

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-243684

CAPL Sponsor Deeming Income Requirements

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/3/2022	1.0	Initial Document	Yale Yee
2/2/2023	2.0	Content Revision to update verbiage	Yale Yee
4/4/2023	3.0	Content Revision for clarification	Yale Yee

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1 OVERVIEW

1.1 Current Design

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

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Sponsorship Detail Page

2.1.1 Overview

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

2.1.2 CAPI Sponsorship Mockup

Sponsorship Detail

*- Indicates required fields

Edit Close

Sponsor: Individual

Sponsored Non-Citizen's Name: *
Smith, Jane 19F

Sponsor's Name: *
Smith, John 27M

Sponsor's Phone Number:

Sponsor's Household Size: * 2

Total Number of Sponsored Non-Citizens: * 1

Total Number of Sponsor's Dependents: 1

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

Figure 2.1.1 – CAPI Sponsorship – View Mode Mockup

Sponsorship Detail

*- Indicates required fields

Save and Return Cancel

Sponsor: Individual

Sponsored Non-Citizen's Name: *
Smith, Jane 19F

Sponsor's Name: *
Smith, John 27M

Sponsor's Phone Number:

Sponsor's Household Size: *

Total Number of Sponsored Non-Citizens: *

Total Number of Sponsor's Dependents:

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

Figure 2.1.1 – CAPI Sponsorship – Edit Mode Mockup

2.1.3 Description of Changes

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

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping for the new field

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Calculate Sponsor Income Used on SOC 454 Worksheet

2.2.1 Overview

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

2.2.2 Description of Changes

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

Note: This functionality exists in the system. This number is the sum of all earned and unearned income of the sponsor(s) and sponsor's spouse (if living together).

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

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

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

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

3. Subtract the total gross income from the sponsor(s)' allocation from the total gross income.

- a. This number is a non-negative number.

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

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

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

5. Subtract the previous result (34.), from the allocation for dependent(s) of the sponsor, from 3.

- a. This number is a non-negative number.

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

2.2.3 Programs Impacted

CAPI

2.2.4 Performance Impacts

N/A

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

2.3.1 Overview

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

2.3.2 Description of Changes

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

Regular Budget	Regular
Unearned Income	\$ 500.00

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

EDBC Person Line Item Detail - Unearned Income

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

Figure 2.3.2 – Display of the Sponsor's Income

2.3.3 Programs Impacted

CAPI

2.3.4 Performance Impacts

N/A

2.4 Calculate Sponsor Resource Used on SOC 454

2.4.1 Overview

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

2.4.2 Description of Changes

1. Sum the total countable resources of the sponsor(s) and sponsor's spouse (if living together).

Note: This functionality exists in the system. This number is the sum of all resources of the sponsor(s) and sponsor's spouse (if living together).

2. Calculate the allocation for sponsor(s). Each sponsor's allocation is:

- a. equal to the SSI resource limit for an individual

OR

- b. equal to the SSI resource limit for a couple when both members of the couple are living together and one member is not a co-sponsor

OR

- c. equal to twice the individual resource limit if both members of the couple are co-sponsors.

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

The answer to the question is blank, No, or Yes. Each answer correlates to a different allocation for sponsor(s), respectively.

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

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

2.4.3 Programs Impacted

CAPI

2.4.4 Performance Impacts

N/A

2.5 Update CAPI EDBC to Calculate Sponsor Resource

2.5.1 Overview

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

2.5.2 Description of Changes

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

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

Figure 2.5.1 – Final Amount Deemed to the Immigrant

Property Detail

Close

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

Close

Figure 2.5.2 – Display of the Sponsor’s Resource

2.5.3 Programs Impacted

CAPI

2.5.4 Performance Impacts

N/A

2.6 Automate SOC 454 Variable Population

2.6.1 Overview

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

State Form: SOC 454 (4/99)

Current Programs: CAPI

Current Attached Forms: N/A

Current Forms Category: Form

Current Template Repository Visibility: All Counties

Existing Languages: English

2.6.2 Update SOC 454 Variable Population

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

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

Form Body Variables:

Variable Name	Population	Formatting	Editable* / Field Type	Template Repository Population
Gross Income	The sponsor's and sponsor's spouse's gross income from EDBC. See Recommendation 2.2.2 #1.	Arial Font Size 10 \$X,XXX.XX	Y	Y

	Example: \$5,500.45			
Allocation for Sponsors	<p>The allocation for the sponsor(s). See Recommendation 2.2.2 #2.</p> <p>Note: This calculation will be stored in as a new value in Budget_Pers_Misc. SSI Income Limits can be found in CT 963.</p> <p>Example: \$841.00</p>	<p>Arial Font Size 10 \$X,XXX.XX</p>	Y	Y
Subtract Allocation	<p>Calculated by subtracting allocation from gross income. See Recommendation 2.2.2 #3.</p> <p>Example: \$4659.45</p>	<p>Arial Font Size 10 \$X,XXX.XX</p>	Y	Y
Allocation for Dependents	<p>Allocation for the dependents of the sponsor (children and spouse who is not a co-sponsor). See Recommendation 2.2.2 #4.</p> <p>Note: This calculation will be stored in as a new value in Budget_Pers_Misc. SSI Income Limits can be found in CT 963.</p> <p>Example: \$1261.50</p>	<p>Arial Font Size 10 \$X,XXX.XX</p>	Y	Y
Subtract Dependents Allocation	<p>Calculated by subtracting 'Allocation for Dependents' from previously calculated 'Subtract Allocation' value. See Recommendation 2.2.2 #5.</p>	<p>Arial Font Size 10 \$X,XXX.XX</p>	Y	Y

	<p>Note: If the calculated value is negative, populate \$0.00</p> <p>Example: \$3,397.95</p>			
Sponsor Resources	<p>The total counted resources of the sponsor and sponsor's spouse from EDBC. See Recommendation 2.4.2 #1.</p> <p>Example: \$9,000.00</p>	<p>Arial Font Size 10</p> <p>\$X,XXX.XX</p>	Y	Y
Resource Allocation	<p>Will populate \$2,000.00 / \$3,000.00 / \$4,000.00 (current SSI asset limit values) for individual sponsor / marries couple where one member is not a co-sponsor / both members are co-sponsors. See Recommendation 2.4.2 #2.</p> <p>Note: This calculation will be stored in as a new value in Budget_Pers_Misc. SSI Asset Limits can be found in CT 355_C1 (Individual) and CT 355_C2 (Couple). A scenario where a couple are both co-sponsors will populate with a value of double the individual limit.</p> <p>Example: \$4,000.00</p>	<p>Arial Font Size 10</p> <p>\$X,XXX.XX</p>	Y	Y
Subtract Resource Allocation	<p>Subtract 'Resource Allocation' from 'Sponsor Resources'. See Recommendation 2.4.2 #3.</p>	<p>Arial Font Size 10</p> <p>\$X,XXX.XX</p>	Y	Y

	Example: \$5,000.00			
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Variables requiring translation: N/A

2.7 Automated Regression Test

2.7.1 Overview

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

2.7.2 Description of Changes

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

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

3 SUPPORTING DOCUMENTS

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-204553

CalWORKs/RCA Adults by WTW/REP Category Dashboard

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Thao Ta; Ravneet Bhatia; Carlos Albances; Lien Phan; Ginko Luna; Loan Vo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/28/2021	1.0	Initial Revision	Esequiel Herrera-Ortiz
08/10/2021	1.1	Added a 'Cash Aid Role Reason' column to every case list. Added a 'Volunteer' column for exempt work participants. Added an 'WTW/REP Program Status Expected End Date' column for adults in Good Cause.	Esequiel Herrera-Ortiz
08/17/2021	1.2	Added the following columns to all case lists: 'Cash Aid Role Status Reason', 'Work Registration Begin Date', 'WTW/REP Program Status Begin Date', 'Report Month'. Included a 'Homeless' column to several case lists. Added an 'Activity Type', 'Activity Number' and 'Activity Status Begin Date' to the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' case lists. Remapped the '1V – RCA' aid code to the new 'RCA Employed 32+ Hrs/Week' measure.	Esequiel Herrera-Ortiz
08/21/2021	1.3	Updated the 'Report Month' parameter to default to the latest month. Updated the 'Homeless' column logic. Added the following columns: 'Prior Month Cash Aid Role Reason', 'Work Registration Status Reason', 'CW/RCA Discontinuance Date', 'Activity Status Reason' and 'Activity Status Begin Date' column. Added column view requirement. Added an 'Excluded' column.	Esequiel Herrera-Ortiz

11/08/2021	1.4	<p>Updating design document per committee review.</p> <ul style="list-style-type: none"> Renamed one of two 'CalWORKs/RCA Adults' header to 'CalWORKs/RCA Adults by Type' Added last known worker column information to the Not Assigned to Worker subcategories. Update the case list column order. Fixed typos and screen shots. 	Esequiel Herrera-Ortiz
02/24/2022	1.5	<p>The following aid codes have been remapped to 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week':</p> <ul style="list-style-type: none"> 3G – CW – Zero Parent (State) 3H – CW-Zero Parent (Mixed) 3R – CW-Zero Parent-Exempt MAP (Fed) <p>The RCA Participant Employed 32+ Hrs/Week metric has been updated to dynamically include any new Fed, State or Mixed aid code.</p>	Esequiel Herrera-Ortiz
03/14/2023	2.0	<p>The Description of Change section and Recommendations section had aid codes 3G, 3H, 3R and 33 incorrectly mapped.</p> <p>The requirement to remove the roles of FRI and FSO from the base population was missing from Description of Change.</p>	Esequiel Herrera-Ortiz
03/29/2023	2.1	<p>Aligned the aid code list for Single Parents and Two Parent households in all sections.</p> <p>Fixed an incorrect reference of Begin Date to Expected Begin Date.</p> <p>Fixed inconsistent column name references.</p> <p>Updates Description of Change section to include missing requirements found in the</p>	Esequiel Herrera-Ortiz

		Recommendation of Change section.	
04/03/2023	2.2	Updated the No WTW/REP Program Block logic to remove the condition that the latest WTW/REP Work Registration record is Mandatory. A person with No WTW/REP program may not have a WTW/REP work registration record.	Esequiel Herrera-Ortiz
04/10/2023	2.3	Updated Description of Change item 19 to remove the column order. The column order was later changed to Appendix 7.7 and the section was not updated accordingly. Updated the case list to remove a Qlik ID column from the Mandatory case list and to add column to the Active case list. This is to match production.	Esequiel Herrera-Ortiz

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7.8 Activity Selection Logic for Timed-Out on Active CalWORKs Cases and
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1 OVERVIEW

The CalWORKs/RCA Adults by WTW/REP Category dashboard in Business Intelligence captures all adults in an active California Work Opportunities and Responsibilities to Kids (CalWORKs) program or Refugee Cash Assistance (RCA) program in each report month and reports them under a single category. The report runs for the prior month's data and the counts then remains static.

The dashboard was introduced into the system with SCR 49631 in the R17.10 release. The SCR sought to convert the legacy SMART's Global report into the legacy OBIEE reporting tool. The report has again been converted to the new Qlik reporting tool with CA-214600 in the 21.01 release.

This SCR updates the dashboard logic to report CalWORKs/RCA Adult participation more accurately.

1.1 Current Design

Currently the CalWORKs/RCA Adults by WTW/REP Category dashboard:

1. The 'CalWORKs/RCA Adults' (base population):
 - Does not restrict to only those adults with a household status of 'In the Home'.
 - Does not restrict the base population based on the adult's CW/RCA role.
 - The base population requires the adult to have an associated WTW/REP program block.

Note: To have an associated WTW/REP program block means the CalWORKs/RCA adult appears within a WTW/REP program block in the Case Summary page.

2. Does not provide the metric 'RCA Participants Employed 32+ Hrs/Week' in the following categories:
 - WTW/REP Mandatory / Assigned to Worker / Active
 - WTW/REP Mandatory / Not Assigned to Worker / Identified Reason
3. Does not include a 'Cal-Learn Adults' category or Cal-Learn Adults case level information.
4. Does not include a category to capture adults in an Active CalWORKs/RCA program who are not Members in the program or are not Active in the program. Such example of this population includes Active FRE Members, Ineligible Members, etc.
5. Does not include a category to capture adults who are in an Active CalWORKs/RCA program but are not in a WTW/REP program block on the same case.

