

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208604 Batch Scheduling Updates for
CalWIN Conversion (Wave 5)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shining Liu
	Reviewed By	Priya Sridharan, Kapil Santosh, Edgars Reinholds, Naveen Bhumandla, Chitra Barsagade

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/13/2023	1.0	Initial version	Shining Liu

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1 OVERVIEW

This SCR will outline the necessary modifications for scheduling the CalSAWS batch jobs for the CalWIN Wave 5 Conversion. The CalWIN Wave 5 Counties include Alameda, Fresno, and Sonoma.

1.1 Current Design

Various CalSAWS Migration DDIDs implemented in R1 through R8 include functionality to turn on/turn off Batch jobs for the 58 Counties. CA-208599 implemented batch schedule updates for the C-IV Migration counties. The SCR contained DDID references and county responses from C-IV and CalWIN Counties per batch job/functionality.

CalWIN Conversion has begun with the 22.09 release of the Wave 1 Counties of Placer and Yolo. Wave 2 CalWIN Conversion Counties Contra Costa, Santa Clara, and Tulare County will be migrated with the 23.01 release. Wave 3 CalWIN Conversion Counties Orange, Santa Barbara, and Ventura will be migrated with the 23.03 release. Wave 4 CalWIN Conversion Counties San Diego, San Mateo, Santa Cruz, and Solano will be migrated with the 23.05 release. Wave 5 CalWIN Conversion Counties Alameda, Fresno, and Sonoma will be migrated with the 23.07 release.

The scheduling of the remaining CalWIN Counties will occur for each conversion wave in future system change requests.

1.2 Requests

Update Batch Scheduling CalWIN Conversion Wave 5 to schedule the various Batch jobs for Alameda, Fresno, and Sonoma. Batch jobs from the following SCRs will be scheduled for the CalWIN Wave 5 Counties starting target September 2023:

Batch:

- CA-207374: DDID 1110 – Update Negative Action Batch jobs to be configurable
- CA-207302: DDID 1527 - CalFresh Denial Due to Missed Interview
- CA-207363: DDID 1236 – Update the Non-MAGI RE Discontinuance Batch Job to run for all 58 Counties
- CA-208568: DDID 1967 – Modify WTW Batch job related to Sanctions for all 58
- CA-222369: Update Batch jobs for Foster Care program when NMD turns 21
- CA-207145: CAPI Discontinuance (PB00E917) for C-IV and CalWIN Counties.
- CRFI 22-031: CalWIN - CFET Automation Jobs
- CRFI 22-043: CalWIN – Update Child Care Certificate
- CRFI 22-021: CalWIN – WTW program Activation Batch Job

- Schedule the following IVR jobs for CalWIN counties: POxxM300, POxxM301, POxxM302, POxxM303, POxxM304, POxxM305

Correspondence:

- CA-50988: Automation of the Medi-Cal Request for Information Form MC 355
- CA-215153: DDID 2659 FDS: Non State Forms – Update MATURES 1
- CA-215155: DDID 2660 FDS: Non State Forms – Update MATURES 2
- CRFI 19-030: DDID 2280 CSF 285 form
- Schedule the following print bundling and print file FTP jobs for the CalWIN counties: PBXXP400, PBXXP401, PBXXP404, PBXXP405, PBXXP500, PBXXP501, PBXXP504, PBXXP420, PBXXP421, PBXXP424, etc., and conduct central print testing.
- Schedule the remaining NOA and FORM Generation thread jobs for the CalWIN Counties.
- CRFI 22-061: CalWIN County CSF 124 and CSF 125

Fiscal:

- CA-216568: DDID 1787 and 1789 – Migrate C-IV County Specific Batch Jobs Phase 5
- CA-212363: DDID 1360 - Add Direct Deposit Functionality to CalSAWS for CalWIN Migration Counties
- CA-217791: DDID 1967 – Update RDB With Direct Deposit Data Collection
- CA-207266: DDID 1652 – Enable Recovery Account Activation Batch Job for all 58 Counties
- CA-207157: DDID 2128 – Add Tax Intercept Functionality to CalSAWS
- CA-212361: DDID 2194 - Add Positive Pay Interface Functionality to CalSAWS for CalWIN Migration Counties
 - Do not schedule Positive Pay job/FTP for Contra Costa County
- Foster Care Main Payroll
 - Schedule Main Payroll on 1st of the month, similar to C-IV counties, for all CalWIN counties.
- CA-215679: DDID 2376 FDS: GA GR Overpayment Suspension/Termination Batch Changes
 - CRFI 22-003: CalWIN - Terminate GA/GR Recovery Account
- CA-235652: CRFI 21-036 Update Warrant Expiration for CalWIN Counties
- CA-207137: DDID 2196, 2200, 2201 - CalWIN Fiscal Interfaces
- CA-207493: DDID 87 – Add Batch Automation for WTW Supportive Services Overpayments

1.3 Overview of Recommendations

1. Update CalSAWS batch jobs via BPCR/BSCR to run for Alameda, Fresno, and Sonoma Counties based on county opt in/opt out decisions starting September 4, 2023.

1.4 Assumptions

1. Batch Scheduling for CalWIN Migration Counties will occur with the following SCRs for each conversion wave:
 - a. CA-208603 CalWIN Wave 4: San Diego, San Mateo, Santa Cruz, and Solano (Release 23.05)
 - b. CA-208604 CalWIN Wave 5: Alameda, Fresno, Sonoma (Release 23.07)
 - c. CA-208605 CalWIN Wave 6: Sacramento, San Francisco, and San Luis Obispo (Release 23.09)
2. The CalWIN Counties will be scheduled for batch jobs that are currently running for all former C-IV Counties and Los Angeles County in CalSAWS. These batch jobs will retain their current batch job frequencies and dependencies, apart from some Fiscal jobs.
 - a. For Foster Care Main payroll, the CalWIN Counties will run on the 1st business day of the month the same as the C-IV Counties.

2 RECOMMENDATIONS

2.1 Schedule Batch Jobs to run for the CalWIN Wave 5 Counties

2.1.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for Alameda, Fresno, and Sonoma Counties.

2.1.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Create BSCR/BPCR (if necessary) to schedule batch jobs for the CalWIN Wave 5 Counties.
 - a. Refer to Supporting Document 'CalWIN All Other Batch Jobs Wave 5' for detailed list of batch jobs.
 - b. There are existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out responses.

2.1.3 Execution Frequency

Refer to Supporting Document 'CalWIN All Other Batch Jobs Wave 5' for batch job frequencies.

2.1.4 Key Scheduling Dependencies

Refer to Supporting Document 'CalWIN All Other Batch Jobs Wave 5' for batch job frequencies.

2.1.5 Counties Impacted

Alameda, Fresno, and Sonoma

2.1.6 Data Volume/Performance

N/A

2.1.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the

file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.2 Schedule Correspondence Jobs to run for the CalWIN Wave 5 Counties

2.2.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for Alameda, Fresno, and Sonoma Counties.

2.2.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Create BSCR/BPCR (if necessary) to schedule batch jobs for the CalWIN Wave 5 Counties.
 - a. Refer to Supporting Document 'CalWIN Correspondence Batch Jobs Wave 5' for detailed list of batch jobs.
 - b. There are existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out responses.

2.2.3 Execution Frequency

Refer to Supporting Document 'CalWIN Correspondence Batch Jobs Wave 5' for batch job frequencies.

2.2.4 Key Scheduling Dependencies

Refer to Supporting Document 'CalWIN Correspondence Batch Jobs Wave 5' for batch job frequencies.

2.2.5 Counties Impacted

Alameda, Fresno, and Sonoma

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

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

2.3 Schedule Fiscal Jobs to run for the CalWIN Wave 5 Counties

2.3.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for Alameda, Fresno, and Sonoma Counties.

2.3.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Create BSCR/BPCR (if necessary) to schedule batch jobs for the CalWIN Wave 5 Counties.
 - a. Refer to Supporting Document 'CalWIN Fiscal Batch Jobs Wave 5' for detailed list of batch jobs.
 - b. There are existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out responses.
2. Foster Care Main Payroll
 - a. Schedule FC Main Payroll on 1st of the month, similar to C-IV counties, for all CalWIN Counties.

Note:

Alameda requests to opt out Positive Pay Interface – CA-254803.

Alameda requests to opt in Paid Warrant Reader and 1099 reporting Writer – CA-245385.

Alameda requests to opt in Direct Deposit Reader – CA-252994.

2.3.3 Execution Frequency

Refer to Supporting Document 'CalWIN Fiscal Batch Jobs Wave 5' for batch job frequencies.

2.3.4 Key Scheduling Dependencies

Refer to Supporting Document 'CalWIN Fiscal Batch Jobs Wave 5' for batch job frequencies.

2.3.5 Counties Impacted

Alameda, Fresno, and Sonoma

2.3.6 Data Volume/Performance

N/A

2.3.7 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch/Interfaces	List of all other batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	CalWIN All Other Batch Jobs Wave 5.xlsx
2	Correspondence	List of Correspondence batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	CalWIN Correspondence Batch Jobs Wave 5.xlsx
3	Fiscal	List of Fiscal batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	CalWIN Fiscal Batch Jobs Wave 5.xlsx

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-231865

ACL 21-141 Out of State ARC Payments

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Akshay Kumar S
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2022-11-22	.01	Initial Revision	Akshay Kumar
2022-02-07	.02	Updates from review	Paul Galloway
2023-03-07	.03	Updated from committee comments: <ul style="list-style-type: none"> Only months after 1/2021 are affected (Some wording clarifications also added)	Paul Galloway

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1 OVERVIEW

Remove the EDBC condition **as of 1/1/2021** that makes a placement ineligible to receive an ARC aid code **if a residency record for the Primary Applicant indicates they are** an out-of-state resident.

1.1 Current Design

The Approved Relative Caregiver (ARC) Funding Option Program was implemented in LRS/CalSAWS by SCR 32773 based on ACL 15-20 which states: "to be eligible for the ARC Program, a child or NMD...must be placed with an approved relative caregiver and reside in California. **Out-of-state placements are not eligible.**"

If a foster youth has a Residency record indicating they are not a resident of California, FC EDBC will not assign an ARC Aid Code.

