Based Organization page).
        ii. A dynamic field titled “Medi-Cal CBO Managers/Assisters:”
            1. This field will only display when the Medi-Cal program is selected from the Program(s) for Release block.
            2. This will be a drop down field with the options of:
                a. No (Default value)
                b. Yes
                    i. When “Yes” is selected display a button titled “Select”.
                    ii. Clicking “Select” will call the CBO-Organization API (reference

Section 2.9 for details on how this API will work) and will direct users to the Select CBO Managers & Assisters for Medi-Cal page (refer to Section 2.5 for more details on how the page will work).

iii. After the Medi-Cal Specific Managers/Assisters are selected the user will be directed back to the Release of Information Detail page. The page will continue to display the "Select" button (clicking the Select button again will make another call the CBO Organization API and will direct the user to the Select CBO Managers & Assisters for Medical page) next to the drop down field along with a new expanded sub block titled " Medi-Cal Specific Manager(s)/Assister(s)" (see below for more details on this sub block).

iii. An expanded sub block titled "Managers Name".
    1. This sub block will list the name of all the Managers associated to the selected organization (the name of Managers that's displayed will be based on the information that is being returned from ForgeRock through the CBO – Organization API. Reference Section 2.9 for more details).
        a. Managers will be listed in the format of First Name Last Name (Example: Minnie Mouse)
    2. This sub block will not be expanded when the page is in Edit or View mode.
    3. The block will not display when the user is directed back to the Release of Information Detail page from the Select CBO Managers & Assisters for Medi-Cal page and the only program selected is Medi-Cal.

iv. An expanded sub block titled "Medi-Cal Specific Manager(s)/Assister(s)".
    1. This sub block will have two columns titled "Medi-Cal Manager(s) Name" and "Medi-Cal Assister(s) Name".
        a. The "Medi-Cal Manager(s) Name" column will list the name of the selected Managers that was selected through the Select CBO Managers & Assisters for Medi-Cal page.
            i. Managers will be listed in the

format of First Name Last Name (Example: Mickey Mouse).

b. The "Medi-Cal Assister(s) Name" column will list the name of the selected Assister(s) that was selected through the Select CBO Managers & Assisters for Medi-Cal page.
    i. Assisters will be listed in the format of First Name Last Name (Example: Mary Poppin).

2. This sub block will not be expanded when the page is in Edit or View mode.
3. The block will display when the user is directed back to the Release of Information Detail page from the Select CBO Managers & Assisters for Medi-Cal page and the Medi-Cal CBO Managers/Assisters is set to "Yes".

v. Information that was entered or selected on the Release of Information Detail page prior to going to the Select CBO Managers & Assisters For Medi-Cal will remain.

3. Any selection that was made on the Community Based Organization Information block will not be retained when changes are made to the Program(s) for Release block after an organization is selected (this will include selecting the CBO Managers and Assisters specific for Medi-Cal).
    a. The block will display the field Organization Name (required field) along with a Select button.
       Note: The block will look the same way as when the page first initially loads in Create mode. Users will need to go through the same process of selecting the organization

and all other fields mentioned above as applicable.

vii. Medi-Cal – Reason for Sharing Information block
1. This will be a required block and will not be editable when in Edit mode. Users will be able to select multiple options but will be required to select at least one of the available options.
2. When in Edit or View mode, all available options will be displayed but only the one that was selected will display a check mark next to it.
3. This will be a dynamic block and will only display when the 'Medi-Cal' option is selected from the Program(s) for Release block.
    a. This block will be located above the Program Information for Release block.
4. This block will have the following options listed in the following order
    a. Assist in applying for and/or keeping public benefits
    b. A specific case issue
    c. At the request of the individual
    d. Other :
        i. Other will be followed by a text field.
            1. Text field will have a maximum amount of characters of 1000.
            2. Once the maximum amount of characters is reached, no further characters can be entered.
        ii. Create a new validation "Other – This is a required field, please enter a value."
            1. Validation will be triggered when the users click Save and the Other option is selected from the Medi-Cal – Reason for Sharing Information block and there is no value entered on the text field.

viii. Program Information for Release block
1. This will be a required block and will not be editable when in Edit mode. Users will be able to select multiple options but will be required to select at least one of the available options.
2. When in Edit or View mode, all available options will be displayed but only the one that was selected will display a check mark next to it.

Commented [CB3]: I keep seeing 'will not be editable in edit mode' for fields that should be editable for the worker. Per the State, the Worker should be able to edit a record previously entered if something was entered in error.

Commented [EK4R3]: Pending outcome of meeting

3. This block will be located below the Medi-Cal reason for Sharing Information block when the Medi-Cal program is also selected from the Program(s) for Release Block.
4. This block will have the following options listed in the following order
    a. Notices of Action (NOAs)
    b. Verification Requests from your County Worker
    c. Benefit Award
    d. Program Status
    e. Termination Reason(s)
    f. Upcoming SAR 7 and Renewal Due Dates

ix. Length of Information Access with the CBO block
1. This will be a required block and it will not be multi select (users can only select one).
2. This will not be an editable field when in Edit mode.
3. When in Edit and View mode, only the selected option will display.
4. The following options will be available and have radio buttons next to them, and it will be listed in the following order
    a. 365 calendar days
    b. Number of days (less than 365 days): "Text field" days
        i. "Text field" will be a text field
            1. The maximum amount of characters allowed is 3.
            2. Once the maximum amount of characters is reached, no further characters can be entered.
    c. Create 2 validations
        i. "Number of days (less than 365 days) - This is a required field, please enter a value."
            1. Validation will be triggered when the users click Save and the Number of days (less than 365 days) option is selected from the Length of Information Access with the CBO block is selected and no value is entered on the text field.
        ii. "Number of days (less than 365 days) – Input [xxx] is not valid for this field.

1. Validation will be triggered when the users click Save and the value entered on the text field is greater than 365 or it contains alpha characters.
2. XXX will be the value entered on the text field.

x. Length of Case History block
   1. This will be a required block and it will not be multi select (users can only select one).
   2. This will not be an editable field when in Edit mode.
   3. When in Edit and View mode, only the selected option will display.
   4. The following options will be available and have radio buttons next to them, and it will be listed in the following order
      a. The past 60 days
      b. No case history

xi. Signature Information block
   1. All fields on this block will be required and will not be editable in Edit mode.
   2. Display the following fields:
      a. Signature of Applicant/Recipient:
         1. This section will display for all programs upon loading in Create mode.
         2. When CalWORKs and/or Medi-Cal programs are selected, this section will have a radio button.
            a. This will be the selected option.
         3. In Edit mode and View mode, this field will not display when Parent/Guardian Signature option is selected (this is only possible when CW and/or MC is selected).
      b. First Name
         i. This field will be located below the "Signature of Applicant/Recipient: field.
         ii. This will be a text field and will have a maximum character limit of 30.
         iii. Once the maximum amount of characters is reached, no further characters can be entered.

iv. This field will be greyed out when the Signature of Parent/Guardian is selected (this is only possible when CalWORKs and/or Medi-Cal is selected).
   1. Any information entered on this field will not be saved.

Note: This is where users will need to enter the First Name of the Applicant/Recipient.

c. Last Name
   i. This field will be located below the "Signature of Applicant/Recipient: field.
   ii. This will be a text field and will have a maximum character limit of 30.
   iii. Once the maximum amount of characters is reached, no further characters can be entered.
   iv. This field will be greyed out when the Signature of Parent/Guardian is selected (this is only possible when CalWORKs and/or Medi-Cal is selected).
      1. Any information entered on this field will not be saved.

   Note: This is where users will need to enter the Last Name of the Applicant/Recipient.

d. Signature of Parent/Guardian:
   i. This field will have a radio button when CalWORKs and/or Medi-Cal is selected on the Program(s) for Release block.
      1. This field will not display when page initially load in Create mode or when the only program selected in CalFresh, this field
      2. In Edit mode and View mode, this field will not display if it's not selected.

e. First Name
   i. This field will be located below the "Signature of Parent/Guardian:" field.

ii. This will be a text field and will have a maximum character limit of 30.
iii. Once the maximum amount of characters is reached, no further characters can be entered.
iv. This field will be greyed out when the Signature of Applicant/Recipient is selected (this is only possible when CalWORKs and/or Medi-Cal is selected).
    1. Any information entered on this field will not be saved.

Note: This is where users will need to enter the First Name of the Parent/Guardian.

f. Last Name
    i. This field will be located below the "Signature of Parent/Guardian:" field.
    ii. This will be a text field and will have a maximum character limit of 30.
    iii. Once the maximum amount of characters is reached, no further characters can be entered.
    iv. This field will be greyed out when the Signature of Applicant/Recipient is selected (this is only possible when CalWORKs and/or Medi-Cal is selected).
        1. Any information entered on this field will not be saved.

    Note: This is where users will need to enter the Last Name of the Parent/Guardian.

g. Signature Date:
    i. The user can enter their desired date or click on the calendar icon to select the date.
    ii. Signature Date will need to be in the format of MM/DD/YYYY (Example: 12/25/2022).
    iii. Create a new validation "Signature Date – Must be a valid calendar date and be in the form MM/DD/YYYY."

1. Validation will be trigger when the user clicks Save, and the date enter on the Signature Date field is not a valid calendar date or not in the correct format.

h. End Date:
   i. This field will be blank when the page is in Create mode.
   ii. The system will automatically calculate and save the End Date as this will be based on the Signature Date and the option that is selected from the Length of Information Access with the CBO.
   iii. Example 1: Signature Date is 01/18/2023 and the option selected from the Length of Information Access with the CBO is 365 calendar days. The system will automatically insert an End Date of 01/18/2024
   iv. Example 2: Signature Date is 01/18/2023 and the option selected from the Length of Information Access with the CBO is Number of Days (less than 365 days): 5 days. The system will automatically insert an End Date of 01/23/2023
   v. End Date will be in the format of MM/DD/YYYY

xii. Release of Information Status History block
1. Upon loading of the page when in Create mode this block will not be expanded.
2. Upon loading of the page when in Edit or View mode this block will be expanded.
3. This block will display all the history information of the statuses of the specific ROI record and will have 3 columns.
   a. Status
      i. This will display all the status of the ROI record.
      ii. The latest status will display on top.
   b. Updated Date
      i. This will display the Date that the ROI record was updated.
      ii. The date will display in the following format of MM/DD/YYYY
   c. Update By

i. This will display the Staff ID of the user that updated the record.
ii. This will be a hyperlink and clicking on the hyperlink will take the user to the Worker Detail page for the selected Staff.

xiii. Create a validation message "Program(s) for Release – The selected Applicant/Recipient is not a primary applicant for the Program(s) selected."
   1. Validation message will be triggered when the user clicks Save, and the selected person is not a primary applicant for the Program(s) selected.

xiv. Images button
   1. Clicking this button will open the Hyland imaging solution on a new window.
   2. Button will be available on the page in all modes (Create, Edit, View)
   3. This button will only display to users that are assign to either the 'ImagingSearchCase' security right or the 'ImagingSearchPerson' security right.
      Note: Both the 'ImagingSearchCase' and the 'ImagingSearchPerson' are existing security rights.

xv. Save button
   1. Clicking this button will Save the ROI record and will direct the user to the Release of Information Detail page in View mode for the specific ROI record.
   2. This button will display in both Create and Edit mode.

xvi. Cancel
   1. Clicking this button will not save the ROI record or save any updates/changes to the record and will direct the user back to the Release of Information Search page.
   2. This button will display in both Create and Edit mode

xvii. Close
   1. Clicking this button will direct the user back to Release of Information Search page.
   2. This button will display in View mode

xviii. Edit
   1. This button will only display in View mode and only for users that are assigned to the ReleaseofInformationEdit Security Right.

2.3.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** Release of Information→ Select Person → Release of Information Search → Release of Information Detail

2.3.5 Security Updates

Security Right	Right Description	Right to Group Mapping
ReleaseofInformationView	Ability to search for and view the Release of Information Detail pages.	Release of Information View
ReleaseofInformationEdit ReleaseofInformationView	Ability to search for, view and add Release of Information Detail pages.	Release of Information Edit

Security Group	Group Description	Group to Role Mapping
Release of Information View	Ability to search for and view the Release of Information Detail pages.	Clerical Supervisor, Eligibility Staff, Eligibility Supervisor, Employment Services Supervisor, Hearings Staff, Hearings Supervisor, Help Desk Staff, Quality Assurance Staff, Quality Assurance Supervisor, Regional Call Center Staff, Regional Call Center Supervisor, Special Investigations Staff, Special Investigations Supervisor
Release of Information Edit	Ability to search for, view and add Release of	Eligibility Staff, Eligibility Supervisor

Security Group	Group Description	Group to Role Mapping
	Information Detail pages.	

2.3.6 Page Mapping

Add page mapping for the Release of Information Detail page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Select Community Based Organization

2.4.1 Overview

The Select Community Based Organization page will display a list of all the approved organizations for the County of the logged in User. Also, it will allow the user to select and add an approved organization for the CBO ROI.

2.4.2 Select Community Based Organization – Mockup

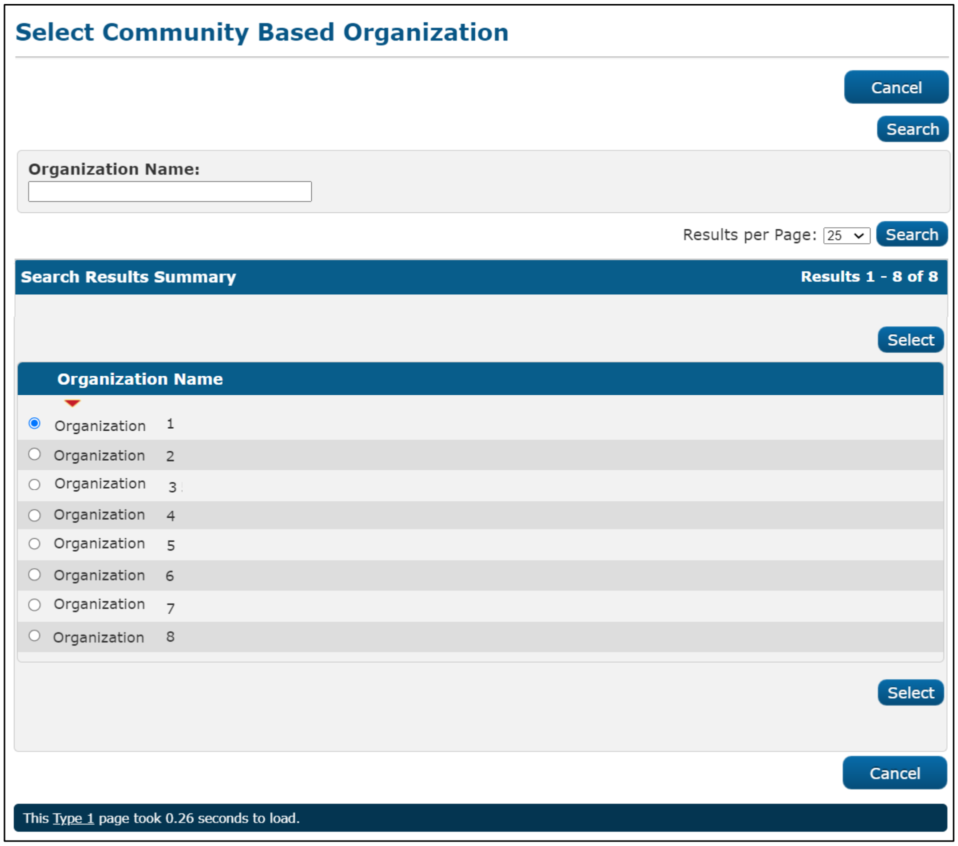


Figure 2.3.2-1 – Select Community Based Organization Page

2.4.3 Description of Changes

1. Create a new page title 'Select Community Based Organization'.
    a. This page will be accessible upon clicking on the 'Select' button from the Organization Name field on the 'Community Based Organization Information' block from the 'Release of Information Detail' page.
    b. Once the page loads, it will display the entire list of the CBOs on the page. If user enters the search criteria, the list of the CBOs will be updated according to the search criteria entered.
        i. Upon selecting the organization and clicking on Select button, user will be navigated back to the Release of Information Detail page. User will be able to view the

selected organization and its associated managers in the Release of Information Detail page Community Based Organization Information block.

ii. If there are more than 25 records on the page, pagination will occur.

2.4.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** Release of Information

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

1. Add page mapping for the Select Community Based Organization page.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Select CBO Managers & Assisters for Medi-Cal

2.5.1 Overview

Select CBO Managers & Assisters for Medi-Cal page will allow the user to select the manager(s) and/or assisters(s) for the ROI when the Medi-Cal program is selected.

2.5.2 Select CBO Managers & Assisters for Medi-Cal – Mockup

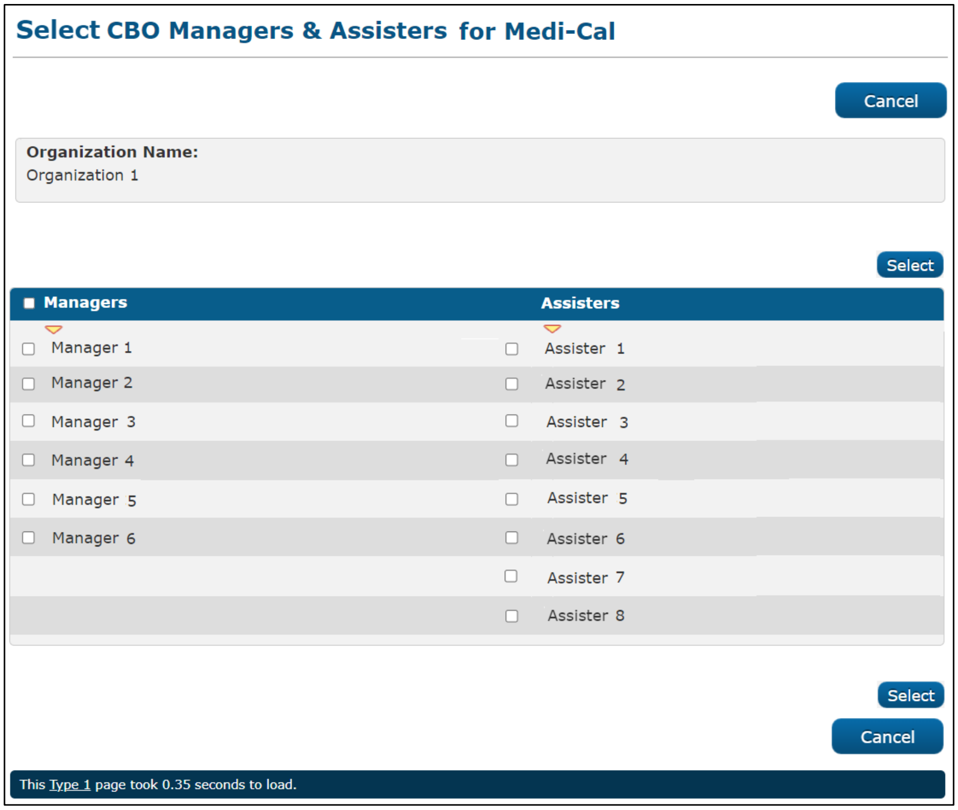


Figure 2.4.2-1 – Select CBO Managers and Assisters for Medi-Cal

2.5.3 Description of Changes

1. Create a new page title ‘Select CBO Managers & Assisters for Medi-Cal’ page.
    a. This page will be accessible upon clicking on the ‘Select’ button from the Medi-Cal CBO Managers/Assisters field on the ‘Community Based Organization Information’ block from the ‘Release of Information Detail’ page.
    b. If there are more than 25 records on the page, pagination will occur.

2.5.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** Release of Information

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

1. Add page mapping for the Select CBO Managers & Assisters for Medic-Cal page.

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Case Summary

2.6.1 Overview

This page allows the user to access the case summary of the entire case, including summaries of the programs on the selected case. The 'Self-Service Portal' section displays the e-Application and linked persons information. This change will add a new section under 'Self-Service Portal' to display the CBO ROI information.

2.6.2 Case Summary – Self-Service Portal Mockup

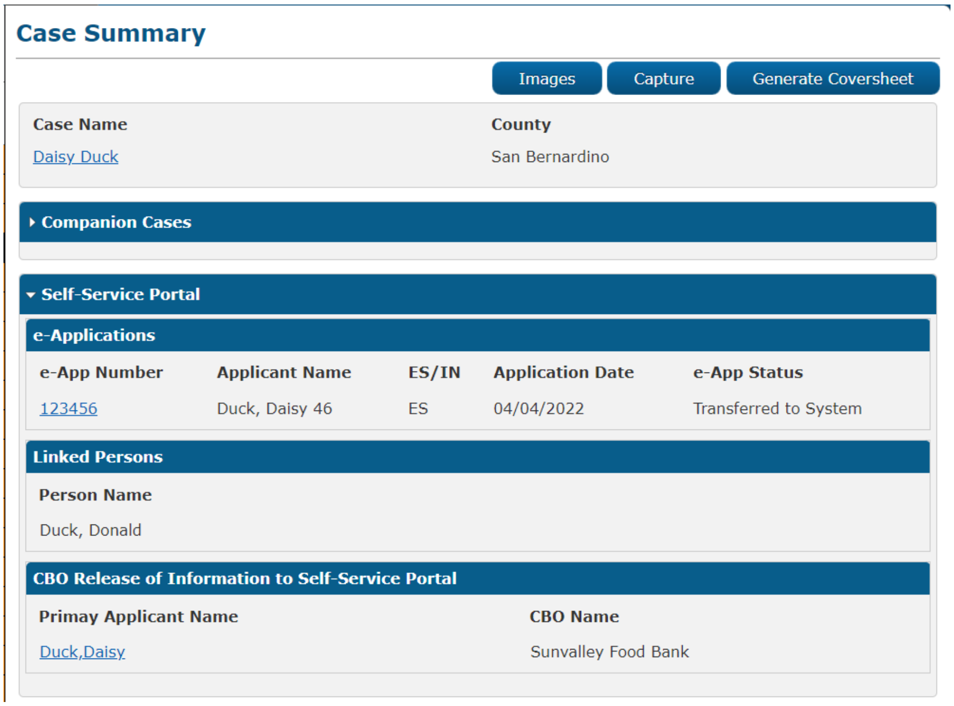


Figure 2.5.2-1 – Case Summary Page – Self-Service Portal Section – 1

2.6.3 Description of Change

1. Add a new sub block title ‘CBO Release of Information to Self-Service Portal’ on the ‘Self-Service Portal’ block of the page.
    a. The new ‘CBO Release of Information Self-Service Portal’ sub block will display a list of ROI records that meets both conditions:
        i. The primary applicant (Applicant/Recipient Name on the Release of Information Detail) on the ROI record is a primary applicant to one of the following programs: CalWORKs, CalFresh, Medi-Cal on the case that is being viewed.
        ii. The ROI records belongs to the same county (‘County of Record’ on the Release of Information Detail) as the Case that is being viewed.
        iii. Examples:
            1. ROI records were created for Daisy Duck in the San Bernardino County (County of Record on the

Release of Information Detail is San Bernardino). Viewing the Case Summary page for Case A12345 that belongs to San Bernardino where Daisy Duck is the primary applicant for both CalFresh and Medi-Cal program, but not for CalWORKs. The ROI records for Daisy Duck will display in this scenario.