Note: To not have an associated WTW/REP program block means the CalWORKs/RCA adult does not appear within a WTW/REP program block in the

- Case Summary page therefore does not have a WTW/REP role or WTW/REP program person status.
6. The '1V – RCA' aid code is mapped to the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures rather than the new 'RCA Participants Employed 32+ Hrs/Week' measure. The 'RCA Participants Employed 32+ Hrs/Week' measure will be updated to accept all Aid Codes marked as RCA Fed, State or Mixed.
 7. The '33 - CW – Zero Parent (Fed)' is mapped to 'Family Employed at Least 35 Hrs/Week' rather than 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week'.
 8. The following aid codes are not mapped to any metric. They will be mapped to 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week':
 - 3G – CW – Zero Parent (State)
 - 3H – CW-Zero Parent (Mixed)
 - 3R – CW-Zero Parent-Exempt MAP (Fed)
 9. Several measure headers have inconsistent capitalization and incorrect abbreviations.
 10. The 'Report Month' parameter is set to default to the latest 5 months. This is an excessive selection and is causing performance issues.
 11. The dashboard name, several sheet names, several category headers, and several measure headers spell out 'Welfare-to-Work' entirely rather than use the abbreviated form WTW and do not include the reference to the REP program.
 12. The columns in the case lists are not properly ordered. Also, some columns are not hidden/visible when they should be depending on the Tier Description parameter selected.
 13. The following case lists do not include a parameter that allows the user to filter to a distinct subcategory/measure within the category:
 - WTW/REP Mandatory
 - Assigned to Worker / Active
 - Assigned to Worker / Identified Reason
 - Assigned to Worker / Unknown Reason
 14. Does not provide the following columns in every case list:
 - Client Index Number (CIN)
 - Cash Aid Role Reason
 - Cash Aid Role Status Reason
 - Work Registration Begin Date
 - Report Month
 - WTW/REP Program Status Begin Date
 - WTW/REP Program Status Reason
 15. The 'CW/RCA Aided Case' list:
 - Contains a single parameter titled 'RCA Aided Reason' rather than 'Work Registration Status'.
 - Contains a column titled 'Expected End Date' rather than 'Work Registration Expected End Date'.
 - Has a 'Exempt Reason' rather than 'Work Registration Status Reason'.
 - Has the 'Prior Work Reg Status' columns, only visible for the WTW/REP Exempt population, that will be removed.

- Has the 'Prior Work Reg Begin Date' column, only visible for the WTW/REP Exempt population, that will be removed.
 - Does not include a 'Prior Month Cash Aid Role Reason' column.
 - The case list does not provide the following columns needed to evaluate the Exempt population:
 - Volunteer
 - Excluded
 - WTW/REP Program Status Expected End Date
16. The dashboard has two sections titled 'CalWORKs/RCA Adults'. The data set that is broken down by type will be renamed to 'CalWORKs/RCA Adults by Type'.
17. Does not include a 'Homeless' column in the following case lists:
- CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population divided by Type Description case list)
 - CalWORKs/RCA Adults by WTW/REP Category
 - CW/RCA Aided
18. The Assigned to Worker 'Identified Reason' case list:
- Does not include an 'WTW/REP Program Status Expected End Date' column for the Good Cause population.
 - Includes the unnecessary 'Program Status Reason' column.
 - Includes the unnecessary 'Program Status Reason Begin Date' column.
19. Does not provide prior assigned worker information for the Sanctioned, Not Assigned to Worker / Identified Reason, and Not Assigned to Worker / Should be Reregistered population who do not have an assigned program worker as of the end of the report month.
20. The 'Assigned to Worker / Active' case list and the 'Not Assigned to Worker / Identified Reason' case list do not include the following columns:
- Activity Type
 - Activity Number
 - Activity Status Begin Date
21. The 'Active' and 'Unknown Reason' case lists:
- Do not include a 'Activity Scheduled End Date' column.
 - Do not include a 'Activity Status Reason' column needed to verify Completed/Closed customer activities.
 - The 'Active' case list does not include an 'Activity Scheduled Start Date' column.
 - The 'Unknown Reason' case list has an existing column titled 'Expected Begin Date' rather than 'Activity Scheduled Begin Date'.
22. The Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)' case list does not have a 'CW/RCA Discontinuance Date' column. The column is needed to verify future current month terminations.
23. The 'CalWORKs/RCA Adults by WTW/REP Category Case List' and 'CalWORKs/RCA Adults by WTW/REP Category' case lists do not provide the following columns:
- TANF Months Used
 - Extender Reason
 - Extender Begin Date
 - Extender End Date

24. The 'CalWORKs/RCA Adults Category' and the 'CalWORKs/RCA Aided' case lists do not provide Activity information for the 'Timed-Out on Active CalWORKs Cases' population or the 'Exempt' population.
25. The 'CalWORKs/RCA Adults by WTW Category' (Base population divided by tier description) does not include any Cal-Learn related columns.
26. The 'Time Expiration Column' within the CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list) and CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type Description case list) case list is displaying the Begin Date of when an adult's Role Status Reason Description is set to 'CW Time Limit'.
Technical Note: The logic will be taken from the Time Limits online page.
27. The 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Should Be Registered)' case list:
 - Includes a column titled 'Program Status Reason' that will be renamed to WTW/REP Program Status Reason.
 - Has a column titled Program Status Reason Begin Date that will be renamed to WTW/REP Program Status Reason Begin Date.

1.2 Requests

The CalWORKs/RCA Adults by WTW/REP Category dashboard, also known as Global Report, as designed, contains requirements that excludes caseload data and includes some data that is not needed. The current report logic needs to be modified for users to have access to accurate data needed to review ongoing participation in activities and to take necessary actions to appropriately manage CalWORKs/RCA eligible participants in the WTW/REP program.

1.3 Overview of Recommendations

The following modifications are made to the CalWORKs/RCA Adults by WTW/REP Category dashboard to accurately capture caseload data:

1. Update the logic definition for the 'CalWORKs/RCA Adults' (base population) as follows:
 - Add the requirement that the adult must have a household status of 'In the Home'.
 - The adult's role is **NOT** Financially Responsible – Included (FRI) or Family Size Only (FSO).
 - Remove the condition that the CalWORKs/RCA Adults must have an associated WTW/REP program block.

Note: To not have an associated WTW/REP program block means the CalWORKs/RCA adult does not appear within a WTW/REP program block in the Case Summary page therefore does not have a WTW/REP role or WTW/REP program person status.

2. Create a new metric titled 'RCA Participants Employed 32+ Hrs/Week' for the categories listed below:

- WTW/REP Mandatory / Assigned to Worker / Active
 - WTW/REP Mandatory / Not Assigned to Worker / Identified Reason
3. Add a new subcategory to 'CalWORKs/RCA Adults by Type' titled 'Cal-Learn Adults' which captures the Cal-Learn adult population.
 4. Add a new category titled 'CalWORKs/RCA Other' which captures adults in an Active CalWORKs/RCA program who are not Members in the program or are not Active in the program.
 5. Add a new category titled 'No WTW/REP Program Block' which captures adults that are CalWORKs/RCA aided but do not have an associated WTW/REP program block.
 Note: To not have an associated WTW/REP program block means the CalWORKs/RCA adult does not appear within a WTW/REP program block in the Case Summary page therefore does not have a WTW/REP role or WTW/REP program person status.
 6. Update the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to exclude the '1V – RCA aid code. The '1V – RCA' aid code is re mapped to the new 'RCA Participant Employed 32+ Hrs/Week' measure. The 'RCA Participants Employed 32+ Hrs/Week' measure will be updated to accept all Aid Codes marked as RCA Fed, State or Mixed.
 7. Update the 'Family Employed at Least 35 Hrs/Week' measure in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to exclude the '33 - CW – Zero Parent (Fed)' aid code. The aid code is re mapped to the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures.
 8. Update the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measure in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to include the following aid codes:
 - 3G – CW – Zero Parent (State)
 - 3H – CW-Zero Parent (Mixed)
 - 3R – CW-Zero Parent-Exempt MAP (Fed)
 9. Update several measure headers within categories to have consistent capitalization and appropriate abbreviations.
 10. Update the 'Report Month' parameter to default to only the latest month rather than the latest 5 months.
 11. Update all 'Welfare-to-Work' references in the dashboard name, sheet names, category headers and measure headers to 'WTW/REP'.
 12. Update all case lists' column order and column's visibility to match Appendix 7.7.
 13. Update the following case lists to include a parameter that allows the user to filter to a distinct subcategory/measure within the category:
 - WTW/REP Mandatory
 - Assigned to Worker / Active
 - Assigned to Worker / Identified Reason
 - Assigned to Worker / Unknown Reason
 14. Update all case lists to Include the following columns:
 - CIN
 - Cash Aid Role Reason

- Cash Aid Role Status Reason
 - Work Registration Begin Date
 - Report Month
 - WTW/REP Program Status Begin Date
 - WTW/REP Program Status Reason
15. Update the 'CW/RCA Aided' case list with the following changes:
- Rename the 'RCA Aided Reason' parameter to 'Work Registration Status'.
 - Rename the 'Expected End Date' column to 'Work Registration Expected End Date'.
 - Rename the 'Exempt Reason' column to 'Work Registration Status Reason'.
 - Remove the 'Prior Work Reg Status' column.
 - Remove the 'Prior Work Reg Begin Date' column.
 - Add a 'Prior Month Cash Aid Role Reason' column.
 - Add the following columns to the case list:
 - Volunteer
 - Excluded
 - WTW/REP Program Status Expected End Date

These new columns are only visible when the 'WTW/REP Exempt' Work Registration Status parameter option is selected.
16. Update the section header for the 'CalWORKs/RCA Adults' that is broken down by Type to 'CalWORKs/RCA Adults by Type'. See the attached mockup for reference.
17. Update the following case lists to include a 'Homeless' column:
- CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list)
 - CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type).
 - CW/RCA Aided
18. Update the Assigned to Worker 'Identified Reason' case list with the following changes:
- Add a 'WTW/REP Program Status Expected End Date' column. The column is only visible when the 'Current Good Cause' Identified Reason Description parameter is selected.
 - Remove the existing 'Program Status Reason' column.
 - Remove the existing 'Program Status Reason Begin Date' column.
19. Update the 'CalWORKs/RCA Adults by WTW/REP Category' (CalWORKs/RCA Adults by Type) case list to include two new columns to evaluate the Sanctioned population. Include the columns in the 'Not Assigned to Worker / Identified Reason' and the 'Not Assigned to Worker / Should be Reregistered' case lists:
- Last WTW/REP Worker ID
 - Last WTW/REP Region
20. Add the following columns to the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' case lists:
- Activity Type

- Activity Number
 - Activity Status Begin Date
21. Update the 'Active' and 'Unknown Reason' case list with the following changes:
- Add a 'Activity Scheduled End Date' column.
 - Add a 'Activity Status Reason' column.
 - Add a 'Activity Scheduled Start Date' column to the 'Active' case list.
 - Rename the existing 'Expected Begin Date' column in the 'Unknown Reason' case list to 'Activity Scheduled Begin Date'.
22. Update the Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)' to include a new column titled 'CW/RCA Discontinuance Date'.
23. Add the following columns to the 'CalWORKs/RCA Adults by WTW/REP Category Case List' and 'CalWORKs/RCA Adults by WTW/REP Category' (CalWORKs/RCA Adults by Type) case lists:
- TANF Months Used
 - Extender Reason
 - Extender Begin Date
 - Extender End Date
24. Add the following columns to the 'CalWORKs/RCA Adults by WTW/REP Category' case list and the 'CalWORKs RCA Aided' case list. The columns are only visible for the 'Timed-Out population and the 'WTW/REP Exempt' population.
- Activity Type
 - Activity Number
 - Activity Status
 - Activity Status Reason
 - Activity Status Begin Date
 - Activity Scheduled Start Date
 - Activity Scheduled End Date
25. Update the 'CalWORKs/RCA Adults by WTW Category' (CalWORKs/RCA Adults by Type) case list to include the following Cal-Learn related columns. The columns are only visible when the 'Cal-Learn Adults' Type Description is selected:
- Age
 - Cal-Learn Office
 - Cal-Learn Office ID
 - Cal-Learn Worker ID
 - Cal-Learn Secondary Worker ID
 - Cal-Learn Program Status
 - Cal-Learn Program Status Reason
 - Cal-Learn Program Status Begin Month
 - Cal-Learn Program Status End Month
26. Update the 'Time Expiration Column' column logic within the CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list) and CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type) case lists to display the Begin Month of the 60th tick of the CalWORKs/RCA time clock.

Technical Note: The logic will be taken from the Time Limits online page.

27. Update the 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Should Be Registered)' case list as follows:

- Rename the 'Program Status Reason' column to 'WTW/REP Program Status Reason'.
- Rename the 'Program Status Reason Begin Date' column to 'WTW/REP Program Status Reason Begin Date'.