1.2 Requests

Update FC EDBC logic for determining ARC aid codes per ACL 21-141 which states, "the ARC program has been expanded to include payments on behalf of children/NMDs in out-of-state placements with relatives when the children/NMDs are not eligible for AFDC-FC. **These placements are eligible for payments effective January 1, 2021.**"

1.3 Overview of Recommendations

1. Remove the EDBC condition **as of 1/1/2021** that makes a placement ineligible to receive an ARC aid code if there is a residency record **for the Primary Applicant** where "CA Resident" is set to "No".

1.4 Assumptions

1. The Residency record is not required, and most FC placements do not have one, but if this validation remains it could cause an out-of-state ARC-eligible placement to fail if there is a record that indicates that the youth is not a California resident. Sometimes these records are present because a worker from another program created it before the youth entered Foster Care.
2. All other ARC eligibility determination will remain unchanged.

2 RECOMMENDATIONS

2.1 Eligibility: EDBC ARC Residency Update

2.1.1 Overview

Remove the EDBC condition **as of 1/1/2021** that makes a placement ineligible to receive an ARC aid code if there is a residency record **for the Primary Applicant** where "CA Resident" is set to "No".

2.1.2 Description of Change

1. Remove the EDBC condition that makes a placement ineligible to receive an ARC aid code **if there is a residency record for the Primary Applicant in effect during the benefit month** where "CA Resident" is set to "No" **when the Benefit Month being processed is 1/2021 or later.**

2.1.3 Programs Impacted

Foster Care/ARC

2.1.4 Performance Impacts

N/A



California Statewide Automated Welfare System

Design Document

CA-237111

Add Threshold Languages for MAGI / NonMAGI
Older Adult Expansion NOAs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Tiffany Huckaby

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09/23/2022	1.0	Initial Document	Jasmine Chen
11/09/2022	1.1	Clarified Assumption 1 Removed Arabic, Hmong and Lao	Maria Jensen

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1 OVERVIEW

1.1 Current Design

CA-231692 introduced Older Adult Expansion (OAE) verbiage and fragments that were added into the system. The effort added the fragments in English and Spanish.

1.2 Requests

1. Add the new fragments from CA-231692 in the following threshold languages: Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese.

1.3 Overview of Recommendations

1. Add the OAE reason fragments, introduced by CA-231692 in the following threshold languages: Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese.

1.4 Assumptions

1. Each fragment has 5 paragraphs. The 1st paragraph is dynamic and will display either version depending on the age range ('under 50' or 'over 50'). The rest of the 4 paragraphs are what we call a Static section. This section will always be displayed.
Though ACWDL 21-13 provided the same static section in English for Medi-Cal Restricted-Scope Retro Approval (for both age ranges) and Restricted Scope to Full Scope (for both age ranges), these static sections in threshold languages do not reflect the English verbiage exactly.
 - Consortium BAs confirmed to use the threshold's static sections that translate closest to the English version. BAs confirmed the Restricted-Scope Retro Approval will use the threshold static sections of 'over 50' age range. The Restricted Scope to Full Scope will use the threshold static section of 'under 50'.
2. There will be no changes to the verbiage, variable population, nor generation conditions of existing OAE reason fragments.
3. Regulations will not be translated for MAGI Fragments. CA-214024 will add common NOA fragments and missing regulations in threshold language for the Medi-Cal program.
4. CA-232581 will add these fragments in the following missing threshold languages: Hindi, Japanese, Mien, Punjabi, Thai, Ukrainian. Note these languages are not currently supported by the system and additional updates will need to be made to add these languages.
5. Per existing system functionality, GEN 1365 will be added to all the envelopes mailed to the customer.
6. Arabic, Hmong and Lao will be added after CA-214024 is implemented.

2 RECOMMENDATIONS

2.1 Add Threshold for MAGI, Non-MAGI reasons of Older Adult Expansion

2.1.1 Overview

CA-231692 introduced new reason verbiage and fragments related to Older Adult Expansion. These existing fragments will be created in the remaining system-supported threshold languages.

Reason Fragments (IDs):

H_AP_RESTRICTED_SCOPE_APP_H912_NEW (ID: 9525)
H_AP_RESTRICTED_SCOPE_RETRO_H911_NEW (ID: 9526)
H_CH_FULL_SCOPE_TO_RESTRICTED_SCOPE_H807_NEW (ID: 9527)
H_CH_RESTRICTED_SCOPE_TO_FULL_SCOPE_H808_NEW (ID: 9528)
MC_AP_RESTRICT_MC_NO_SOC_M224_NEW (ID: 9529)
MC_AP_RESTRICT_RETRO_MC_M225_NEW (ID: 9530)
MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW (ID: 9531)
MC_CH_RESTR_TO_FULL_M781_NEW (ID: 9532)

Known State NOA: ACWDL 21-13

NOA Template: H_NOA_TEMPLATE (Fragment ID = 3033)

Program(s): MAGI & Non-MAGI Medi-Cal

Action Type(s): Approval, Change

Fragment Level: Person

Repeatable: Yes

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A, none attached with this NOA

Existing Languages for all above reasons (2): English, Spanish

2.1.2 NOA Reason Verbiage

The below threshold versions of the above reasons will be added into the system.

Note: There are no changes to the existing reason's verbiage in English, Spanish.

Updated Languages to Add (8): Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

2.1.3 NOA Reason Variable Population

No changes to any variable population.

2.1.4 NOA Reason Fragment Generation

No changes to generation conditions.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	Zip folder of CDSS-provided translations of OAE reasons	CA 237111 CDSS OAE Threshold.zip
2	NOA	Excel workbook detailing above NOA reasons per worksheet with verbiage sections in its corresponding threshold language.	CA-237111 MC OAE_Threshold.xlsx

4 REQUIREMENTS

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.7	The LRS shall identify case actions that require a notice, NOA, form, letter, stuffer, or flyer, and shall generate that appropriate notice, NOA, form, letter, stuffer, or flyer, using variable case-specific information.	CalSAWS will generate Older Adult Expansion NOAs in the following threshold languages: Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-247105

Remove CAPI OPA and Unearned Income
Records Associated to CAPI Administered by
San Mateo County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Akshay Kumar S
	Reviewed By	Ramakrishna Kuchibhotla, Business Analysts, Build and Test team, CW/CF Committee, CAPI Committee

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/20/2022	1.0	Initial Draft	Akshay Kumar S
11/03/2022	2.0	Modified sections 1.2, 1.3, 1.4, 2.1.2 and 2.2.2 as per review comments	Harish N
1/3/2023	3.0	Revise document	Yale Yee

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1 OVERVIEW

1.1 Current Design

CAPI Consortium is a group of counties that have jointly agreed to have the CAPI program in each individual county administered by a single lead county within the group. San Mateo is a lead county that administers CAPI program for other counties.

San Mateo administers CAPI for the following counties:

- Alameda
 - Note: Alameda County is scheduled for Wave 5 of conversion. CA-257158 was created to apply the changes of this SCR to Alameda County.
- Contra Costa
- Marin
- Merced
- Monterey
- San Mateo
- Santa Cruz
- Solano
- Sonoma
 - Note: Sonoma County is scheduled for Wave 5 of conversion. CA-257158 was created to apply the changes of this SCR to Sonoma County.
- Stanislaus

Until San Mateo is converted into CalSAWS, the C-IV/CalSAWS counties San Mateo administered CAPI enter an Other Program Assistance (OPA) record of CAPI benefits to be used in the CalFresh (CF) EDBC determination.

Until San Mateo is converted into CalSAWS, the CalWIN counties San Mateo administered CAPI enter an Unearned Income record that is used in the CF EDBC determination.

Category: Miscellaneous	Type: * Other Unearned All
Source: EDD	
Frequency: * Every Other Week	
Description: CalWIN Conversion Income Type: Unearned Income from excluded CAPI recipient	

Figure 1.1.1 – Unearned Income for CAPI from CalWIN converted into CalSAWS

1.2 Requests

When San Mateo is converted into CalSAWS, the CF EDBC will consider the Other Program Assistance record as receiving duplicate aid or count the Unearned Income record in the CF budget (resulting in the CAPI grant being counted twice and may discontinue the CF program for over-income). If the Unearned Income record does not result in an Over Income, the CF program will reduce benefits.

1. Apply a data change to remove the CAPI OPA records for all members in an active CAPI program for a county with CAPI administered by San Mateo County.
2. Add a journal entry if the data change removed a OPA record for CAPI.
3. Apply a data change to remove the Unearned Income record for CAPI for all members in an active CAPI program for a county with CAPI administered by San Mateo County.
4. Add a journal entry if the data change removed an Unearned Income Record for CAPI.
5. Provide a list of case where the CF program was run between the Wave Go Live date and the implementation of this SCR.

1.3 Overview of Recommendations

1. A data change will be applied to remove the OPA records for a county with CAPI administered by San Mateo County.
2. A data change will be applied to remove the Unearned Income records for a county with CAPI administered by San Mateo County.
3. A journal entry will be created for the cases the data change was applied.
4. A list of cases will be provided if a CF case was run in a specific timeframe.

1.4 Assumptions

1. The data change will run only one time.
2. The worker is responsible for updating the case when an applicant/recipient moves counties.
3. San Mateo county converts into CalSAWS in Wave 4 on July 3rd, 2023. The DCR will run on July 7th, 2023.

2 RECOMMENDATIONS

2.1 Remove OPA record for CAPI for CalSAWS Counties

2.1.1 Overview

A data change will be applied to remove the OPA records for all members in an active CAPI program in each administered county by San Mateo County.

2.1.2 Description of Changes

1. Apply a data change to remove the CAPI OPA records for all members in an active CAPI program administered by San Mateo County.

Note: This DCR will be applied after the San Mateo County Conversion to CalSAWS.

2.1.3 Estimated Number of Records Impacted/Performance

~25 cases.

2.2 Add Journal Entry Where the Data Change Applied

2.2.1 Overview

Create a journal entry for cases the data change was applied.

2.2.2 Description of Change

Create a journal entry where the OPA record was removed.

Journal Entry	Description
New/Update	New
Journal Category	All
Journal Type	Closure

Short Description	CAPI OPA record is removed.
Long Description	CAPI OPA record is removed during San Mateo County converting to CalSAWS.
New/Update	New
Case ID	Case ID of the case where the CAPI OPA record is removed.

2.3 Programs Impacted

CAPI, CalFresh

2.4 Remove Unearned Income Record for CAPI for CalWIN Counties

2.4.1 Overview

A data change will be applied to remove the Unearned Income records for all members in an active CAPI program in each administered county by San Mateo County.

2.4.2 Description of Changes

1. Apply a data change to remove the Unearned Income records for all members in an active CAPI program administered by San Mateo County.