2. ROI records were created for Daisy Duck in the San Bernardino County (County of Record on the Release of Information Detail is San Bernardino). Viewing the Case Summary page for Case A56789 that belongs to San Bernardino where Daisy Duck is not the primary applicant for CalWORKs, CalFresh and Medi-Cal program. The ROI records for Daisy Duck will not display in this scenario.
3. ROI records were created for Daisy Duck in the San Bernardino County (County of Record on the Release of Information Detail is San Bernardino). Viewing the Case Summary page for Case ABC123 that belongs to San Bernardino where Daisy Duck is the primary applicant for GR/GR program but not for CalWORKs, CalFresh and Medi-Cal programs. The ROI records for Daisy Duck will not display in this scenario.
4. ROI records were created for Daisy Duck in the San Bernardino County (County of Record on the Release of Information Detail is San Bernardino). Viewing the Case Summary page for Case B2WCW90 that belongs to Los Angeles where Daisy Duck is the primary applicant for CalWORKs, CalFresh and Medi-Cal program. The ROI records for Daisy Duck will not display in this scenario.

b. The new 'CBO Release of Information Self-Service Portal' sub block will have two columns titled 'Primary Applicant Name' and 'CBO Name'.
   i. The 'Primary Applicant Name' column will display the name of the primary applicant for the ROI record.
      1. This will be the 'Applicant/Recipient' name on the Release of Information Detail page.
      2. The name will display in the format of Last Name, First Name (Example: Duck, Daisy) and will display as a hyperlink for users that are assigned to the ReleaseofInformationView or ReleaseofInformationEdit Security right (these are new security rights that are being created as part of this SCR).
         a. Clicking the hyperlink will direct the users to the Release of

Information Detail page in View mode.

ii. The ‘CBO Name’ column will display the name of the organization for the corresponding ROI record.

1. This is name of the organization that’s selected on the Release of Information Detail page.

2. Hide the ‘CBO’ column from displaying on the ‘Linked Person’ block on the Case Summary page.

2.6.4 Page Location

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

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Add page mapping for the ‘CBO Release of Information to Self-Service Portal’ section of the Case Summary page.

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Release of Information - ROI API

2.7.1 Overview

The Release of Information API is a RESTful webservice that will allow CalSAWS to do the following:

- Send ROI information to Self-Service portal when a ROI record is created and approved in CalSAWS.
- Send and receive the ROI status updates for existing ROI records.
- Retrieve the ROI information from Self-Service portal and store in CalSAWS Release of Information pages. This information will be readily available in the Release of Information Detail page.

Refer to Appendix section for process flow that are supported by this API.

2.7.2 Description of Change

1. Create a new RESTful API webservice in CalSAWS to save, update, and send the following Release of Information form attributes.
    a. Release of Information Attributes – These are the attributes that CalSAWS will display on the new Release of Information detail page and send ROI details to the Customer's and CBO's Self-Service Portal account.
        i. Refer to Supporting documents section for ROI API data field mapping.

Release of Information Attributes	
Attribute	**Description**
County	The name of county that information is being requested from. Note**:** For API purposes, the County will be received/sent in a county code format (i.e., Los Angeles County = 19)
Applicant/Recipient Name	The first and last name of the Customer listed on the CBO ROI form. This is the Primary Applicant of the program on a case.
Applicant/Recipient Mailing Address	The mailing address of the ROI Customer listed on the CBO ROI form.
Mailing Address Indicator	This indicates if the ROI Customer does not have a mailing address
Applicant/Recipient Phone Number	The phone number of the ROI applicant listed on the CBO ROI form
Phone Number Indicator	This indicates if the ROI applicant/recipient, listed on the CBO ROI form, does not have a phone number
CBO Name	The name of the of Community-Based Organization.
Program(s)	The type of program(s) for which the ROI applicant/recipient wishes to share information. Selections will include • CalFresh • CalWORKs • Medi-Cal
CBO Individual(s) *(If Medi-Cal program is selected)*	The name(s) of the CBO individual(s) (Managers and Assisters) associated to a CBO.

Release of Information Attributes	
Attribute	**Description**
Medi-Cal Reason(s) *(If Medi-Cal program is checked)*	This list the Medi-Cal reasons for sharing the information to a CBO manager/assister. Selections include the following: • Assist in applying for and/or keeping public benefits • A specific case issue • At the request of the individual • Other – ROI applicant/recipient may specify a reason if the reasons above do not apply.
Benefit Details to be shared to CBO	The specific case information to be released to the CBO identified on the CBO ROI form. The selection list includes the following (*See Case Details – CBO API for case information details*): • Notices of Action (NOAs) • Verification Requests from your County Worker • Benefit Award • Program Status • Termination Reason(s) • Upcoming SAR 7 and Renewal Due Dates – Note: These SAR 7 and RE due dates pertain to current or most recent dates.
ROI Time Period	The desired length of time the applicant/recipient chooses to share case information with the CBO/Assister. This time period begins the date the form is signed. Time period options include either: • 365 calendar days or • Number of days (less than 365 days): {'X' Number of days} days Note: Any new specific information indicated from the applicant/recipient to share becomes available during this time period will also be available to the CBO/Assister.

Release of Information Attributes	
Attribute	**Description**
Case History Time Period	The desired length of time the applicant chooses to share case history, except for any previous NOAs, with CBO Manager/Assister. The time period options include either: • The past 60 days – 60 days prior to date of signature. When selected, all data elements between 60 days prior to date of signature and the current date will be able to be viewed by the CBO. • No Case history – When selected, all data elements between date of signature and current date will be able to be viewed by the CBO Manager/Assister. Note: Not all case information history can be shared to a CBO (i.e., Historical NOAs/Forms, Verification Requests, Program Status, and SAR 7 and Renewal Due Dates will not be shared to the CBO)
Applicant/Recipient Name	The first and last name of Customer on the ROI. This is the Primary Applicant of the program on a case. Note: There are two locations for a customer to enter their name. The second field location is right above the 'Signature of Applicant/Recipient'.
Signature of Applicant/Recipient	The applicant/recipient's signature on the CBO ROI form
Applicant Signature Date	The date the CBO ROI form was signed by the applicant/recipient
Birth Date	The applicant/recipient's date of birth indicated on the CBO ROI form
Signature of Parent/Guardian	The Parent/Guardian's signature is required for Minor Cases, in some instances. The signature may only be needed if the program selected is CalWORKs or Medi-Cal.
Parent Signature Date	The date the CBO ROI form was signed by the Parent/Guardian of the ROI applicant/recipient

2. Create CTCR to add a new reference column for Category 263 and add a 'Y' indicator for the following statuses for ROI: Approved, Pending, Expired, Revoked.
3. Create a new Release of Information API that accepts and stores the data elements in (Section 2.7.2.1.a.i – CBO ROI Form Attributes) in the POST method for a matched County, Customer GUID and CBO/CBO Manager/Assister GUID. The ROI information will be processed and stored in CalSAWS.
    a. All form attributes are required to be completed, or have an option selected (when applicable), with the exception of a chosen Assister for Medi-Cal or Signature of Parent/Guardian, to facilitate the automated process into CalSAWS and to BenefitsCal. If the form is incomplete, the automated process will not occur, and the CBO will not have access to the customer's case information.
    b. If all form attributes are complete and an 'Approved' or 'Pending' ROI status is received in the API, the ROI information will be populated into the Release of Information Detail page.
        i. Approved status – all form attributes are complete and Name/DOB match is found in CalSAWS.
        ii. Pending status – all form attributes are complete but there is a discrepancy in Name/DOB match or there is a duplicate ROI for the same Applicant/CBO/County combination. This will require a worker to validate/review the ROI detail for the customer.
        iii. Create a Journal entry for the case with details when an automated ROI is received with an 'Approved' or 'Pending' status.
            1. Person Name: The individual's First and Last name listed on the CBO ROI form.
            2. Date Received: The date the ROI from was received in CalSAWS. Format: MM/DD/YYYY
            3. CBO Name: The name of the CBO listed on the CBO ROI form.
            4. ROI Status: The status of the ROI received via API. Status = Approved or Pending.
            5. Signature Date: The signature date documented on the customer's CBO ROI form.

Journal Entry	Description
New/Update	Yes
Journal Category	Interfaces
Journal Type	Self-Service

Journal Entry	Description
Short Description	CBO ROI Form Received
Long Description	An CBO ROI Form with an effective date of {Signature Date} has been received with a {ROI Status} status on (Date Received} for {Person Name} with the Organization: {CBO Name}.
Trigger Condition	When an automated ROI is received through the API with an 'Approved' or 'Pending' status

c. When the ROI details is successfully received and stored into the Release of Information detail page (Approved or Pending status), send the following response to BenefitsCal:
   i. ROI Identifier – System generated identifier for an ROI record.
   ii. Signature Date – The effective date or Signature date of the ROI.
   iii. Expiration Date – The expiration date or end date created based on the Signature date and 'Length of Information Access with a CBO' of the ROI. Note: The expiration date will be set in CalSAWS.

d. Invoke a store call in the POST method for ROI with 'Approved' status. This will bypass the document routing rule task for an imaged CBO ROI form for an 'Approved' ROI. This will result a document routing rule task to only generate for a 'Pending' ROI.

e. Refer to Appendix section '*Release of information form submission process flow*'. The diagrams depict the various channels a CBO ROI form can be submitted and processed in CalSAWS.

4. Create a Customer View endpoint in the ROI API that pulls and sends the CBO ROI form details (Section 2.7.2.1.a.i – CBO ROI Form Attributes) in the GET method based on matched Customer GUID. The ROI information will be sent from the CalSAWS ROI API and sent to display on the customer's Self-Service Portal account.
   a. Send the following in the response to BenefitsCal:
      i. ROI Identifier – System generated identifier for an ROI record.
      ii. ROI Status – The current status of the ROI record.
      iii. County Code – The county code of the ROI record.
      iv. Signature Date – The date of signature of the ROI record.

v. Expiration Date – The expiration date of the ROI record.
vi. Benefit details – The selected benefit details on the ROI record.
vii. CBO Info – The name of the CBO, including any listed CBO Managers and/or Assisters.
viii. Case history indicator – This indicates the customer consents to share the past 60 days from signature date of case history.

5. Create a CBO View endpoint in the ROI API that pulls and sends the customers ROI information in the GET method based on a matched CBO/CBO Manager/Assister GUID. The ROI information will be sent from the CalSAWS API and sent to display on the CBO's Self-Service Portal account.
    a. Send the following in the response to BenefitsCal:
        i. ROI Identifier – System generated identifier for an ROI record.
        ii. ROI Status – The current status of the ROI record.
        iii. County Code – The county code of the ROI record.
        iv. Expiration Date – The expiration date of the ROI record.
        v. Applicant Name – The first and last name of the primary applicant.
        vi. Date of Birth – The date of birth of the applicant.

6. Create a ROI Status API endpoint that responds with the following information in the request for the PUT method based on the following parameters when a customer revokes their ROI through their Self-Service Portal account:
    a. ROI Identifier – System generated identifier for an ROI record.
    b. ROI Status – The 'Revoked' status of the ROI. **Note**: The Customer can only update the status of their ROI record to 'Revoked' on their Self-Service Portal account or by contacting the county. A CBO Manager/Assister cannot Revoke an ROI via their Account.
    c. Action Date – The effective date of the ROI status update for an existing ROI record.
    d. Create a Journal entry for the case with details when the ROI status for an existing ROI record is automatically updated via ROI API.
        i. Person Name: The individual's First and Last name listed on the CBO ROI form.
        ii. CBO Name: The name of the CBO on the CBO ROI form
        iii. ROI Status: The 'Revoked' status of and ROI record updated via API.

Journal Entry	Description
New/Update	Yes
Journal Category	Interfaces
Journal Type	Self-Service
Short Description	ROI Status updated
Long Description	The ROI status for {Person Name} with Organization: {CBO Name} has been updated to {ROI Status}.
Trigger Condition	When the status of an existing ROI was updated to 'Revoked' through the ROI API.

2.7.3 Partner Integration Testing

Yes

2.7.4 Execution Frequency

Real-Time web service

2.7.5 Key Scheduling Dependencies

N/A

2.7.6 Counties Impacted

CalSAWS counties

2.7.7 Category

N/A

2.7.8 Data Volume/Performance

N/A

2.7.9 Interface Partner

BenefitsCal

2.7.10 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.)

2.8 Forms API – ROI

2.8.1 Overview

The Forms API is a RESTful webservice that generates a PDF of a form with the customer's answers mapped and uploads the said form to the imaging solution. This service will be updated to have the ability to generate the CBO ROI form with customer's answers and upload to the imaging solution.

2.8.2 Description of Change

1. Update the existing Forms RESTful API with a ROI operation that accepts a request body with a county code, applicant name, and details to the CBO ROI form when successfully received in the ROI API.
    a. This API will generate a Release of Information (ROI) (ABCDM 229) with Applicant/Recipient information populated.
    b. The API will return a successful response when the PDF has been successfully generated given the request parameters it. Received. Refer to section 2.7.2.1 for CBO ROI form attributes.
    c. In case of errors, the API will return customized error responses.
    d. Upon successful generation of the form, it will upload the form to Hyland.
2. Store the CBO ROI form into the designated Imaging System drawer.
    a. For a customer with an existing case within the County, automatically store the CBO ROI form in the Hyland person drawer.
    b. For a customer with no existing case submitting an CBO ROI form with an application, store in the Hyland external staging drawer. The application, including the CBO ROI form, will be stored into the Hyland person drawer once a Case link is established.

ROI Submission Scenario	Channel	Auto/Manual Process	Imaging Drawer
Customer with a BenefitsCal account and an existing CalSAWS case initiating the ROI from their BenefitsCal	ROI API	Auto	Person drawer

ROI Submission Scenario	Channel	Auto/Manual Process	Imaging Drawer
dashboard for a county where they have an existing case			
Customer with a BenefitsCal account, no existing case and submitting on application with an ROI	ROI API	Manual	External staging drawer

2.8.3 Partner Integration Testing

Yes

2.8.4 Execution Frequency

Real-Time web service

2.8.5 Key Scheduling Dependencies

N/A

2.8.6 Counties Impacted

CalSAWS counties

2.8.7 Category

N/A

2.8.8 Data Volume/Performance

N/A

2.8.9 Interface Partner

BenefitsCal and Hyland

2.8.10 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 ForgeRock - CBO Organization API

2.9.1 Overview

CalSAWS will create a new webservice with ForgeRock that will allow CalSAWS to retrieve a CBO's information for the worker based on the customer's program selection on the Select Community Based Organization Search page.

2.9.2 Description of Change

1. Update the 'Select Community Based Organization Search' and 'Select Managers & Assisters for Medi-Cal' page to support the new webservice with ForgeRock. The following information will be displayed on the corresponding pages:
    a. On the 'Select Community Based Organization Search' page display the Agency/Organization Name.
    b. On the 'Select Managers & Assisters for Medi-Cal' page display:
        i. CBO Manager – The CBO Manager(s) first and last name associated to the CBO.
        ii. Assister – The selected individual(s) first and last name associated to a Community-Based Organization. Note: This field is only for the Medi-Cal program.

    Note: ForgeRock system will maintain the active CBO agreements with the State and/or Counties.
2. Add a new 'Verified' field for Organization in ForgeRock. This new field will indicate the CBO has a valid agreement with the State or County stored and saved in ForgeRock.
3. When CalSAWS makes a call through the new CBO-Organization API, ForgeRock will do the following sequence:
    a. Get access token
    b. Get list of verified Organization names with corresponding Global Unique identifiers (GUIDs).
    c. Execute a search for all active users with the organization GUID selected and return the following information:
        i. GUID
        ii. Given Name (First Name)
        iii. SN (Last Name)
        iv. Role (Manager, Assister)

2.9.3 Partner Integration Testing

Yes

2.9.4 Execution Frequency

Real-Time web service

2.9.5 Key Scheduling Dependencies

N/A

2.9.6 Counties Impacted

CalSAWS counties

2.9.7 Category

N/A

2.9.8 Data Volume/Performance

N/A

2.9.9 Interface Partner

ForgeRock

2.9.10 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.)

2.10 CBO - Case Details API

2.10.1 Overview

The Case Details – CBO API is a RESTful webservice that will allow the Self-Service Portal to retrieve a customer's case information for the CBO user based on the customer's CBO ROI form in CalSAWS.

2.10.2 Description of Change

1. Create a RESTful Case Details – CBO API to pull selected case information from Release of Information Detail page when provided the CBO/CBO Manager/Assister GUID and ROI Id in the GET method.
   a. Use date of signature as the begin date when pulling case information.
   b. Only send the primary applicant's case information to CBO when the following criteria are met:
      i. The ROI record for customer/county/CBO combination in CalSAWS is in an 'Approved' status and the end date of the ROI is not reached.
      ii. Do not send data to CBO for the following:
         1. If there is a high-dated Customer Privacy record for the Primary Applicant on the case.
         2. If the Primary Applicant has a Minor Consent case. Minor Consent case is a MC program with aid codes 7M, 7N, 7P, & 7R.
      iii. Data elements to send to CBO include the following:

Data Element	Program	Share Case History with CBO?	Description
Notices of Action (NOAs)	CalFresh, CalWORKs, Medi-Cal	No	Any NOAs associated to the customer generated between the ROI signature date and the current date, up until the ROI expiration date or the effective date the ROI is revoked. Per SCERFRA 22-524, history of NOAs will not be released to a CBO/Assister. **Note**: The CBO – Notices API will be invoked to pull the list of NOAs for the CBO from all of the cases for the Customer, in the county where they are the Primary Applicant for CalWORKs, CalFresh, and/or Medi-Cal programs.

Data Element	Program	Share Case History with CBO?	Description
Verification Requests from your County Worker	CalFresh, CalWORKs, Medi-Cal	No	Any Verification Request(s) generated by the worker between the ROI signature date and the current date, up until the ROI expiration date or the effective date the ROI is revoked. The verification requests include CSF 103, CW 2200, and MC 355 associated to customer. Per SCERFRA 22-524, no history of verification requests will be shared to a CBO/Assister. **Note**: The CBO – Notices API will be invoked to pull the list of Verification Request for the CBO from all the cases for the customer, in the county.
Benefit Award	CalFresh, CalWORKs	Yes	The authorized amount of the current EDBC results and issuance date will be shared to CBO/Assister. When 'The past 60 days' is selected, pull benefit award information 60 days from the Signature date to the current date. This information will be displayed on the CBO's Self-Service Portal account.
Program Status	CalFresh, CalWORKs Medi-Cal	No	The current status of the program will be shared to the CBO. Note: No history for program status is available. The program status to be viewed by a CBO will be the current program status for the program.

Data Element	Program	Share Case History with CBO?	Description
Termination Reason	CalFresh, CalWORKs, Medi-Cal	Yes	The reason and effective date for the program's discontinuance and denial. When 'The past 60 days' is selected, pull Termination reason information from the prior 2 months from the Signature date to the current date. This information will be displayed on the CBO's Self-Service Portal account. **Note**: Case Inquiry API will be updated to send this data to the Customer
Upcoming SAR 7 and Renewal Due Dates	CalFresh, CalWORKs, Medi-Cal	No	The due date for upcoming SAR 7 and Renewal/Recertification/Redetermination for the associated program. **Note**: SAR 7 submit month = Due month

2.10.3 Partner Integration Testing

Yes

2.10.4 Execution Frequency

Real-Time web service

2.10.5 Key Scheduling Dependencies

N/A

2.10.6 Counties Impacted

CalSAWS counties

2.10.7 Category

N/A

2.10.8 Data Volume/Performance

N/A

2.10.9 Interface Partner

BenefitsCal

2.10.10 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.)

2.11 Update the Case Inquiry API

2.11.1 Overview

The Case Inquiry API is a RESTful webservice that retrieves case information in CalSAWS and sends the information to the Self-Service portal. As part of the CBO ROI form requirements, CalSAWS will need to send Termination reasons to the Self-Service portal.

2.11.2 Description of Change

1. Update the Case Inquiry API to return the Termination reason(s) and effective date associated to the individual's case when they exist for BenefitsCal supported programs.
    a. Send Program status reasons for programs that have been Discontinued, Denied, Deregistered, and Deferred.
    b. Send the following to BenefitsCal:
        i. Termination date – the effective date of the program termination.
        ii. Termination reason – the program status reason description for the program.
2. Update the Case Inquiry API to retrieve the final benefit issuance amount for the month and return any duplicate amounts for the month.

2.11.3 Partner Integration Testing

Yes

2.11.4 Execution Frequency

Real-Time web service

2.11.5 Key Scheduling Dependencies

N/A

2.11.6 Counties Impacted

CalSAWS counties

2.11.7 Category

N/A

2.11.8 Data Volume/Performance

N/A

2.11.9 Interface Partner

BenefitsCal

2.11.10 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.)

2.12 CBO - Notices API

2.12.1 Overview

The CBO - Notices API is a RESTful webservice that will allow the Self-Service Portal to retrieve a list of notices associated to a customer for the CBO and allow the CBO to view the document.

2.12.2 Description of Change

1. Create a RESTful CBO - Notices API similar to the existing Notices API, that will allow CalSAWS to retrieve list of documents for an authorized CBO associated to a customer's GUID per Program within a county in

the first GET method. The API will only send the document list for an 'Approved' ROI to an authorized CBO by the supported programs (CW, CF, MC). For example, a CBO for Medi-Cal will not be able to view a customer's CalFresh NOAs.

   a. Notices of Action:
      i. Confirm ROI authorization before pulling the list of Customer's NOAs for the CBO. This will be indicated on the CBO ROI form or ROI Detail page, in the 'Notices of Action (NOAs)' checkbox as selected.
      ii. Pull the list of NOAs generated for the Primary Applicant of the program between the Signature Date of the ROI, and the current date. The documents returned will be from the last 6 months from current date. Do not pull historical NOAs generated prior to the date the ROI was signed and approved.
   b. Verification Requests:
      i. Confirm ROI authorization before pulling list of Customer Verification Requests for the CBO. This will be indicated on the CBO ROI form or ROI detail page in the 'Verification Request' checkbox as selected.
      ii. Pull the list of verification requests (CSF 103, CW 2200, and MC 355) associated to Primary Applicant of the program generated between the Signature Date of the ROI, and the current date. Do not pull historical Verification Requests generated prior to the date the ROI was signed and approved. The documents returned will be from the last 6 months from current date. These forms will have a PUBLSH_CBO_IND = 'Y' from the DOC_TEMPL_LANG table. The indicator will be used to determine the form associated to the ROI applicant and the ROI supported program.
   c. Example: ROI signed on 01/02/2023 where customer selects to share 'Notices of Action' with a CBO for 365 days. Any NOAs generated prior to 01/02/2023 will not be sent to the CBO. When CBO view NOA list on 08/01/2023, they will only be able to view NOAs generated from 02/01/2023 (6 months from current date).

2. The second GET method will retrieve the imaged documents given the document identifier and case number. The county code passed to the File Service API will be derived from the identifier.

2.12.3 Partner Integration Testing

Yes

2.12.4 Execution Frequency

Real-Time web service

2.12.5 Key Scheduling Dependencies

N/A

2.12.6 Counties Impacted

CalSAWS counties

2.12.7 Category

N/A

2.12.8 Data Volume/Performance

N/A

2.12.9 Interface Partner

BenefitsCal

2.12.10 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.)