1.4 Assumptions

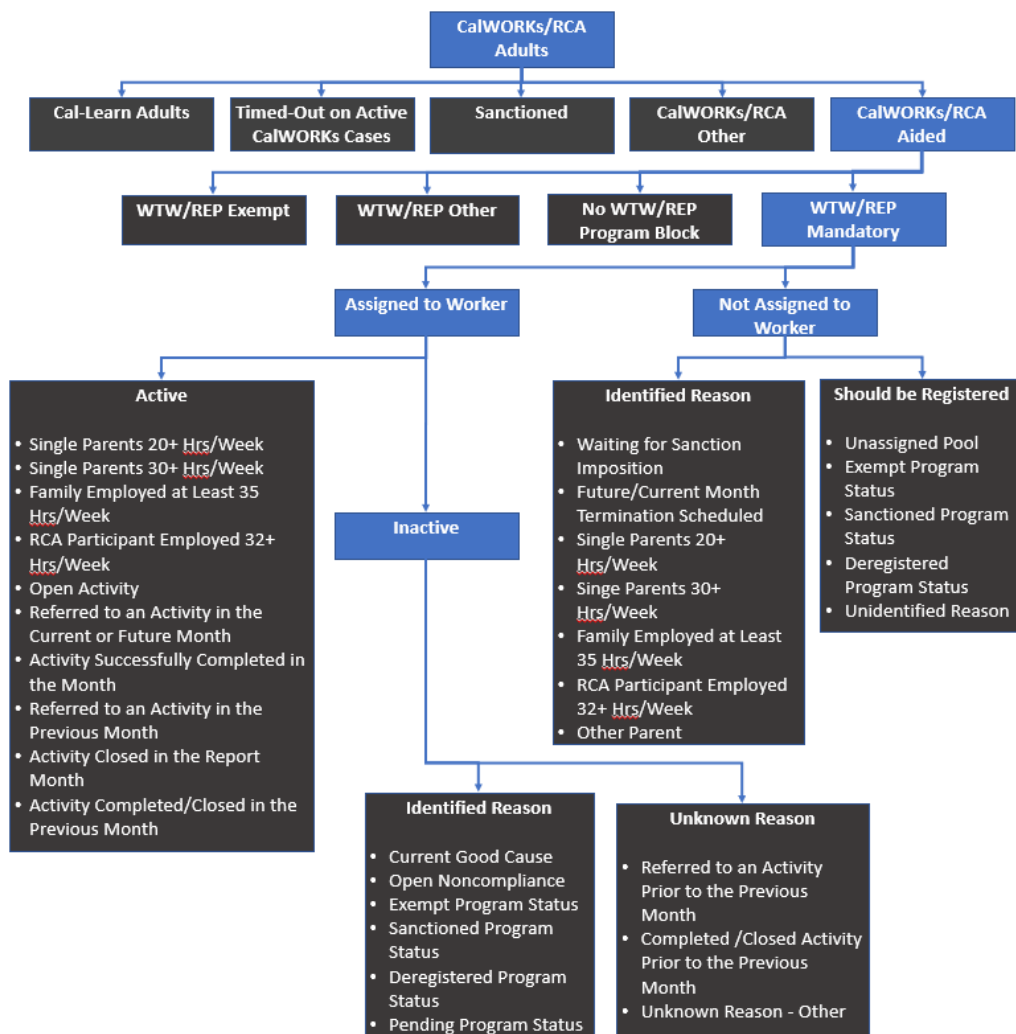
1. No update was made to the logic of the dashboard categories during the replatforming effort of the dashboard from the OBIEE reporting tool to the new Qlik version.
2. The 'Assigned to Worker Percentages' section and 'Not Assigned to Worker Percentages' section automatically adjust with the changes outlined in this SCR.
3. The data for historical months is not updated in this SCR.
4. **CA-217944 ACL 20-113 / 20-120 – CW 60 MTC and WTW 24 MTC** will be introduced before this SCR in the 22.03 release. As part of that SCR, the 'WTW Time Used' column will be removed from the dashboard. The column has been omitted from this design.
5. The Assigned to Worker 'Identified Reason' case list contains a 'WTW/REP Program Status Reason' column currently is not displaying any value. The issue is expected to be fixed on or before the implementation of this SCR.

2 RECOMMENDATIONS

2.1 CalWORKs/RCA Adults by WTW/REP Category

2.1.1 Overview

The CalWORKs/RCA Adults by WTW/REP Category dashboard takes the CalWORKs/RCA Adults base population and categorizes each adult into a single Welfare-to-Work (WTW)/ Refugee Employment Program (REP) category as displayed below in gray boxes. An adult can meet the criteria for multiple categories; therefore, a hierarchy is used to make the count distinct. The hierarchy chart below presents how the flow the CalWORKs/RCA Adults by WTW/REP population is categorized within the dashboard. The hierarchy starts from top to bottom and left to right. The adult is reported in the first category they meet the requirements for. The blue boxes represent an aggregation count of two or more subcategories.



2.1.2 CalWORKs/RCA Adults by WTW/REP Category Screenshot

CalSAWS

CalWORKs/RCA Adults by WTW Category

Data extracted daily as of: 2/3/2021 11:57:55 AM

User UserName

Month

Cash Aid Program

WTW/REP Region Group

WTW/REP Region

WTW/REP Office

WTW/REP Unit

WTW/REP Worker ID

Reset

CalWORKs/RCA Adults by Welfare-to-Work Category

Tier Description

Month Filter

Nov-20

Dec-20

Grand Total

1

1

Single Parents 20+ hr/week

1

1

Single Parents 30+ hr/week

1

1

Family Employed at least 35 hr/week

1

1

RCA Participant Employed 32+ hr/week

1

1

Open Activity

1

1

Referred to an Activity in the Current or Future Month

1

1

Activity Successfully Completed in the month

1

1

Referred to an Activity in the Previous Month

1

1

Activity Closed in the Report Month

1

1

Go to case list

Inactive

Month Filter

Nov-20

Dec-20

Inactive

1

1

Go to case list

Identified Reason

Tier Description

Month

Nov-20

Dec-20

Grand Total

1

1

Current Good Cause

1

1

Deregistered Program Status

1

1

Exempt Program Status

1

1

Open Noncompliance

1

1

Pending Program Status

1

1

Sanctioned Program Status

1

1

Go to case list

Unknown Reason

Tier Description

Month

Nov-20

Dec-20

Grand Total

1

1

Referred to an Activity prior to the Previous Month

1

1

Unknown Reason - Other

1

1

Completed/Closed Activity prior to the Previous Month

1

1

Assigned to Worker Percentages

Values

Month

Nov-20

Dec-20

% Active

0.00%

0.00%

% Inactive

0.00%

0.00%

Identified Reason % of Inactive

0.00%

0.00%

Unknown Reason % of Inactive

0.00%

0.00%

Unknown Reason % of Referred to Work

0.00%

0.00%

Note: This mockup has been cropped to fit the page. See the Supporting Documents section for the full view.

2.1.3 Description of Changes

- Make the following updates to dashboard categories. See the table below for more detail:
 - Update the logic for the 'CalWORKs/RCA Adults' (base population) as follows:

- Include the requirement that the adult must have a Household Status of 'In the Home'.
 - The adult's role is **NOT** Financially Responsible – Included (FRI) or Family Size Only (FSO).
 - **Remove** the condition that a CalWORKs/RCA adult must have an associated WTW/REP program block.
- b. Create a new metric titled 'RCA Participants Employed 32+ Hrs/Week' for the categories listed below:
- Assigned to Worker / Active
 - Not Assigned to Worker / Identified Reason
- c. Add a new category titled 'Cal-Learn Adults' which captures adults in the Cal-Learn program. See the table below for the category logic.
- d. Add a new category titled 'CalWORKs/RCA Other'. See table below for the category logic.
- e. Add a new category titled 'No WTW/REP Program Block'. See the table below for the category logic.
- f. Update the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to exclude the '1V – RCA' aid code. The '1V – RCA' aid code is re mapped to the new 'RCA Participant Employed 32+ Hrs/Week' measure. The 'RCA Participants Employed 32+ Hrs/Week' measure now captures all Aid Codes marked as RCA Fed, State or Mixed. See Appendix 7.2 and 7.5 for the new measure logic.
- g. Update the 'Family Employed at Least 35 Hrs/Week' measure in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to exclude the '33 - CW – Zero Parent (Fed)' aid code. The aid code is re mapped to the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures.
- h. Update the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to include the following aid codes:
- 3G – CW – Zero Parent (State)
 - 3H – CW-Zero Parent (Mixed)
 - 3R – CW-Zero Parent-Exempt MAP (Fed)

Note: All conditions are as of the end of the reporting month.

Category	Logic Definition
CalWORKs/RCA Adults (Base Population)	<ul style="list-style-type: none"> • The adult is in one of the following Programs (CT-18): <ul style="list-style-type: none"> ○ CW – CalWORKs ○ RC - RCA • Program Status (CT-72): <ul style="list-style-type: none"> ○ AC - Active

	<ul style="list-style-type: none"> The program person Adult/Child indicator (CT-345): <ul style="list-style-type: none"> AD - Adult Household Status (CT-209): <ul style="list-style-type: none"> IH - In the Home The adult does NOT have a CW/RC Role of <ul style="list-style-type: none"> FI - FRI FM - FSO <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> Cal-Learn Adults Timed-Out on Active CalWORKs Cases Sanctioned CalWORKs/RCA Other CalWORKs/RCA Aided <p>Technical Note: The base population does not include a condition that the adult must have an associated WTW/REP program block.</p>
CalWORKs/RCA Adults: Cal-Learn Adults	<p>From the base population, count the adult in this category if the adult is in a Cal-Learn Program which is in one of the following program statuses (CT-72):</p> <ul style="list-style-type: none"> Pending Active Good Cause Exempt Deferred <p>Note The Discontinued status is not included.</p>
CalWORKs/RCA Adults: Timed-Out on Active CalWORKs Cases	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> Not in the Cal-Learn Adults population Role Reason Description (CT-73): <ul style="list-style-type: none"> AA - CW Time Limit <p>Technical Note: The 'AA – CW Time Limit' role reason is only applied to CalWORKs program persons.</p>
CalWORKs/RCA Adults: Sanctioned	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> Not in the Cal-Learn Adults population Role Reason Description (CT-73) <ul style="list-style-type: none"> BC - CW Non Part
CalWORKs/RCA Adults: CalWORKs/RCA Other	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> Not In the Cal-Learn Adults population Role Reason Not Equal to (CT-73):

	<ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type Not Equal to (CT-201): <ul style="list-style-type: none"> • ME - Member <p>OR</p> <p>Program Person Status Not Equal to (CT-72):</p> <ul style="list-style-type: none"> • AC – Active <p>Note: This category captures the adults who are in an active CalWORKs/RCA program but have a program person status and role type combination such as one of the following:</p> <ul style="list-style-type: none"> • Active: FRE, MMO, UP • Discontinued: Mem, FSO, FRE, UP, MMO • Denied: UP, FRE, MEM, MMO • Ineligible: FRI, MEM, UP
CalWORKs/RCA Adults: CalWORKs/RCA Aided	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC - Active <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • WTW/REP Exempt • WTW/REP Other • No WTW/REP Program Block • WTW/REP Mandatory <p>For adults who are receiving aid in both CalWORKs and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Exempt	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72):

	<ul style="list-style-type: none"> • AC - Active • Latest WTW/REP Work Registration Status (CT-248): <ul style="list-style-type: none"> • EX - Exempt <p>For adults who are receiving aid in both CalWORKs and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Other	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC - Active • Latest WTW/REP Work Registration Status is Not (CT-248): <ul style="list-style-type: none"> • EX – Exempt • MA - Mandatory <p>OR Latest WTW/REP Work Registration Status is blank.</p> <p>OR Does Not have any existing WTW/REP Work Registration record.</p> <p>Note: For people who are receiving aid in both CW and RCA, capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: No WTW/REP Program Block	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Does Not have an associated WTW/REP program block.