Note: This DCR will be applied after the San Mateo County Conversion to CalSAWS.

2.4.3 Estimated Number of Records Impacted/Performance

~2300 cases.

2.5 Add Journal Entry Where the Data Change Applied

2.5.1 Overview

Create a journal entry for cases the data change was applied.

2.5.2 Description of Change

Create a journal entry where the Unearned Income record was removed.

Journal Entry	Description
New/Update	New
Journal Category	All
Journal Type	Closure
Short Description	Unearned Income record for the CAPI program is removed.
Long Description	Unearned Income record is removed during San Mateo County converting to CalSAWS.
New/Update	New
Case ID	Case ID of the case where the Unearned Income record is removed.

2.6 Programs Impacted

CalFresh, CAPI

3 OUTREACH

3.1 Lists

Provide a list of cases where a CF EDBC was run between the Wave 4 Go-Live date and the implementation date of this SCR.

Provide cases with the following:

1. For CalSAWS counties, there exists a CAPI OPA record.
2. For CalWIN counties, there exists an Unearned Income record for CAPI.

And, the CF EDBC failed for either Duplicate Aid, Over Income, or benefits were reduced.

List Name: List_of_cases_with_OPA_or_Unearned_Income_record

List Criteria:

1. Date the CF EDBC was run is between Wave 4 Go-Live Date and implementation date of this SCR.
2. For CalSAWS counties, there exists a CAPI OPA record.
3. For CalWIN counties, there exists an Unearned Income record for CAPI.
4. CF EDBC failed for Duplicate Aid, Over Income, or benefits were reduced.

Standard Columns:

- Case Name
- Case Number

- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s):

- Status Reason

Note:

- For cases with CAPI OPA records, the status reason will be Duplicate Aid.
- For cases with Unearned Income records, the status reason will be Over Income or benefits will decrease.

Frequency: One Time

The list will be posted to the following location:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-247105

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-247106

Remove CAPI OPA and Unearned Income
Records Associated to CAPI Administered by
Sacramento County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Akshay Kumar S
	Reviewed By	Ramakrishna Kuchibhotla, Business Analysts, Build and Test team, CW/CF Committee, CAPI Committee

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/20/2022	1.0	Initial Draft	Akshay Kumar S
11/03/2022	2.0	Modified sections 1.2, 1.3, 1.4, 2.1.2 and 2.2.2 as per review comments	Harish N
1/3/2023	3.0	Revise document	Yale Yee

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1 OVERVIEW

1.1 Current Design

CAPI Consortium is a group of counties that have jointly agreed to have the CAPI program in each individual county administered by a single lead county within the group. Sacramento is a lead county that administers CAPI program for other counties.

Sacramento administers CAPI for the following counties:

- Alpine
- Amador
- Butte
- Calaveras
- Colusa
- Del Norte
- El Dorado
- Glenn
- Humboldt
- Lake
- Lassen
- Mendocino
- Modoc
- Nevada
- Orange
- Placer
- Plumas
- Sacramento
- San Joaquin
- Santa Barbara
- Shasta
- Sierra
- Siskiyou
- Sutter
- Tehama
- Trinity
- Yolo
- Yuba

Until Sacramento is converted into CalSAWS, the C-IV/CalSAWS counties Sacramento administered CAPI enter an Other Program Assistance (OPA) record of CAPI benefits to be used in the CalFresh (CF) EDBC determination.

Until Sacramento is converted into CalSAWS, the CalWIN counties Sacramento administered CAPI enter an Unearned Income record that is used in the CF EDBC determination.

Category: Miscellaneous	Type: * Other Unearned All
Source: EDD	
Frequency: * Every Other Week	
Description: CalWIN Conversion Income Type: Unearned Income from excluded CAPI recipient	

Figure 1.1.1 – Unearned Income for CAPI from CalWIN converted into CalSAWS

1.2 Requests

When Sacramento is converted into CalSAWS, the CF EDBC will consider the Other Program Assistance record as receiving duplicate aid or count the Unearned Income record in the CF budget (resulting in the CAPI grant being counted twice and may discontinue the CF program for over-income). If the Unearned Income record does not result in an Over Income, the CF program will reduce benefits.

1. Apply a data change to remove the CAPI OPA records for all members in an active CAPI program for a county with CAPI administered by Sacramento County.
2. Add a journal entry if the data change removed a OPA record for CAPI.
3. Apply a data change to remove the Unearned Income record for CAPI for all members in an active CAPI program for a county with CAPI administered by Sacramento County.
4. Add a journal entry if the data change removed an Unearned Income Record for CAPI.
5. Provide a list of case where the CF program was run between the Wave Go Live date and the implementation of this SCR.

1.3 Overview of Recommendations

1. A data change will be applied to remove the OPA records for a county with CAPI administered by Sacramento County.
2. A data change will be applied to remove the Unearned Income records for a county with CAPI administered by Sacramento County.
3. A journal entry will be created for the cases the data change was applied.
4. A list of cases will be provided if a CF case was run in a specific timeframe.

1.4 Assumptions

1. The data change will run only one time.
2. The worker is responsible for updating the case when an applicant/recipient moves counties.
3. Sacramento county converts into CalSAWS in Wave 6 on October 30th, 2023. The DCR will run on November 3rd, 2023.

2 RECOMMENDATIONS

2.1 Remove OPA record for CAPI for CalSAWS Counties

2.1.1 Overview

A data change will be applied to remove the OPA records for all members in an active CAPI program in each administered county by Sacramento County.

2.1.2 Description of Changes

1. Apply a data change to remove the CAPI OPA records for all members in an active CAPI program administered by Sacramento County.

Note: This DCR will be applied after the Sacramento County Conversion to CalSAWS.

2.1.3 Estimated Number of Records Impacted/Performance

~25 cases.

2.2 Add Journal Entry Where the Data Change Applied

2.2.1 Overview

Create a journal entry for cases the data change was applied.

2.2.2 Description of Change

Create a journal entry where the OPA record was removed.

Journal Entry	Description
New/Update	New
Journal Category	All
Journal Type	Closure
Short Description	CAPI OPA record is removed.
Long Description	CAPI OPA record is removed during Sacramento County converting to CalSAWS.
New/Update	New
Case ID	Case ID of the case where the CAPI OPA record is removed.

2.3 Programs Impacted

CAPI, CalFresh

2.4 Remove Unearned Income Record for CAPI for CalWIN Counties

2.4.1 Overview

A data change will be applied to remove the Unearned Income records for all members in an active CAPI program in each administered county by Sacramento County.

2.4.2 Description of Changes

1. Apply a data change to remove the Unearned Income records for all members in an active CAPI program administered by Sacramento County.

Note: This DCR will be applied after the Sacramento County Conversion to CalSAWS.

2.4.3 Estimated Number of Records Impacted/Performance

~2300 cases.

2.5 Add Journal Entry Where the Data Change Applied

2.5.1 Overview

Create a journal entry for cases the data change was applied.

2.5.2 Description of Change

Create a journal entry where the Unearned Income record was removed.

Journal Entry	Description
New/Update	New
Journal Category	All
Journal Type	Closure
Short Description	Unearned Income record for the CAPI program is removed.
Long Description	Unearned Income record is removed during Sacramento County converting to CalSAWS.
New/Update	New
Case ID	Case ID of the case where the Unearned Income record is removed.

2.6 Programs Impacted

CalFresh, CAPI

3 OUTREACH

3.1 Lists

Provide a list of cases where a CF EDBC was run between the Wave 6 Go-Live date and the implementation date of this SCR.

Provide cases with the following:

1. For CalSAWS counties, there exists a CAPI OPA record.
2. For CalWIN counties, there exists an Unearned Income record for CAPI.

And, the CF EDBC failed for either Duplicate Aid, Over Income, or benefits were reduced.

List Name: List_of_cases_with_OPA_or_Unearned_Income_record

List Criteria:

1. Date the CF EDBC was run is between Wave 6 Go-Live Date and implementation date of this SCR.
2. For CalSAWS counties, there exists a CAPI OPA record.
3. For CalWIN counties, there exists an Unearned Income record for CAPI.
4. CF EDBC failed for Duplicate Aid, Over Income, or benefits were reduced.

Standard Columns:

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

Additional Column(s):

- Status Reason

Note:

- For cases with CAPI OPA records, the status reason will be Duplicate Aid.
- For cases with Unearned Income records, the status reason will be Over Income or benefits will decrease.

Frequency: One Time

The list will be posted to the following location:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-247106



California Statewide Automated Welfare System

Design Document

CA-249291

Add Missing Languages for Former Foster Youth (FFY)
Threshold NOAs

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/05/2022	1.0	Initial Draft	Indira Ramasamy

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1 OVERVIEW

This effort will add MC 239 FFY-1, MC 239 FFY-4 NOAs in Arabic and Hmong languages.

1.1 Current Design

Currently MC 239 FFY-1 and MC 239 FFY-4 NOAs are available only in the below mentioned languages.

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

1.2 Requests

1. Add Approval of Eligibility for FFY (MC 239 FFY-1 Rev. 12/15) NOA in Arabic and Hmong Languages.
2. Add Notice of Continuing Medi-Cal Coverage for the Former Foster Youth Medi-Cal Program (MC 239 FFY-4 Rev.12/15) NOA in Arabic and Hmong Languages.

1.3 Overview of Recommendations

1. Add Approval of Eligibility for FFY (MC 239 FFY-1 Rev. 12/15) NOA Arabic and Hmong Languages.
2. Add Notice of Continuing Medi-Cal Coverage for the Former Foster Youth Medi-Cal Program (MC 239 FFY-4 Rev.12/15) NOA in Arabic and Hmong Languages.

1.4 Assumptions

1. There are no changes to the generation logic of these NOAs. All triggers for the newly added Hmong and Arabic languages will be same as the existing languages NOAs.
2. Supporting Documents section references attachments found on Jira.
3. SCR CA-214024 will add the common NOA Fragments for Threshold Generation.

2 RECOMMENDATIONS

2.1 Add MC 239 FFY-1 NOAs in Arabic and Hmong Languages.

2.1.1 Overview

This section will cover the requirements for adding the MC 239 FFY-1 NOA in Arabic and Hmong Languages.