2.13 Create a New Batch job for an Expired ROI

2.13.1 Overview

A ROI record will have an end date that will be automatically calculated by the System based on the Signature date and the selected 'Length of Information Access with a CBO' on the Release of Information Detail page. The length of access value can have a numeric value up to 365 (calendar days).

2.13.2 Description of Change

1. Create a new batch job to automatically update the ROI status to 'Expired' based on the end date or expiration date. An ROI record's end date will be calculated by the System based on the applicant's/recipient's signature date and the 'Length of Information Access with a CBO' field.
   a. Status = Approved
   b. ROI End date is equal to the batch date. If the batch date falls on a Sunday or CalSAWS holiday, then the batch job will set the ROI status to 'Expired' on the next CalSAWS business date during the nightly batch.

   For example: A ROI record in County 19 with signature date 12/05/2022 with '90 days' selected for 'Length of Information Access with a CBO''. The end date is generated by the System as 03/05/2023 (*Sunday*). The batch job will automatically set the status of the ROI record to 'Expired' on 03/06/2023 during the nightly batch process.

   c. Create a Journal entry for the case with details when an ROI record status is set to 'Expired'. The end date of the ROI record is determined by the System based on the date of Signature and the 'Length of Information Access with a CBO' indicated on the CBO ROI form.
      i. Person Name: The individual's First and Last name listed on the CBO ROI form.
      ii. CBO Name: The CBO name listed on the CBO ROI form.
      iii. ROI Status: The 'Expired' status of ROI

Journal Entry	Description
New/Update	Yes
Journal Category	Interfaces
Journal Type	Self-Service
Short Description	CBO ROI Form Expired
Long Description	The CBO ROI form for {Person Name} with Organization: {CBO Name} has {ROI Status}.
Trigger Condition	When the ROI record end date is prior to the batch date.

   c. Create a BSCR to schedule this new batch job to run daily Monday – Saturday.

2.13.3 Partner Integration Testing

No

2.13.4 Execution Frequency

Schedule this job to run daily Monday – Saturday on CalSAWS business days.

2.13.5 Key Scheduling Dependencies

N/A

2.13.6 Counties Impacted

CalSAWS counties

2.13.7 Category

N/A

2.13.8 Data Volume/Performance

N/A

2.13.9 Interface Partner

BenefitsCal

2.13.10 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.)

2.14 Adding New ABCDM 229 Form

2.14.1 Overview

This form will be used to authorize Community-Based Organizations (CBOs) access a customer's information in BenefitsCal.

State Form: ABCDM 229 (01/23)

Programs: CalWORKs, CalFresh, Medi-Cal

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: English and Spanish

2.14.2 Form Verbiage

Create Form XDP

Create a new XDP for the new CBO ROI form.

Form Header: CalSAWS Standard Header Coversheet (CSF 147)

Form Title (Document List Page Displayed Name): Applicant/Recipient Authorization for Release of Information to CBO in BenefitsCal

Form Number: ABCDM 229

Include NA Back 9: No

Imaging Form Name: Release of Information ABCDM 229

Imaging Document Type: Authorized Rep and Release of Info

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #1

2.14.3 Form Variable Population

The coversheet header will be populated with the standard case information if generated in the context of a case from the Template Repository.

There is no variable population required for the body of the form.

2.14.4 Form Generation Conditions

1. **Add Form to Template Repository**

   This form will be added to the Template Repository.

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

2. **Add Form Control**

   The following barcodes will be applied to this form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

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

The following print options for the form are as follows:

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 Requirements:

Mail-To (Recipient): The person selected from the Customer Name dropdown from the Document Parameters

Mailed From (Return): Sending Office

Mail-back-to Address: None

Outgoing Envelope Type: Standard Mail Envelope

Return Envelope Type: None

Additional Requirements:

Special Paper Stock: None

Enclosures: None

Electronic Signature: No

Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): Yes

2.15 DBCR to DOC_TEMPL_LANG Table

2.15.1 Overview

Perform a DBCR to the DOC_TEMPL_LANG table to include a new column called "PUBLSH_CBO_IND".

2.15.2 Description of Change

Add a new column to the DOC_TEMPL_LANG table with the following elements and conditions:

a. New column is titled "PUBLSH_CBO_IND"

b. This value is defaulted to "N" for all forms unless otherwise specified in a design document.

c. The following forms will have the PUBLSH_CBO_IND set to "Y":

1. CSF 103

2. CW 2200
3. MC 355

2.16 Automated Regression Test

2.16.1 Overview

Create new regression test scripts based on the system test scenarios for the permanent functional changes outlined above.

2.16.2 Description of Change

1. Evaluate each system test scenario for the potential of automation. Known exclusionary criteria:
    a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
    b. Technical limitations (ex., visual comparison of a static document against a template)
    c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
    d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
    a. Repeatability: The script must be able to execute multiple times between data refreshes
    b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario

2.17 Hyland Imaging Updates

2.17.1 Overview

This section will outline the necessary modifications to allow the new CBO ROI form to be viewed in the Hyland Imaging system.

2.17.2 Description of Change

1. For Imaging system 'View', return the document type 'ABCDM 229 - Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal'. This will

navigate the user to the Hyland Imaging system and display all the imaged CBO ROI forms for the primary applicant.

2. Create a new helper method in the 'View' URL to retrieve images for all the cases for an individual within a County.

3 SUPPORTING DOCUMENTS

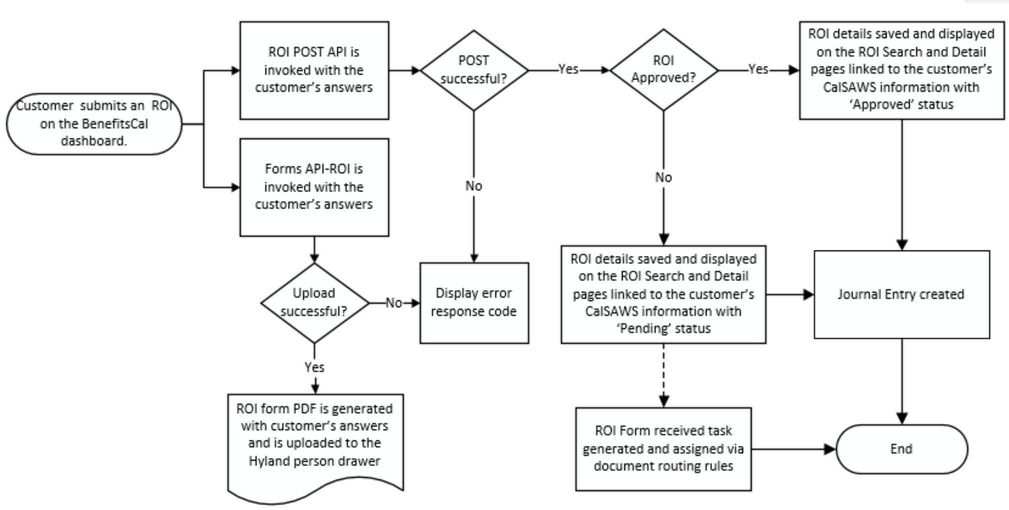
Number	Functional Area	Description	Attachment
1	Interface	This attachment will contain the Release of Information (ROI) API data field mappings.	ROI API field Mapping.xlsx
2	Interface	ROI-API YAML	ROI-API.yaml
3	Interface	ROI-API HTML	ROI-API.html
4	Interface	Forms – API YAML	CalSAWSFormsAPI.yaml
5	Interface	Forms – API HTML	CalSAWSForms.html
6	Interface	CBO-OrgAPI YAML	CBO-OrgAPI.yaml
7	Interface	CBO -OrgAPI HTML	CBO-OrgAPI.html
8	Interface	CBO-Case Details YAML	CBO-Case Details.yaml
9	Interface	CBO-Case Details HTML	CBO-Case Details.html

Number	Functional Area	Description	Attachment
10	Interface	CBO-Notices YAML	CBO-Notices.yaml
11	Interface	CBO-Notices	CBO-Notices.html
12	Interface	Case Inquiry YAML	CaseInquiry.yaml
13	Interface	Case Inquiry HTML	CaseInquiry.html
14	Online (Security)	Security Matrix	CA-247709 Security Matrix.xls

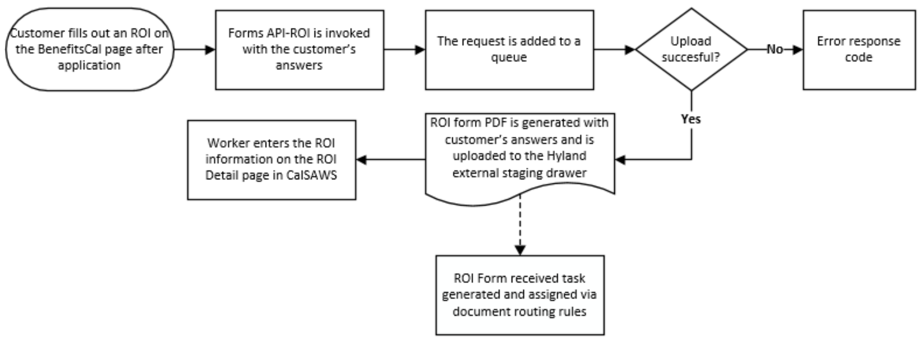
4 APPENDIX

1. Release of information API process flow – The ROI submission process can occur through various channels (digital form, document upload, or paper submission). The diagrams below depict the process flow of the CBO ROI form submission.

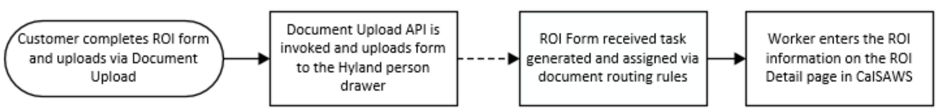
a. Customer initiated ROI – Existing CalSAWS case and BenefitsCal account



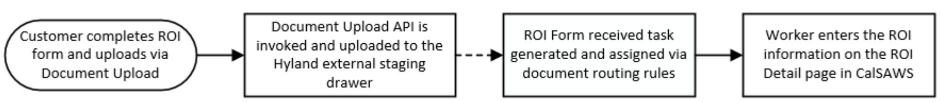
b. Customer initiated ROI – No existing CalSAWS case with a BenefitsCal account – Applying for benefits (Manual Process)



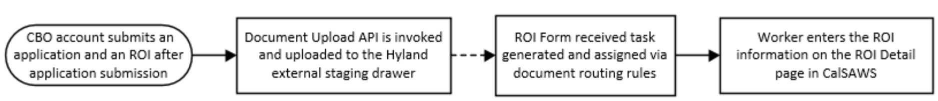
c. Customer initiated ROI – Upload CBO ROI form from BenefitsCal account via Document Upload



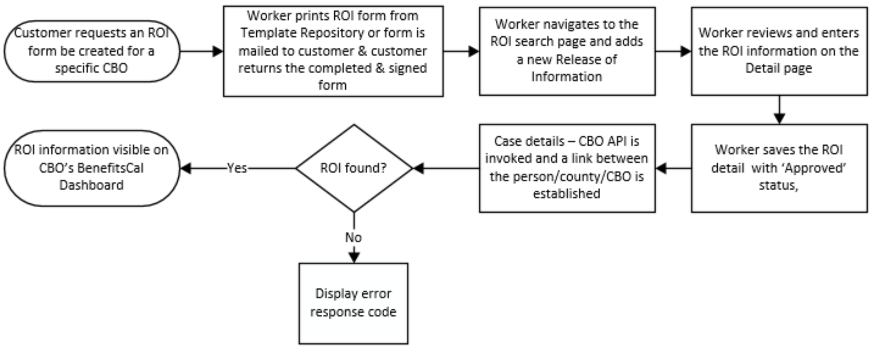
d. Customer initiated ROI – As an Anonymous user and uploads CBO ROI form after application submission



e. CBO initiated ROI – ROI form submitted after application submission via their CBO account in BenefitsCal through Document Upload API



f. County Worker initiated ROI – ROI record created upon Customer's Request


Customer requests an ROI form be created for a specific CBO
Worker prints ROI form from Template Repository or form is mailed to customer & customer returns the completed & signed form
Worker navigates to the ROI search page and adds a new Release of Information
Worker reviews and enters the ROI information on the Detail page
Worker saves the ROI detail with 'Approved' status,
Case details – CBO API is invoked and a link between the person/county/CBO is established
ROI found?
Yes
ROI information visible on CBO's BenefitsCal Dashboard
No
Display error response code

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-249461

Update Spanish AAP3 Form to New Revision

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ramya YK
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/14/2023	1.0	Initial Draft	Ramya YK

Table of Contents

1 OVERVIEW

The purpose of this SCR is update AAP 3 to latest state version in Spanish language to CalSAWS Template Repository.

1.1 Current Design

Currently AAP 3 (2/22) is not available in CalSAWS Template Repository for Spanish language.

1.2 Requests

Update AAP 3 (2/22) Reassessment Information - Adoption Assistance Program in Spanish Languages to CalSAWS Template Repository.

1.3 Overview of Recommendations

Update AAP 3 (2/22) Reassessment Information - Adoption Assistance Program in Spanish Languages to CalSAWS Template Repository.

1.4 Assumptions

1. All fields (blank or prepopulated) will be editable.
2. No updates to the variable population logic
3. Supporting Documents section references attachments found on JIRA.

2 RECOMMENDATIONS

2.1 Update AAP 3 to latest state version to CalSAWS in Spanish languages

2.1.1 Overview

Update AAP 3 to latest state version to CalSAWS in Spanish languages.

State Form: AAP 3 (2/22)

Programs: Adoptions Assistance Program (AAP)

Forms Category: Forms

Template Repository Visibility: All Counties

Form Title (Document List Page Displayed Name):

Reassessment Information - Adoption Assistance Program

Imaging Form Name: Reassessment Info - AAP

Imaging Document Type: Adoption Assistance Program (AAP)

Imaging Case/Person: Case

Existing Languages: English

2.1.2 Form Verbiage

Updated AAP 3 XDP

A new XDP will be added for AAP 3 form with version (2/22) for Spanish languages.

The XDP will have 3 impressions. The impression will be a coversheet with standard header. Second impression will be blank page. Third impression will follow the state version.

Form Header: CalSAWS Standard Header (Header_1)

Include NA Back 9: No

Form Mockups/Examples: See supporting documents #1

2.1.3 Form Generation Conditions

Update AAP 3 (2/22) to Template Repository in Spanish languages

The AAP 3 (2/22) Reassessment Information - Adoption Assistance Program only to Template Repository.

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

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for

Reassessment Information - Adoption Assistance Program

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 AAP 3
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	Yes

Mailing Options	Option AAP 3
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Add Form Control

Add an imaging barcode for AAP 3.

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Additional Options:

Requirement	Option for AAP 3 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	AAP 3 Spanish Language	AAP_3_SP.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms;	AAP 3 (2/22) is being added in Spanish languages.

	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.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-249509

Add Spanish Version of FC NOA Reasons

(Phase 1)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Indira Ramasamy
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/01/2023	1.0	Initial Document	Indira Ramasamy

Table of Contents

1 OVERVIEW

The purpose of this change is to add Spanish version of FC NOA Reasons to CalSAWS.

1.1 Current Design

Some of the Foster Care NOAs exists only in English language in CalSAWS system.

1.2 Requests

Generate Spanish NOAs for the following reasons

1. Child is Eligible to Kin-GAP
2. Infant Supplement Payment (ISP) has started

1.3 Overview of Recommendations

1. Add Child Eligible to Kin-GAP NOA for Discontinuance in Spanish Language.
2. Add Infant Supplement Payment (ISP) has stated NOA for Benefic Change in Spanish Language.

1.4 Assumptions

1. The triggering conditions of the NOA Fragments for Threshold Generation remain 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.
4. Spanish language versions of action and message fragments: FC_KG_CH_ACTION3, FC_KG_TN_ACTION4, FC_CH_MESSAGE1 was added by CA-228880.

2 RECOMMENDATIONS

2.1 Add Child Eligible to Kin-GAP NOA for Discontinuance in Spanish Language.

2.1.1 Overview

Add Child Eligible to Kin-GAP NOA (CCR) for Discontinuance in Spanish Language.

Reason Fragment Name and ID: FC_TN_CHILD_ELIGIBLE_TO_KINGAP (ID: 7823)
State Form/NOA: NA 403 (01/22)

NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)
Program(s): Foster Care
Action Type(s): Discontinuance
Fragment Level: Program
Repeatable: No
Include NA Back 9: Yes
Forms/NOAs Generated with this NOA: N/A
Existing Languages: English

2.1.2 Form/NOA Verbiage

Add Threshold Language Fragments

Add reason fragment FC_TN_CHILD_ELIGIBLE_TO_KINGAP_SP (CCR) and its NOA for Spanish.

Add Threshold languages: Spanish

Reason Fragment Verbiage:

Description	English Verbiage	Spanish Verbiage	Formatting
<STATIC_SECTION1>	The Foster Care child is no longer eligible to Foster Care benefits because he/she is now Eligible to Kin-GAP benefits.	El Niño recibiendo Cuidado de Crianza Temporal, no califíca para recibir los beneficios de este programa, dado a que él o ella ahora califican para los beneficios bajo Kin-Gap.	Arial Font Size 10

2.1.3 Form/NOA Variable Population

No updates to this section.

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2 Add Infant Supplement Payment (ISP) for Benefit Change in Spanish Language.

2.2.1 Overview

Add Infant Supplement Payment (ISP) (CCR) for Benefit Change in Spanish Language.

Reason Fragment Name and ID: FC_CH_INFANT_SUPLIMENT_PAY_T312 (ID: 7487)
State Form/NOA: NA 403 (01/22)
NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)
Program(s): Foster Care
Action Type(s): Change
Fragment Level: Program
Repeatable: No
Include NA Back 9: Yes
Forms/NOAs Generated with this NOA: N/A
Existing Languages: English

2.2.2 Form/NOA Verbiage

Add on Threshold Language Fragments

Add the reason fragment FC_CH_INFANT_SUPLIMENT_PAY_T312_SP (CCR) and its NOA for Spanish.

Add Threshold languages: Spanish

Reason Fragment Verbiage:

Description	English Verbiage	Spanish Verbiage	Formatting
<STATIC_SECTION1>	An Infant Supplemental Payment is being issued for <Person> in the amount of <ISP_AMOUNT>.	Un Pago Suplemental para Infantes será emitido <Person> en la cantidad de <ISP_AMOUNT>.	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.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

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. RedeDenial, 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;	Child is Eligible to Kin-GAP NOA and Infant Supplement Payment (ISP) has started NOA are Turned on in Spanish Language.

	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.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-250529

Add ability to search the ForgeRock User directory when adding a user in CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Trevor Torres
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/6/2023	1.0	Initial Revision	Trevor Torres

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1 OVERVIEW

Currently, when a user is being added into CalSAWS for CalWIN counties and the user already exists in ForgeRock it displays a validation and does not allow that user to be added into CalSAWS. This SCR is to update the Security Assignment page to have users in CalWIN counties go to the CalSAWS Identity Search page when using the "Add User Name" button.

1.1 Current Design

When a user is being added into CalSAWS for CalWIN counties and the user already exists in ForgeRock, CalSAWS does a validation check against ForgeRock to determine if the email address(username) exists in ForgeRock. If there is a match, it CalSAWS displays an error and doesn't allow that user to be added into CalSAWS.

1.2 Requests

Allow CalSAWS to do a lookup of ForgeRock added users and attach them to the respective CalSAWS user that is being created. Add a feature to allow adding a user into CalSAWS when an existing user identity exists in ForgeRock prior to being created in CalSAWS. This search directory function would be similar to what we do for Active Directory connected Organizations like LA County and CalSAWS project.

1.3 Overview of Recommendations

1. Update the Security Assignment page to have users in CalWIN counties go to the CalSAWS Identity Search page when using the "Add User Name" button.
2. Update the CalSAWS Identity Search page to have a "Cancel" button.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.

2 RECOMMENDATIONS

2.1 Security Assignment

2.1.1 Overview

The Security Assignment page is used for displaying Staff Name, User Name, Login Status, Assigned Security Roles, Assigned Security Groups and more if applicable. The page is also used for generating User Names for newly created staff, as well as resetting the temporary password that is created with the User Name. This SCR is to update the Security Assignment page to have users in CalWIN counties go to the CalSAWS Identity search page when using the “Add User Name” button.

2.1.2 Security Assignment Mockups

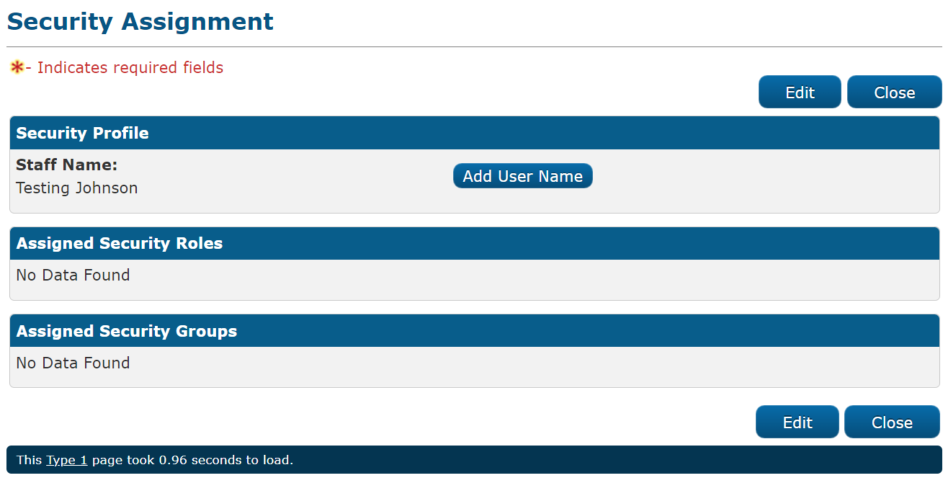

Figure 2.1.1 – Security Assignment Page “Add User Name”

2.1.3 Description of Changes

1. Update the existing logic used on the “Add User Name” button to take users in CalWIN counties go to the CalSAWS Identity Search page.
    a. The User Name email address selected from the CalSAWS Identity Search page will be used as the Staff User Name for users in CalWIN counties.

       Note: Non-CalWIN counties will continue using current functionality for pressing the “Add User Name” button.

2.1.4 Page Location

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

- **Task: Staff**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 CalSAWS Identity Search

2.2.1 Overview

The CalSAWS Identity Search page allows you to search for CalSAWS Identity ID either by email, name, or login. This SCR is to update the CalSAWS Identity Search page to include a "Cancel" button that will take user to the "Resource Detail" page or the "Security Assignment" (only for CalWIN counties) page depending on how the user gets to the page.