<p>CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA – Mandatory <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • Assigned to Worker • Not Assigned to Worker
<p>CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Assigned to Worker</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program has a program assigned worker. <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • Active • Inactive <p>Note: For people who are receiving aid in both CW and RCA, capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>

<p>CalWORKs/RCA Adults:</p> <p>CalWORKs/RCA Aided:</p> <p>WTW/REP Mandatory:</p> <p>Assigned to Worker:</p> <p>Active</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program has a program assigned worker. • Meets one of the following metric requirements. See Appendix 7.2 for the logic definition. See Appendix 7.1 for hour calculation logic. <ul style="list-style-type: none"> • Single Parent 20+ Hrs/Week • Single Parents 30+ Hrs/Week • Family Employed at Least 35 Hrs/Week • RCA Participant Employed 32+ Hrs/Week • Open Activity • Referred to an Activity in the Current or Future Month • Activity Successfully Completed in the Month • Referred to an Activity in the Previous Month • Activity Closed in the Report Month • Activities Completed/Closed in the Previous Month <p>Note: For people who are receiving aid in both CW and RCA, capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p> <p>Note: The summary is a distinct person count but the detailed drill-down displays at max the 3 latest activates for each metric: 'Referred to an Activity in the Current or Future Month', 'Activity Successfully Completed in the Month', 'Referred to an Activity in the Previous Month', 'Activity Closed in the Report</p>
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	Month', 'Activities Completed/Closed in the Previous Month'.
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Assigned to Worker: Inactive	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program has a program assigned worker. • Does Not meet any of the 'Active' category metric requirements. <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • Identified Reason • Unknown Reason <p>Note: For people who are receiving aid in both CW and RCA, capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Assigned to Worker: Inactive: Identified Reason	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory

	<ul style="list-style-type: none"> • The WTW/REP program has a program assigned worker. • Does Not meet any of 'Active' category metric requirements. • Meets the criteria for one of the measures below. See Appendix 7.3 for the logic definition. <ul style="list-style-type: none"> • Current Good Cause • Open Noncompliance • Exempt Program Status • Sanctioned Program Status • Deregistered Program Status • Pending Program Status <p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Assigned to Worker: Inactive: Unknown Reason	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program has a program assigned worker. • Does Not meet any of the 'Active' category metric requirements. • Does Not meet any of the 'Inactive Identified Reason' category metric requirements. • Meets one of the following metric requirements. See Appendix 7.4 for the logic definition. <ul style="list-style-type: none"> • Referred to an Activity Prior to the Previous Month • Completed/Closed Activity Prior to the Previous Month • Unknown Reason - Other

	<p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
<p>CalWORKs/RCA Adults:</p> <p>CalWORKs/RCA Aided:</p> <p>WTW/REP Mandatory:</p> <p>Not Assigned to Worker</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program does Not have a program assigned worker. <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • Identified Reason • Should be Registered <p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
<p>CalWORKs/RCA Adults:</p> <p>CalWORKs/RCA Aided:</p> <p>WTW/REP Mandatory:</p> <p>Not Assigned to Worker:</p> <p>Identified Reason</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program does Not have a program assigned worker.

	<ul style="list-style-type: none"> Meets one of the following metric requirements. See Appendix 7.5 for the logic definition. See Appendix 7.1 for hour calculation logic. <ul style="list-style-type: none"> Waiting for Sanction Imposition Future/Current Month Termination Scheduled Single Parents 20+ Hrs/Week Single Parents 30+ Hrs/Week Family Employed at Least 35 Hrs/Week RCA Participant Employed 32+ Hrs/Week Other Parent <p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Not Assigned to Worker: Should be Registered	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> Not In the Cal-Learn Adults population Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> BC - CW Non Part AA - CW Time Limit Role Type (CT-201): <ul style="list-style-type: none"> ME - Member Program Person Status (CT-72): <ul style="list-style-type: none"> AC - Active Has an associated WTW/REP program block. Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> MA - Mandatory The WTW/REP program does Not have a program assigned worker. Does Not meet any of the 'Not Assigned to Worker Identified Reason' category metric requirements. Meets one of the following metric requirements. See Appendix 7.6 for the logic definition. <ul style="list-style-type: none"> Unassigned Pool Exempt Program Status Sanctioned Program Status Deregistered Program Status Unidentified Reason <p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work</p>

	Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.
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2. Make the following updates to the Worker / Active category measure headers:

Header Before	Header Now
Single Parents 20+ hr/week	Single Parents 20+ Hrs/Week
Single Parents 30+ hr/week	Single Parents 30+ Hrs/Week
Family Employed at Least 35 hr/week	Family Employed at Least 35 Hrs/Week
Activities completed/Closed in the previous Month	Activities Completed/Closed in the Previous Month

3. Make the following updates to the Assigned to Worker / Unknown Reason category measure headers:

Header Before	Header Now
Referred to an Activity prior to the Previous Month	Referred to an Activity Prior to the Previous Month

4. Make the following updates to the Not Assigned to Worker / Identified Reason measure headers:

Header Before	Header Now
Single Parents 20+ hr/week	Single Parents 20+ Hrs/Week
Single Parents 30+ hr/week	Single Parents 30+ Hrs/Week
Family Employed at least 35 hr/week	Family Employed at Least 35 Hrs/Week

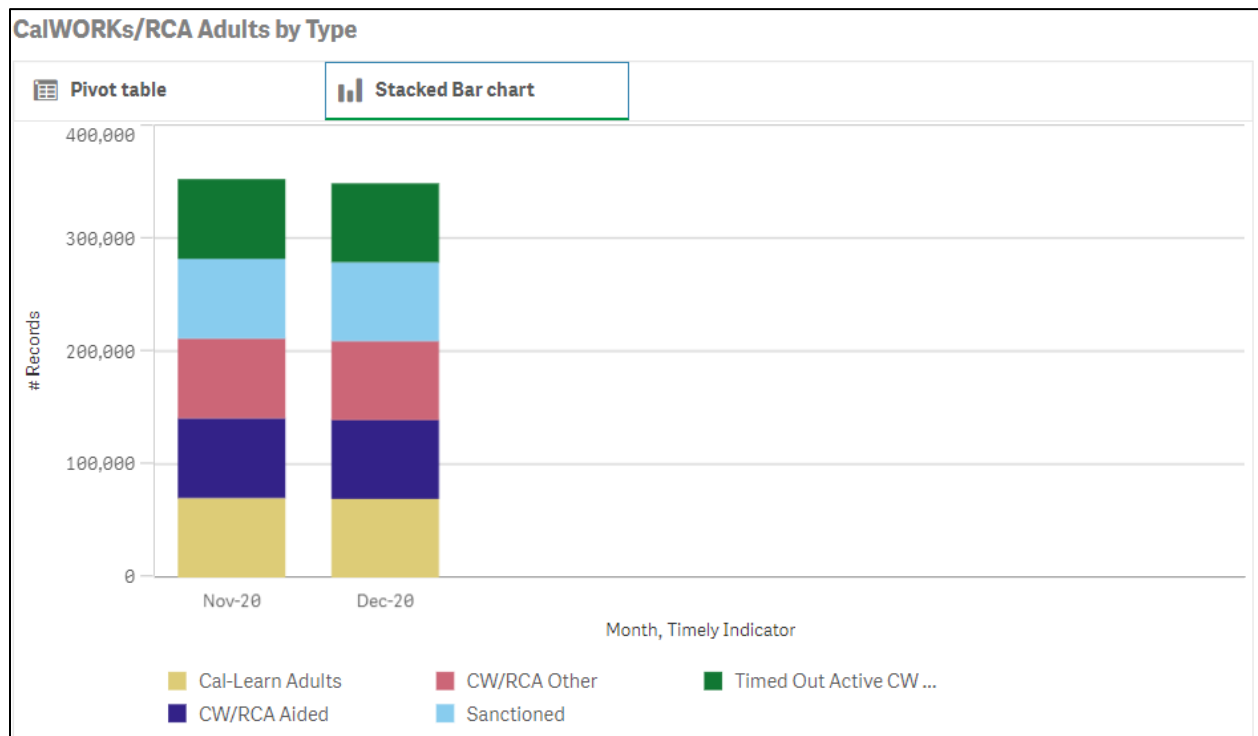
5. Update the 'Report Month' parameter found on all sheets to default to the latest available reporting month rather than the latest 5 reporting months.
6. Update all 'Welfare-to-Work' references in the dashboard name, sheet names, category headers and measure headers to 'WTW/REP'.
7. Update the column order and their visibility logic on all case lists to match Appendix 7.7.

- Rename the 'CalWORKs/RCA Adults' section title, which displays a Pivot Table and Stacked Bar Chart for the base population broken down by Type Description, to 'CalWORKs/RCA Adults by Type'. Update the Stacked Bar Chart and Pivot Table to display the new 'Cal-Learn Adults' and 'CalWORKs/RCA Other' Type Descriptions. The summation of the Type Descriptions is equal to the CalWORKs/RCA Adults total.

CalWORKs/RCA Adults by Type

Pivot table **Stacked Bar chart**

Type Description <input type="text"/>	Month Filter <input type="text"/>	
	Nov-20	Dec-20
Cal-Learn Adults	1	1
CW/RCA Aided	1	1
CW/RCA Other	1	1
Sanctioned	1	1
Timed Out Active CW Cases	1	1



- Update the 'CalWORKs/RCA Aided' Pivot Table and Stacked Bar Chart, which displays the CalWORKs/RCA Aided population broken down by RCA Aided Reason, to display the new 'No WTW/REP Program Block' RCA Aided Reason. The summation of the RCA Aided Reasons is equal to the

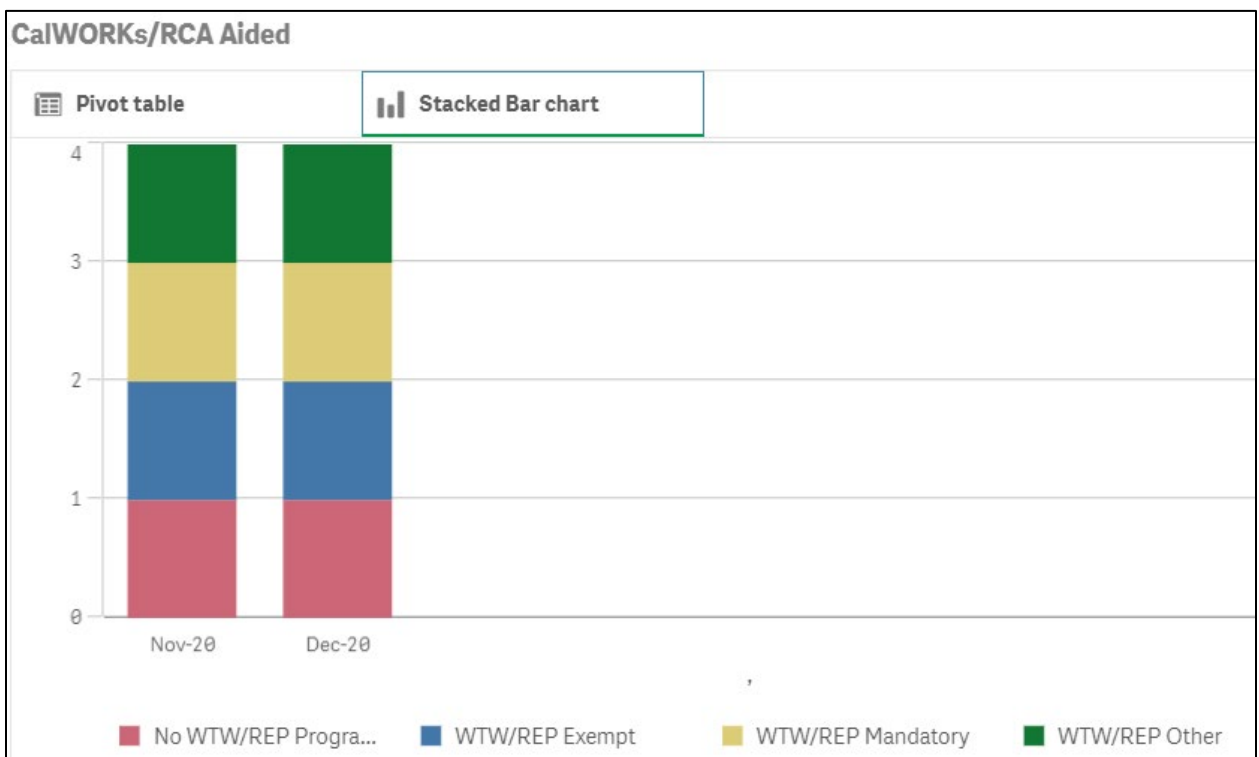
CalWORKs/RCA Aided total. Also rename the 'RCA Aided Reason' dimension on the Pivot Table to 'Work Registration Status'.

CalWORKs/RCA Aided

Pivot table Stacked Bar chart

Work Registratio... Month

	Nov-20	Dec-20
No WTW/REP Program Block	1	1
WTW/REP Exempt	1	1
WTW/REP Mandatory	1	1
WTW/REP Other	1	1



- Update the Assigned to Worker 'Active' table, which displays the CalWORKs/RCA Assigned to Worker population broken down by Tier Description, to display the new 'RCA Participant Employed 32+ Hrs/Week' metric. The summation of the metrics is equal to the WTW/REP Mandatory / Active population.

Active		
Tier Description <input type="text"/>	Month Filter <input type="text"/>	
	Nov-20	Dec-20
Grand Total	1	1
Single Parents 20+ Hrs/Week	1	1
Single Parents 30+ Hrs/Week	1	1
Family Employed at Least 35 Hrs/Week	1	1
RCA Participant Employed 32+ Hrs/Week	1	1
Open Activity	1	1
Referred to an Activity in the Current or Future Month	1	1
Activity Successfully Completed in the Month	1	1
Referred to an Activity in the Previous Month	1	1
Activity Closed in the Report Month	1	1

Note: Some measures are not visible in the scrollable table.

- Update the Not Assigned to Worker Identified Reason table, which displays the CalWORKs/RCA Not Assigned to Worker population broken down by Identified Reason Description, to display the new 'RCA Participant Employed 32+ Hrs/Week' metric. The summation of the metrics is equal to the WTW/REP Mandatory / Identified Reason population.