Reason Fragment Name and ID:

MC_AP_FORMER_FOSTER_YOUTH_M147_EN (ID: 6326)

State Form/NOA: MC 239 FFY-1 (10/2015)

Current NOA Template: MC_NOA_TEMPLATE

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: N/A

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

2.1.2 Form/NOA Verbiage

Add NOA fragments in the following languages:

Threshold Languages Added: Arabic and Hmong

NOA Mockups/Examples: Supporting Documents #1

2.1.3 Form/NOA Variable Population

No updates in this section.

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2 Add available system supported threshold languages to MC 239 FFY-4

2.2.1 Overview

This section will cover the requirements for adding the MC 239 FFY-4 NOA in Arabic and Hmong Languages.

Reason Fragment Name and

ID: MC_CH_FORMER_FOSTER_YOUTH_M147_EN (ID: 6327)

State Form/NOA: MC 239 FFY-4 (10/2015)

Current NOA Template: MC_NOA_TEMPLATE

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: N/A

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

2.2.2 Form/NOA Verbiage

Add NOA fragments in the following languages:

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

NOA Mockups/Examples: Supporting Documents #3

2.2.3 Form/NOA Variable Population

No updates in this section.

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	MC 239 FFY-1 Threshold Languages	MC 239 FFY-1_NOA FY Aprov_ARA_1215.doc MC 239 FFY-1_NOA FY Aprov_HMO_1215.docx
2	Correspondence	MC 239 FFY-4 Threshold Languages	MC 239 FFY-4_NOA FY Cont_ARA_1215.doc MC 239 FFY-4_NOA FY Cont_HMO_1215.docx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none">a. Appointment notices;b. Redetermination, Recertification, and/or Annual Agreement notices and forms;c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);d. Periodic reporting notices;e. Contact letters;f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;g. Information notices and stuffers;h. Case-specific verification/referral forms;i. GR Vendor notices;k. Court-mandated notices, including Balderas notices;l. SSIAP appointment notices;m. Withdrawal forms;n. COLA notices;o. Time limit notices;p. Transitioning of aid notices;q. Interface triggered forms and notices (e.g., IFDS, IEVS);r. Non-compliance and sanction notices;s. Benefit issuance and benefit recovery forms and notices, including reminder notices;t. Corrective NOAs on State Fair Hearing decisions;u. CSC paper ID cards with LRS-generated access information; andv. CSC PIN notices.	MC 239 FFY-1 and MC 239 FFY-4 NOAs are being added in Arabic and Hmong languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-249511

Add Spanish versions of FC NOA Reasons
(Phase 2)

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/01/2023	1.0	Initial Document	M.R.Kavitha

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1 OVERVIEW

The purpose of this SCR is to add Foster Care (FC) NOA reasons in Spanish languages

1.1 Current Design

Currently in CalSAWS, the below Foster Care (FC) NOA reasons are going to be implemented in English as part of SCR CA-238042.

1. Age Changed
2. Adopted
3. Transferred to Non-FC Program
4. Petition Not Filed
5. Didn't Recert License

1.2 Requests

Add the Spanish languages for below Foster Care reasons.

1. Age Changed
2. Adopted
3. Transferred to Non-FC Program
4. Petition Not Filed
5. Didn't Recert License

1.3 Overview of Recommendations

1. Add new 'Age Changed' NOA Reason in Spanish language for Benefit Change for Non-CCR
2. Add new 'Adopted' NOA Reason in Spanish language for Discontinuance for both CCR, Non-CCR
3. Add new 'Transferred to Non-FC Program' NOA Reason Discontinuance in Spanish language for both CCR, Non-CCR
4. Add new 'Petition Not Filed' NOA Reason in Spanish language for Discontinuance for both CCR, Non-CCR
5. Add new 'Didn't Recert License' NOA Reason in Spanish language for Discontinuance for both CCR, Non-CCR

1.4 Assumptions

1. No updates to the variable population.
2. No updates to the existing NOA Generation conditions.
3. Please refer the SCR CA-238042 for NOA Generation conditions.

2 RECOMMENDATIONS

2.1 Add FC NOA Change Reason in Spanish language: Age Changed

2.1.1 Overview

The recommendation is adding FC benefit change NOA reason in Spanish language which will occur with Non-CCR rate scenarios.

Reason Fragment Name: FC_CH_MONTHLY_RATE_CHANGE_DUE_TO_AGE
(Fragment ID:7829)

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

2.1.2 NOA Reason Verbiage

Create Fragment XDP

Add a new FC NOA reason fragment XDP in Spanish language to display the following verbiage:

Description	English Text	Spanish Text	Formatting*
<STATIC>	The child's age has changed. The monthly rate for this age is <FCMonthlyRate>.	La edad del niño ha cambiado. La mensualidad para esta edad es. <FCMonthlyRate>.	Arial Font Size 10

2.1.3 NOA Reason Variable Population

No updates in variable population section.

2.2 Add FC NOA Discontinuance Reason in Spanish language: Child Adopted

2.2.1 Overview

The recommendation is adding FC Discontinuance NOA reason in Spanish language.

Reason Fragment Name and ID for Non-CCR: FC_CHILD_ADOPTED
(Fragment ID: 7830)
Reason Fragment Name and ID for CCR: FC_CHILD_ADOPTED (Fragment ID: 7831)
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

2.2.2 NOA Reason Verbiage

Create new reason fragment XDP

Add a new FC NOA reason fragment XDP in Spanish language to display the following verbiage:

Description	English Text	Spanish Text	Formatting*
<STATIC>	This child is no longer eligible to Foster Care because he/she has been adopted.	Este niño ya no califica para Foster Care porque él / ella ha sido adoptado(a).	Arial Font Size 10

2.2.3 NOA Reason Variable Population

No updates to variable population

2.3 Add FC NOA Discontinuance Reason in Spanish language: Transferred to Non-FC Program

2.3.1 Overview

The recommendation is adding FC Discontinuance NOA reason in Spanish language.

Fragment Name and ID for Non-CCR:

CHILD_TRANSFERRED_TO_OTHER_PROGRAM (Fragment ID:7832)

Fragment Name and ID for CCR:

CHILD_TRANSFERRED_TO_OTHER_PROGRAM (Fragment ID:7833)

NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Person

Repeatable: Yes
Include NA Back 9: Yes
Forms/NOAs Generated with this NOA: N/A
Existing Languages: English

2.3.2 NOA Reason Verbiage

Create new reason fragment XDP

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

Description	English Text	Spanish Text	Formatting*
<STATIC>	<PERSON> has been transferred to another cash aid program. You will get another notice about that child's eligibility for that program.	<PERSON> ha sido transferido a otro programa de asistencia monetaria. Usted recibirá otra notificación acerca de la elegibilidad de ese niño para ese programa.	Arial Font Size 10

2.3.3 NOA Reason Variable Population

No Updates to variable population

2.4 Add New FC NOA Discontinuance Reason in Spanish language: Petition Not Filed

2.4.1 Overview

The recommendation is adding FC Discontinuance NOA reason in Spanish language.

Fragment Name and ID for Non-CCR: FC_DS_CARE_CHILD_REMOVED
(Fragment ID: 7834)

Fragment Name and ID for CCR: FC_DS_CARE_CHILD_REMOVED
(Fragment ID: 7835)

NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Person

Repeatable: Yes

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A

Existing Languages: English

2.4.2 NOA Reason Verbiage

Create new reason fragment XDP

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

Description	English Text	Spanish Text	Formatting*
<STATIC>	A court petition was not filed to remove the child from his/her parent(s)/relative(s).	No fue hecha una petición en la corte para quitar el niño de su padre(s)/pariente(s).	Arial Font Size 10

2.4.3 NOA Reason Variable Population

No Updates to variable population

2.5 Add New FC NOA Discontinuance Reason in Spanish language: Didn't Recert License

2.5.1 Overview

The recommendation is adding FC Discontinuance NOA reason in Spanish language

Fragment Name and ID for Non-CCR: STATUS_OF_LICENSE (Fragment ID: 7836)

Fragment Name and ID for CCR: STATUS_OF_LICENSE (Fragment ID: 7837)

NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Person

Repeatable: Yes

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A

Existing Languages: English

2.5.2 NOA Reason Verbiage

Create new reason fragment XDP

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

Description	English Text	Spanish Text	Formatting*
STATIC	<PERSON> is not eligible to receive a Foster Care payment until your home is licensed or recertified by the Social Worker.	<PERSON> no califica para recibir un pago de Crianza Temporal hasta que su hogar sea otorgado una licencia o sea recertificado por el Trabajador Social.	Arial Font Size 10

2.5.3 NOA Reason Variable Population

No updates to variable population

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.7 CAR-1243	The LRS shall identify case actions that require a notice, NOA, form, letter, stuffer, or flyer, and shall generate that appropriate notice, NOA, form, letter, stuffer, or flyer, using variable case-specific information.	<p>This SCR will add Foster Care NOAs in Spanish languages for below of Reasons:</p> <ol style="list-style-type: none"> 1. Age Changed (Non-CCR) 2. Adopted (CCR, Non-CCR) 3. Transferred to Non-FC Program (CCR, Non-CCR) 4. Petition Not Filed (CCR, Non-CCR) 5. Didn't Recert License (CCR, Non-CCR) <p>.</p>

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-251253

CF 502 Mass Mail via Batch

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/11/2022	1.0	Initial Document	Jasmine Chen
11/11/2022	1.1	SCRB fixes	Maria Jensen

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1 OVERVIEW

1.1 Current Design

Per CA-245192, the CF502 mailer – End of Emergency Allotments, was added to the Template Repository.

1.2 Requests

Generate the CF 502 as a mass mailer via a one-time batch to all active CalFresh and Transitional CalFresh households to inform them the Emergency Allotment effort is ending.

1.3 Overview of Recommendations

1. Mass mail the CF 502 to all CF and TCF households via a one-time batch process.

1.4 Assumptions

1. CA-245192 will add this CF 502 mailer into the CalSAWS system. Per SCERFRA responses, the mailer will only be implemented in English and Spanish.
2. Written languages of households other than English and Spanish will get the English version with a GEN 1365.
3. This would be a one-time mass mailer and any CalFresh program approved between the time of the mass mailer and the end of the CalFresh Emergency Allotments would need to be noticed by the county worker.

2 RECOMMENDATIONS

2.1 Update CF 502 to be mass-mailed via Batch

2.1.1 Overview

The CF 502 (7/22) form will be mass mailed to all active CF, TCF households via a one-time batch process.

State Form: CF 502 (7/22)

Current Programs: CF, TCF

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

2.1.2 Form Verbiage

Form XDP

There are no changes to the form verbiage.