2.2.2 CalSAWS Identity Search Mockups

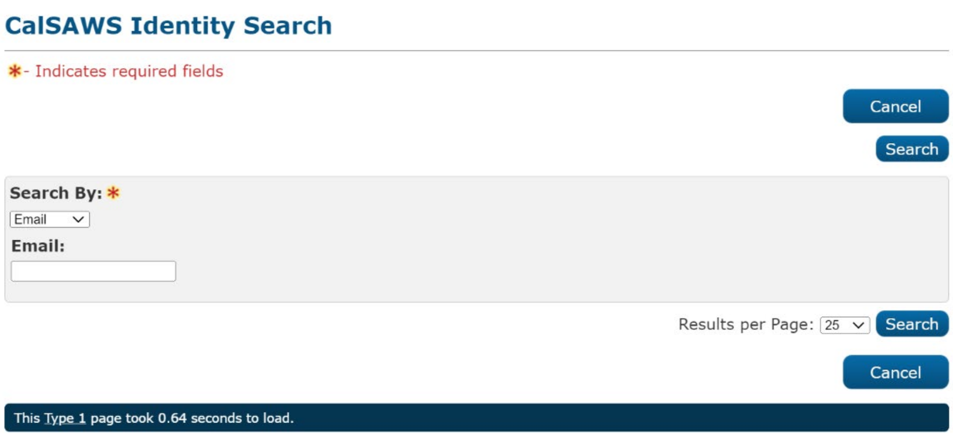

Figure 2.2.1 – CalSAWS Identity Search Page "Cancel" Button Mockup

2.2.3 Description of Changes

1. Update the CalSAWS Identity Search page to include a "Cancel" button, as shown in Figure 2.2.1.

a. If the page is accessed from the “Resource Detail” page, the “Cancel” button will take them back to the “Resource Detail” page.
b. If the page is accessed from the “Security Assignment” page for users in CalWIN counties, the “Cancel” button will take them back to the “Security Assignment” page.

   Note: Non-CalWIN county users will not be able to access the CalSAWS Identity Search page from the “Security Assignment” page.

2. For CalWIN counties users, the User Name email address selected from the CalSAWS Identity Search page will be used as the Staff User Name for the Security Assignment page.

2.2.4 Page Location

- **Global: Resource Databank**
- **Local: Resources**
- **Task: Add Resource Access**

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 Automated Regression Test

2.3.1 Overview

Create automated regression test scripts to verify navigation to the “CalSAWS Identity Search” page from the “Security Assignment” page in the context of a CalWIN county, and the editable fields displayed on the page in this context.

2.3.2 Description of Changes

1. Create a regression script to perform the following actions and verifications while in the context of a CalWIN county:

a. Create a new Staff record and navigate to the "Security Assignment" page. Verify the "Add User Name" button is displayed.
b. From the end state of the previous step, click the "Add User Name" button and verify that the "CalSAWS Identity Search" page displays. Verify that the following editable fields display in this context:
    i. "Search By"
    ii. "Email", "Name", "Login" based on the populated "Search By" value
    iii. "Results per Page"
c. Click the "Cancel" button and verify that the "Security Assignment" page displays.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.3.1.3.3	3. The LRS shall use a systems model that includes multiple screen layouts and multiple navigational choices (e.g., menus, buttons, pop-ups, scroll bars) that offer and deliver a industry standard Internet look and feel.	This SCR is adding a "Cancel" button to the CalSAWS Identity Search page.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-250727

Add Foster Care to Program Drop-Down for MC 194

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ramya YK
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/08/2023	1.0	Initial Draft	Ramya YK

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1 OVERVIEW

The purpose of this SCR is to add Foster Care to the Program drop-down list for the MC 194 Social Security Administration Referral Notice in CalSAWS.

1.1 Current Design

Currently, Foster Care is not available in the program drop-down list for MC 194 in CalSAWS.

1.2 Requests

Add Foster Care to the Program drop-down list for the MC 194 Social Security Administration Referral Notice. Having Foster Care in the Program drop-down would make the process of completing and sending an MC 194 more efficient.

1.3 Overview of Recommendations

Add Foster Care to the Program drop-down list for the MC 194 Social Security Administration Referral Notice in CalSAWS.

1.4 Assumptions

1. There are no changes to the generation logic of these forms.
2. No updates to the existing variable population logic.
3. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Add Foster Care to the Program drop-down list for the MC 194

2.1.1 Overview

Add Foster Care to the Program drop-down list

State Form: MC 194

Updated Programs: Calfresh, RCA, Medical, CalWorks, CAPI, General Assistance/General Relief, Foster Care

Attached Forms: N/A

Forms Category: Referrals

Template Repository Visibility: All Counties

Form Title (Document List Page Displayed Name):

Social Security Administration Referral Notice

Imaging Form Name: SSA Referral Notice
Imaging Document Type: Medi-Cal (MC)

2.1.2 Form Verbiage

N/A

2.1.3 Form Variable Population

N/A

2.1.4 Form Generation Conditions

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

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;	Foster Care will be added to program dropdown list for MC 194.

	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.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-251208

Add NOA Fragments in Threshold Languages for Medi-Cal NOA Generation (MC 239 DRA4)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Reshma Chandy
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/23/2023	1.0	Initial Document	Reshma Chandy

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1 OVERVIEW

The purpose of this change is to add NOA fragments in system supported threshold languages for Medi-Cal NOA (MC 239 DRA4) in CalSAWS.

1.1 Current Design

Currently the Medi-Cal NOA (MC 239 DRA4) is available only in English Language in CalSAWS.

1.2 Requests

Add NOA fragments in system supported threshold languages for Snippet ID 6599-DRA Not Met-Full to Rstr SOC (NOA Code M196C) to CalSAWS.

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

1.3 Overview of Recommendations

Add NOA fragments in system supported threshold languages for Snippet ID 6599-DRA Not Met-Full to Rstr SOC (NOA Code M196C).

1.4 Assumptions

1. The triggering conditions of the 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 Medi-Cal NOA Fragment (ID: 6599) in system supported Threshold languages in CalSAWS.

2.1.1 Overview

Add Change Medi-Cal NOA Reason Fragments in system supported Threshold languages in CalSAWS.

Reason Fragment Name and ID: MC_CH_DRA_RESTRICT_WITH_SOC_M196 (Fragment ID: 6599)
State Form/NOA: MC 239 DRA4
Current Program(s): Medi-Cal
Current Action Type: Change
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: No
Existing Languages: English

2.1.2 Form/NOA Verbiage

Add Medi-Cal NOA fragments in system supported threshold languages.

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

Reason Fragment Verbiage: See Supporting Documents #1

2.1.3 Form/NOA Variable Population

No updates to this Section

2.1.4 Form/NOA Generation Conditions

No updates to the generation condition.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	NOA	Medi-Cal NOA Fragments	Fragments Verbiage.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 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;	NOA Reason Code M196 of MC 239 DRA4 Medi-Cal NOA added in system supported threshold languages.

	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.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253347

Task Mgmt: Enhance Homepage to Include Additional Task Information

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/04/2023	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 enhance information displayed within the My Tasks panel of the Homepage.

1.1 Current Design

The CalSAWS Homepage My Tasks panel displays 2 metrics for Tasks that are overdue or coming due within 5 days for the logged in user.

1.2 Requests

1. Update the My Tasks panel on the Homepage to include a breakdown of the existing 2 metrics by Task Category.

1.3 Overview of Recommendations

1. Update the My Tasks panel of the Homepage to include a breakout by Task Category for each of the 2 metrics within the panel.
2. Update the My Tasks panel of the Homepage so that the hyperlinks route to the Task Pop-Up: Task Search page.

1.4 Assumptions

1. Existing page load behavior of the 'My Tasks' panel in Homepage will not change.

2 RECOMMENDATIONS

2.1 Homepage: My Tasks

2.1.1 Overview

This section outlines the modifications to the CalSAWS Homepage My Tasks panel.

2.1.2 Homepage: My Tasks Mockup

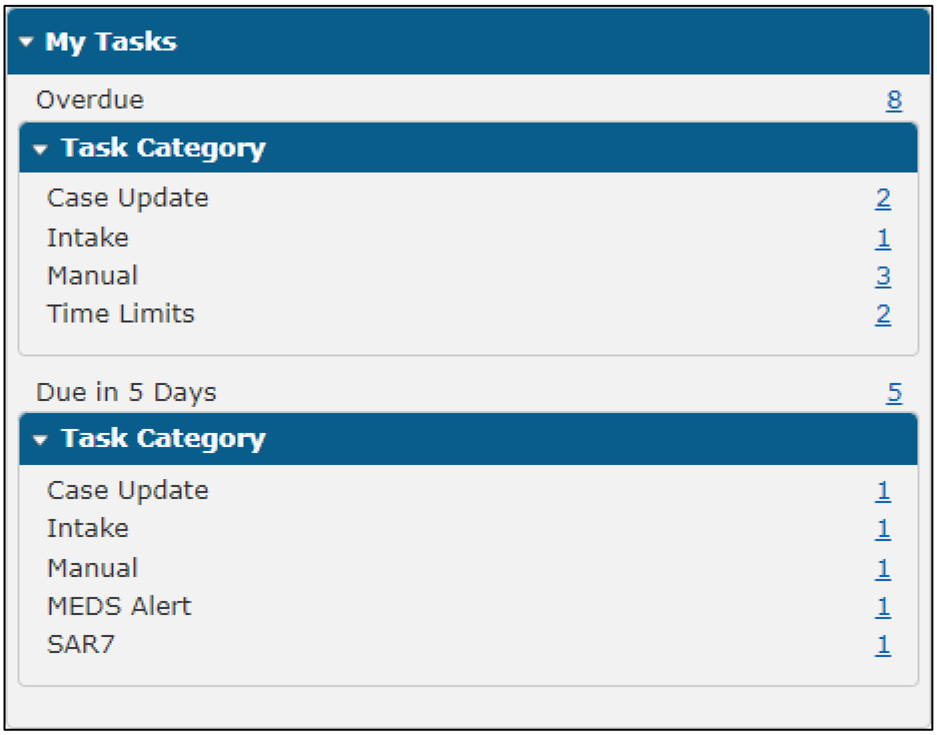


Figure 2.1.1 – My Tasks panel in Homepage

2.1.3 Description of Changes

1. Update the My Tasks panel in the Homepage as follows:
   a. Add two new collapsible "Task Category" panels, one for the "Overdue" metric and one for the "Due in 5 Days" metric.
      i. Each panel will provide a granular breakout of the Tasks by Task Category based on the parent metric. For example, the panel beneath "Overdue" will provide a breakout of the Overdue Tasks by Task Category.
      ii. Each panel will be collapsed on page load whether the panel includes information or not.
      iii. Each panel will remain collapsed when "My Tasks" panel is expanded. A user may expand a panel if necessary.

iv. If “Overdue” or “Due in 5 Days” indicates a metric of 0, then the “Task Category” panel for that metric will not display.

b. Update the existing hyperlinks within the My Tasks panel to navigate to the Task Pop-Up: Task Search page with the appropriate parameters pre-loaded to search and display the Tasks represented by the hyperlink. A hyperlink will not display if the metric indicates a 0, in which case will display as plain text.

   Hyperlinks within the new Task Category panels will function in a similar manner. Clicking a hyperlink will navigate to the Task Pop-Up: Task Search page with the appropriate parameters pre-loaded to display the particular Tasks represented by the hyperlink.
   Note: The hyperlinks will no longer navigate to the Worklist page with this enhancement.

   If the logged in user does not have the appropriate security to access to the Task Pop-Up: Task Search page, the metrics within the My Tasks panel on the Homepage will display as plain text. The Security Groups that provide access to the Task Pop-Up: Task Search page are “Task View” and “Task Edit”.

2.1.4 Page Location

Homepage

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping for the My Tasks panel on the Homepage.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253348

Task Mgmt: Track Time Spent Working Task

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/04/2023	1.0	Initial Revision	Vallari Bathala

Table of Contents

1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to allow recording of time spent working a Task.

1.1 Current Design

Task Management functionality within the CalSAWS System provides attributes that allow measurement of how long Tasks reside in a particular Status. There is no functionality in place that allows measurement or recording of actual time spent working a particular Task.

The CalSAWS System includes a Task Settings page that allows individual counties to enable specific Task Management features.

1.2 Requests

1. Provide a county configurable method that allows recording of actual time spent working a Task.

1.3 Overview of Recommendations

1. Update the Task Settings page to include a new Setting allowing individual counties to enable a Task time recording feature.
2. Update the Task Pop-Up: Task Detail page to include controls to record time spent working the Task and include display of the time metrics.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Task Settings Page

2.1.1 Overview

This section outlines the modifications to the Task Settings page to include a new Setting allowing individual counties to enable a Task time recording feature.

2.1.2 Task Settings Mockup

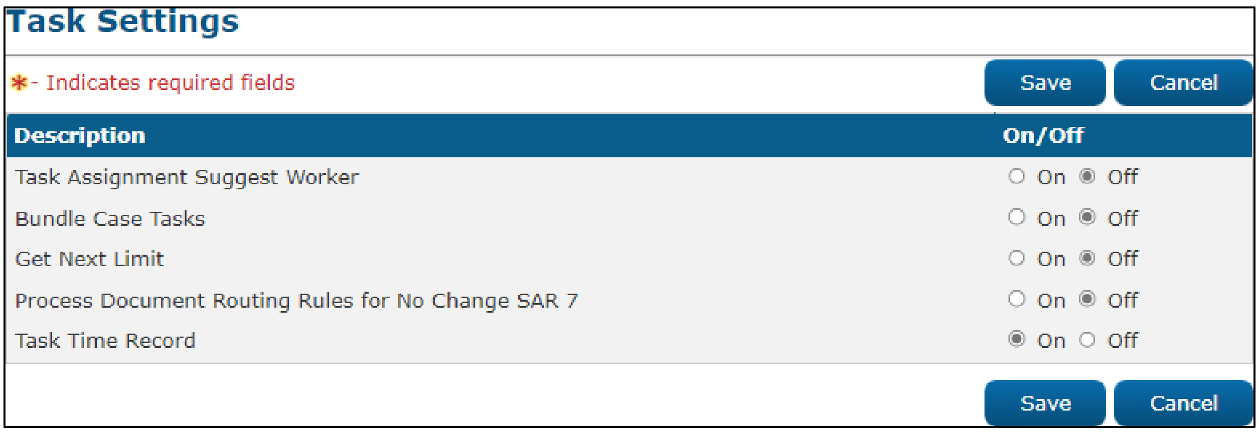


Figure 2.1.2-1 – Task Settings – Edit Mode

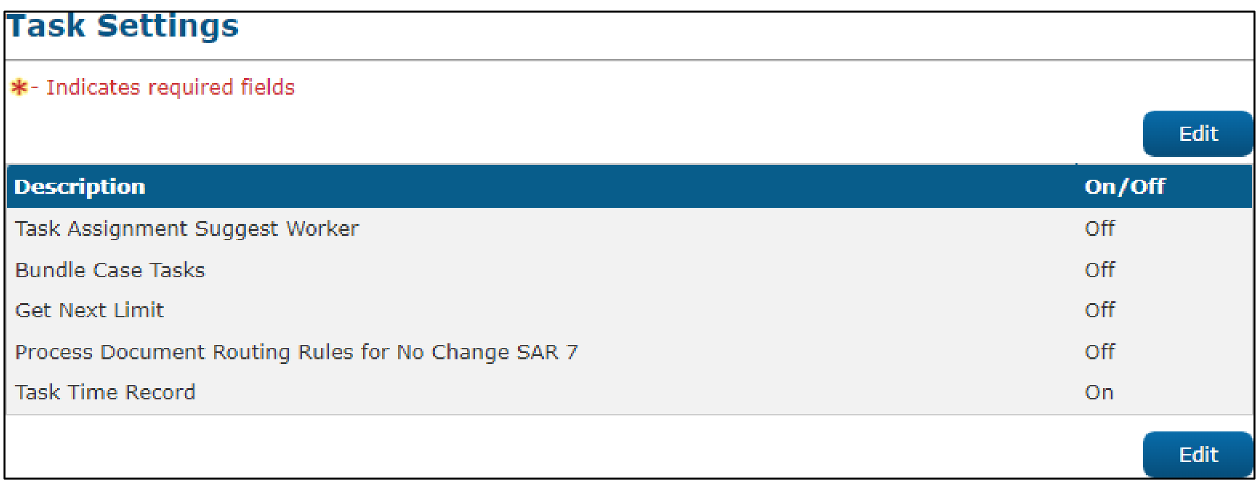


Figure 2.1.2-2 – Task Settings – View Mode

2.1.3 Description of Changes

1. Update the Task Settings page to include a "Task Time Record" setting that will default to "Off" for all counties. This setting will control the

display of buttons for Task time recording on the Task Pop-Up: Task Detail page as defined in Section 2.2.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Task Pop-Up: Task Detail Page

2.2.1 Overview

This section describes updates to the Task Pop-Up: Task Detail page to include controls to record time spent working the Task and include display of the time metrics.