Identified Reason		
Identified Reason... <input type="text"/>	Month <input type="text"/>	
	Nov-20	Dec-20
Waiting for Sanction Imposition	1	1
Future/Current Month Termination Scheduled	1	1
Single Parents 20+ Hrs/Week	1	1
Single Parents 30+ Hrs/Week	1	1
Family Employed at Least 35 Hrs/Week	1	1
RCA Participant Employed 32+ Hrs/Week	1	1
Other Parent	1	1

- Add a parameter to the 'WTW/REP Mandatory' case list which filters the result set by Mandatory Reason.

Parameter	Description
Mandatory Reason	Filters the WTW/REP Mandatory population by the Mandatory Reason. Possible Values: <ul style="list-style-type: none"> Assigned to Worker Not Assigned to Worker

CalSAWS CalWORKs/RCA Adults by Welfare-to-Work Category CL

Mandatory Reason

WTW/REP Region	WTW/REP Unit	WTW/REP Worker ID	District Office
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown

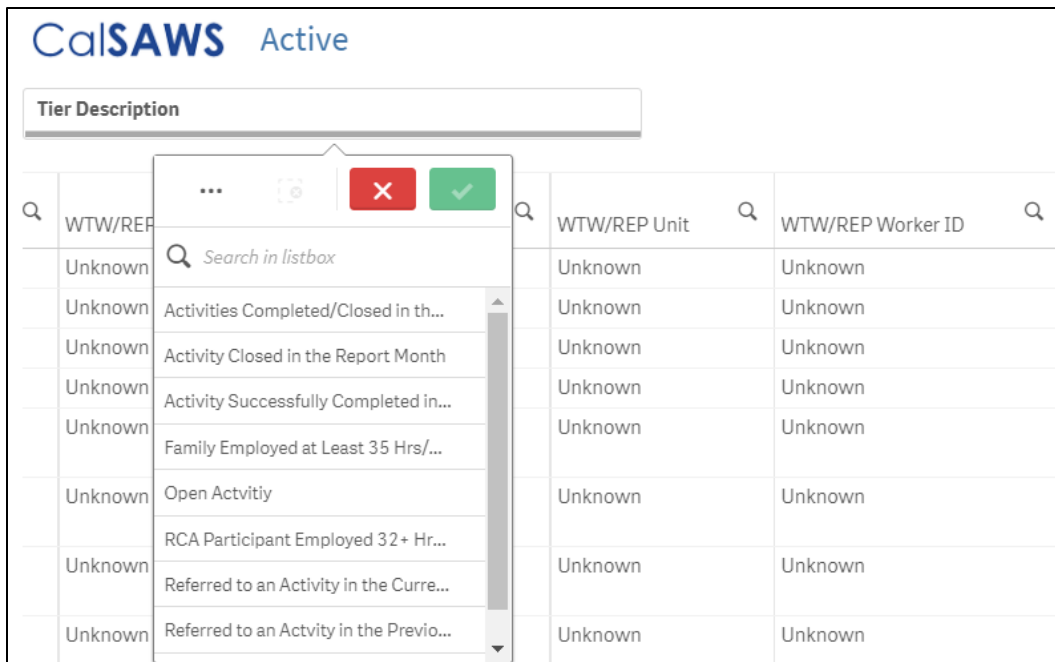
Search in listbox

Assigned to Worker

Not Assigned to Worker

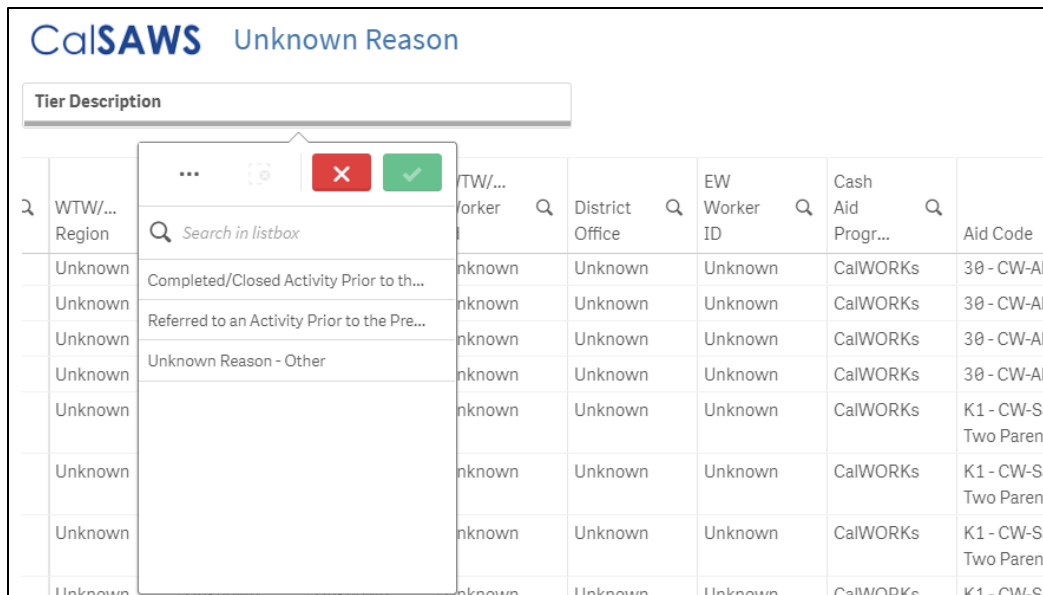
13. Add a parameter to the 'Assigned to Worker / Active' case list which filters the result set by Tier Description.

Parameter	Description
Tier Description	<p>Filters the WTW/REP Assigned to Worker / Active population by the Tier Description.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Single Parents 20+ Hrs/Week • Single Parents 30+ Hrs/Week • Family Employed at Least 35 Hrs/Week • RCA Participant Employed 32+ Hrs/Week • Open Activity • Referred to an Activity in the Current or Future Month • Activity Successfully Completed in the Month • Referred to an Activity in the Previous Month • Activity Closed in the Report Month • Activities Completed/Closed in the Previous Month



14. Add a parameter to the 'Assigned to Worker / Identified Reason' case list which filters the result set by Tier Description.

Parameter	Description
Tier Description	<p>Filters the WTW/REP Assigned to Worker Identified Reason population by the Tier Description.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Current Good Cause • Deregistered Program Status • Exempt Program Status • Open Noncompliance • Sanctioned Program Status • Pending Program Status



16. Update all case lists within the dashboard to include the following columns. The column's position and visibility logic are found in Appendix 7.7:

Column Name	Column Description
CIN	Displays the Client Index Number (CIN) of the adult. The column is blank if the adult does not have a CIN number.
Cash Aid Role Reason	73 - Displays the reason for a person's CalWORKs/RCA role. The column is blank when there is no Role Reason.
Cash Aid Role Status Reason	73 - Displays the CW/RCA person's Role Status Reason. The column is blank when there is no Role Status Reason.
Work Registration Begin Date	Displays the Work Registration Begin Date. Format: MM/DD/YYYY
Report Month	Displays the Report Month the record was captured for. Format: MM/YYYY

WTW/REP Program Status Begin Date	Displays the WTW/REP Program Status Begin Date. Format: MM/DD/YYYY
WTW/REP Program Status Reason	Displays the WTW/REP Program Status Reason. This column is blank when there is no Program Status Reason.

Note:

- The 'WTW/REP Program Status Begin Date' is existing in the Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)'. The column is relocated in this case lists. The column is now visible regardless of the parameter selected.
- The 'Program Status Reason' and 'Program Status Reason Begin Date' is existing in the Not Assigned to Worker 'Should Be Registered' case list.
- The 'WTW/REP Program Status Reason' is existing in the following case lists: 'CW/RCA Aided', 'CalWORKs/RCA Adults by WTW/REP Category CL' (Mandatory), Assigned to Worker 'Identified Reason' and Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)'. This requirement will add the column to the rest of the case lists.

See Appendix 7.7 for all case lists and their column order and their visibility logic.

List of all case lists to update:

- CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list)
- CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type)
- CW/RCA Aided
- CalWORKs/RCA Adults by WTW/REP Category CL (Mandatory)
- Active
- Inactive
- Identified Reason
- Unknown Reason
- Not Assigned to Worker / CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)
- CalWORKs/RCA Adults by WTW/REP Category CL (Should Be Registered)

17. Updates to the 'CalWORKs/RCA Adults by WTW/REP Category' (CalWORKs/RCA Adults by Type), 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Identified Reason)' and 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Should Be Registered)' case list to include two new columns. In the 'CalWORKs/RCA Adults by WTW/REP Category', the columns are only visible when the 'Sanctioned' Type Description parameter is selected. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Last WTW/REP Worker ID	Displays the last known Worker ID when there is no assigned worker to the WTW/REP program as of the last day of the report month. Blank – The column is blank when the WTW/REP program has an assigned worker as of the last day of the report month.
Last WTW/REP Region	Displays the Region of the last known Worker when there is no assigned worker to the WTW/REP program as of the last day of the report month. Blank – The column is blank when the WTW/REP program has an assigned worker as of the last day of the report month.

18. Make the following updates to the 'CW/RCA Aided' case list:
- Rename the existing 'Expected End Date' column to 'Work Registration Expected End Date'.
 - Rename the 'Exempt Reason' column to 'Work Registration Status Reason'.
 - Remove the 'Prior Work Reg Status' column.
 - Remove the 'Prior Work Reg Begin Date' column.
 - Add the columns listed below to the case list. The columns are only visible when the 'WTW/REP Exempt' value is selected for the RCA Aided Reason parameter. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Volunteer	Indicates whether the adult volunteers to participate. Possible Values: <ul style="list-style-type: none"> • 'Y' – The work registration record indicates the adult is a volunteered participant.

	<ul style="list-style-type: none"> 'N' - The work registration record indicates the adult is not a volunteered participant.
Excluded	<p>Indicates whether the adult volunteer participant is excluded.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> Y' – The work registration record indicates the adult is an excluded volunteered participant. 'N' - The work registration record indicates the adult is not an excluded volunteered participant. [Blank] – The field will be blank if the information is not available.
Work Registration Status Reason	<p>Displays the Work Registration Status Reason for the Exempt Adult.</p> <p>Possible Values (CT 249):</p> <ul style="list-style-type: none"> 60 years of age or older (EDBC determined) Disabled (EDBC determined) ... <p>Note: This list is not restrictive or complete. If more Work Registration Status values are added to the system, the report will automatically pick up the value.</p>
WTW/REP Program Status Expected End Date	<p>Displays the Expected End Date tied to the adult's program person status.</p> <p>Format: MM/DD/YYYY</p> <p>This field will be blank if the program status does not have an expected end date.</p> <p>Technical Note: No Expected End Date is when the field is NULL or set to 12/01/9999.</p>

19. Update the following case lists to include a new column titled 'Homeless'. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Homeless	<p>Indicates whether the adult is homeless.</p> <p>Possible Values</p> <ul style="list-style-type: none"> Y – If the "Use Office Address" check box is selected on the Address Detail page for the adult's Physical address. <p>OR</p> <p>The adult's physical address matches any Office of Type 'DT - District' (CT-253).</p> <p>N – The adult does not meet the Homeless requirements.</p>

	Technical Note: "Use Office Address" is stored PERS_ADDR.USE_DISTR_OFFICE_ADDR_IND
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List of all case lists to update:

- CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list)
- CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type)
- CW/RCA Aided

20. Update the 'Assigned to Worker / Inactive / Identified Reason' case list as follows:

- Remove the 'Program Status Reason' column.
- Remove the 'Program Status Reason Begin Date' column.
- Add the 'WTW/REP Program Status Expected End Date'. The column is only visible when the 'Current Good Cause' value is selected for the Identified Reason Description parameter. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
WTW/REP Program Status Expected End Date	Indicates when the adult's Good Cause status is expected to end. Format: MM/DD/YYYY The value is blank if there is no Expected End Date. Technical Note: This field comes from PGM_PERS_DETL.EXPECT_END_DATE.

21. Update the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' case lists to include the columns listed below. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Activity Type	The type of activity for which the adult participated in (CT 26,56). Example of possible values: <ul style="list-style-type: none"> • SIP • Work Study • Employment • Adult Services • Appraisal • Assessment • ...

	Note: This list is not restrictive. If new customer activity types are created, the logic automatically picks up the value.
Activity Number	The alphanumerical identifier that the staff assigned the customer activity. Technical Note: This field is stored in SERV_ACTIV.ACTIV_NUM_IDENTIF
Activity Status Begin Date	The Begin Date of the latest status of the corresponding activity. Format: MM/DD/YYYY

22. Update the 'CW/RCA Aided' case list to include a new column titled 'Prior Month Cash Aid Role Reason'. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Prior Month Cash Aid Role Reason	73 – For adults who have a different effective program person role record in the prior month from the current reporting month, this column displays the role reason for the prior month's CalWORKs/RCA role. The column is blank when there is no Role Reason, or the adult has the same effective role in the current month as the prior month.