2.1.3 Form Variable Population

Form Body Variables:

There are no changes to the variable population.

Form Footer Variables:

There are no changes to the footer variable population.

2.1.4 Form Generation Conditions

1. Add Form Generation

Generate CF 502 via batch process as a one-time mass-mailer for all active CF and TCF households.

To generate CF 502 via batch process, create a DCR that does the following:

1. Find the cases that meet all the following conditions:
 - a. The program is CalFresh or Transitional CalFresh.
 - b. The program status is Active.

2. Insert the following values below in the System Transaction (SYS_TRANSACTION) table for each case:

Table Field to Populate	Population for Field
Case Id	The case id associated to the current CF, TCF program.
Program Id	The program id of the current CF, TCF program.
Person Id	The person id of the primary applicant of the current CF, TCF program.
Type Code	Forms (CT626_FR)
Sub Type Code	IN (for one-time mass mailers)
Effective Date	Batch date to mass-mail the CF 502

- a. The batch date to mass-mail the CF 502 is undetermined and will be provided by the State.

2. Update Form Print Options and Mailing Requirements

Mailing Requirements:

Mail-To (Recipient):

- When mass-mailed - the Primary Applicant of the CF/TCF household
- When generated through Template Repository - the individual selected from the 'Customer Name' parameter.

Mailed From (Return): CalFresh Worker's Office

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1254	The LRS shall generate special mailings and mass notifications to specific programs, populations, or individuals, as specified by COUNTY.	The CalSAWS system will perform a one-time, mass mailing of CF 502 to inform all active CF, TCF households of emergency allotments ending.



California Statewide Automated Welfare System

Design Document

CA-257096

Sync Probation Parent Table with Child Table for
Online Pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	G. Limbrick
	Reviewed By	Howard Suksanti

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/21/2023	Draft	Initial	G. Limbrick

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1 OVERVIEW

1.1 Current Design

The Institutional Detail page holds information about the incarceration dates and incarceration location(s) of a minor in the household. An incarcerated minor may move between different locations/institutions during the same period of incarceration. The 'To' field is editable for user updates, but only modifies the end of for the specific location (in PERS_PROBTN_DETL) and does not modify the end of the incarceration period (these dates are stored in the PERS_PROBTN table). Household Status checks are run against the incarceration period (in the PERS_PROBTN table). This is causing the minor to show as incarcerated / out of the home and not eligible for benefits, even after a worker updates the Institutional Detail page with an end date. DCRs are continually needed to correct the incarceration period ending date.

1.2 Requests

Sync the incarceration period end date with updates made to the latest location end date thru the Institutional Detail page, so that Household Status checks recognize the minor as no longer incarcerated.

1.3 Overview of Recommendations

1. Add logic to Sync the PERS_PROBTN table's end date (incarceration period's end date) with the latest associated end date from the PERS_PROBTN_DETL table (location end date), each time an Online edit is made (an edit thru the page).
2. Update the page mapping for the Juvenile List and Juvenile Detail pages.

1.4 Assumptions

1. Fields and functionalities not mentioned will not be changed.
2. The Juvenile Probation interface's logic will not be changed with this SCR.
3. An incarceration period should ALWAYS have an end date when/if all the detail records/locations have an end date; this may be enforced thru page logic and or database logic (e.g., database triggers).

2 RECOMMENDATIONS

2.1 Institutional Detail page

2.1.1 Overview

Add logic to Sync the PERS_PROBTN table's end date (incarceration period's end date) with the latest related end date from the PERS_PROBTN_DETL table (location end date), each time an Online edit is made (an edit thru the page).

2.1.2 Institutional Detail page Mockup

N/A

2.1.3 Description of Changes

1. Add logic to Sync the PERS_PROBTN table's end date (incarceration period's end date) with the latest related end date from the PERS_PROBTN_DETL table (the location end date), each time an Online edit is made (an edit thru the page):
 - a. When a user updates the 'To' field, end dating a location record, add logic to check for other locations without an end date and related to the same incarceration period (check for PERS_PROBTN_DETL records related to the same PERS_PROBTN record)
 - b. Add an end date to the incarceration period when/if the last location record is end dated
 - c. When a user updates the 'To' field, removing or changing a location end date, add logic to check and update the incarceration period end date (stored in the PERS_PROBTN table) only if it is the latest location end date related to the incarceration period, and all other locations are also end dated

Tech Note: the PERS_PROBTN end date is PERS_PROBTN.PLACEMT_END_DATE and the PERS_PROBTN_DETL tables end date is PERS_PROBTN_DETL.PLACEMT_ACTUAL_REL_DATE

2.1.4 Page Location

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

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 Juvenile List page

2.2.1 Overview

Update the Juvenile List page with current page mapping.

2.2.2 Juvenile List page Mockup

N/A

2.2.3 Description of Changes

2. Update the Juvenile List page with current page mapping.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update the Juvenile List page with current page mapping.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Juvenile Detail page

2.3.1 Overview

Update the Juvenile Detail page with current page mapping.

2.3.2 Juvenile List page Mockup

N/A

2.3.3 Description of Changes

3. Update the Juvenile Detail page with current page mapping.

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update the Juvenile Detail page with current page mapping.

2.3.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.8	The LRS shall validate the household composition for appropriate public assistance programs.	This SCR adds the Incarceration end date (PLACEMENT_END_DATE) needed by The System to validate the household composition.

3.2 Migration Requirements

N/A

4 MIGRATION IMPACTS

N/A



California Statewide Automated Welfare System

Design Document

CA-257158

Remove CAPI Unearned Income Records for
Sonoma and Alameda County

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/28/2023	1.0	Initial Draft	Yale Yee

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1 OVERVIEW

1.1 Current Design

CAPI Consortium is a group of counties that have jointly agreed to have the CAPI program in each individual county administered by a single lead county within the group. San Mateo is a lead county that administers CAPI program for other counties.

San Mateo administers CAPI for the following counties:

- Alameda
- Contra Costa
- Marin
- Merced
- Monterey
- San Mateo
- Santa Cruz
- Solano
- Sonoma
- Stanislaus

San Mateo converted into CalSAWS on 07/03/2023, the CalWIN counties San Mateo administered CAPI enter an Unearned Income record that is used in the CF EDBC determination.

Sonoma and Alameda County converts into CalSAWS in Wave 5; Go-Live Date is 09/04/2023. The changes from CA-247105 (Remove CAPI OPA and Unearned Income Records Associated to CAPI Administered by San Mateo County) did not apply to Sonoma and Alameda County.

Category: Miscellaneous	Type: * Other Unearned All
Source: EDD	
Frequency: * Every Other Week	
Description: CalWIN Conversion Income Type: Unearned Income from excluded CAPI recipient	

Figure 1.1.1 – Unearned Income for CAPI from CalWIN converted into CalSAWS

1.2 Requests

When San Mateo converted into CalSAWS, the CF EDBC will count the Unearned Income record in the CF budget (resulting in the CAPI grant being counted twice and may discontinue the CF program for over-income). If the Unearned Income record does not result in an Over Income, the CF program will reduce benefits.

1. Apply a data change to remove the Unearned Income record for CAPI for all members in an active CAPI program for a county with CAPI administered by San Mateo County.
2. Add a journal entry if the data change removed an Unearned Income Record for CAPI.
3. Provide a list of case where the CF program was run between the Wave Go Live date and the implementation of this SCR.

The changes above were implemented with CA-247105 and the changes will be applied to Sonoma and Alameda County with this SCR.

1.3 Overview of Recommendations

1. A data change will be applied to remove the Unearned Income records for a county with CAPI administered by San Mateo County.
2. A journal entry will be created for the cases the data change was applied.
3. A list of cases will be provided if a CF case was run in a specific timeframe.

1.4 Assumptions

1. The data change will run only one time.
2. The worker is responsible for updating the case when an applicant/recipient moves counties.
3. San Mateo county converts into CalSAWS in Wave 4 on July 3rd, 2023.
4. Sonoma and Alameda County converts into CalSAWS in Wave 5 on Sept 4th, 2023. The DCR will run on Sept 8th, 2023.

2 RECOMMENDATIONS

2.1 Remove Unearned Income Record for CAPI for Sonoma and Alameda County

2.1.1 Overview

A data change will be applied to remove the Unearned Income records for all members in an active CAPI program administered by San Mateo County for Sonoma and Alameda County.

2.1.2 Description of Changes

1. Apply a data change to remove the Unearned Income records for all members in an active CAPI program administered by San Mateo County for Sonoma and Alameda County.

Note: This DCR will be applied after the San Mateo County Conversion to CalSAWS and after the changes in CA-247105.

2.1.3 Estimated Number of Records Impacted/Performance

~50 cases.

2.2 Add Journal Entry Where the Data Change Applied

2.2.1 Overview

Create a journal entry for cases the data change was applied.

2.2.2 Description of Change

Create a journal entry where the Unearned Income record was removed.

Journal Entry	Description
New/Update	New
Journal Category	All
Journal Type	Closure
Short Description	Unearned Income record for the CAPI program is removed.
Long Description	Unearned Income record is removed during (county name) County converting to CalSAWS.
New/Update	New
Case ID	Case ID of the case where the Unearned Income record is removed.

2.3 Programs Impacted

CalFresh, CAPI

3 OUTREACH

3.1 Lists

Provide a list of cases where a CF EDBC was run between the Wave 5 Go-Live date and the implementation date of this SCR.

Provide cases with the following:

1. For Sonoma and Alameda County, these exists an Unearned Income record for CAPI.

And, the CF EDBC failed for either Over Income or benefits were reduced.

List Name: List_of_cases_with_Unearned_Income_record

List Criteria:

1. Date the CF EDBC was run is between Wave 5 Go-Live Date and implementation date of this SCR.
2. For CalWIN counties, these exists an Unearned Income record for CAPI.
3. CF EDBC failed for Over Income or benefits were reduced.

Standard Columns:

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

Additional Column(s):

- Status Reason

Note:

- For cases with Unearned Income records, the status reason will be Over Income or benefits will decrease.

Frequency: One Time

The list will be posted to the following location:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-257158

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-257224

Update Run EDBC Validation Message for
CalWIN Conversion Months

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Paul Galloway
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2023-03-10	.01	Initial Draft	Paul Galloway
2023-03-22	.02	Corrected Wave 2 dates in Appendix	Paul Galloway

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1 OVERVIEW

Allow EDBC to run for the month of go-live for migrating CalWIN counties.