2.2.2 Task Detail Mockup

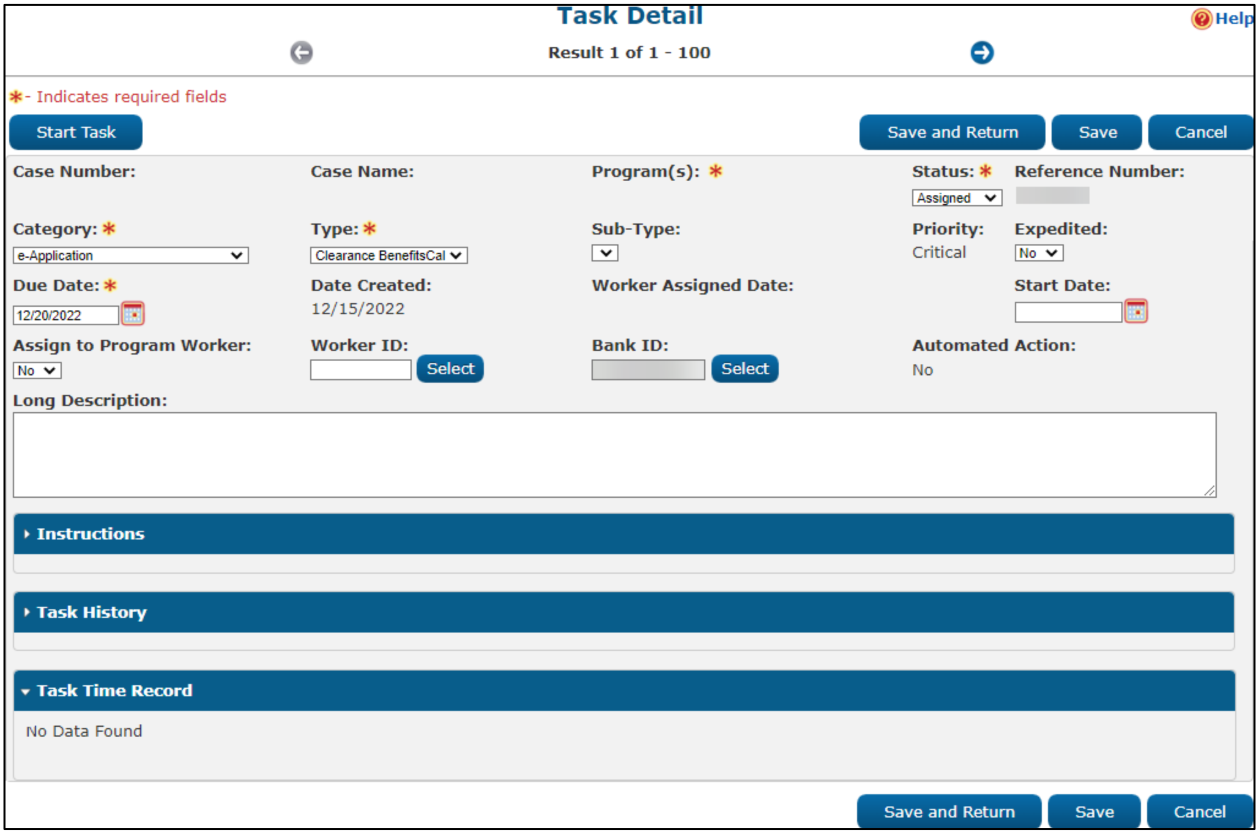


Figure 2.2.2-1 – Task Detail: No Task Time Record – Edit Mode

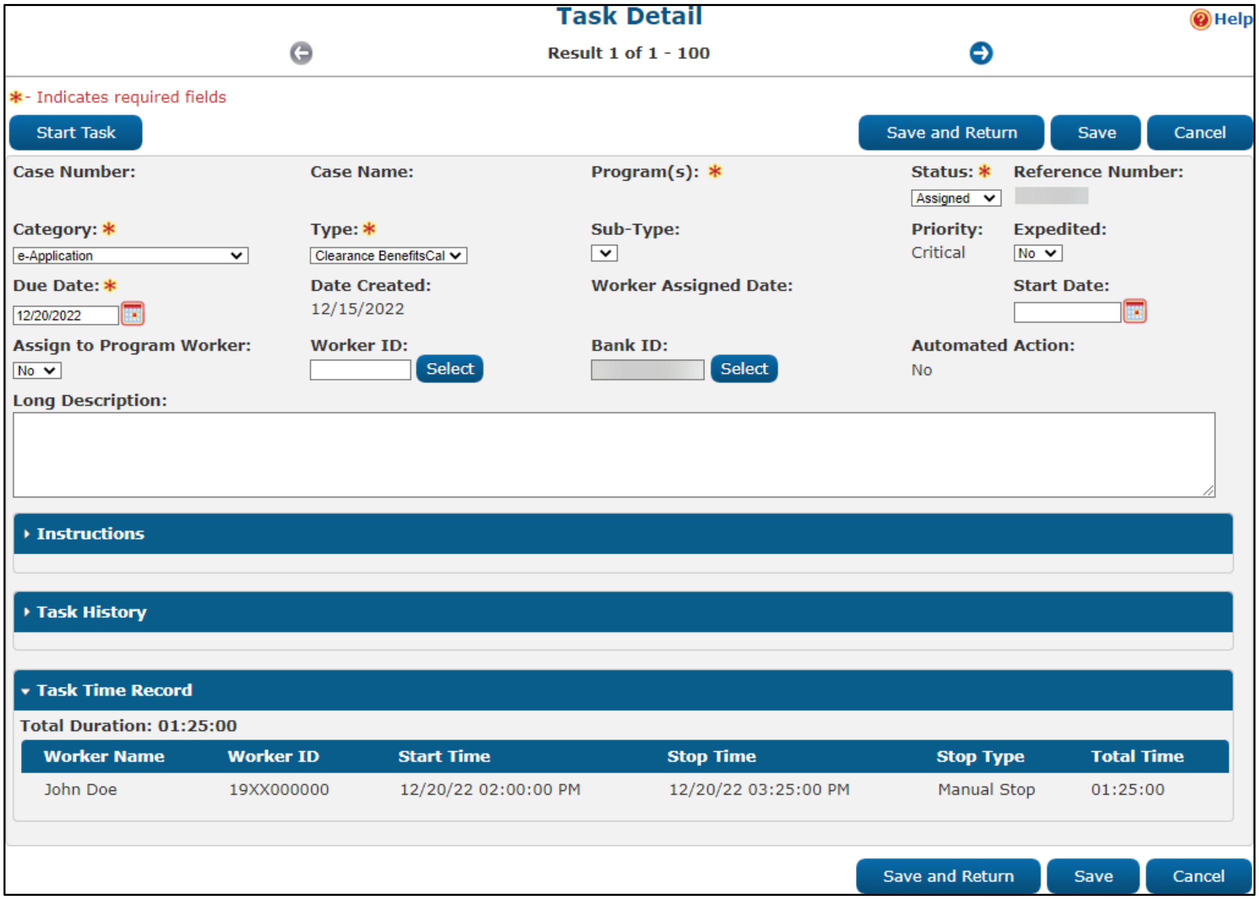


Figure 2.2.2-2 – Task Detail: Single Task Time Record – Edit Mode

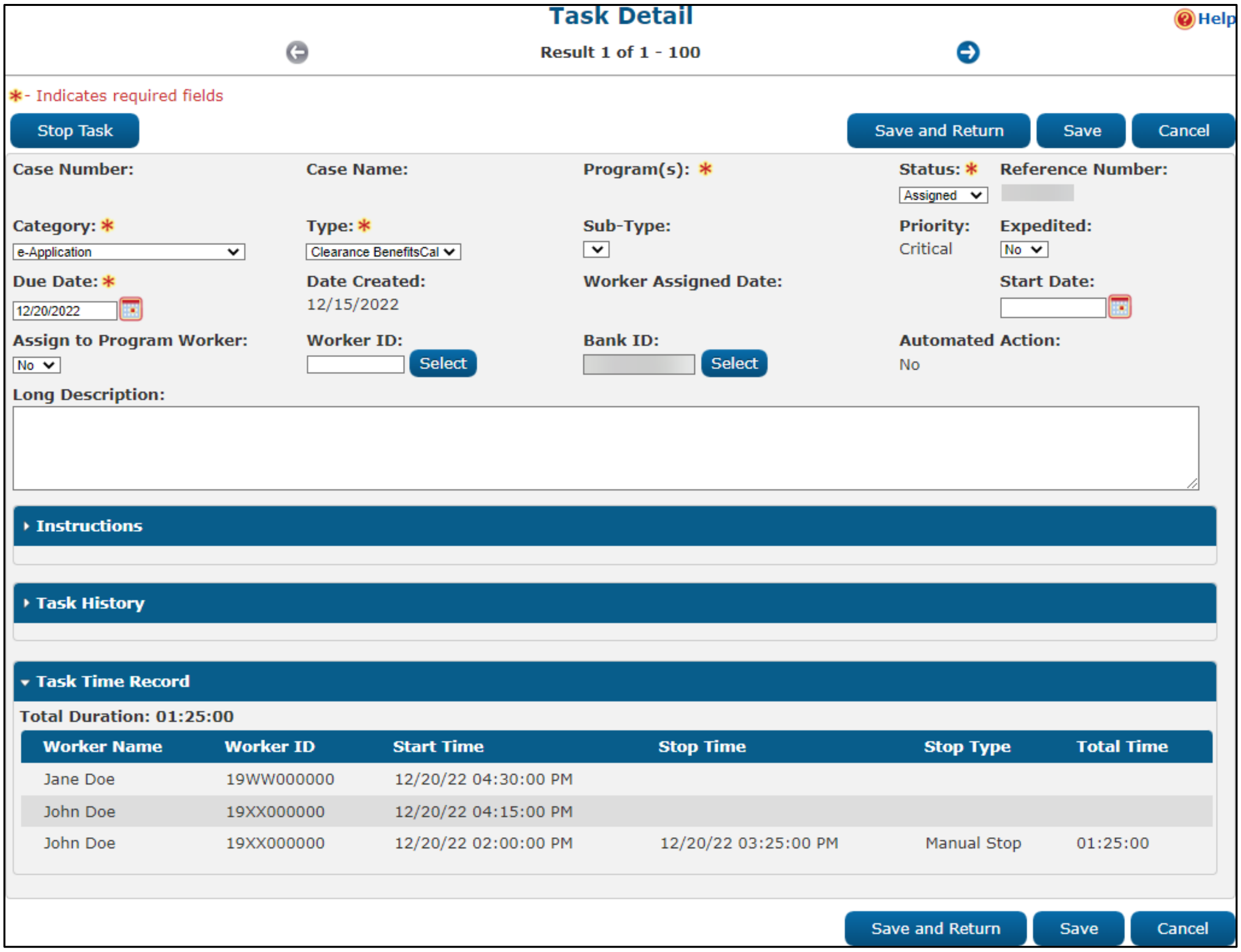


Figure 2.2.2-3 – Task Detail: Multiple Task Time Records – Edit Mode

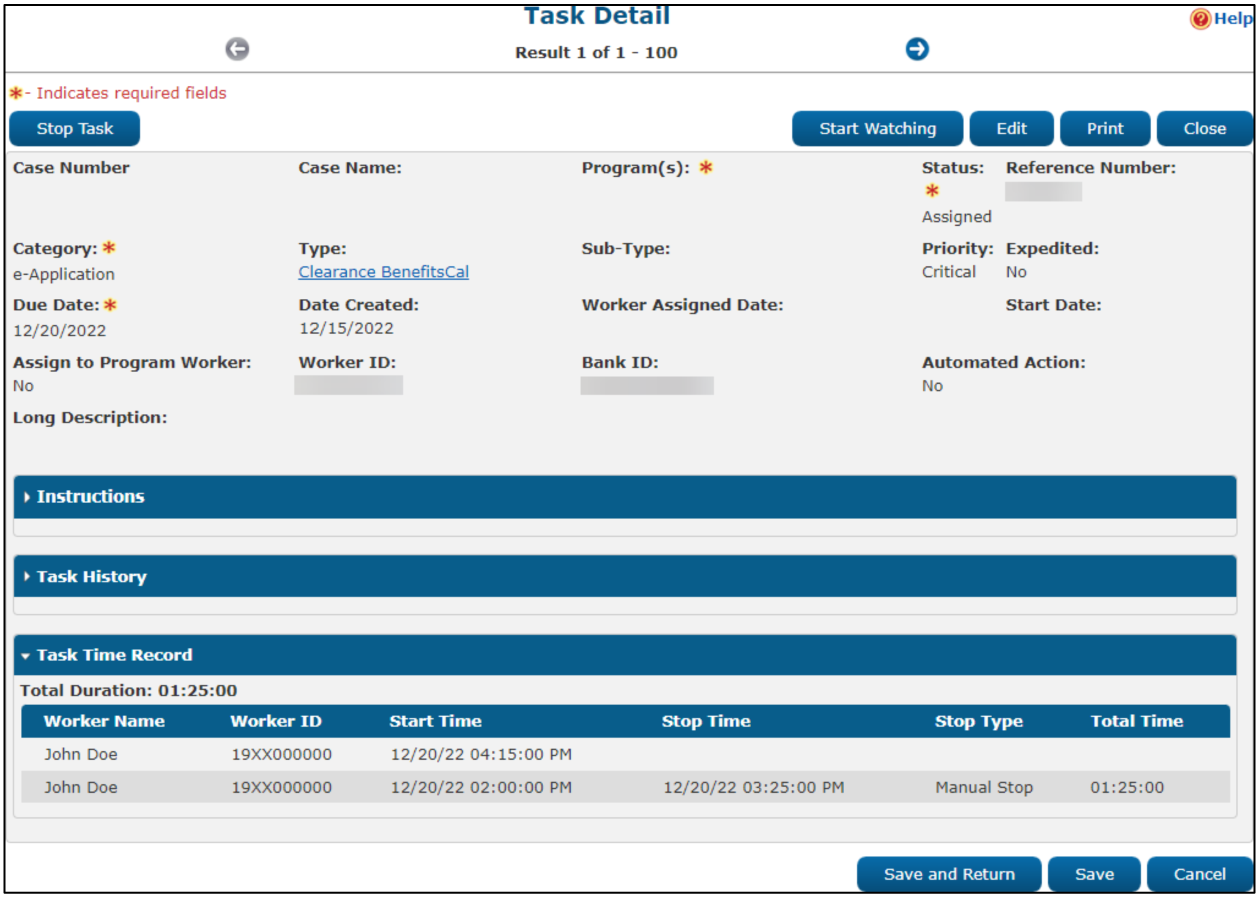


Figure 2.2.2-4 – Task Detail: Multiple Task Time Records – View Mode

2.2.3 Description of Changes

1. Update the Task Pop-Up: Task Detail page to add the following:
    a. **BUTTON:** Start Task – This button will display when:
        i. The page is in View or Edit mode
        ii. The "Task Time Record" Task Setting is enabled for the county
        iii. The viewing Worker does not already have an active Task Time Record entry for the Task that has not been stopped.

    When clicked, the "Start Task" button will be replaced by a "Stop Task" button and a row will be added to the Task Time Record panel with the start time and worker information. This entry is considered an active Task Time Record entry for the Worker/Task.

    b. **BUTTON:** Stop Task – This button will display when:
        i. The page is in View or Edit mode
        ii. The "Task Time Record" Task Setting is enabled for the county
        iii. The viewing Worker has an active Task Time Record entry for the Task that does not have a Stop Time.

When clicked, the "Stop Task" button will be replaced by a "Start Task" button and the active Task Time Record entry for the worker will be updated with the Stop Time as the time the button was clicked. The Stop Type will be set to "Manual Stop"

c. <u>Task Time Record</u>
A new collapsible panel below the 'Task History' panel. The panel will display as collapsed in all page modes whether the panel includes information or not. This panel display whether the "Task Time Record" Task Setting has been enabled for the county or not.
The following field and columns will display in this panel for each Start event:
   a. Total Duration – A single field that will show the sum of the "Total Time" column from each row in the panel.
      i. The time will display formatted as HH:MM:SS.
   b. Worker Name – This column will display the staff first and last name of the User who clicked the "Start Task" button to initiate recording of the time spent working on the Task.
   c. Worker ID – This column will display the Worker ID of the User who clicked the "Start Task" button to initiate recording of the time spent working on the Task.
   d. Start Time – This column will display the date and time indicating when the User clicked the "Start Task" button to initiate recording of the time spent working on the Task.
      i. The time will be displayed as MM/DD/YYYY HH:MM:SS AM/PM.
   e. Stop Time - This column will display the date and time indicating when the User clicked the "Stop Task" button to stop the active Task Time Record entry or the date and time that a Stop Event occurred for the Task. (See Section 2.3 for additional information)
      i. The time will be displayed as MM/DD/YYYY HH:MM:SS AM/PM.
   f. Stop Type – This column indicates the type of stop event that occurred (Reference Section 2.3 for additional details). Possible values within this column are:
      i. Manual Stop – A worker manually clicked the "Stop Task" button to end the active Task Time Record.
      ii. End Task – The Task Status was set to Complete or Void.
      iii. Logout – A Timeout or a Logout event occurred resulting in the logged Stop Time.
      iv. Batch – Batch processing logged the Stop Time for the active Task Time Record (Reference Section 2.4 for additional details)
   g. Total Time – This column will display the total time between the "Start Time" and "Stop Time" values for each row. This field will

only be calculated for rows with a Stop Time. This column will be blank for rows that do not have a Stop Time.

2.2.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A
  Page is accessible through Utility bar's Tasks Option.

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Add page mapping for the Task Time Record panel on the Task Detail page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Stop Events and Behavior

2.3.1 Overview

This section describes the various stop events that can be captured to record stop times for active Task Time Record entries as well as behavior related to user notification of an active Task Time Record when necessary.

2.3.2 Description of Changes

1. <u>Stop Events</u>
   A Stop Event is an event or action that will result in Stop Times being recorded for active Task Time Record entries.

   a. Task End State Reached
      i. If a Worker Completes or Voids a Task, all active Task Time Record entries will be updated with the Stop Time and a Stop Type of "End Task".
         1. Example: A Worker clicks the "Start Task" button to initiate work on the task and log an active Task Time Record entry. The Worker takes the appropriate action for the Task and updates the Task to

Complete. The action of updating the Task to Complete will log the date/time as the Stop Time of the active Task Time Record entry with a Stop Type of “End Task”. The Worker is not required to click the “Stop Task” button separately.

b. Timeout
   i. If the Worker’s CalSAWS session times out, all active Task Time Record entries for the Worker will be updated with the Stop Time and a Stop Type of “Logout”.

c. Logout
   i. If a Worker clicks the Logout hyperlink to log out of CalSAWS, all active Task Time Record entries for the Worker will be updated with the Stop Time and a Stop Type of “Logout”.

Note: Certain events cannot be captured in an automated fashion to log Stop Times for active Task Time Records. Examples include (but are not limited to) closing the CalSAWS browser window by clicking the browser’s “X” button, losing network connectivity, or experiencing a power outage.

Example: A worker clicks the “Start Task” button on a Task at 2:00 PM which records an active Task Time Record entry with a Start Time of 2:00 PM. While working on the Task, the county experiences a network or power outage which cannot be captured to log a Stop Time for the active Task Time Record. If the outage is resolved during business, the worker may navigate back to the Task and click the “Stop Task” button which will log the appropriate Stop Time. If the outage continues for the remainder of business, the batch processing defined in Section 2.4 will log a Stop Time and Stop Type for the active Task Time Record.

2. <u>Active Task Time Record Prompt</u>
   When a Worker leaves the context of a Case within the CalSAWS System and the worker has on active Task Time Record for a Task that is associated to the Case, an overlay prompt will display as follows:

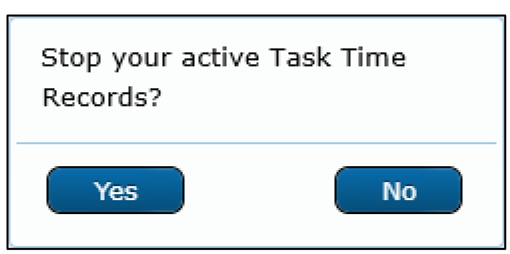


Figure 2.3.2-1 – Active Task Time Record Overlay Mockup

BUTTON No – This button will not update or stop the active Task Time Records for Tasks on the Case that the Worker has started.

BUTTON Yes – This button will log a Stop Time for active Task Time Records for Tasks on the Case that the Worker has started. The Stop Type will be set to "Manual Stop".

Example 1:

> A Worker has a Task assigned to them for Case 123 and they click the "Start Task" button for the Task. The Worker then navigates into Case context for the Case in the CalSAWS window to action the Task/Case.
>
> **Result**: Soft Validation DOES NOT display
>
> **Worker Action**: N/A

Example 2:

> A Worker has a Task assigned to them for Case 123 and they click the "Start Task" button for the Task. The Worker then navigates into Case context for the Case in the CalSAWS window and spends some time within Case context. The Worker then attempts to leave Case context by navigating to the Homepage prior to manually stopping the active Task Time Record.
>
> **Result:** Soft Validation DOES display
>
> **Worker Action:** Worker clicks "Yes"
>
> The active Task Time Record that the Worker started for the Task on Case 123 will be updated with the appropriate Stop Time and a Stop Type of "Manual Stop".

Example 3:

> A Worker has two Tasks assigned to them, one for Case 123 and one for Case 789. The Worker clicks the "Start Task" button for the Task associated to Case 123, navigates into the Case context for Case 123 and works the Case. The Worker then chooses to begin work on the Task for Case 789 and clicks "Start Task". The Worker attempts to leave the context of Case 123 and enter Case context for Case 789.
>
> **Result:** Soft Validation DOES display
>
> **Worker Action:** Worker clicks "No"
>
> The active Task Time Record that the Worker started for the Task on Case 123 will not be modified.
>
> The Worker then spends time actioning Case 789 and after some time attempts to leave Case context by navigating to the Homepage.
>
> **Result:** Soft Validation DOES display
>
> **Worker Action:** Worker clicks "Yes"

The active Task Time Record that the Worker started for the Task on Case 789 will be updated with the appropriate Stop Time and a Stop Type of "Manual Stop".

2.4 Task Time Record: Stop Task Batch Job

2.4.1 Overview

This section describes the behavior of a new daily batch process that will stop all active Task Time Records that were not stopped during business hours.

2.4.2 Description of Change

Implement a new batch process to run daily and log Stop Times for all active Task Time Record entries that do not have a Stop Time. The batch process will retrieve all Task Time Records that do NOT have logged Stop Times and set a Stop Time of the batch date/time and a Stop Type of "Batch".

2.4.3 Execution Frequency

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

2.4.4 Key Scheduling Dependencies

None.

2.4.5 Counties Impacted

All CalSAWS Counties.

2.4.6 Category

Non-Core.

2.4.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.4.8 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253604

Task Mgmt: Update Dashboard for Task Mgmt – Part 1

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Ravneet Bhatia; Gokul Suresh

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/26/2023	1.0	Initial Revision	Esequiel Herrera-Ortiz
02/14/2023	1.1	Updates made per Build and System test review.	Esequiel Herrera-Ortiz

Table of Contents

1 OVERVIEW

1.1 Current Design

The Task Management Dashboard does not include the following functionality or information:

- Program information related to tasks
- A program parameter to filter to tasks tied to specific programs
- Widgets related to Tasks that are assigned to Banks

1.2 Requests

1. Include all program for which there are tasks
2. Allow for the filtering of tasks related to specific programs. This is needed by DPSS to exclude DCFS tasks.
3. Provide additional data elements to the case lists.
4. Provide list of task categories and task types assigned to the Bank ID
5. Provide counts and lists of task categories and task types assigned to the Bank IDs which have never been assigned to a worker.
6. Provide days in pending status for each task based on assigned status.

1.3 Overview of Recommendations

1. Add a Program parameter to the dashboard.
2. Add a new '# Tasks Assigned to Banks by Category' widget to the Real Time Task Management dashboard.
3. Add a new '# Tasks Assigned to Banks by Type' widget to the Real Time Task Management dashboard.
4. Create a new case list for the new '# Tasks Assigned to Banks by Category' and '# Tasks Assigned to Banks by Type' case list.
5. Rename the existing 'Task Description' column to 'Task Type' on every case list sheet.
6. Update the logic of the existing Office column on every case list to display the Bank office name when the worker office name is not available.
7. Add new columns to the case lists.

1.4 Assumptions

1. There was a request to include a column for CalFresh Expedited Service and CalWORKs Immediate Need Indicators. This will be implemented in a later SCR as there is a dependency **CA-255938 Automated Actions for Expedited Service and Immediate Need**.

2 RECOMMENDATIONS

2.1 Task Management Dashboard

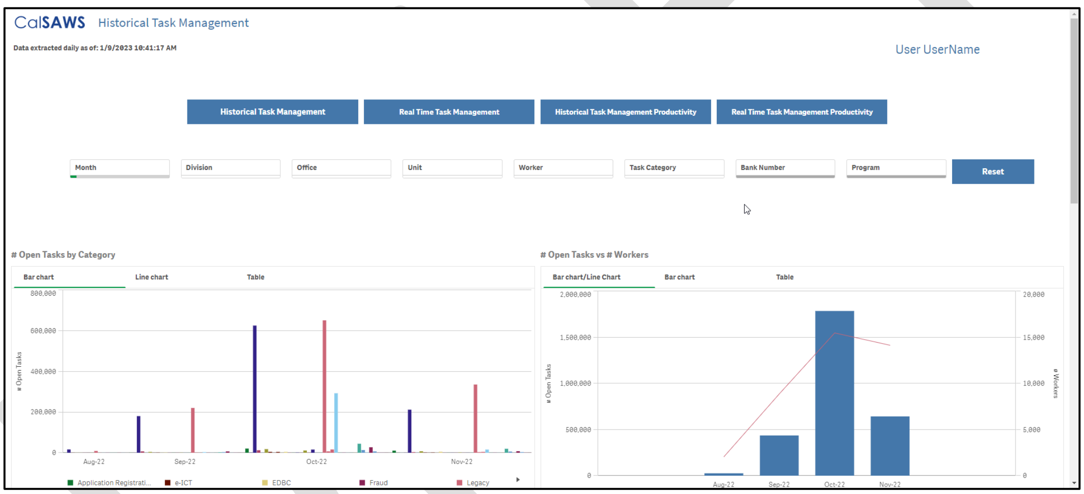
2.1.1 Overview

The Task Management Dashboard consists of the following sheets:

- Historical Task Management
- Real Time Task Management
- Historical Task Management Productivity
- Real Time Task Management Productivity

The Real Time sheets pull live data while the Historical sheets contains stored and curated historical data.

2.1.2 Task Management Dashboard Screenshot



Note: The mockup is attached is attached in the Supporting Documents section.

2.1.3 Description of Change

1. Add a Program parameter to the following sheets within the Task Management Dashboard. The parameter will be placed to the right of the existing Bank Number parameter. See the attached mockup in the supporting documents section for reference.
    - Historical Task Management
    - Real Time Task Management
    - Historical Task Management Productivity
    - Real Time Task Management Productivity

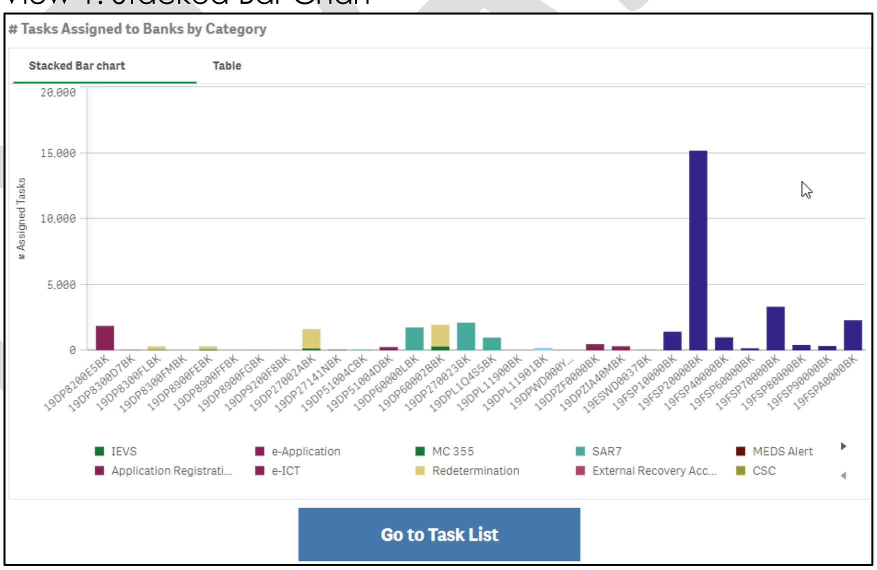
Parameter Name	Description
Program	A multi select parameter which filters the base population to those tasks associated to the selected program(s). When no value is selected, the base population will not be restricted by a program. The parameter will include an 'All' option which selects all tasks associated to any program.

Note: Applying a parameter impacts all the widgets by limiting to the totals related to of all the widgets on the sheet.

2. Add a new widget to the Real Time Task Management sheet. The widget is titled '#Tasks Assigned to Banks by Category'. The widget is placed under the '#Completed Task During Current Day By Division' widget. The widget captures all open tasks assigned to Banks. The widget has a link titled 'Go to Task List' which links to a new '#Tasks Assigned to Banks' case list.