23. Make the following updates to the 'Active' and 'Unknown Reason' case lists:
- Add a 'Activity Scheduled End Date' column. The column is only visible for **referred activities**.
 - Add a 'Activity Status Reason' column.
 - Add a 'Activity Scheduled Start Date' column to the 'Active' case list.
 - Rename the existing '**Expected** Begin Date' column in the 'Unknown Reason' case list to 'Activity Scheduled Begin Date'.
- The Activity Scheduled Begin/End Date columns are only visible for Referred Activities. Prior to the Previous Month' Type Description is selected. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
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Activity Scheduled Begin Date	Displays the Scheduled Start Date of the adult's referred activity. Format: MM/DD/YYYY
Activity Scheduled End Date	Displays the Scheduled End Date of the adult's referred activity. Format: MM/DD/YYYY
Activity Status Reason	Displays the Customer Activity Status Reason (CT - 124). Possible Values: <ul style="list-style-type: none"> Completed Satisfactory Drop Out Activity Cancelled Employed The column will be blank if there is no status reason. Note the list above is not complete or restrictive. If new customer activity status reasons are added the report will automatically display the value.

24. Add a 'CW/RCA Discontinuance Date' column to the Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)' case list. The column is only visible when the 'Future/Current Month Termination Scheduled' Tier Description parameter is selected. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
CW/RCA Discontinuance Date	Displays the effective date of future discontinuance of the adult's CW/RCA program. Format: MM/DD/YYYY

25. Add the following columns to the 'CalWORKs/RCA Adults by WTW/REP Category Case List' (Entire CalWORKs/RCA Adults population case list) and the 'CalWORKs/RCA Adults by WTW/REP Category' case list (CalWORKs/RCA Adults by Type). See Appendix 7.7 for all case lists and their column order and their visibility logic.:

Column Name	Column Description
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TANF Months Used	Total number of TANF months used by the adult. Technical Note: This is existing logic and should be taken from the Time Limit Summary page for the TANF Months Used field.
Extender Reason	Displays the latest Approved (CT-10528) extender reason applied to the adult. Possible Values (CT-863): <ul style="list-style-type: none"> • No Services Provided • Individual needs an additional time to complete a welfare-to-work activity specified in his or her welfare-to-work case plan due to a diagnosed learning or other disability • Individual is likely to obtain employment within six months. ... Note latest Extender Reason will be based on Begin Date. Note: This list is not complete or restrictive. If more Extender Reasons are added the report will automatically display the information. Technical Note: Extender Information can be found on the Time Limit Extension Request Detail page.
Extender Begin Date	Displays the begin date of the approved time limit extender request. Format: MM/DD/YYYY This field will be blank if there is no Extender Begin Date information available.
Extender End Date	Displays the end date of the approved time limit extension request. Format: MM/DD/YYYY This field will be blank if there is no Extender Begin Date information available.

26. Add the following columns to the 'CalWORKs/RCA Adults by WTW/REP Category' (CalWORKs/RCA Adults by Type) case list and the 'CalWORKs/RCA Aided' case list. In the 'CalWORKs/RCA Adults by WTW/REP Category' case list the column is only visible when the 'Timed Out on Active CalWORKs Cases' parameter is selected. In the 'CalWORKs/RCA Aided' case list the columns are only visible when the 'Welfare-to-Work Exempt' parameter is selected.

See Appendix 7.7 for all case lists and their column order and their visibility logic. See Appendix 7.8 for the hierarchy for activity selection logic.

Column Name	Column Description
Activity Type	<p>The type of activity for which the adult participated in (CT 26,56).</p> <p>Example of possible values:</p> <ul style="list-style-type: none"> • SIP • Work Study • Employment • Adult Services • Appraisal • Assessment ... <p>This column will be blank if the Adult does not have an associated Activity.</p> <p>Note: This list is not restrictive. If new customer activity types are created, the logic automatically picks up the value.</p>
Activity Number	<p>The alphanumerical identifier that the staff assigned the customer activity.</p> <p>This column will be blank if the Adult does not have an associated Activity.</p> <p>Technical Note: This field is stored in SERV_ACTIV.ACTIV_NUM_IDENTIF</p>
Activity Status	<p>Displays the Status of the Customer Activity (CT-151).</p> <p>This column will be blank if the Adult does not have an Activity.</p>
Activity Status Reason	<p>Displays the Customer Activity Status Reason (CT - 124).</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Completed Satisfactory • Drop Out • Activity Cancelled • Employed <p>The column will be blank if there is no status reason.</p> <p>Note the list above is not complete or restrictive. If new customer activity status reasons are added the report will automatically display the value.</p>

Activity Status Begin Date	The Begin Date of the latest status of the corresponding activity. Format: MM/DD/YYYY This column will be blank if the Adult does not have an associated Activity.
Activity Scheduled Start Date	The expected or schedule begin date of the customer activity. Format: MM/DD/YYYY This column will be blank if the Adult does not have an associated Activity.
Activity Scheduled End Date	The expected or schedule end date of the customer activity. Format: MM/DD/YYYY This column will be blank if the Adult does not have an associated Activity.

27. Add the following columns to the 'CalWORKs/RCA Adults by WTW Category' (CalWORKs/RCA Adults by Type) case list. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Age	Displays the age of the Cal-Learn adult.
Cal-Learn Office	Displays the Office Name of the office associated to the primary Cal-Learn program assigned Worker. This field will be blank if there is no primary program assigned worker.
Cal-Learn Office ID	Displays the Office ID of the office associated to the primary Cal-Learn program assigned worker. This field will be blank if there is no primary program assigned worker.
Cal-Learn Worker ID	Displays the Worker ID of the primary Cal-Learn program assigned Worker. This field will be blank if there is no primary program assigned worker.

Cal-Learn Secondary Worker ID	Displays the Worker ID of the secondary Cal-Learn program assigned Worker. This field will be blank if there is no secondary program assigned worker.
Cal-Learn Program Status	Displays the Program Status of the Cal-Learn program (CT-72). Possible Values: <ul style="list-style-type: none"> • Pending • Active • Good Cause • Exempt • Deferred
Cal-Learn Program Status Reason	Displays the Program Status Reason of the Cal-Learn program (CT-73). Possible Values
Cal-Learn Program Status Begin Month	Displays the Office associated to the primary Cal-Learn Worker assigned to the program. This field will be blank if there is no primary program assigned worker.
Cal-Learn Program Status End Month	Displays the Office associated to the primary Cal-Learn Worker assigned to the program. This field will be blank if there is no primary program assigned worker.

28. Update the 'Time Expiration Column' column logic within the CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list) and CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type) case lists. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Time Expiration Date	Displays the Begin Month of the 60 th tick of the CalWORKs/RCA time clock. This column will be blank if the case has not reached 60 ticks. Note: If a person has ticks split between two cases and EDBC marks them as Timed Out this column will be blank.

29. Update the 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Should Be Registered)' case list as follows:

- Rename the 'Program Status Reason' column to 'WTW/REP Program Status Reason'.
- Rename the 'Program Status Reason Begin Date' column to 'WTW/REP Program Status Reason Begin Date'.

2.1.4 Counties Impacted

The changes outlined in this section impact all counties.

2.1.5 Report Location

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


2.1.6 Security Updates

No updates are made to the dashboard's existing security.

2.1.7 Report Usage/Performance Impacts

The changes outlined in this SCR do not cause any notable affect to the system's performance.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	CalWORKs/RCA Adults by WTW/REP Category Mockup	 CalWORKs RCA by WTW REP Category M

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.8	The LRS shall include the ability to generate the following parameter-driven reports: a. Fraud reports; b. Hearing reports; c. Financial reports; d. Federal and State claiming reports; e. Caseload Activity Report (CAR); f. Personnel management reports; h. Benefit authorization reports; i. Issuance reports; j. Collection reports; k. QC reports; l. Mass update reports; m. Interface reports; n. Error reports; o. Caseload management reports; p. Performance-based criteria reports; q. Case LRS Data reports; and r. Control and processing reports.	The CalWORKs RCA Adults by WTW/REP Category Report is a parameter-driven caseload management report.

4.2 Migration Requirements

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

5 MIGRATION IMPACTS

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

6 OUTREACH

N/A

7 APPENDIX

7.1 Calculating Employment Hours

Single Parent

- 1) If the single parent has active employment record(s), as of the last day of the report month, then sum all scheduled employment hours in the active employment record(s), as displayed on the Employment Detail page.
- 2) If the active employment record(s) has/have no employment hours, then sum the hours of all existing active employment activities (customer activity category code = EM, category id 54) the single parent is participating in, as of the last day of the report month.
- 3) If the single parent does not have any active employment record(s), and thus no employment activities. Then, use the single parent's earned income information used by EDBC found in the system: **Eligibility>Customer Information>Financial>Income>Income List>Income Detail** (income category id 277, code = 01, category field= Earnings), to calculate the number of employed hours in a week. This calculation is incorporated in the report, since this calculation does not exist in the database.

Double Parent:

- 1) If the parent(s) has active employment record(s), as of the last day of the report month, then sum all scheduled employment hours in the active employment record(s), as displayed on the Employment Detail page.
- 2) If the active employment record(s) (of neither parent) has/have no employment hours, then sum the hours of all existing active employment activities (customer activity category code = EM, category id 54) both parents are participating in, as of the last day of the report month.
- 3) If the parents in the household do not have any active employment record(s), and thus no employment activities. Then, use both parents' earned income information used by EDBC found in the system: **Eligibility>Customer Information>Financial>Income>Income List>Income Detail** (income category id 277, code = 01, category field= Earnings), to calculate the number of employed hours in a week. This calculation is incorporated in the report, since this calculation does not exist in the database.

7.2 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Assigned to Worker / Active

An adult captured in the 'Assigned to Worker' population is considered **Active** if they meet all the requirements for any of the given measures listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measure hierarchy is listed below in numerical order:

1. Single Parents 20+ Hrs/Week

- There is at least one child in the CW household under the age of 6 (exclusive).
- The adult/parent works at least 20 hours/week (inclusive) and less than 30 hours/week (exclusive). See appendix 7.1 for instructions on calculating hours.
- Has one of the following Aid Codes (CT-184):
 - 30 - CW – All Other Families (Fed)
 - 33 - CW – Zero Parent (Fed)
 - 3G – CW – Zero Parent (State)
 - 3H – CW- Zero Parent (Mixed)
 - 3R – CW – Zero Parent – Exempt MAP (Fed)
 - 3E - CW - All Other Families (Mixed)
 - 3L - CW – All Other Families (State)
 - 3P - CW – All Other Families-Exempt MAP (Fed)
 - 32 - CW – TANF – Timed Out -All Families (State)
 - 3W - CW – TANF – Timed Out (State)
 - K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
 - R1 - CW - TCVAP (State)

2. Single Parents 30+ Hrs/Week

- All children in the household are 6 years old or over.
- The parent works 30 or more hours per week (inclusive). See appendix 7.1 for instructions on calculating hours.
- Has one of the following Aid Codes (CT-184):
 - 30 - CW – All Other Families (Fed)
 - 33 - CW – Zero Parent (Fed)
 - 3G – CW – Zero Parent (State)
 - 3H – CW- Zero Parent (Mixed)
 - 3R – CW – Zero Parent – Exempt MAP (Fed)
 - 3E - CW - All Other Families (Mixed)
 - 3L - CW – All Other Families (State)
 - 3P - CW – All Other Families-Exempt MAP (Fed)
 - 32 - CW – TANF – Timed Out -All Families (State)
 - 3W - CW – TANF – Timed Out (State)
 - K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
 - R1 - CW - TCVAP (State)

3. Family Employed at Least 35 Hrs/Week

- The CW household has children irrespective of the child's age.
- The employment hours for one or both adults/parents in the CalWORKs household must be at least 35 hours per week (inclusive).
- Has one of the following Aid Codes (CT-184):
 - 35 - CW – Two Parent (Fed)
 - 3F - CW – Safety Net/Felon/WTW Sanct – Two Parent
 - 3M - CW-Two Parent (State)
 - 3U - CW – Two Parent (State)

4. RCA Participant Employed 32+ Hrs/Week

- **Program (CT-18):**
 - **RC - RCA**

- The employment hours for the adult are 32 or more per week (inclusive). See appendix 7.1 for instructions on calculating hours.
- Has a Federal, State, or Mixed RCA Aid Code (CT-184). This will be a dynamic list and if an aid code is later added, then the report will automatically pick up the information.

Current Possible Aid Codes:

- 01 – RCA – RCA (Fed)
- 1V - RCA - TCVAP (State)

Technical Note: RCA Aid Codes can be identified by looking at CODE_DETL.REFER_TABLE_4_DESCR in ('FE','NF', MX') and REFER_TABLE_5_DESCR = 'RC'.

5. Open Activity

- Has an existing customer activity with the following latest status (CT-21):
 - AC – Active
- The customer activity has the following Status Reason (CT-124):
 - AT – Attending

6. Referred to an Activity in the Current or Future Month

- The adult has a customer activity with a begin date in the report month or future month. The customer activity has the following latest status and status reason:
 - Customer Activity Status (CT-21):
 - AC - Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred
 - PR – Processing

OR

- The adult has a customer activity with an expected/scheduled start date in the report month or future month.