1.1 Current Design

The CONV_DATE field on the PGM table is populated when programs are converted into CalSAWS from migrating systems. This began with LEADER migration and continued with C-IV and now CalWIN. The CONV_DATE may be the actual date the data was converted, or it may be set to a different value to allow EDBC to run for months prior to the conversion.

CONV_DATE is used by the Run EDBC and Negative Action Detail pages to limit how far in the past EDBC can run on a converted program. EDBC can only run for benefit months after the month of the CONV_DATE. If a worker selects an earlier EDBC Begin Month, a message displays (see SCR CA-228383: Update Run EDBC Validation Message for Conversion Months). An exception was made by adding a new security right that allowed authorized workers to run some converted C-IV programs back as far as 1/2021 on the Run EDBC page regardless of the CONV_DATE value (see SCR CA-236997: Retro Month EDBC on Converted Cases).

CalWIN migration is occurring in six waves. Active programs converted from CalWIN have the actual day the data was converted set as the CONV_DATE. The conversion process for each wave takes several days, so Active programs in the same wave may have different CONV_DATE values, and some may even be in different months when the conversion process begins at the end of one month and go-live is in the next month. EDBC can only be run on converted Active CalWIN programs starting with the benefit month after the month of the CONV_DATE. (See [Appendix - TABLE OF CONVERSION GO-LIVE DATES](#).)

Converted CalWIN Pending programs may have an earlier CONV_DATE to allow workers to run EDBC back to the Application Date.

1.2 Requests

Allow workers in CalWIN migration counties to run EDBC on converted Active programs starting with the benefit month they go-live in CalSAWS.

1.3 Overview of Recommendations

1. Update the Run EDBC page so Active programs converted from CalWIN will no longer display a validation preventing workers from running EDBC when the benefit month selected is the month of go-live.
2. Update Negative Action Detail with the same change being made for Run EDBC.

1.4 Assumptions

1. All references to EDBC in this SCR refer to running Regular EDBC on the Run EDBC or Negative Action Detail page, not Manual EDBC.
2. The CONV_DATE does not affect Manual EDBC. Workers can use Manual EDBC to process any months prior to conversion (assuming other requirements are met such as an open application, etc.).
3. The CONV_DATE is stored at the program level, not the case level. The programs on a case will generally all have the same CONV_DATE, but not always.
4. Converted Pending programs may have a CONV_DATE in a month prior to the actual data conversion to allow workers to run EDBC on the program back to the application date of the Pending program. If, after migration, a worker processes the Pending application and the program becomes Active, the new logic being added by this SCR will apply to the program because of its Active status.

2 RECOMMENDATIONS

Remove validation that prevents running EDBC on Active converted CalWIN programs in the month of go-live.

2.1 Eligibility: Run EDBC

2.1.1 Overview

The EDBC validation that prevents EDBC from running in the month of the CONV_DATE will be modified for converted Active CalWIN programs to allow EDBC to run starting with the month of the go-live. For most CalWIN conversion waves, this means internally shifting the CONV_DATE one month earlier and then applying the existing logic. However, Waves 4 and 5 have a conversion process that spans across a month end, so an exception will be included to not move the date back on any programs converted in the month prior to the go-live for those two waves.

2.1.2 Description of Changes

1. Modify the logic on Run EDBC that displays the “**EDBC cannot be run for this program(s) prior to...**” validation message when the following conditions are all true:
 - a. The program status is Active; and,
 - b. The CONV_DATE is after 10/27/2022; and,
 - c. The CONV_DATE is not in the month of 6/2023 or 8/2023

to internally move the CONV_DATE back one month for the purpose of determining the months for which the validation should display.

EXAMPLES:

- Wave 3 CalWIN go-live is 4/24/2023.
 - A converted Wave 3 case has a CalWORKs and a CalFresh program.
 - Both programs have CONV_DATE = 4/23/2023.
 - **CURRENT FUNCTIONALITY:**
 - Worker sets Begin Month to 4/2023 on Run EDBC page. The first day of the Begin Month is earlier than the CONV_DATE, so validation displays:

Benefit Processing Range:

Begin Month: *

End Month: *

04/2023 ▼

04/2023 ▼

Program	Status	Timely Notice Exception	Reason	Run Reason
CalFresh, CalWORKs: EDBC cannot be run for this program(s) prior to 05/2023. Please use Manual EDBC for months prior to 05/2023.				

- **FUNCTIONALITY AFTER THIS SCR IS IMPLEMENTED:**
 - Worker sets Begin Month to 4/2023 on Run EDBC page. Internally, CONV_DATE is adjusted back to 3/23/2023. The first day of the Begin Month is after the adjusted CONV_DATE, so CalWORKs and CalFresh programs are visible with select checkboxes:

Benefit Processing Range:

Begin Month: * **End Month:** *

04/2023 ▼ 04/2023 ▼

<input checked="" type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	CalFresh	Active			
<input checked="" type="checkbox"/>	CalWORKs	Active			

- Worker sets Begin Month to 3/2023 (or earlier) on Run EDBC page. Internally, CONV_DATE is adjusted back to 3/23/2023. The first day of the Begin Month is earlier than the adjusted CONV_DATE, so CalWORKs validation displays:

Benefit Processing Range:

Begin Month: * **End Month:** *

03/2023 ▼ 04/2023 ▼

<input type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
CalFresh, CalWORKs: EDBC cannot be run for this program(s) prior to 04/2023. Please use Manual EDBC for months prior to 04/2023.					

Technical Note: This logic is contained in the `edbc/runedbc/RunEdbcController.java` method `runEdbc_xa`.

2.1.3 Programs Impacted

All automated EDBC programs converted from CalWIN.

2.1.4 Performance Impacts

None anticipated.

2.1 Eligibility: Negative Action Detail

2.1.1 Overview

Apply the same change from the previous recommendation to running EDBC on the Negative Action Detail page.

2.1.2 Description of Changes

1. Modify the logic on Negative Action Detail that displays the “**EDBC cannot be run for this program(s) prior to...**” validation message when the following conditions are all true:
 - a. The program status is Active; and,
 - b. The CONV_DATE is after 10/27/2022; and,
 - c. The CONV_DATE is not in the month of 6/2023 or 8/2023

to internally move the CONV_DATE back one month for the purpose of determining the months for which the validation should display.

Technical Note: This logic is contained in the `edbc/negativeaction/data/ProgramDaoImpl.java` method `resultSetToBean`.

2.1.3 Programs Impacted

All automated EDBC programs converted from CalWIN.

2.1.4 Performance Impacts

None anticipated.

3 APPENDIX - Table of Conversion Go-Live Dates

Table of conversion go-live dates since C-IV migration, CONV_DATES, and change to available Run EDBC months with the implementation of this SCR:

WAVE	Go-Live:	CONV_DATE on Active Programs	Before this SCR, EDBC can run starting:	After this SCR, EDBC can run starting:
C-IV	Mon 09/27/2021	FC/AAP/CAPI/GA/GM/RCA/HT/HP 09/26/2021	10/2021	<no change>
		CW/CF/MC/NB/KG 05/31/2021	06/2021	<no change>
1	Mon 10/31/2022	10/29/2022	11/2022	10/2022
2	Mon 02/27/2023	02/24/2023 to 02/25/2023	03/2023	02/2023
3	Mon 04/24/2023	04/21/2023 to 04/23/2023	05/2023	04/2023
4	Mon 07/03/2023	06/30/2023 to 07/02/2023	07 or 08/2023	07/2023
5	Mon 09/04/2023	08/31/2023 to 09/03/2023	09 or 10/2023	09/2023
6	Mon 10/30/2023	10/26/2023 to 10/30/2023	11/2023	10/2023

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-258728

CalSAWS VA Expansion – Release 5

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Uzochi Oparaji
	Reviewed By	Sarah Cordano and Regina Zmuidzinas Aguilar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/10/23	1.0	Original Draft	Uzochi Oparaji

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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, Welfare-to-Work 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 5 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 5	Total (All Releases)
Number of UCs	108	18	136
Number of Keywords	278	22	300
Main Menu Branches	6	0	6
Sub-Menu Branches	16	3	19

Summary of Enhancements to Existing Content:

Category	Release 5
Number of Edited UCs	3
Updated UX/UI Features	2

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).

CalSAWS

San Bernardino AT1

Case Info | Eligibility | Empl. Services | Child Care | Resource Databank | Fiscal | Special Units | Reports | Client Correspondence | Admin Tools

e-Tools

- ▼ Application
 - e-Application
 - Search
 - Case Link
 - Request
 - Self-Service Portal
 - Customer Privacy
 - E-Messages
 - Application Registration Search
- ▼ Inter-County Transfer
 - Incoming ICT
 - Outgoing ICT
 - ICT Additional Documents
- ▼ External Agencies
 - Subscriber County

Application Registration Summary

★ Indicates required fields

Source: ★ App Date: ★ 10/12/2022 Case Number: ★

App Site: ★

Application Number: ★

Last Name: ★ First Name: ★ MI: ★ Social Security Number: ★

Other Names: (Maiden, Nicknames, ETC.) ★ Gender: ★ Date of Birth: ★

Home Address: ★

Street Number and Name: ★ Apt#: ★ City: ★ County: ★ State: ★ ZIP Code: ★

Save and Return

Chat

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 18 more UCs, 3 edits to existing UCs, 22 new keywords, 3 new sub-menu branches, and 2 UX/UI updates.