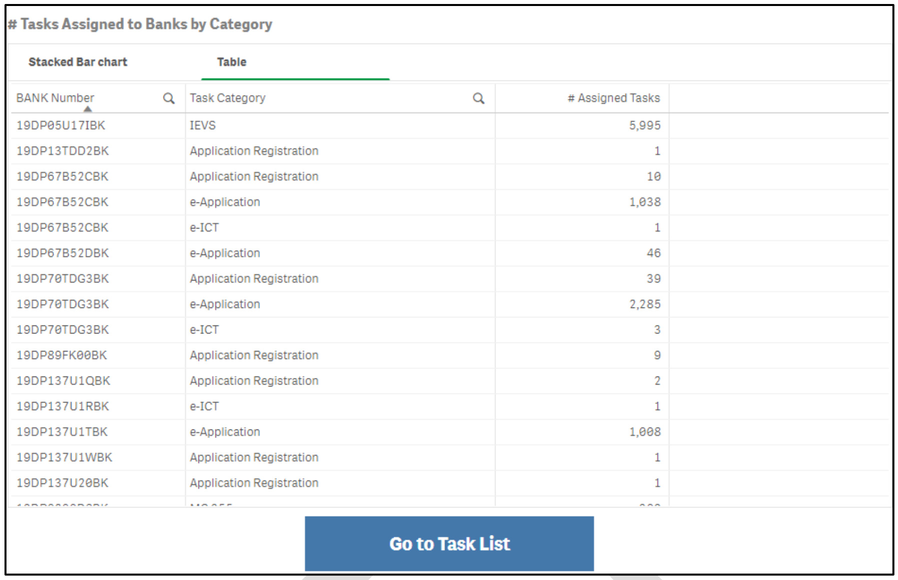
#Tasks Assigned to Banks by Category

View 1: Stacked Bar Chart



Stack = Bank Number
Bars = Task Category
Length of bars = Number of Open and Assigned Tasks

View 2: Table



Tasks Assigned to Banks by Category

Stacked Bar chart | Table

BANK Number	Task Category	# Assigned Tasks
19DP05U17IBK	IEVS	5,995
19DP13TDD2BK	Application Registration	1
19DP67B52CBK	Application Registration	10
19DP67B52CBK	e-Application	1,038
19DP67B52CBK	e-ICT	1
19DP67B52DBK	e-Application	46
19DP70TDG3BK	Application Registration	39
19DP70TDG3BK	e-Application	2,285
19DP70TDG3BK	e-ICT	3
19DP89FK00BK	Application Registration	9
19DP137U1QBK	Application Registration	2
19DP137U1RBK	e-ICT	1
19DP137U1TBK	e-Application	1,008
19DP137U1WBK	Application Registration	1
19DP137U20BK	Application Registration	1

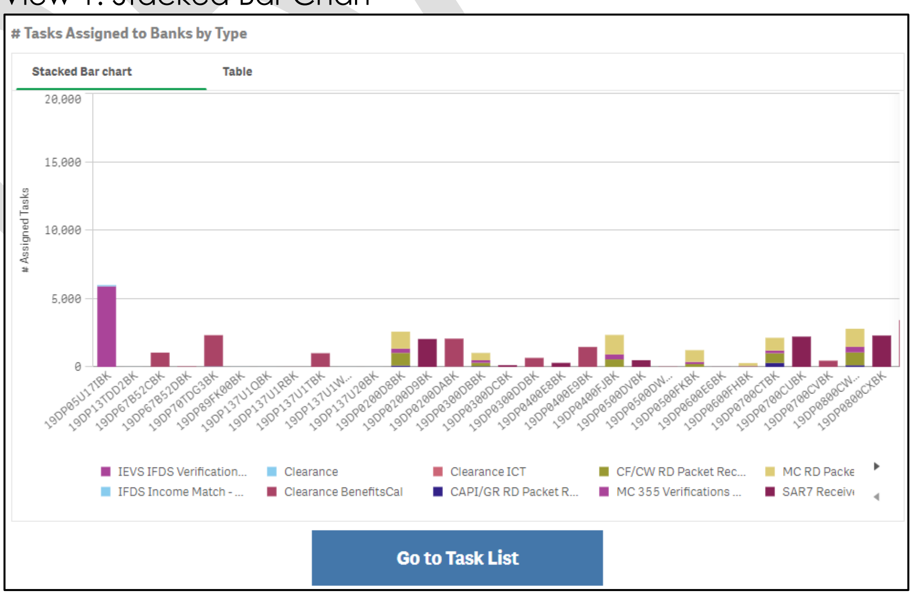
Go to Task List

Columns = Bank Number, Task Category, # Assigned Tasks

3. Add a new widget to the Real Time Task Management sheet. The widget is titled '#Tasks Assigned to Banks by Type'. The widget is placed to the right of the new '#Tasks Assigned to Banks by Category widget'. The widget captures all open tasks assigned to Banks. The widget has a link titled 'Go to Task List' which links to a new '#Tasks Assigned to Banks' case list.

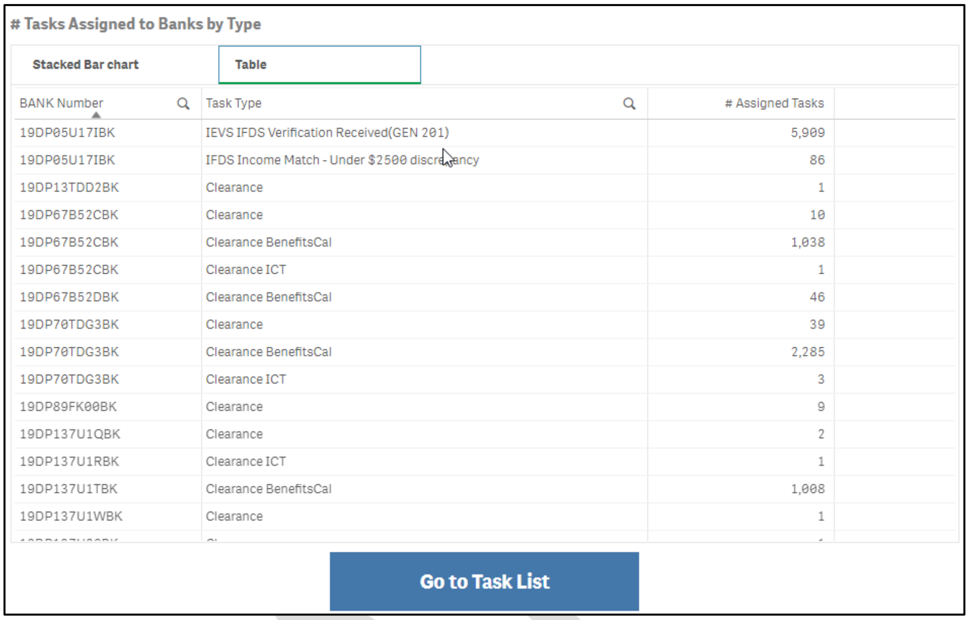
#Tasks Assigned to Banks by Type

View 1: Stacked Bar Chart



Stack = Bank Number
Bars = Task Type
Length of bars = Number of Open and Assigned Tasks

View 2: Table



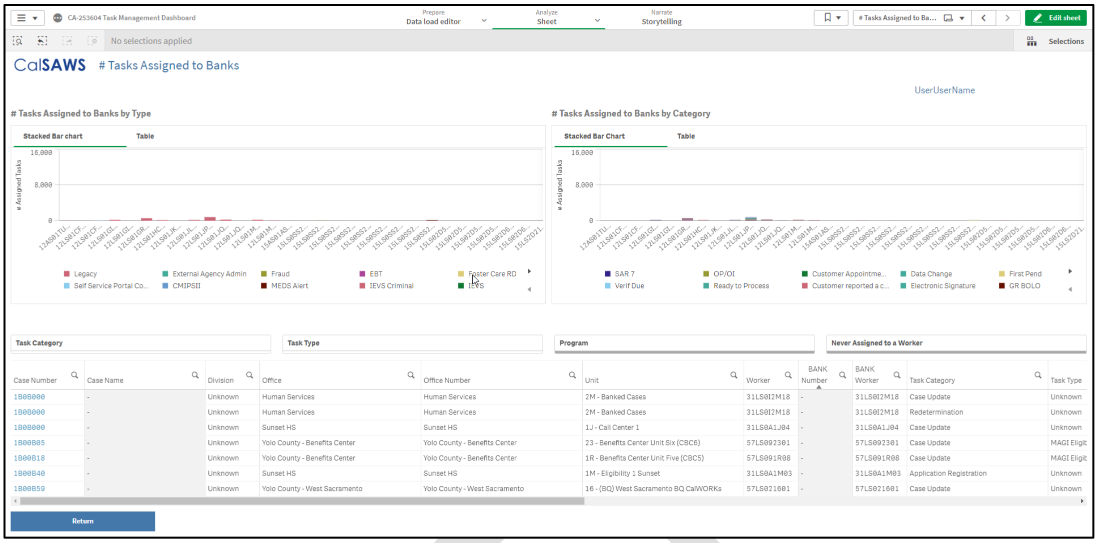
BANK Number	Task Type	# Assigned Tasks
19DP05U17IBK	IEVS IFDS Verification Received(GEN 201)	5,909
19DP05U17IBK	IFDS Income Match - Under $2500 discrepancy	86
19DP13TDD2BK	Clearance	1
19DP67B52CBK	Clearance	10
19DP67B52CBK	Clearance BenefitsCal	1,038
19DP67B52CBK	Clearance ICT	1
19DP67B52DBK	Clearance BenefitsCal	46
19DP70TDG3BK	Clearance	39
19DP70TDG3BK	Clearance BenefitsCal	2,285
19DP70TDG3BK	Clearance ICT	3
19DP89FK00BK	Clearance	9
19DP137U1QBK	Clearance	2
19DP137U1RBK	Clearance ICT	1
19DP137U1TBK	Clearance BenefitsCal	1,008
19DP137U1WBK	Clearance	1

Columns = Bank Number, Task Type, # Assigned Tasks

4. Create a new case list for the '#Tasks Assigned to Bank by Category' and '#Tasks Assigned to Banks by Type' widgets. The case list has a copy of the '#Tasks Assigned to Banks by Category' and '#Tasks Assigned to Banks by Type' widgets placed at the top. The case list includes a 'Return' button at the bottom of the page which returns the user to the 'Realtime Task Management' sheet. See the attached mockup in the Supporting Documents section for reference.

   Note: When a user navigates to the case list using the 'Go to Task List' button, the selected view of the Widget does not carry over. The user will see the default view of the widget which is the Stacked Bar Chart view.

 # Tasks Assigned to Banks Screenshot



Note: The mockup is attached is attached in the Supporting Documents section.

Base Population:
Includes all tasks in the Real Time Task Management Sheet that are assigned to a Bank. This includes Assigned tasks, in Process tasks and tasks completed in the day.

Parameters:

Parameter Name	Description
Task Category	A multi select parameter which filters the data to the specified Task Categories. If no value is selected, then the data will not be restricted by Task Category.
Task Type	A multi select parameter which filters the data to the specified Task Type(s). If no value is selected, then the data will not be restricted by Task Type.
Program	A multi select parameter which filters the data to those tasks associated to the selected program(s). If no value is selected, then the data will not be restricted by Program. The parameter will include an 'All' option which selects all tasks associated to any program.
Never Assigned to a Worker	A multi select parameter which filters data based on those tasks which have never been assigned to a worker. If no option is selected,

	then the data will not be filtered by this condition. Possible Value: • Y – The task has never been assigned to a worker. • N – The task has been assigned to a worker.

Columns:

The columns appear in the order they are placed in in the case list.

Column Name	Description
Case Number	Displays the Case Number of the case associated to the task. The value will be a hyperlink which navigates the user to the Case Summary Page for the selected case.
Case Name	Displays the case number of the case associated to the task.
Division	Displays the division associated with the task. If a worker is assigned to the task, this value is the division of the worker; otherwise, this is the division of the assigned Bank.
Office Number	Displays the office number of the office If a worker is assigned to the task, this value is the division of the worker; otherwise, this is the division of the assigned Bank.
Office	Displays the office name associated with the task. If a worker is assigned to the task, this value is the office of the worker; otherwise, this is the office of the assigned Bank.
Unit	Displays the unit associated with the task. If a worker is assigned to the task, this value is the unit of the worker; otherwise, this is the unit of the assigned Bank.
Worker	Displays the Worker ID of the worker assigned to the task. This column will be blank if the data is not available.

Bank Number	Displays the Bank ID of the Bank assigned to the task. This column will be blank if the data is not available.
Task Category	Displays the Task Category of the task.
Task Type	Displays the Task Type of the task. Technical Note: TASK_TYPE.TYPE_NAME
Program	Displays the program associated to the task. The column will be blank if the data is not available.
Program Status	Displays the current program status of the program associated to the task. This column will be blank if data is not available.
Primary Applicant	Displays the first name and last name of the primary applicant of the program that is associated to the task. This column will be blank if the data is not available. Format: [First Name] [Last Name]
Spoken Language	Displays the current spoken language of the primary applicant at the time of task creation. The column will be blank if the data is not available. Technical Note: TASK.LANG_CODE
Application Date	Displays the Application Date on the current application of the program that is associated to the task. This column will be blank if data is not available. Technical Note: PGM_APP.APP_DATE
Task Status	Displays the current Task Status of the task.
Task Status Date	Displays the task status date of the task. Format: MM/DD/YYYY HH:MM:SS AM/PM
Days Elapsed from Status Date	Displays the number of days the task has been in the same status. Days Elapsed from Status Date = Current Date – Task Status Date

Task Assign Date	Displays the date the task was assigned to a position. This column will be blank if the data is not available. Format: MM/DD/YYYY HH:MM:SS AM/PM Technical Note: TASK.ASSIGN_DATE
Task Due Date	Displays the due date of the task. Format: MM/DD/YYYY HH:MM:SS AM/PM
Task Create Date	Displays the date the task was created. Format: MM/DD/YYYY HH:MM:SS AM/PM Technical Note: TASK.RECRD_CREATE_DATE
Task Start Date	Displays the start date the task. This column will be blank if a start date was not configured. Format: MM/DD/YYYY HH:MM:SS AM/PM Technical Note: TASK.START_DATE
Task Expiration Date	Displays the expiration date on the task. This column will be blank if the data is not available. Format: MM/DD/YYYY HH:MM:SS AM/PM
#Remaining Days	Displays the number of days remaining on the task before reaching the Due Date. #Remaining Days = Current Date – Task Due Date
Date Appended	Displays the most recent date that the task has been appended. This column will be blank if the data is not available. Format: MM/DD/YYYY
Overdue Indicator	Displays Y/N if the task is overdue. Possible Values: • Y – The current date is greater than the task overdue date. • N - The current date is less than or equal to the task overdue date.

Customer Report Type	If the task is generated from a Document Routing Rule, displays the customer report type. This column will be blank if the data is not available. Technical Note: This information can be derived from TASK_ATTR.
Customer Report Submit Month	If the task is generated from a Document Routing Rule, displays the customer report submit month. This column will be blank if the data is not available. Format: MM/YYYY
Confidential Flag	Displays Yes if the case has one of the following confidential types and the removal date on the record is not equal to or less than the current date (CT-51): • DV – Domestic Violence • ER – Employee/Employee Relative • HR – Human Trafficking • MC – Minor Consent The column will display 'No' if the criteria above is not met.
Confidential Description	Displays the confidentiality type assigned to the case. The column will be blank if data is not available or if the removal date on the record is equal to or less than the current date. Technical Note: CONFID_DETL.TYPE_NOTE
Never Assigned to Worker Ind	Indicates if the task has been assigned to a Worker before. Possible Values: • Y – The task has been assigned to a worker. N – The task has not been assigned to a worker.
Qlik ID	Displays the Qlik ID unique identifier.

5. Rename the existing 'Task Description' column to 'Task Type' on every case list within the dashboard. This is to match the online page.

Real Time Task Management

- #Overdue Tasks
- #Open Tasks by Category
- #Completed Tasks During Current Day by Category (Division Drill Down)
- #Open Tasks by Category
- #Completed Tasks During Current Day by Division

Historical Task Management

- #Open Tasks vs # Workers – Task List
- #Open Tasks by Category
- #Completed Tasks by Category

Historical Task Management Productivity

- #Open Tasks by Category
- # Completed Tasks by Category
- # Overdue Tasks

Real Time Task Management Productivity

- #Open Task by Category
- #Overdue Tasks
- #Completed Tasks During Current Day by Category

- # Overdue Tasks
- # Open Tasks by Category
- #Completed Tasks During Current Day by Category
- #Assigned Tasks by Division
- #Completed Tasks During Current Day by Division

6. Update the logic for the Office column in every case list within the tab.

Column Name	Description
Office	Displays the current Office Name of the office that is associated to the task assigned worker. If there is no task assigned worker, then displays the office associated to the Bank will be displayed.

Real Time Task Management

- #Overdue Tasks
- #Open Tasks by Category
- #Completed Tasks During Current Day by Category (Division Drill Down)

- #Open Tasks by Category
- #Completed Tasks During Current Day by Division

Historical Task Management

- #Open Tasks vs # Workers – Task List
- #Open Tasks vs # Workers – Worker List
- #Open Tasks by Category
- #Completed Tasks by Category

Historical Task Management Productivity

- #Open Tasks by Category
- # Completed Tasks by Category
- # Overdue Tasks

Real Time Task Management Productivity

- #Open Task by Category
- #Overdue Tasks
- #Completed Tasks During Current Day by Category
- # Overdue Tasks
- # Open Tasks by Category
- #Completed Tasks During Current Day by Category
- #Assigned Tasks by Division
- #Completed Tasks During Current Day by Division

7. Add the following new columns to the specified case lists listed below.

Column Name	Description
Case Name	Displays the case name of the case.
Office Number	Displays the Office Number of the office that is associated to the task assigned worker. If there is no task assigned worker, then the office associated to the Bank will be displayed. Technical Note: OFFICE.OFFICE_NUM_IDENTIF
Primary Applicant	Displays the first name and last name of the primary applicant of the program that is associated to the task. This column will be blank if the data is not available. Format: [First Name] [Last Name]
Spoken Language	Displays the spoken language of the primary applicant at the time of task creation. The

	column will be blank if the data is not available. Technical Note: TASK.LANG_CODE
Program	Displays the program associated to the task. The column will be blank if the data is not available.
Program Status	Displays the current program status of the program associated to the task. This column will be blank if data is not available.
Application Date	Displays the current Application Date on the current application of the program that is associated to the task. This column will be blank if data is not available. Technical Note: PGM_APP.APP_DATE
Task Status	Displays the current Task Status of the task.
Task Status Date	Displays the task status date of the task. Format: MM/DD/YYYY HH:MM:SS AM/PM
Days Elapsed from Status Date	Displays the number of days the task has been in the same status. Days Elapsed from Status Date = Current Date – Task Status Date
Customer Report Type	If the task is generated from a Document Routing Rule, displays the Customer Report Type. This column will be blank if the data is not available.
Customer Report Submit Month	If the task is generated from a Document Routing Rule, displays the packet due date. This column will be blank if the data is not available. Format: MM/YYYY
Confidential Flag	Displays Yes if the case has one of the following confidential types and the removal date on the record is not equal to or less than the current date (CT-51): • DV – Domestic Violence • ER – Employee/Employee Relative

	• HR – Human Trafficking • MC – Minor Consent The column will display 'No' if the criteria above is not met.
Confidential Description	Displays the confidentiality type assigned to the case. The column will be blank if data is not available or if the removal date on the record is equal to or less than the current date. Technical Note: CONFID_DETL.TYPE_NOTE
Task Assign Date	Displays the date the task was assigned to a position. This column will be blank if the data is not available. Format: MM/DD/YYYY HH:MM:SS AM/PM Technical Note: TASK.ASSIGN_DATE
Task Create Date	Displays the date the task was created. Format: MM/DD/YYYY HH:MM:SS AM/PM Technical Note: TASK.RECRD_CREATE_DATE
Task Start Date	Displays the start date the task. This column will be blank if a start date was not configured. Format: MM/DD/YYYY HH:MM:SS AM/PM Technical Note: TASK.START_DATE
Task Expiration Date	Displays the expiration date on the task. This column will be blank if the data is not available. Format: MM/DD/YYYY HH:MM:SS AM/PM
Task Due Date	Displays the due date of the task. Format: MM/DD/YYYY HH:MM:SS AM/PM
Date Appended	Displays the most recent date that the task has been appended. This column will be blank if the data is not available. Format: MM/DD/YYYY

Real Time Task Management

#Overdue Tasks

1. Case Number (Link Broken)
2. **Case Name**
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task **Type**
11. **Program**
12. **Program Status**
13. **Primary Applicant**
14. **Spoken Language**
15. **Application Date**
16. **Task Status**
17. **Task Status Date**
18. **Days Elapsed from Status Date**
19. Task Assign Date
20. Task Due Date
21. **Task Create Date**
22. **Task Start Date**
23. **Task Expiration Date**
24. # Days Overdue
25. **Date Appended**
26. **Customer Report Type**
27. **Customer Report Submit Month**
28. **Confidential Flag**
29. **Confidential Description**
30. Qlik ID

#Open Tasks by Category

1. Case Number (Link Broken)
2. **Case Name**
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task Source

11. Task **Type**
12. **Program**
13. **Program Status**
14. **Primary Applicant**
15. **Spoken Language**
16. **Application Date**
17. **Task Status**
18. **Task Status Date**
19. **Days Elapsed from Status Date**
20. Task Assign Date
21. Task Due Date
22. **Task Create Date**
23. **Task Start Date**
24. **Task Expiration Date**
25. # Remaining Days
26. Overdue Indicator
27. **Date Appended**
28. **Customer Report Type**
29. **Customer Report Submit Month**
30. **Confidential Flag**
31. **Confidential Description**
32. Qlik ID

#Completed Tasks During Current Day by Category (Division Drill Down)

1. Case Number (Link not working)
2. Case Name
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task Assign Date
11. Task **Type**
12. **Program**
13. **Program Status**
14. **Primary Applicant**
15. **Spoken Language**
16. **Application Date**
17. Task Assign Date
18. Task Complete Date
19. **Task Due Date**
20. **Task Create Date**
21. **Task Start Date**
22. **Task Expiration Date**

23. Task Status Description
24. **Date Appended**
25. **Customer Report Type**
26. **Customer Report Submit Month**
27. **Confidential Flag**
28. **Confidential Description**
29. Qlik ID

#Open Tasks by Category

1. Case Number (Link Broken)
2. **Case Name**
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task Source
11. Task **Type**
12. **Program**
13. **Program Status**
14. **Primary Applicant**
15. **Spoken Language**
16. **Application Date**
17. **Task Status**
18. **Task Status Date**
19. **Days Elapsed from Status Date**
20. Task Assign Date
21. Task Due Date
22. **Task Create Date**
23. **Task Start Date**
24. **Task Expiration Date**
25. # Remaining Days
26. Overdue Indicator
27. **Date Appended**
28. **Customer Report Type**
29. **Customer Report Submit Month**
30. **Confidential Flag**
31. Qlik ID

#Completed Tasks During Current Day by Division

1. Case Number (Link not working)
2. Case Name
3. Division
4. Office

5. **Office Number**
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task **Type**
11. **Program**
12. **Program Status**
13. **Primary Applicant**
14. **Spoken Language**
15. **Application Date**
16. Task Assign Date
17. **Task Due Date**
18. **Task Create Date**
19. **Task Start Date**
20. **Task Expiration Date**
21. Task Complete Date
22. **Date Appended**
23. **Customer Report Type**
24. **Customer Report Submit Month**
25. **Confidential Flag**
26. **Confidential Description**
27. Qlik ID

Historical Task Management

#Open Tasks vs # Workers – Task List

1. **Case Number**
2. **Case Name**
3. **Division**
4. **Office**
5. **Office Number**
6. **Unit**
7. **Worker**
8. Bank Number
9. Task Assigned Date
10. Task Category
11. Task **Type**
12. Qlik ID

#Open Tasks by Category

1. Case Number
2. **Case Name**
3. Division
4. Office

5. **Office Number**
6. Unit
7. Worker
8. Worker Name
9. Bank Number
10. Task Category
11. Task **Type**
12. **Program**
13. **Program Status**
14. **Primary Applicant**
15. **Spoken Language**
16. **Application Date**
17. **Task Status**
18. **Task Status Date**
19. **Days Elapsed from Status Date**
20. Task Assign Date
21. **Task Due Date**
22. **Task Create Date**
23. **Task Start Date**
24. **Task Expiration Date**
25. **Date Appended**
26. **Customer Report Type**
27. **Customer Report Submit Month**
28. **Confidential Flag**
29. **Confidential Description**
30. Qlik ID