7. Activity Successfully Completed in the Month

- The adult has a customer activity effective in the report month with the following latest status and status reason:
 - Customer Activity Status (CT-21):
 - CO - Completed
 - Customer Activity Status Reason (CT-124):
 - CS – Completed Satisfactory
 - CE - Employed

8. Referred to an Activity in the Previous Month

- The adult has a customer activity with a begin date that falls in the month immediately prior to the report month with the latest status and status reason of:
 - Customer Activity Status (CT-21):
 - AC - Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred

9. Activity Close in the Report Month

- The adult has a customer activity with a begin date that falls in the report month and the latest status is the following:
 - Customer Activity Status (CT-21):
 - CL - Closed

10. Activity Completed/Closed in the Previous Month

- The adult has a customer activity with a begin date that falls in the month immediately prior to the report month.
 - Customer Activity Status (CT-21)
 - CO - Completed
 - CL - Closed
 - Status Reason (CT-124):
 - [Any]

7.3 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Assigned to Worker / Inactive / Identified Reason

An adult captured in the 'Assigned to Worker' population is considered **Inactive for Identified Reason** if they do not meet any of the Active measures but meet one of the measure requirements listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measure hierarchy is listed below in numerical order:

1. Current Good Cause

- Program (CT-18):
 - WT - WTW
 - RE - REP
- Program Status (CT-72):
 - GC - Good Cause

2. Open Noncompliance

- Program (CT-18):
 - WT - WTW
 - RE - REP
- Program Status:
 - NC- Non-Compliant

3. Exempt Program Status

- Program (CT-18):
 - WT - WTW
 - RE - REP
- Program Status (CT-72):
 - EX- Exempt

4. Sanctioned Program Status

- Program (CT-18):
 - WT - WTW
 - RE - REP
- Program Status (CT-72):
 - SA- Sanction

5. Deregistered Program Status

- Program (CT-18):
 - WT – WTW
 - RE - REP
- Program Status (CT-72):
 - DG - Deregistered

6. Pending Program Status

- Program (CT-18):
 - WT – WTW
 - RE - REP
- Program Status (CT-72):
 - PE- Pending

7.4 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Assigned to Worker / Inactive / Unknown Reason

An adult captured in the 'Assigned to Worker' population is considered **Inactive for Unknown Reason** if they do not meet any Active measures and do not meet one of the 'Inactive / Identified Reason' measures requirements but meet one of the measure requirements listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measures hierarchy are listed below in numerical order:

1. Referred to an Activity Prior to the Previous Month:

- The adult has a customer activity with a begin date two months prior to the report month with the latest status and status reason of:
 - Customer Activity Status (CT-21):
 - AC- Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred

2. Completed/Closed Activity Prior to the Previous Month:

- The adult has a customer activity with a begin date two months prior to the report month with the latest status and status reason of:
 - Customer Activity Status (CT-21):
 - CL- Closed
 - CO - Complete

3. Unknown Reason - Other:

- All other adults in the Inactive population who could not be categorized for Known Reasons or the two unknown reasons of 'Referred to an Activity Prior to the Previous Month' or 'Completed/Closed Activity Prior to the Previous Month'.

7.5 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Not Assigned to Worker / Identified Reason

An adult captured in the 'Not Assigned to Worker' population is considered having an **Identified Reason** if they meet the requirements for one of the measures listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measures hierarchy are listed below in numerical order:

1. Waiting for Sanction Imposition:

- Program (CT-18):
 - WT - WTW
 - REP - REP
- Program Status (CT-72):
 - SA- Sanction

2. Future/Current Month Termination Scheduled:

- Program (CT-18):
 - CW - CalWORKs
 - RC - RCA
- Program Status effective the month after the report month (CT-72):
 - DS – Discontinued

3. Single Parents 20+ Hrs/Week:

- There is at least one child in the CW household under the age of 6 (exclusive).
- The adult/parent works at least 20 hours/week (inclusive) and less than 30 hours/week (exclusive). See appendix 7.1 for instructions on calculating hours.
- Has one of the following Aid Codes (CT-184):
 - 30 - CW – All Other Families (Fed)
 - 33 - CW – Zero Parent (Fed)
 - 3G – CW – Zero Parent (State)
 - 3H – CW- Zero Parent (Mixed)
 - 3R – CW – Zero Parent – Exempt MAP (Fed)
 - 3E - CW - All Other Families (Mixed)
 - 3L - CW – All Other Families (State)
 - 3P - CW – All Other Families-Exempt MAP (Fed)
 - 32 - CW – TANF – Timed Out -All Families (State)
 - 3W - CW – TANF – Timed Out (State)

- K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
- R1 - CW - TCVAP (State)

4. Single Parents 30+ Hrs/Week:

- All children in the household are 6 years old or over.
- The parent works 30 or more hours per week (inclusive). See appendix 7.1 for instructions on calculating hours.
- Has one of the following Aid Codes (CT-184):
 - 30 - CW – All Other Families (Fed)
 - 33 - CW – Zero Parent (Fed)
 - 3G – CW – Zero Parent (State)
 - 3H – CW- Zero Parent (Mixed)
 - 3R – CW – Zero Parent – Exempt MAP (Fed)
 - 3E - CW - All Other Families (Mixed)
 - 3L - CW – All Other Families (State)
 - 3P - CW – All Other Families-Exempt MAP (Fed)
 - 32 - CW – TANF – Timed Out -All Families (State)
 - 3W - CW – TANF – Timed Out (State)
 - K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
 - R1 - CW - TCVAP (State)

5. Family Employed at Least 35 Hrs/Week

- The CW household has children.
- The employment hours for one or both adults/parents in the CW household must be at least 35 hours per week (inclusive).
- Has one of the following Aid Codes (CT-184):
 - 35 - CW – Two Parent (Fed)
 - 3F - CW – Safety Net/Felon/WTW Sanct – Two Parent
 - 3M - CW-Two Parent (State)
 - 3U - CW – Two Parent (State)

6. RCA Participant Employed 32+ Hrs/Week

- **Program (CT-18)**
 - **RC - RCA**
- **The employment hours for the adult are at least 32 hours per week (inclusive).**
- **Has a Federal, State, or Mixed RCA Aid Code (CT-184). This will be a dynamic list and if an aid code is later added, then the report will automatically pick up the information.**
Current Possible Aid Codes:
 - **01 – RCA – RCA (Fed)**
 - **1V - RCA - TCVAP (State)**

Technical Note: RCA Aid Codes can be identified by looking at CODE_DETL.REFER_TABLE_4_DESCR in ('FE','NF', MX') and REFER_TABLE_5_DESCR = 'RC'.

7. Other Parent

- Program (CT-18):
 - WT – WTW
 - RE – REP
- Program Status (CT-72):
 - DG - Deregistered
- Program Person Status Reason (CT-73):
 - PP – Other parent participation 35 hours.

7.6 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Not Assigned to Worker / Should be Registered

An adult captured in the 'Not Assigned to Worker' population is considered '**Should be Registered**' if they do not meet any of the 'Not assigned to Worker Identified Reason' measures requirements but meet one measures requirements listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measures hierarchy are listed below in numerical order:

1. Unassigned Pool

- Program (CT-18):
 - WT – WTW
 - RE – REP
- Program Status (CT-72):
 - PE- Pending (CT 72)

Note: This count may or may not match the result(s) on the Unassigned Pool Business Intelligence Dashboard as a 'Pending' program may have been captured in a prior category in the hierarchy.

2. Exempt Program Status

- Program (CT-18):
 - WT – WTW
 - RE – REP
- Program Status (CT-72):
 - EX- Exempt (CT 72)

3. Sanctioned Program Status

- Program (CT-18):
 - WT – WTW
 - RE – REP
- Program Status (CT-72):
 - SA- Sanction

4. Deregistered Program Status

- Program (CT-18):
 - WT – WTW
 - RE – REP
- Program Status (CT-72):
 - DE- Deregistered

5. Unidentified Reason

- All adults who were captured in the 'Not Assigned to Worker' category but could not be captured in any of the measures for 'Identified Reason' or 'Should be Registered' category is reported here.

7.7 Case Lists Column Order

CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list)

1. **Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name
11. **CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
17. **Cash Aid Role Reason**
18. Cash Aid Role Status
19. **Cash Aid Role Status Reason**
20. Sanction Effective Date
21. **Homeless**
22. Work Registration Status
23. **Work Registration Begin Date**
24. WTW/REP Program
25. WTW/REP Program Status
26. **WTW/REP Program Status Reason**

- 27. **WTW/REP Program Status Begin Date**
- 28. **TANF Months Used**
- 29. CW Months Used
- 30. **Extender Reason**
- 31. **Extender Begin Date**
- 32. **Extender End Date**
- 33. Time Expiration Date

Note: This case list does not have a parameter therefore does not have any columns which are only visible dependent on parameter selection.

CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type)

- 1. Report Month**
- 2. WTW/REP Region Group
- 3. WTW/REP Region
- 4. WTW/REP Office
- 5. WTW/REP Unit
- 6. WTW/REP Worker ID
- 7. Last WTW/REP Worker ID**
- 8. Last WTW/REP Region**
- 9. District Office
- 10. EW Worker ID
- 11. Case Number
- 12. Participant Name
- 13. CIN**
- 14. Person ID
- 15. DOB
- 16. Aid Code
- 17. Cash Aid Program
- 18. Cash Aid Role
- 19. Cash Aid Role Reason**
- 20. Cash Aid Role Status
- 21. Cash Aid Role Status Reason**
- 22. Sanction Effective Date
- 23. Homeless**
- 24. Work Registration Status
- 25. Work Registration Begin Date**
- 26. WTW/REP Program
- 27. WTW/REP Program Status
- 28. WTW/REP Program Status Reason**
- 29. WTW/REP Program Status Begin Date**
- 30. Activity Type**
- 31. Activity Number**
- 32. Activity Status**
- 33. Activity Status Reason**
- 34. Activity Status Begin Date**

- 35. Activity Scheduled Start Date**
- 36. Activity Scheduled End Date**
- 37. TANF Months Used**
- 38. CW Months Used
- 39. Time Expiration Date
- 40. Extender Reason**
- 41. Extender Begin Date**
- 42. Extender End Date**
- 43. Age**
- 44. Cal-Learn Office**
- 45. Cal-Learn Office ID**
- 46. Cal-Learn Worker ID**
- 47. Cal-Learn Secondary Worker ID**
- 48. Cal-Learn Program Status**
- 49. Cal-Learn Program Status Reason**
- 50. Cal-Learn Program Status Begin Month**
- 51. Cal-Learn Program Status End Month**
- 52. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

CW/RCA Aided:

- TANF Months Used
- CW Months Used
- Extender Reason
- Extender Begin Date
- Extender End Date

Sanctioned:

- Sanction Effective Date
- Last WTW/REP Worker ID
- Last WTW/REP Region

Timed Out Active CW Cases:

- TANF Months Used
- CW Months Used
- Time Expiration Date
- Extender Reason
- Extender Begin Date
- Extender End Date
- Activity Type
- Activity Number
- Activity Status
- Activity Status Reason
- Activity Status Begin Date
- Activity Scheduled Start Date

- Activity Scheduled End Date

Cal-Learn Adults:

- Age
- Cal-Learn Office
- Cal-Learn Office ID
- Cal-Learn Worker ID
- Cal-Learn Secondary Worker ID
- Cal-Learn Program Status
- Cal-Learn Program Status Reason
- Cal-Learn Program Status Begin Month
- Cal-Learn Program Status End Month

CalWORKs/RCA Other:

- N/A

CW/RCA Aided

- 1. Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name
- 11. CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
- 17. Cash Aid Role Reason**
18. Cash Aid Role Status
- 19. Cash Aid Role Status Reason**
- 20. Prior Month Cash Aid Role Reason**
- 21. Homeless**
22. Work Registration Status
- 23. Work Registration Status Reason**
- 24. Work Registration Begin Date**
25. **Work Registration** Expected End Date
26. WTW/REP Program
27. WTW/REP Program Status
28. WTW/REP Program Status Reason
- 29. WTW/REP Program Status Begin Date**

- 30. WTW/REP Program Status Expected End Date
- 31. Activity Type
- 32. Activity Number
- 33. Activity Status
- 34. Activity Status Reason
- 35. Activity Status Begin Date
- 36. Activity Scheduled Start Date
- 37. Activity Scheduled End Date
- 38. Volunteer
- 39. Excluded
- 40. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

WTW/REP Exempt:

- Work Registration Status Reason
- Work Registration Expected End Date
- Volunteer
- Excluded
- WTW/REP Program Status Expected End Date
- Activity Type
- Activity Number
- Activity Status
- Activity Status Reason
- Activity Status Begin Date
- Activity Scheduled Start Date
- Activity Scheduled End Date