2.1.2 CalSAWS VA Mockups

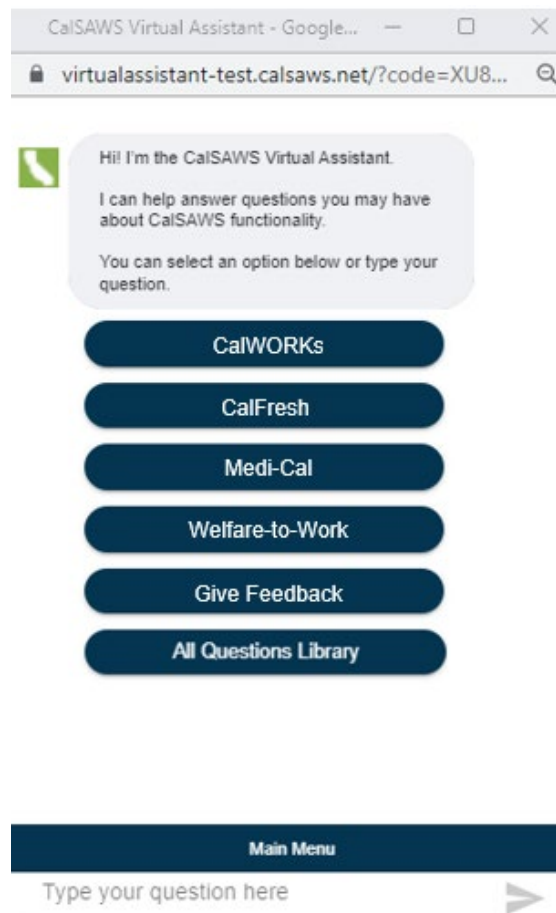


Figure 2.1.2.1 - VA Window

2.1.3 Description of Changes

1. New UCs

Below is a table containing all the new Use Cases in Release 5:

Program	Question	Answer	Buttons
Income Sub-Menu	What are the different income categories?	<p>You can find many different Income Categories within CalSAWS. Within each income category are the qualifying types of income. Income Categories include, but are not limited to:</p> <ul style="list-style-type: none"> • Child/Spousal Support • Disability • Earnings • IHSS • Social Security • Unemployment <p>To see the complete list of Income Categories, click the button below.</p>	<p>Button: Income Categories and Types in the System (JA)</p> <p>Button: More Income-related Topics</p>
Report Sub-Menu	What reports are in CalSAWS?	<p>The Reports Overview in Online Help (OLH) describes all the reports in the System. This is updated with every Major release and includes security groups, location, whether it is scheduled or on request, etc.</p> <p>Click the button below for the Reports Overview.</p>	<p>Button: Report Overview (OLH)</p> <p>Button: More Report-related Topics</p>
EDBC Sub-Menu	How to run EDBC?	<p>To run EDBC:</p> <ol style="list-style-type: none"> 1. Place the cursor over Eligibility on the Global navigation bar 2. Click the Customer Information link on the Local navigator 3. Click the Run EDBC link on the Task navigation bar 4. On the Run EDBC page: <ol style="list-style-type: none"> a. Click the checkbox(es) for the appropriate program(s) 	<p>Button: Run EDBC (OLH)</p> <p>Button: More EDBC-related Topics</p>

		<p>b. Enter appropriate information</p> <p>c. Confirm the Begin Month and End Month are correct</p> <p>d. Click the Run EDBC button</p> <p>Note: EDBC can be ran for a six-month period at a time.</p>	
EDBC Sub-Menu	How to append EDBC NOAs?	<p>In CalSAWS you can append an NOA after you have reviewed and saved EDBC. To append an EDBC NOA:</p> <p>1. Review the NOA after saving EDBC:</p> <p>a. Click the Save and Continue button on the EDBC List page to save EDBC results</p> <p>b. Click the Document Name hyperlink (with the status of Pending Review) and a PDF document will generate with print options. The Append option will not be available if the NOA was printed Locally or Centrally</p> <p>c. The PDF shows that you can Append, Save and Print Locally, Save and Print Centrally or Reject</p> <p>Note: Appending adds information to the existing NOA prior to the NOA being printed. The user cannot Edit the information generated on the system NOA</p> <p>2. Click the Append button to open the Append Detail page that contains a free form text field (2000 characters max)</p> <p>3. Click the Generate NOA button. This displays the updated NOA, and the buttons have changed.</p> <p>4. The Distributed Documents Search page now shows that the original NOA was overridden and the Appended NOA is in Accept – Print Centrally status</p> <p>For information on how to generate EDBC NOAs, click the button below.</p>	<p>Button: NOA Append Detail (OLH)</p> <p>Button: More EDBC-related Topics</p>
Report Sub-Menu	How to view Scheduled Reports?	<p>Scheduled reports are generated by batch, so the data presented will vary based on the report's date. They are split into the following categories: Administrative, Case Activity,</p>	<p>Button: Report Search (JA)</p>

		<p>Employment Services, Fiscal, State, Resource Database, and Special Units.</p> <p>To access Scheduled Reports:</p> <ol style="list-style-type: none"> 1. Place the cursor over Reports on the Global navigation bar 2. Select Scheduled from the Local navigator <p>Note: Access to reports is based on assigned security roles/groups.</p> <p>For instructions on how to search for a specific report, click the button below.</p>	<p>Button: More Report-related Topics</p>
Report Sub-Menu	How to view On Request Reports?	<p>On Request reports are generated by the System upon request, based on parameters that you enter. They are split into the following categories: Administrative, Case Activity, Employment Services, Fiscal, Resource Databank, and Special Units.</p> <p>To access On Request Reports:</p> <ol style="list-style-type: none"> 1. Place the cursor over Reports on the Global navigation bar 2. Select On Request from the Local navigator <p>Note: Access to reports is based on assigned security roles/groups.</p> <p>For instructions on how to search for a specific report, click the button below.</p>	<p>Button: Report Search (JA)</p> <p>Button: More Report-related Topics</p>
CalWORKs, CalFresh, and Medi-Cal	How to assign a worker for a pending program?	<p>To assign a worker to a new or pending program:</p> <ol style="list-style-type: none"> 1. Place the cursor over Case Info on the Global navigation bar 2. Select Worker Assignment from the Local navigator 3. On the Pending Assignment List page: <ol style="list-style-type: none"> a. Click the program(s) check box(es) in the Program Information section to select the program(s) you want to assign b. Click the Manual Assignment radio button in the Assignment Options section to manually assign a worker 	<p>Button: Worker Assignment (JA)</p> <p>Button: More CalWORKs-related Topics</p> <p>Button: More CalFresh-related Topics</p>

		<p>c. Click the Select button</p> <p>4. On the Select Worker page:</p> <p>a. Enter the appropriate search criteria</p> <p>b. Click the Search button</p> <p>c. Click the radio button for the appropriate Worker</p> <p>d. Click the Select button</p> <p>5. On the Pending Assignment List page:</p> <p>a. Automatically Reassign When Activated will default to <No>. Based on your County business process, you can select <Yes></p> <p>b. Click the Assign button</p> <p>Note: Worker assignment assumes you are within the context of a case. Users with the correct security rights can also reassign programs using the Worker Assignment page in Admin Tools.</p>	<p>Button: More Medi-Cal-related Topics</p> <p>Button: More Welfare-to-Work-related Topics</p>
Income Sub-Menu	How to add income?	<p>1. On the Income List page:</p> <p>a. Select <Income Category> from the Income Category drop list</p> <p>b. Click the Add button</p> <p>2. On the Income Detail page:</p> <p>a. Select <Name>, <Type>, <Frequency> from their respective drop lists</p> <p>b. Enter <Description> in the Description field, if applicable</p> <p>c. Click the Shared with RDP page section expand caret and select <Yes or No> from the Is this income shared with a Registered Domestic Partner? drop list, if applicable</p> <p>d. Select <Program> from the Display Program drop list</p> <p>e. Click the Add button</p> <p>3. In the Income Amount Detail page section:</p> <p>a. Select <Change Reason> from the Change Reason drop list</p> <p>b. Enter <Date> in the Reported Date field</p>	<p>Button: Income Categories and Types in the System (JA)</p> <p>Button: More Income-related Topics</p>

		<p>c. Utilize the Average Calculator, based on your County business process</p> <p>d. Enter the applicable income amount(s)</p> <p>Note: The Add button does not display until a program is selected from the Display Program drop list. When adding income be sure to select/link the correct employment record.</p> <p>For more information on how to add an income record, click the button below.</p>	
Income Sub-Menu	How to enter Income In-Kind (IIK) unearned?	<p>Income in-kind (IIK) is used for CalWORKs and/or Medi-Cal applicants and recipients.</p> <p>When IIK unearned is the income type, the Income Amount Detail page allows you to select each person who should receive IIK. This is necessary only when unearned IIK should NOT be distributed evenly across all family members.</p> <p>If No is selected from the Specify Person(s) Receiving Income In-Kind drop list, the System will distribute the IIK to all persons with an Active status and any role other than UP. This includes parents and spouses pulled in the EDBC as financially responsible persons. The IIK is also allocated for unborns of any of the Active persons.</p> <p>For instructions on how to enter income in-kind (IIK) within the context of a case, click the button below.</p>	<p>Button: Medi-Cal – Income In-Kind - Unearned (JA)</p> <p>Button: More Income-related Topics</p>
Imaging Sub-Menu	How to select person when imaging?	<p>Certain documents are considered "Person level" by the Imaging Solution. This means a specific person needs to be linked to the image. Examples of person level documents include Social Security cards, passports, earnings and birth certificates.</p> <p>When a person level document is imaged, you should fill in the document</p>	<p>Button: More Imaging-related Topics</p>

		<p>properties as usual, including linking it to a case. Once submitted, the image will be processed by the system and then end up in the Person Selection workflow queue. This queue is accessed through Capture & Indexing. If you do not see the Person Selection queue, you do not have the appropriate security rights to access that workflow queue and should follow your chain of command for guidance.</p> <ol style="list-style-type: none"> 1. Locate and open your image in Person Selection 2. Click the magnifying glass in the Case/Person Name field 3. In the dialog box, click the Search button. The results display all the people on the linked case Choose the person that the document belongs to and click the Route to Person Select Handling button 4. The document is now a person-level document associated to the chosen individual <p>Note: After indexing an image, users may encounter a delay before it is available in the Person Selection queue.</p>	
Imaging Sub-Menu	How to remove an image from imaging?	<p>Before removing images, follow your county guidelines.</p> <p>If Document is in Workflow: For documents already in a workflow queue, navigate to queue containing the document and open it. Select the blue "Send To" button at the top right of the page, choose "Document Removal" from the dropdown. Documents will remain in this queue for 30 days for retrieval.</p> <p>If Document is Archived (Not in Workflow): To remove an image from the system, open the image and click the Add to Workflow button on the top bar. On the popup window, select the Route to Document Removal option.</p>	Button: More Imaging-related Topics