#Completed Tasks by Category

1. Case Number
2. **Case Name**
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker
8. Worker Name
9. Bank Number
10. Task Category
11. **Task Type**
12. **Program**
13. **Program Status**
14. **Primary Applicant**
15. **Spoken Language**
16. **Application Date**
17. **Task Assign Date**
18. **Task Due Date**
19. **Task Create Date**

20. **Task Start Date**
21. **Task Expiration Date**
22. Task Completion Date
23. #Days to Complete Task
24. **Date Appended**
25. **Customer Report Type**
26. **Customer Report Submit Month**
27. **Confidential Flag**
28. **Confidential Description**

Historical Task Management Productivity

#Open Tasks by Category

1. Case Number
2. **Case Name**
3. Division
4. Unit
5. Office
6. **Office Number**
7. Worker
8. Worker Name
9. Bank Number
10. Task Category
11. Task **Type**
12. Task Source
13. **Program**
14. **Program Status**
15. **Primary Applicant**
16. **Spoken Language**
17. **Application Date**
18. **Task Status**
19. **Task Status Date**
20. **Days Elapsed from Status Date**
21. Task Assign Date
22. Task Due Date
23. **Task Create Date**
24. **Task Start Date**
25. **Task Expiration Date**
26. # Remining Days
27. Overdue Indicator
28. **Date Appended**
29. **Customer Report Type**
30. **Customer Report Submit month**
31. **Confidential Flag**
32. **Confidential Description**
33. **Qlik ID**

Completed Tasks by Category

1. Case Number
2. **Case Name**
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker
8. Worker Name
9. Bank Number
10. Task Category
11. Task **Type**
12. **Program**
13. **Program Status**
14. **Primary Applicant**
15. **Spoken Language**
16. **Application Date**
17. **Task Assign Date**
18. Task Due Date
19. **Task Create Date**
20. **Task Start Date**
21. **Task Expiration Date**
22. Task Completion Date
23. #Days to Complete Task
24. **Date Appended**
25. **Customer Report Type**
26. **Customer Report Submit month**
27. **Confidential Flag**
28. **Confidential Description**
29. Qlik ID

Overdue Tasks

1. Case Number
2. **Case Name**
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker
8. Worker Name
9. Bank Number
10. Task Category
11. Task **Type**
12. **Program**
13. **Program Status**
14. **Primary Applicant**

15. **Spoken Language**
16. **Application Date**
17. Task Status
18. Task Status Date
19. **Days Elapsed from Status Date**
20. Task Assign Date
21. Task Due Date
22. **Task Create Date**
23. **Task Start Date**
24. **Task Expiration Date**
25. #Days Overdue
26. **Date Appended**
27. **Customer Report Type**
28. **Customer Report Submit month**
29. **Confidential Flag**
30. **Confidential Description**

Real Time Task Management Productivity

#Open Task by Category

1. Case Number (Link Broken)
2. **Case Name**
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task Source
11. Task **Type**
12. **Program**
13. **Program Status**
14. **Primary Applicant**
15. **Spoken Language**
16. **Application Date**
17. **Task Status**
18. **Task Status Date**
19. **Days Elapsed from Status Date**
20. Task Assign Date
21. Task Due Date
22. **Task Create Date**
23. **Task Start Date**
24. **Task Expiration Date**
25. #Remaining Days
26. Overdue Indicator
27. **Date Appended**

28. **Customer Report Type**
29. **Customer Report Submit Month**
30. **Confidential Flag**
31. **Confidential Description**
32. Qlik ID

#Overdue Tasks

1. Case Number
2. **Case Name**
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task **Type**
11. **Program**
12. **Program Status**
13. **Primary Applicant**
14. **Spoken Language**
15. **Application Date**
16. **Task Status**
17. **Task Status Date**
18. **Days Elapsed from Status Date**
19. Task Assign Date
20. Task Due Date
21. **Task Create Date**
22. **Task Start Date**
23. **Task Expiration Date**
24. # Days Overdue
25. **Date Appended**
26. **Customer Report Type**
27. **Customer Report Submit Month**
28. **Confidential Flag**
29. **Confidential Description**
30. Qlik ID

#Completed Tasks During Current Day by Category

1. Case Number (Link Broken)
2. Case Name
3. Division
4. Office
5. **Office Number**
6. Unit
7. Worker

8. Bank Number
9. Task Category
10. Task **Type**
11. **Program**
12. **Program Status**
13. **Primary Applicant**
14. **Spoken Language**
15. **Application Date**
16. Task Status Description
17. Task Assign Date
18. Task Due Date
19. **Task Create Date**
20. **Task Start Date**
21. **Task Expiration Date**
22. Task Complete Date
23. **Date Appended**
24. **Customer Report Type**
25. **Customer Report Submit Month**
26. **Confidential Flag**
27. **Confidential Description**

2.1.4 Report Location

- **Global: Business Intelligence**
- **Local: Real Time Task Management**
- **Task: Real Time Task Management**

2.1.5 Counties Impacted

All counties are impacted by the changes outlined in this section.

2.1.6 Security Updates

No updates are made to the Dashboards existing security.

2.1.7 Report Usage/Performance

The Performance for the Real Time Task Management and Real Time Task Performance dashboard will increase due to additional data points.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	# Tasks Assigned to Banks	#Tasks Assigned to Banks Mockup.jpg
2	Reports	Real Time Task Management Dashboard Mockup	Real Time Task Management Mocku

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.8	The LRS shall include the ability to generate the following parameter-driven reports: a. Fraud reports; b. Hearing reports; c. Financial reports; d. Federal and State claiming reports; e. Caseload Activity Report (CAR); f. Personnel management reports; h. Benefit authorization reports; i. Issuance reports; j. Collection reports; k. QC reports; l. Mass update reports; m. Interface reports; n. Error reports; o. Caseload management reports; p. Performance-based criteria reports; q. Case LRS Data reports; and r. Control and processing reports	The Task Management Dashboard is a parameter-driven caseload management report.

4.2 Migration Requirements

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

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
CA-253604	Reports	This is a joint 58 county design where there is regional approval aligning to the governance model.	No Impact		

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-255462

Hide Reset Password button for CalWIN Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Trevor Torres
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/24/2023	1.0	Initial Revision	Trevor Torres

Table of Contents

1 OVERVIEW

Currently, CalWIN Users are attempting to reset their passwords within CalSAWS using the Password Reset buttons. This SCR will hide these reset buttons from the CalWIN counties.

1.1 Current Design

CalWIN Users are attempting to Reset User Passwords within CalSAWS using the Password Reset buttons.

1.2 Requests

Hide the Reset Password buttons within CalSAWS from the CalWIN Counties.

1.3 Overview of Recommendations

1. Hide the "Reset Password" button on the Homepage for CalWIN counties.
2. Hide the "Update Password" button on the Homepage for CalWIN counties.
3. Hide the "Reset Password" button and "Password" field on the Security Assignment Detail page for CalWIN counties.

1.4 Assumptions

1. Existing functionalities will remain unchanged unless called out as part of this SCR.

2 RECOMMENDATIONS

2.1 Homepage

2.1.1 Overview

The Homepage the landing page that users are navigated to when logging into the system. This SCR will hide these reset buttons for the CalWIN counties.

2.1.2 Description of Changes

1. Hide the "Reset Password" and "Update Password" buttons from the Homepage for CalWIN counties.

2.1.3 Security Updates

N/A

2.1.4 Page Mapping

N/A

2.1.5 Page Usage/Data Volume Impacts

N/A

2.2 Security Assignment

2.2.1 Overview

The Security Assignment page is used for displaying Staff Name, User Name, Login Status, Assigned Security Roles, Assigned Security Groups and more if applicable. The page is also used for generating User Names for newly created staff, as well as resetting the temporary password that is created with the User Name. This SCR will hide the "Reset Password" button and "Password" field for the CalWIN counties.

2.2.2 Security Assignment Mockups

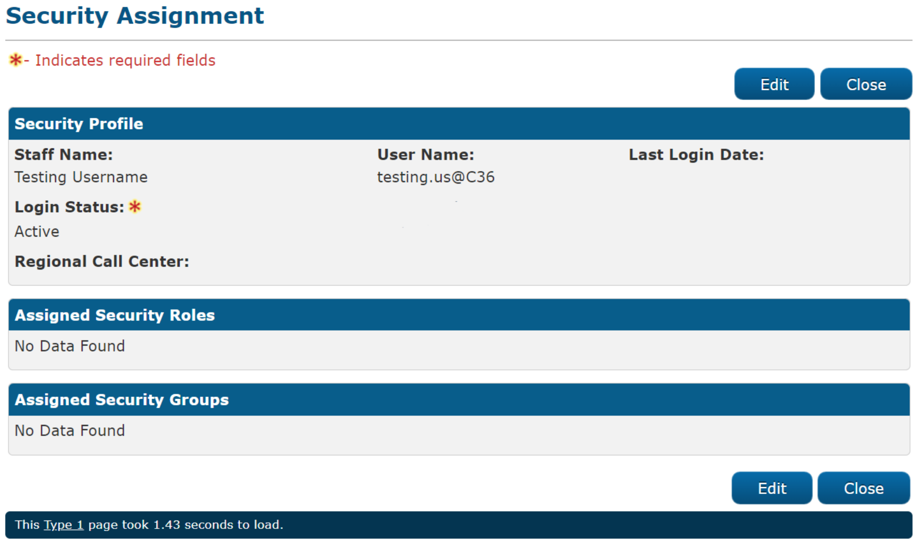


Figure 2.1.1 – Security Assignment No Reset Password Mockup

2.2.3 Description of Changes

1. Hide the "Reset Password" button and "Password" field on the Security Assignment Detail page for CalWIN counties.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.1.1.29	The LRS shall include the ability to system-generate the password for the User, whereby the generation, transmission, and internal storage of the password is accomplished in a secure manner based on industry standards.	This SCR is hiding/removing the buttons that reset passwords with generation, transmission, and internal storage in a secured manner based on industry standards.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-255689

Create a new mail priority for Mass Mailers and COLA Documents

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Manisha Chatterjee
	Reviewed By	Raj Devidi

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/14/2023	0.1	Initial Draft	Manisha Chatterjee
02/27/2023	0.2	Updated Assumptions with Technical note	Manisha Chatterjee

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1 OVERVIEW

SCR CA-255689 will create a new mail priority or way of bundling the mass mailers/COLA Forms and NOAs separately.

1.1 Current Design

Currently mass mailers and COLA Forms and NOAs get bundled with the daily bundle making it difficult for central print to prioritize the daily bundles over mass mailers/COLA.

1.2 Requests

Create a new mail priority or way of bundling the mass mailers/COLA Forms and NOAs separately.

1.3 Overview of Recommendations

Add a new priority or way for the mass mailers/COLA Forms and NOAs so that their priority will be less than the daily bundles (with priority '01') and these can be bundled separately without interfering with the daily bundles.

1.4 Assumptions

1. Currently mass mailers and COLA forms/NOAs have mail priority '01'. Future mass mailers will use priority '08' based on COLA SCRs. This SCR will not change any existing Forms/NOAs mail priority.

2. The mail priority will be updated to '08' for the correspondence generated during COLA run with DCRs so that all the COLA correspondence will be bundled and mailed together.

3. The list of forms can be generated from EDBC are - AAP 2, AR 2, AR 2 SAR, CW 2211, CW 2212, CW 2215, FC 3, FC 3A and SAR 2.

4. COLA correspondence can be identified by COLA run reason or by COLA batch EDBC begin and end time stamps.

5. Mass mailers will be generated via batch process by inserting them into SYS_TRANSACT table.

Technical Note: In future, whenever any mass mailer or any COLA NOA/Form will get generated, its priority will be updated to priority '08' to avoid bundling with priority '01' bundles. The priority needs to be updated by applying DCR on the correspondences which will be considered for mass mailer, or which will get generated during COLA run.

For COLA correspondences, the priority number can be updated in PRINT_FILE table where the COLA NOA/Forms are determined by the begin and end timestamps of the COLA EDBC batch.

For Mass mailers, there can be a new entry in the DOC_TEMPL table with mail priority code as ‘08’ for that correspondence.

For testing the functionality of this SCR, Mock DCR can be created to update the mail priority to ‘08’ for the existing mass mailers/COLA NOAs and forms and running the corresponding batches for this priority.

Since we are using the priority ‘08’ for mass mailers/ COLA NOAs and forms which is an existing priority currently disabled in the system, any existing code related to priority ‘08’ should be removed and should not affect the functionality of this SCR.

2 RECOMMENDATIONS

2.1 Create the Bundling Batch Jobs for the new priority ‘08’

2.1.1 Overview

The bundling batch jobs do not exist for the new priority ‘08’ in CalSAWS for other counties except Los Angeles County. Create the batch jobs for all other counties similar to Los Angeles County batch job PB19P408.

2.1.2 Description of Change

1. Create the following batch jobs for all counties except Los Angeles County (‘19’):

    a. PBXXP408 – Priority 08 Bundling Job

    Note: *The ‘XX’ denotes the county code. For example, PB34P408 is the bundling job for Sacramento County.*

2.1.3 Execution Frequency

These batch jobs run daily.

2.1.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County batch job PB19P408.

2.1.5 Counties Impacted

All counties except LA county

2.1.6 Data Volume/Performance

Approximately more than 1,20,000 records are processed monthly by Bundling batch job. Please note that the number of records processed by each job is an approximation, and this number may vary.

2.1.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.2 Create the Print File Transfer Batch Jobs for the new priority '08'

2.2.1 Overview

The print file transfer batch jobs are responsible for sending the bundles over to the print center to be printed. The print file transfer batch jobs currently do not exist for new priority '08' in CalSAWS for other counties except Los Angeles County. Create the batch jobs for all other counties similar to Los Angeles County file transfer batch job PB19P428.

2.2.2 Description of Change

1. Create the following batch jobs for all counties except Los Angeles county ('19').

    a. PBXXP508
    b. PBXXP428

Note: *The 'XX' denotes the county code. For example, PB34P428 is the print file transfer job for Sacramento County.*

2.2.3 Execution Frequency

These batch jobs run daily.

2.2.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County jobs PB19P508 and PB19P428.

2.2.5 Counties Impacted

All counties except LA county

2.2.6 Data Volume/Performance

Approximately more than 1,20,000 records are processed monthly by Bundling batch job. Please note that the number of records processed by each job is an approximation, and this number may vary.

2.2.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.3 Schedule the Bundling and File Transfer Batch Jobs

2.3.1 Overview

The bundling and print file transfer batch jobs for the Los Angeles currently exist in CalSAWS but are not scheduled to run (according to BSCRs CA-232515 and CA-232514). Update the scheduling of all the bundling and print file transfer batch jobs for all counties to run daily.

2.3.2 Description of Change

1. Schedule the following batch jobs for all counties:

    a. PBXXP408
    b. PBXXP508
    c. PBXXP428

    Note: *The 'XX' denotes the county code. For example, PB36P408 is the priority 08 bundling job for San Bernardino.*

2.3.3 Execution Frequency

These batch jobs run daily.

2.3.4 Key Scheduling Dependencies

These batch jobs have the same predecessor and successor as the Los Angeles County jobs - PB19P408 and PB19P508 and PB19P428(Check BSCRs CA-232515 and CA-232514).

2.3.5 Counties Impacted

All Counties

2.3.6 Data Volume/Performance

Approximately more than 1,20,000 records each are processed monthly by Bundling batch job and Print File transfer batch jobs. Please note that the number of records processed by each job is an approximation, and this number may vary.

2.3.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

3 REQUIREMENTS

3.1 Migration Requirements

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-255938

Automated Actions for Expedited Service and Immediate Need

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/31/2023	1.0	Initial Revision	Vallari Bathala

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1 OVERVIEW

This design describes the creation of Expedited Service and Immediate Need Task Automated Actions.

1.1 Current Design

The CalSAWS System includes functionality to create Tasks in an automated fashion via the Automated Action framework. This framework allows a level of configuration for automated Tasks that can be maintained by the Counties. There are no Automated Actions for Expedited Service or Immediate Need.

1.2 Requests

1. Add Automated Actions for Expedited Service (ES) and Immediate Need (IN) to the CalSAWS system.

1.3 Overview of Recommendations

1. Implement an Automated Action to be invoked when a CalFresh program is potentially entitled or entitled for ES.
2. Implement an Automated Action to be invoked when an Immediate Need program is assigned on the Pending Assignment List page.

1.4 Assumptions

1. The current e-Application process will not change with this enhancement.
2. The existing Immediate Need Application Registration functionality will not change with this enhancement.

2 RECOMMENDATIONS

2.1 Automated Actions

2.1.1 Overview

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

2.1.2 Automated Action Detail Mockup – Reference Example

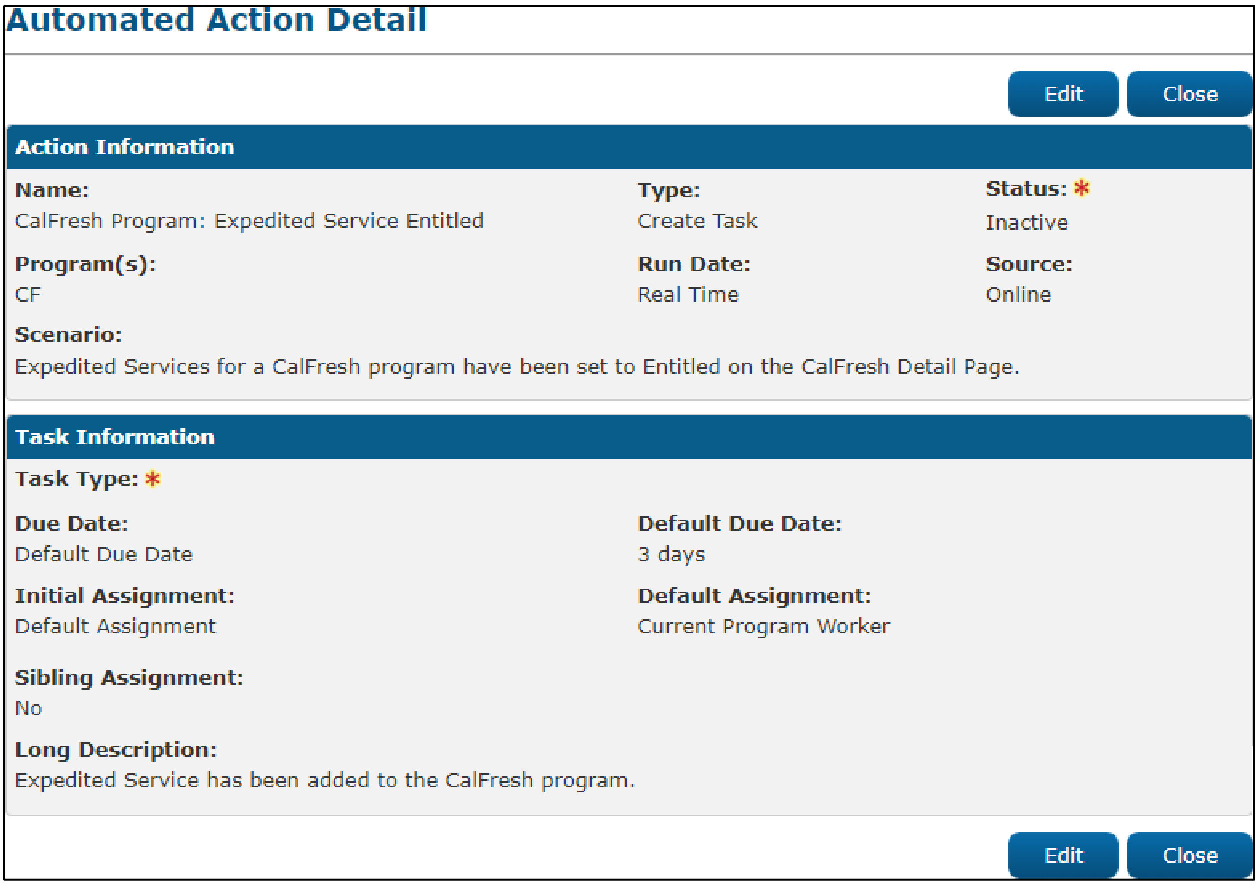

Figure 2.1.1 – Automate Action Detail Reference Example

2.1.3 Description of Changes

Add the following Create Task type Automated Actions to the CalSAWS system. 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:

1. CalFresh Program: Expedited Service
    a. Action Information

i. Name: CalFresh Program: Expedited Service
ii. Type: Create Task
iii. Status: Inactive
iv. Program(s): CF
v. Run Date: Real Time
vi. Source: Online
vii. Scenario: A CalFresh e-Application indicates potential Expedited Services or Expedited Services for a CalFresh program have been set to Entitled on the CalFresh Detail Page.

b. Task Information
i. Task Type: BLANK
ii. Task Sub-Type: BLANK
iii. Due Date: Default Due Date
iv. Default Due Date: 3 Days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: A CalFresh e-Application indicates potential Expedited Services or Expedited Service has been added to the CalFresh program.

c. This Automated Action will be invoked in the following two scenarios:
1. When a CalFresh program is assigned on the Pending Assignment List and the program application originated from an e-Application that has "ES" or "ES/IN" in the "Expedited Services/Immediate Need/Immediate MediCal" field of the e-Application Summary Page.

2. The "Entitled" attribute within the "Expedited Service" panel of the CalFresh Detail page is set to Yes and the page is saved.

The Automated Action will not be invoked if the Case/Program currently has a Task that originated from the Automated Action that is in an In-Process or Assigned Status.

For example, if a CalFresh program is assigned on the Pending Assignment list that originated from an e-Application that indicates "ES", the Automated Action will be invoked to create a Task. If the resulting Task remains in an Assigned status, and the "Entitled" attribute is later set to "Yes" on the CalFresh Detail page for the program, a secondary Task will not be created.

3. Immediate Need Program: Pended
    a. Action Information
        i. Name: Immediate Need Program: Pended
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): IN
        v. Run Date: Real Time
        vi. Source: Online
        vii. Scenario: An Immediate Need program has been Pended and Assigned.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date
        iv. Default Due Date: 1 Day
        v. Initial Assignment: Default Assignment
        vi. Default Assignment: Current Program Worker
        vii. Long Description: An Immediate Need program has been pended.

    c. This Automated Action will be invoked when an Immediate Need program is assigned on the Pending Assignment List page.

       Note: The trigger event for this Automated Action will function in a similar manner as the "Intake" Automated Action, which is invoked to create a Task for each program assigned on the Pending Assignment List page. The difference is that the new Automated Action is restricted to the Immediate Need program alone which can be activated/configured as needed by each county.
       As a result, a county that has activated both the "Intake" and the "Immediate Need Program: Pended" Automated Actions will receive 2 Tasks (one from each Automated Action) when an Immediate Need program is assigned on the Pending Assignment List page.
       Alternately, a county that has not activated the "Intake" Automated Action can opt to activate the "Immediate Need Program: Pended" Automated Action for a single Immediate Need Task to be created when an Immediate Need program is Pended.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-256840

CalSAWS VA Expansion – Release 3

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gray Guzman
	Reviewed By	Nathali Roizman Lizerbram, Regina Zmuidzinas Aguilar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/16/23	1.0	Original Draft	Gray Guzman

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1 OVERVIEW

1.1 Current Design

The Virtual Assistant (VA) allows 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.

1.2 Requests

Add more content to the VA and edit previously deployed content.

1.3 Overview of Recommendations

In Release 3 of the CalSAWS VA, we will release additional UCs within the VA and make enhancements to existing content. The scope of this SCR is as follows:

Summary of New Content:

Category	Current Design	Release 3	Total (All Releases)
Number of UCs	62	28	90
Number of Keywords	238	14	252
Main Menu Branch	5	0	5
Sub-Menu Branches	9	3	12

Summary of Enhancements to Existing Content:

Category	Release 3
Number of Edited UCs	2
New UX/UI Features	0

1.4 Assumptions

1. To chat with the VA, the user would click the orange chat icon in the bottom right corner of the website (shown below).

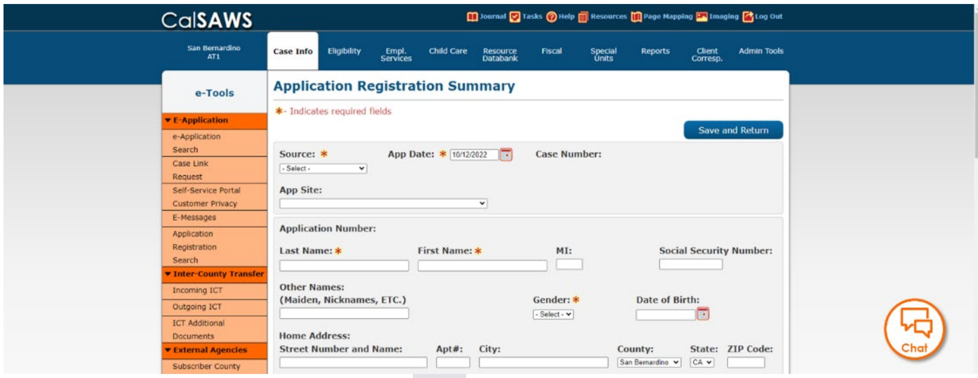

Figure 1.4.1 - VA Chat Icon

2. Once clicked, the VA will open as a pop-up window with the URL: virtualassistant.calsaws.net.

2 RECOMMENDATIONS

2.1 Internal VA Items

2.1.1 Overview

In this release, we will be adding more content to the VA and making enhancements to existing content. This content will include 28 more UCs, 14 new keywords, and 3 new sub-menu branches.

2.1.2 CalSAWS VA Mockups

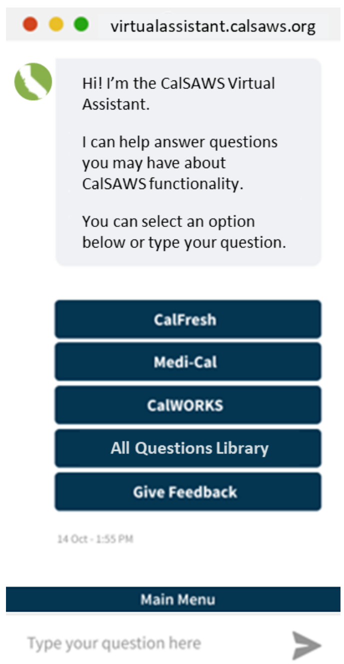

Figure 2.1.2.1 - VA Window

2.1.3 Description of Changes

1. New UCs

Below is a table containing all new UCs in Release 3:

Program	Question	Answer	Buttons
Self-Service Portal sub-menu	How to identify Expedited Service (ES) & Immediate Need (IN) e-Applications?	The e-Application Search page displays an Expedited Service (ES) / Immediate Need (IN) column. The code(s) displayed are as follows: • ES – Displays if applicant potentially qualifies for ES • IN – Displays if applicant potentially qualifies for IN • ES/IN – Displays if applicant is potentially eligible for ES and IN • No – Displays if applicant did not request or did not answer the ES or IN questions Note: Every application should be screened for Expedited Services even if it displays a "No" code.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to search for e-applications?	You can access the e-Application Search by placing your cursor over **Case Info** on the Global navigation bar and selecting **e-Tools** from the **Local** navigator. To search for an e-Application: 1. Go to the **e-Application Search** page 2. Enter the appropriate search criteria 3. Click the **Search** button	**Button:** e-Application Search (OLH) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to process a Case Link Request from Self-Service Portal?	Customers may link their Self-Service Portal (SSP) account to their case through the SSP. Case link requests occur automatically if there is a 100% information match. If there is not a 100% information match, the user must manually complete the process. To learn more about how to process a case link request, click the button below.	**Button:** Self-Service Portal (SSP) - Case Link Requests (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to reject a Case Link Request from the Self-Service Portal?	There are various reasons for why Counties may consider rejecting a Case Link Request. Possible scenarios may include:	**Button:** Self-Service Portal (SSP) - Case Link Requests (JA)

		• Any of the associated cases have an active Children Services program • The Primary Applicant has an active Customer Privacy record • The individual requesting the Case Link is not actually the Primary Applicant on any program To learn more about how and when to reject a case link request, click the button below.	**Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to link an e-Application to a case for a customer in the System?	You may link an e-Application (e-App) for customers after they complete and submit an application through the Self-Service Portal. Note: For customers unknown to the system, please follow your County's guidance on file clearance before linking. While an e-App is in "data transfer" status, you cannot link a second e-App to that case. Click the button below for instructions on how to link an e-App to a case for a customer known and unknown to the System.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to unlink an e-Application from a case in the system?	You may unlink an e-Application (e-App) from a case if you linked an e-App to the incorrect case. To unlink, you must repeat the steps to link the e-App to the correct case. The e-App will then show as linked to the new/correct case and disappears from the case to which it was originally linked. Note: You can only unlink an e-App while it is in "Data Transfer" status. Click the button below to learn more about how to link an e-App to the correct case.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** Link e-Application to a Case **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to add a Customer Privacy Record?	Customers may not want their case information to be sent to their Self-Service Portal (SSP) account for various privacy reasons. The Customer Privacy Record is used to prevent case data from being sent to the SSP.	**Button:** Self-Service Portal (SSP) Customer Privacy (JA) **Button:** More Self-Service

		Note: Adding a Customer Privacy record does not make the case confidential in the System. Click the button below for steps on how to add a Customer Privacy Record to a case.	Portal-related Topics
Self-Service Portal sub-menu	How to end date a Customer Privacy Record?	End dating a customer privacy record will allow the System to send all case data and available documents to the Self-Service Portal (SSP) for customer viewing. Customers requesting case information and that their forms/NOAs be available through their SSP account (after a customer privacy request was processed) can have their customer privacy record end dated. Click the button below for steps on end dating a Customer Privacy Record.	**Button:** Self-Service Portal (SSP) Customer Privacy (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to process a Re-Evaluation / Recertification / Redetermination submitted through the Self-Service Portal?	Customers can complete and sign their Re-Evaluations (RE) from their Self-Service Portal (SSP) account. CalSAWS uses the data to populate the RE form(s) and uploads the form to the Imaging system. The Imaging system updates the Customer Reporting Detail page to show the RE has a status of "Received". Click the buttons below for more information on how to process a RE.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** Recertification Process **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to navigate to the Self-Service Portal Customer Privacy Page?	You may add a Customer Privacy record to a case to prevent case data from being sent to the Self-Service Portal (SSP). To access the SSP Customer Privacy page: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click **Self-Service Portal Customer Privacy** from the **Task** navigation bar 4. On the **Select Person** page	**Button:** Self-Service Portal (SSP) Customer Privacy (JA) **Button:** Add Customer Privacy Record **Button:** End Dating a Customer

		a. Enter the Case Number or Person information b. Click the **Search** button c. Select the **Primary Person** on the Case	Privacy Record **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to unlink Primary Applicant from a Self-Service Portal Account?	Only under certain circumstances can users with the appropriate security rights unlink a Primary Applicant from a Self-Service Portal (SSP) account. When a Primary Applicant is unlinked from their SSP account all associated cases are unlinked as well. Click the button below for detailed instructions on how to unlink a Primary Applicant from SSP account.	**Button:** Self-Service Portal (SSP) - Case Link Requests (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to transfer customer data from the Self-Service Portal into CalSAWS?	Data the customer enters in the Self-Service Portal (SSP) populates the data collection pages. Review all information submitted by the applicant on all appropriate data collection pages. Information submitted by an applicant is indicated by the e-Data icon on the list and detail pages. You can accept or reject e-Data information for each field or drop list, as necessary. Note: Customer data transfer only applies to e-Applications. When a customer submits a renewal or a report-a-change (RAC), the data will not transfer. In these cases, the user will need to look at the imaged document. For step-by-step instructions on how to transfer customer data in the Self-Service Portal, click the button below.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to assign or re-assign an e-Application in the Self-Service Portal?	To assign/re-assign an e-Application, start from the Case Summary page for the linked e-Application. 1. Click the **Expand** caret in the **Self-Service Portal** page section. Select the **e-App Number** hyperlink for the most current e-Application.	**Button:** Self-Service Portal (SSP) e-Applications (JA) **Button:** More Self-Service

		2. On the **e-Application Summary** page: Click the **Edit** button. Click the **Select** button under the **Assigned Worker Name** field in the **Assigned Worker Information** page section. 3. On the **Select Worker** page: Enter the appropriate search information and click the **Search** button. 4. Click the radio button for the appropriate worker. Click the **Select** button. 5. On the **e-Application Summary** page: Click the **Assign** button. Click the **Close** button.	Portal-related Topics
Self-Service Portal sub-menu	How to send an e-Message?	The e-Message functionality allows all Counties to send e-Messages to the customer's Self-Service Portal (SSP) account, regardless of whether they opted in or out of two-way messaging. To send an e-Message, the customer must have created an SSP account. Customers may be sent an email notification when they receive an e-Message on their SSP account. In order to receive email notifications, a customer must opt-in to e-Notifications and provide a valid email address. Note: Only workers with the appropriate security rights to access the e-Message Detail page can send an e-Message. Follow your County's policy regarding e-Messages. To access the e-Messages pages: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click the **E-Messages** link on the **Task** navigation bar Click the button for detailed instructions on how to send an e-Message.	**Button:** Self-Service Portal (SSP) - e-Messages (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to respond to an e-Message?	When a Self-Service Portal (SSP) customer sends an e-Message, the worker, based on County policy, can respond to the customer through the e-Messages pages.	**Button:** Self-Service Portal (SSP) - e-Messages (JA)

		To access the e-Messages pages: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click the **E-Messages** link on the **Task** navigation bar Click the button for detailed instructions on how to respond to an e-Message.	**Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to request an action from the customer?	Workers can request information or verifications from the customer or send forms to the customer to complete and return through the e-Messages pages. To access the e-Messages pages: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click the **E-Messages** link on the **Task** navigation bar Click the button for detailed instructions on how to request an action from the customer.	**Button:** Self-Service Portal (SSP) - e-Messages (JA) **Button:** More Self-Service Portal-related Topics
Self-Service Portal sub-menu	How to close an e-Message Action?	When a response is received from the customer, workers may update the e-Message status to Action Completed. To access the e-Messages pages: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **e-Tools** from the **Local** navigator 3. Click the **E-Messages** link on the **Task** navigation bar Click the button for detailed instructions on how to close an e-Message Action.	**Button:** Self-Service Portal (SSP) - e-Messages (JA) **Button:** More Self-Service Portal-related Topics
Referrals sub-menu	How to create referrals?	You may create referrals on the Referrals site. To create the referral: 1. Place the cursor over **Empl. Services** on the **Global** navigation bar 2. Click the **Supportive Services** link from the **Local** navigator	**Button:** Referrals – Manage (JA) **Button:** More Referrals-related Topics

		3. Click the **Needs** link in the **Task** navigation bar 4. After filling out the fields on the **Need Detail** page: a. Select **Indicated** from the **Status** drop list b. Select **Documented** from the **Status Reason** drop list c. Select **Referral** from the **Save & Add New** drop list 5. On the **Referral Detail** page: a. Confirm the radio button for the appropriate need is selected b. Click the **Select** button under **Provider** 6. After filling out the fields on the **Select Service and Provider** page: a. Click the **Search** button b. Click the radio button for the appropriate Provider c. Click the **Select** button 7. After filling out the fields on the **Referral Detail** page: a. Click the **Save and Return** button	
Referrals sub-menu	How to edit referrals?	You may edit referrals on the Referrals site. To edit the referral: 1. Place the cursor over **Empl. Services** on the **Global** navigation bar 2. Click the **Supportive Services** link from the **Local** navigator 3. Click the **Referrals** link in the **Task** navigation bar 4. Click the **Edit** button for the appropriate referral on the **Referrals List** page 5. After filling out the fields on the **Referral Detail** page: a. Click the **Save and Return** button	**Button:** Referrals – Manage (JA) **Button:** More Referrals-related Topics
Referrals sub-menu	How to remove referrals?	You may remove referrals on the Referrals site. To remove the referral: 1. Place the cursor over **Empl. Services** on the **Global** navigation bar 2. Click the **Supportive Services** link from the **Local** navigator 3. Click the **Referrals** link in the **Task** navigation bar 4. On the **Referrals List** page:	**Button:** Referrals – Manage (JA) **Button:** More Referrals-related Topics

		a. Click the check box for the appropriate referral b. Click the **Remove** button	
Referrals sub-menu	How to access IHSS Referrals Search page?	The In Home Supportive Services (IHSS) Referral Search page displays all pending IHSS referrals assigned to a worker. To access the IHSS Referrals Search page: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **Referral** from the **Local** navigator 3. If no data is displayed, click the **Refine Your Search** link and enter new search parameters	**Button:** IHSS Referrals (OLH) **Button:** More Referrals-related Topics
Referrals sub-menu	How to link an IHSS referral to a case in the System?	The In Home Supportive Services (IHSS) Referral Detail page allows users to link a referral to a case in the System and view information sent through the Caseload Management Information and Payrolling System (CMIPS) II interface. Users may access the IHSS Referrals Detail Page from the IHSS Referrals Search page by clicking the IHSS Case hyperlink on the IHSS Referral Search page. Note: Only users with the appropriate security rights can link an IHSS referral to a case. To link an IHSS referral to a case in the System: 1. Click the link to **System Case** button on the **IHSS Referral Detail** page 2. Search for an existing person on the **New Person Search** page. Add a new person or select an existing person on the **New Person Search Results** page Note: When an IHSS applicant has a pseudo Social Security Number (SSN) in MEDS, the CMIPS II system sends zeros for a person's SSN and populates the SSN text box with zeros during the linking process. Remove the zeros and leave the SSN text box blank or enter a valid SSN, if applicable.	**Button:** IHSS Referrals (JA) **Button:** More Referrals-related Topics

		3. Click the **Select** or **Create New Case** button depending upon whether the person being added has an existing System case Note: If the person being added does not have sufficient information to assign a Client Index Number (CIN), they will be added to the case, but no System program is created. Note: For more information on adding a person or creating a case in the System, refer to the "System Establish a Case - Existing Customer" and "The System Establish a Case - New Customer" job aids.	
Referrals sub-menu	How to reject IHSS referrals?	Referrals can be rejected if a user determines that an In Home Supportive Services (IHSS) referral should not be linked to a case in the System. When in edit mode on the IHSS Referral Detail page, clicking the Reject button updates the referral status from Accepted to Rejected. Note: Only users with the appropriate security rights can reject an IHSS Referral. If necessary, a rejected referral can be linked to another case in the System by clicking the Link to System Case button. Doing this will change the referral status from Rejected to Accepted. When a referral is rejected and linked to another System case, the nightly interface sends a transaction to Caseload Management Information and Payrolling System (CMIPS) II notifying them of the new System case number and status of the Medi-Cal or cash-based program. In the event the IHSS referral is not linked to another System case, the System will reject all future CMIPS II interface transactions as the IHSS referral is no longer known to the System.	**Button:** IHSS Referrals (JA) **Button:** More Referrals-related Topics

Task Management sub-menu	How to add tasks?	You can create a task using **Tasks** on the **Utilities** navigation bar or using the **Worklist** page. To add a task using **Tasks** on the **Utilities** navigation bar, you need to know the case number or be in the context of a case. Click the button below for detailed instructions on how to add tasks.	**Button:** Task Management (JA) **Button:** More Task Management -related Topics
Task Management sub-menu	How to reassign tasks?	To reassign a single task, you can edit the task and update the associated Worker and/or Bank, using the Task Search page. Several tasks can be reassigned at the same time using the Task Search page. Tasks may be reassigned through an overnight batch process according to the criteria entered on the Task Reassignment Detail page. Note: When a task is added, it is associated to a specific Worker ID and/or Bank ID. The Worker ID associated may be either the Worker ID associated to the program or a specific Worker ID associated to the task. An assigned task can be reassigned to another Worker and/or Bank at any time. Once a task is completed or expired, it cannot be edited or reassigned. For more detailed instructions, click the button below.	**Button:** Task Management (JA) **Button:** More Task Management -related Topics
Task Management sub-menu	How to search tasks?	The Task Search page allows workers to search for newly assigned tasks, overdue tasks, and for a specific Category, Task Type, or priority. To access the Task Search page: 1. Click **Tasks** on the **Utilities** navigation bar 2. Click the **Task Search** tab to access the **Task Search** page Note: A case number is required when searching for All tasks or Completed tasks. If the User needs to search for completed tasks, they may generate the On-Request Task	**Button:** Task Management (JA) **Button:** More Task Management -related Topics

		Report with the appropriate security rights. For additional information on searching for a task, click the link below.	
Task Management sub-menu	How to edit tasks?	You can edit Tasks by clicking on **Edit** next to the task on the **Task Search** page or the **My Tasks** page. 1. The **Task Detail** displays as an overlay when you click on the **Edit** button or the **Due Date** hyperlink to view a task 2. After you click **Save** or **Save and Return** on the **Task Detail** overlay, the task displays on the **Task Search** page and the **My Tasks** page with the updated information Click the button below for further detailed instructions on how to edit tasks and to see which Task Detail fields are editable.	**Button:** Task Management (JA) **Button:** More Task Management -related Topics
Task Management sub-menu	How to complete tasks?	Users can complete a task once the action required by that task is completed. Tasks can be cleared one at a time by using any one of the following methods: 1. Click the **Complete** button on the **My Tasks** page OR 2. Click the **Edit** button on the **My Tasks** page to access the **Task Detail** page • Select **Complete** from the **Status** drop-down box • Click the **Save and Return** button OR 3. Click the **Complete** button on the **Task Search** page OR 4. Click the **Edit** button on the **Task Search** page to access the **Task Detail** page • Select **Complete** from the **Status** drop-down box • Click the **Save and Return** button	**Button:** Task Management (JA) **Button:** More Task Management -related Topics

2. Edited UCs

Below is a table containing all edited UCs in Release 3. Text highlighted signals edits:

Program	Question/Title	Answer	Buttons
Free Response	Help Response	I'm sorry for not answering your question, I'm still learning and may have an answer in the future. ~~Please~~ For additional assistance, please ask your supervisor or assigned support staff so that they can escalate, as necessary.	
CalWORKs, CalFresh, Medi-Cal	How to complete an electronic signature?	Electronic Signature is a method of capturing a participant's signature or intent through electronic options rather than signing a physical piece of paper. For step-by-step instructions on how to complete an electronic signature, click the Electronic Signature (e-Sign) (JA) button below. For more information on forms that require a telephonic / electronic signature, click the Forms Overview button below. Note: The Forms Overview Online Help guides are updated with each major release; forms with priority release will not be in the Form Overview.	**Button:** Electronic Signature (e-Sign) (JA) ~~**Button:** CalSAWS Forms Inventory~~ **Button:** Forms Overview (OLH) **Button:** More CalWORKs-related Topics **Button:** More CalFresh-related Topics **Button:** More Medi-Cal-related Topics

3. New Keywords

Below is a table containing all new Keywords in Release 3:

UC #	Title	Keywords
UC FR.14	Self-Service Portal Sub-Menu	SSP, self-service portal, e-Message, emessage, Case Link Request, case link
UC FR.16	Referrals Sub-Menu	Referrals, IHSS, In Home Supportive Services, CMIPS II, cmips, Caseload Management Information and Payrolling System

UC FR.17	Task Management Sub-Menu	task management, tasks

4. **New Sub-Menu Branches**
   Release 3 we will include several new sub-menu branches that will bucket keywords into a sub-menu.

   These new sub-menu branches are:
    1. Self-Service Portal
    2. Referrals
    3. Task Management

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Design	Release Tracker	
2	Design	Miro Board – VA flow and UCs are documents	

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-25901

Update Valuable Voucher Type for CalWIN Wave 2

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	John B., Kapil S.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/24/2023	1.0	Initial Version	Jimmy Tu

Table of Contents

1 OVERVIEW

1.1 Current Design

Valuable Voucher Types are stored in the database and appear in the drop-down list for Valuable Category Voucher. When there are no Voucher Types stored for a County, the drop-down is empty.

1.2 Requests

1. Add Valuable Voucher Types for the CalWIN Wave 2.

1.3 Overview of Recommendations

1. Update the Valuable Type table to include new Valuable Types for Contra Costa and Santa Clara.
2. Update the Valuable Type Program table to include new mappings for Valuable Voucher types.

1.4 Assumptions

None.

2 RECOMMENDATIONS

2.1 Data Change Request

2.1.1 Overview

This Data Change Request is to add additional Valuable Voucher Types for Santa Clara and Contra Costa.

2.1.2 Description of Change

1. Update the Valuable Type (Vabl_type) table to include the following new Valuable Voucher Types:

Category Code (Cat_Code)	Valuable Description	County Code
Voucher ('VO')	CalLearn Voucher	Santa Clara (43)
Voucher ('VO')	Homeless Assistance Voucher	Santa Clara (43)
Voucher ('VO')	Voucher	Santa Clara (43)
Voucher ('VO')	WtW Book Voucher	Santa Clara (43)
Voucher ('VO')	WtW Voucher	Santa Clara (43)
Voucher ('VO')	Housing Voucher	Santa Clara (43)
Voucher ('VO')	Supportive Service Voucher	Santa Clara (43)
Voucher ('VO')	DMV Voucher	Santa Clara (43)
Voucher ('VO')	J-Voucher / Homeless Assistance Voucher	Contra Costa (07)

2. Update the Valuable Type Program (Valbl_type_pgm_code) table to include new program to voucher type mappings for the new voucher types above.

Program Code (PGM_CODE)	Valuable Type (Valbl_type_ID)
CalLearn	CalLearn Voucher
Homeless Temp, Homeless Perm	Homeless Assistance Voucher
WTW, CalLearn, CFET, CalWORKs, RCA, CalFresh, Medi-Cal, GA/GR	Voucher
WTW	WtW Book Voucher
WTW	WtW Voucher

Commented [JT1]: GA/GR Automated Solution (GR)?

WTW	Housing Voucher
CFET	Supportive Service Voucher
WTW, CalLearn, CFET, CalWORKs, RCA, CalFresh, Medi-Cal, GA/GR	DMV Voucher
CalWORKs, Homeless Temp, Homeless Perm	J-Voucher / Homeless Assistance Voucher

2.1.3 Estimated Number of Records Impacted/Performance

35 records impacted.

3 SUPPORTING DOCUMENTS

None.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

5 MIGRATION IMPACTS

None.

6 OUTREACH

None.

7 APPENDIX

None.