		<p>Once the option is chosen, click the blue Add button. This will route the image to the Document Removal workflow queue. Documents will remain in this queue for 30 days for retrieval.</p> <p>Note: If you do not see the Document Removal queue in Capture & Indexing or Route to Document Removal, you do not have the appropriate security rights to access that workflow queue and should follow your chain of command for guidance.</p>	
Imaging Sub-Menu	How to scan returned mail?	<p>Returned mail can be scanned into the imaging solution using the "Return Mail Scan" Capture Profile.</p> <p>To scan returned mail for multiple cases at a time, you can take advantage of the Coversheets page in CalSAWS to generate up to 10 barcoded coversheets at a time. Follow the steps below:</p> <ol style="list-style-type: none"> 1. Place cursor over Client Correspondence on the Global navigation bar 2. Select Barcodes from the Local navigator 3. Select Coversheets from the Task navigation bar 4. Enter up to 10 case numbers in the Case Number(s) field, separating each case number with a semi-colon (;) 5. Click the Submit button 6. Click the Generate Coversheet(s) button to create printable, PDF coversheets for the successfully validated case numbers 7. Print the coversheets and place them before the returned mail for each case in the stack of returned mail 8. Scan the returned mail and coversheets 9. The returned mail batch will have automatically separated the returned mail for each case using the coversheets 	Button: More Imaging-related Topics

Imaging Sub-Menu	How to print from imaging?	<p>To print an image from the imaging solution:</p> <ol style="list-style-type: none"> 1. Open the image 2. On the top bar, find the printer icon to print the image <p>Note: If you do not see a printer icon, you do not have the appropriate security right to access that workflow queue and should follow your chain of command for guidance.</p>	Button: More Imaging-related Topics
Imaging Sub-Menu	How to search for images in a workflow queue?	<p>To search for images:</p> <ol style="list-style-type: none"> 1. Launch Imaging by clicking the Imaging button (next to Logout at the top right of a CalSAWS page) 2. Select Capture and Indexing 3. Select the queue name (QA & Indexing, Exception, Barcode Verification, Person Selection, etc.) 4. Click the + icon near the upper left of the page 5. In the second from the left dropdown, enter your search criteria 6. Click the Add button 7. Click the blue Search button 	Button: More Imaging-related Topics
Imaging Sub-Menu	How to generate Imaging Coversheets from the Template Repository?	<p>To generate Imaging Coversheets from the Template Repository:</p> <ol style="list-style-type: none"> 1. Hover over Client Corresp. on the Global navigation bar 2. Select Templates from the Local navigator 3. Enter "Imaging" in the Form Name field, and then click the Search button 4. Click Imaging No Case Coversheet or the Imaging Separator Coversheet hyperlink <ol style="list-style-type: none"> a. Imaging No Case Coversheet: used to upload documents that don't have a case created in CalSAWS. Follow your county's business process when using this Coversheet b. Imaging Separator Coversheet: used to separate non-barcode documents during scanning; referred to as "Generic Separator Sheets", these can be re-used 5. Click the Generate Form button on the Document Parameters pop-up 	Button: More Imaging-related Topics

Imaging Sub-Menu	What Imaging Capture Profile should I use?	<p>Capture Profiles:</p> <ul style="list-style-type: none"> Any Capture Profile that ends with "Scan" is used to upload physical documents using your County's scanner in Black & White, unless you use the Hyland Virtual Printer. Any Capture Profile that ends with "File" is used to upload files that are saved/stored on your local device. You may either drag and drop the files into the Imaging Solution or click the Browse button to search for the files in the saved folder location. Any Capture Profile that ends with "Photo Scan" will optimize the physical scan for color. <p>Note: Photo Scans will take more time to scan and have a longer retrieval time when viewed due to the increased file size.</p>	Button: More Imaging-related Topics
Imaging Sub-Menu	What is the QA & Indexing Queue?	<p>The QA & Indexing queue holds documents that have been uploaded but not submitted (i.e., the Submit button has not been clicked).</p> <p>Documents that are not submitted from this queue will not be stored in the Imaging Solution. They will not appear in any of the Imaging Solution drawers and cannot be retrieved by clicking the Images buttons in the System.</p> <p>Tasks that should be tied to the documents pending in this queue will not be triggered nor will the Customer Reporting and/or Distributed Documents Search pages be updated.</p>	Button: More Imaging-related Topics
Imaging Sub-Menu	What is the Exception Queue?	<p>The Exception / Exception Confidential queue holds documents that Optical Character Recognition (OCR) cannot confidently categorize. The System automatically routes documents to this queue after they are submitted from the QA & Indexing queue and go through OCR processing.</p> <p>Documents must be routed out of this</p>	Button: More Imaging-related Topics

		<p>queue to trigger task creation, if applicable based on Document Routing Rules, and to make any updates to the Customer Reporting and/or Distributed Documents Search pages in CalSAWS.</p> <p>Additionally, person-level documents that are not routed out of this queue will remain in the All-Case Archived drawer and stored as case-level documents. After you route person-level documents of the Exception queue, the System automatically sends them to the appropriate Person Selection queue.</p> <p>Note: Users may set the OCR Bypass Switch to "True" to prevent documents from going through the OCR process</p>	
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2. Edited UCs

Below is a table containing all edited Use Cases in Release 5. Text highlighted signals edits:

Program	Question/Title	Answer	Buttons
Imaging Sub-Menu	How to find an indexed image?	<p>There are different ways to access images in CalSAWS:</p> <p>Option 1: In the System, you can view images associated with a case or an individual on the Case Summary Page. To do this, click on the Images button on the top of the Case Summary Page. This will pull back the last 365 days of images for the case and persons associated to the case.</p> <p>There are 70+ CalSAWS pages with Images buttons that retrieve images relevant to the context of the CalSAWS page. For example: the Vital Statistics page will retrieve person verification documents.</p>	<p>Button: View Images (JA)</p> <p>Button: More Imaging-related Topics</p>

		<p>1. Place the cursor over Case Info on the Global navigation bar.</p> <p>2. Select Case Summary from the Local navigator.</p> <p>3. On the Person Search page:</p> <ul style="list-style-type: none"> a. Enter the search criteria. b. Click the Search button. <p>4. In the Search Results Summary Page section:</p> <ul style="list-style-type: none"> a. Click the <Name> hyperlink for the case you wish to view. <p>5. On the Case Summary Page, click the Images button.</p> <p>OR</p> <p>Option 2: Click the "Imaging" button in the top navigation bar next to the "Log Out" button. Then, click the "Documents" button and use the search feature to find the relevant image.</p> <p>The Document Views section contains pre-defined filters accessed by clicking the arrow next to the name. Examples include Case Number and Captured by User by Date(s).</p> <p>When in a Document View, click the + icon also allows searching specific fields such as Name, CIN and Form Number. Either type in the field or choose from the dropdown. Click the Add button to add multiple search parameters then click the blue Search button.</p>	
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		<p>Option 3: If already viewing an image on a Case or Person, you can toggle the Show or Hide Related Documents icon directly to the left of the i icon at the top right of the Image preview window.</p>	
Imaging Sub-Menu	How to reindex image?	<p>There is a Reindex queue that workers can route documents to when they need to be managed, updated, or manipulated. If you do not see the Reindex or Reindex All queues in the Capture & Indexing section of Perceptive, you do not have the appropriate security rights to access that workflow queue and should follow your chain of command for guidance.</p> <p>Access to each County-maintained workflow queue is driven by CalSAWS security rights. If you don't see a workflow queue on the Perceptive Experience Capture and Indexing page, you do not have the appropriate security rights to access that workflow queue and should follow your chain of command for guidance.</p> <p>To reindex, search for your image. Open the image if it is not already in workflow (does not display the workflow tray icon on left side of search grid result line) and select the Add to Workflow button on the top bar. On the popup window select the Reindex queue for changing only the Form Name.</p>	<p>Button: Imaging Workflow Queues and Exceptions (JA)</p> <p>Button: More Imaging-related Topics</p>

		<p>Select Reindex All for changing other document properties.</p> <p>Once added to workflow, navigate to Capture & Indexing then choose the Reindex or Reindex All queue. Your document may not arrive immediately. Once it appears in the queue, open it and change the desired properties. Once done, click the blue Send To button and select Workflow Archive.</p> <p>For more information about the Imaging Workflow Queue, click the button below.</p>	
Imaging Sub-Menu	How to print to imaging?	<p>The Virtual Printer capture mode allows you to print documents from an application or window directly into the Imaging Solution, without physically printing or scanning the document. the document or capturing the screen.</p> <p>To use the Virtual Printer, follow the steps below. These steps assume you logged into CalSAWS and are currently viewing the document to upload:</p> <ol style="list-style-type: none"> 1. In the application where the document is currently located, print the document as if you are physically printing it 2. Select Hyland Virtual Printer from the list in the Printing dialog box. If Hyland Virtual Printer is not listed, please verify 	<p>Button: Imaging Single Case Scanning and Virtual Printing (JA)</p> <p>Button: More Imaging-related Topics</p>

		<p>you have it installed on your workstation</p> <p>3. Click the Print button to scan the documents into CalSAWS</p> <p>4. The Imaging Solution opens in a new window. Select <Single Case Scan> in the Capture Profile drop list</p> <p>5. Adjust values on the Capture & Indexing window as needed then click Start</p> <p>6. The document will be uploaded. Click the Open Batch button when it turns dark blue</p> <p>7. The QA & Indexing window will open with the document. QA as normal and submit the document</p> <p>Note: If a task does not need to be created after printing, change Task Override to True.</p> <p>For additional information and instructions, click the button below.</p>	
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3. New Keywords

Below is a table containing all new Keywords in Release 5.

UC #	Title	Keywords
FR.12	Imaging Sub-Menu	scan, exception queue, qa and indexing queue, imaging coversheets
FR.22	Income Sub-Menu	income, income management, income categories, report income, income reporting
FR.23	Reports Sub-Menu	reports, on request reports, scheduled reports, reporting calendar, report timeline, business intelligence reports, qlik reports

FR.24	EDBC Sub-Menu	EDBC, edbc, run edbc, start edbc, batch sweeps, create manual edbc
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4. New Main Menu/Sub-Menu Branches

Release 5 will include 3 new sub-menu branches that will bucket keywords into a sub-menu.

The new sub-menu branches are:

1. EDBC
2. Income
3. Reports

5. UX/UI Updates

This is what the All Questions Library looked like in previous releases:

The All Questions Library will be enhanced in Release 5 in two ways:

1. The keyword search box will now be gray, and contain the words "Type keyword here..."
2. The question buttons in the All Questions Library will be smaller, boxed rather than rounded, and have a blue outline instead of yellow. The "I cannot find my question" button will be larger and dark blue.

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	VirtualAssistant_Release5Tracker.xlsx
2	Design	Miro Board – VA flow and use cases are documents	R5 – CalSAWS Worker-Facing VA.pdf

4 REQUIREMENTS

4.1 Project Requirements

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

5 OUTREACH

N/A

6 APPENDIX

N/A