WTW/REP Mandatory:

- N/A

WTW/REP Other:

- N/A

No WTW/REP Program Block:

- N/A

CalWORKs/RCA Adults by WTW/REP Category CL (Mandatory)

- 1. **Report Month**
- 2. WTW/REP Region Group
- 3. WTW/REP Region
- 4. WTW/REP Office
- 5. WTW/REP Unit
- 6. WTW/REP Worker ID
- 7. District Office
- 8. EW Worker ID

9. Case Number
10. Participant Name
- 11. CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
- 17. Cash Aid Role Reason**
18. Cash Aid Role Status
- 19. Cash Aid Role Status Reason**
20. Work Registration Status
- 21. Work Registration Begin Date**
22. WTW/REP Program
23. WTW/REP Program Status
24. WTW/REP Program Status Reason
- 25. WTW/REP Program Status Begin Date**
26. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Assigned to Worker:

- N/A

Not Assigned to Worker:

- N/A

Active

- 1. Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name
- 11. CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
- 17. Cash Aid Role Reason**

- 18. Cash Aid Role Status
- 19. **Cash Aid Role Status Reason**
- 20. Work Registration Status
- 21. **Work Registration Begin Date**
- 22. WTW/REP Program
- 23. WTW/REP Program Status
- 24. **WTW/REP Program Status Reason**
- 25. **WTW/REP Program Status Begin Date**
- 26. **Activity Type**
- 27. **Activity Number**
- 28. **Activity Status**
- 29. **Activity Status Reason**
- 30. **Activity Status Begin Date**
- 31. **Activity Scheduled Start Date**
- 32. **Activity Scheduled End Date**
- 33. Total Hours Employed Per Week
- 34. Source of Hours
- 35. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Single Parents 20+ Hrs/Week:

- Total hours Employed Per Week
- Source of Hours

Single Parents 30+ Hrs/Week:

- Total hours Employed Per Week
- Source of Hours

Family Employed 32+ Hrs/Week:

- Total hours Employed Per Week
- Source of Hours

RCA Participant Employed 32+ Hrs/Week:

- Total hours Employed Per Week
- Source of Hours

Open Activity:

- N/A

Referred to an Activity in the Current or Future Month:

- Activity Scheduled Start Date
- Activity Scheduled End Date

Activity Successfully Completed in the Month:

- N/A

Referred to an Activity in the Previous Month:

- Activity Scheduled Start Date

- Activity Scheduled End Date

Activity Closed in the Report Month:

- N/A

Activity Completed/Closed in the Previous Month:

- N/A

Inactive

1. Report Month

2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name

11. CIN

12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role

17. Cash Aid Role Reason

18. Cash Aid Role Status

19. Cash Aid Role Status Reason

20. Work Registration Status

21. Work Registration Begin Date

22. WTW/REP Program
23. WTW/REP Program Status

24. WTW/REP Program Status Reason

25. WTW/REP Program Status Begin Date

26. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Identified Reason:

- N/A

Unknown Reason:

- N/A

Identified Reason (Assigned to Worker)

1. **Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name
11. **CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
17. **Cash Aid Role Reason**
18. Cash Aid Role Status
19. **Cash Aid Role Status Reason**
20. Effective Sanction Date
21. Work Registration Status
22. **Work Registration Begin Date**
23. WTW/REP Program
24. WTW/REP Program Status
25. WTW/REP Program Status Reason
26. **WTW/REP Program Status Begin Date**
27. **WTW/REP Program Status Expected End Date**
28. Total Hours Employed Per Week
29. Source of Hours
30. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Current Good Cause:

- **WTW/REP Program Status** Expected End Date
- Effective Sanction Date

Open Noncompliance:

- Effective Sanction Date

Exempt Program Status:

- Effective Sanction Date

Sanctioned Program Status:

- Effective Sanction Date

Deregistered Program Status:

- Effective Sanction Date
- Pending Program Status:
- Effective Sanction Date

Unknown Reason

- 1. Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name
- 11. CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
- 17. Cash Aid Role Reason**
18. Cash Aid Role Status
- 19. Cash Aid Role Status Reason**
20. Work Registration Status
- 21. Work Registration Begin Date**
22. WTW/REP Program
23. WTW/REP Program Status
- 24. WTW/REP Program Status Begin Date**
25. Activity Type
26. Activity Number
- 27. Activity Status Reason**
28. Activity Status Begin Date
- 29. Activity Scheduled Start Date**
- 30. Activity Scheduled End Date**
31. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Referred to an Activity Prior to the Previous Month:

- Activity Type
- Activity Number
- Activity Status Begin Date
- Activity Scheduled Start Date

Completed/Closed Activity Prior to the Previous Month:

- Activity Type
- Activity Number
- Activity Status Begin Date

Unknown Reason - Other:

- N/A

**Not Assigned to Worker / CalWORKs/RCA Adults by WTW/REP Category CL
(Identified Reason)**

- 1. Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
- 7. Last WTW/REP Worker ID**
- 8. Last WTW/REP Region**
9. District Office
10. EW Worker ID
11. Case Number
12. Participant Name
- 13. CIN**
14. Person ID
15. DOB
16. Aid Code
17. Cash Aid Program
18. Cash Aid Role
- 19. Cash Aid Role Reason**
20. Cash Aid Role Status
- 21. Cash Aid Role Status Reason**
- 22. CW/RCA Discontinuance Date**
23. Effective Sanction Date
24. Work Registration Status
- 25. Work Registration Begin Date**
26. WTW/REP Program
27. WTW/REP Program Status
28. WTW/REP Program Status Reason
- 29. WTW/REP Program Status Begin Date**
- 30. Activity Type**
- 31. Activity Number**
- 32. Activity Status Begin Date**
33. Total Hours Employed Per Week
34. Source Hours
35. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Waiting for Sanction Imposition:

- Effective Sanction Date

Future/Current Month Termination Scheduled:

- CW/RCA Discontinuance Date

Single Parents 20+ Hrs/Week:

- Total Hours Employed Per Week
- Source of Hours
- **Activity Type**
- **Activity Number**
- **Activity Status Begin Date**

Single Parents 30+ Hrs/Week:

- Total Hours Employed Per Week
- Source of Hours
- **Activity Type**
- **Activity Number**
- **Activity Status Begin Date**

Family Employed at Least 35 Hrs/Week:

- Total Hours Employed Per Week
- Source of Hours
- **Activity Type**
- **Activity Number**
- **Activity Status Begin Date**

RCA Participant Employed 32+ Hrs/Week:

- Total Hours Employed Per Week
- Source of Hours
- **Activity Type**
- **Activity Number**
- **Activity Status Begin Date**

Other Parent:

- N/A

CalWORKs/RCA Adults by WTW/REP Category CL (Should Be Registered)

1. **Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit

6. WTW/REP Worker ID
- 7. Last WTW/REP Worker ID**
- 8. Last WTW/REP Region**
9. District Office
10. EW Worker ID
11. Case Number
12. Participant Name
- 13. CIN**
14. Person ID
15. DOB
16. Aid Code
17. Cash Aid Program
18. Cash Aid Role
- 19. Cash Aid Role Reason**
20. Cash Aid Role Status
- 21. Cash Aid Role Status Reason**
22. CW/RCA Approval Date
23. CW/RCA Application Date
24. Work Registration Status
- 25. Work Registration Begin Date**
26. WTW/REP Program
27. WTW/REP Program Status
28. **WTW/REP** Program Status Reason
29. **WTW/REP** Program Status Reason Begin Date
- 30. WTW/REP Program Status Begin Date**
31. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Unassigned Pool:

- CW/RCA Approval Date
- CW/RCA Application Date

Exempt Program Status:

- WTW/REP Program Status Reason

Sanctioned Program Status:

- WTW/REP Program Status Reason

Deregistered Program Status:

- WTW/REP Program Status Reason

Unidentified Reason:

- N/A

7.8 Activity Selection Logic for Timed-Out on Active CalWORKs Cases and WTW/REP Exempt Timed Out

For the 'Timed-Out on Active CalWORKs Cases and WTW/REP Exempt Timed Out' population, the following hierarchy will be used to select a single Activity to display for the adult.

1. Open Activity

- Has an existing customer activity with the following latest status (CT-21):
 - AC – Active
- The customer activity has the following Status Reason (CT-124):
 - AT – Attending

2. Referred to an Activity in the Current or Future Month

- The adult has a customer activity with a begin date in the report month or future month. The customer activity has the following latest status and status reason:
 - Customer Activity Status (CT-21):
 - AC - Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred
 - PR – Processing

OR

- The adult has a customer activity with an expected/scheduled start date in the report month or future month.

3. Activity Successfully Completed in the Month

- The adult has a customer activity effective in the report month with the following latest status and status reason:
 - Customer Activity Status (CT-21):
 - CO - Completed
 - Customer Activity Status Reason (CT-124):
 - CS – Completed Satisfactory
 - CE - Employed

4. Referred to an Activity in the Previous Month

- The adult has a customer activity with a begin date that falls in the month immediately prior to the report month with the latest status and status reason of:
 - Customer Activity Status (CT-21):
 - AC - Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred

5. Activity Close in the Report Month

- The adult has a customer activity with a begin date that falls in the report month and the latest status is the following:
 - Customer Activity Status (CT-21):
 - CL - Closed

6. Activities Completed/Closed in the Previous Month

- The adult has a customer activity with a begin date that falls in the month immediately prior to the report month.
 - Customer Activity Status (CT-21)
 - CO - Completed
 - CL – Closed
 - Status Reason (CT-124):
 - [Any]

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
4/5/2023	1.1	Updates for Sonoma	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-207494: DDID 85 - Update Batch that removes WTW Program Worker at Sanction status to be configurable
- 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.

2. Update PB00M100 via DCR to opt Sonoma out of the configuration to end-date WTW worker assignment when the program status is Sanctioned.

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. Create a Data Change Request (DCR) to update PB00M100 so that Sonoma is opted out of the configuration to end-date WTW worker assignment when the program is Sanctioned. Table 2.1.2.1 specifies the configuration that Sonoma should be opted out of.

Table 2.1.2.1 – Configuration to Opt Sonoma Out

Migration County	Program	Program Status	Program Status Reason	Rules
Alpine, Butte, Calaveras, Colusa, El Dorado, Fresno, Humboldt, Los Angeles, Mendocino, Merced, Nevada, San Joaquin, Orange, Placer, San Diego, Solano, Sonoma , Stanislaus, Tuolumne Note: The list of counties above are the counties who opted into the functionality per DDID 85. Marin was opted out per CA-250439.	WTW, REP	Sanctioned	All Program Status Reasons	Immediately end-date worker assignment based on the begin date (effective date) of the program status.

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-Update.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-221914

Add Threshold languages for the Revised
Notices & Forms per ACL 19-76EI

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Narendar Sabbani
	Reviewed By	P. Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/16/2022	1.0	Initial Draft	Narendar Sabbani
03/31/2022	1.1	Content Revision Updated section 1.2 and 1.3 to remove the customer id from NA 274H and NA274G	Lianel Richwin

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1 OVERVIEW

This effort will add M44-207K (5/20), M44-352A (11/11), NA 274G(7/19), NA 274H(12/20) and M44-315A in all available threshold languages to CalSAWS.

1.1 Current Design

Currently M44-207K (5/20), M44-352A (11/11), NA 274G(7/19), NA 274H(12/20) are available only in English and Spanish Languages in CalSAWS Template Repository.

1.2 Requests

1. Add Threshold Languages to the CalSAWS for the M44-207K (5/20) NOA.
Languages Include: Armenian, Cambodian, Chinese, Korean, Russian, and Vietnamese.
2. Add Threshold Languages to the CalSAWS for the M44-352A (11/11) Form Template Repository and system generated.
Languages Include: Cambodian, Chinese, Russian, and Vietnamese.
3. Add Threshold Languages to the CalSAWS for the NA 274G (7/19) Form Template Repository and system generated.
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
4. Add Threshold Languages to the CalSAWS for the NA 274H (12/20) Form Template Repository and system generated.
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
5. Add threshold Languages for the Demand NOA Packet with M44-352A and NA 274G.
Languages Include: Cambodian, Chinese, Russian, and Vietnamese.
6. Add threshold Languages for the Demand NOA Packet with M44-352A and NA 274H.
Languages Include: Cambodian, Chinese, Russian, and Vietnamese.
7. Add the M44-315A (\$10 Minimum Payment, Change NOA A752C) in English and available threshold languages.
Languages Include: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, and Vietnamese
8. Update the NA 274G and NA 27H to remove the field "Customer ID" from header for existing English and Spanish languages.

1.3 Overview of Recommendations

1. Add M44-207K (5/20) NOA to CalSAWS in available threshold languages.
Languages: Armenian, Cambodian, Chinese, Korean, Russian, and Vietnamese.
2. Add M44-352A (11/11) to CalSAWS Template Repository in available languages.

- Languages: Cambodian, Chinese, Russian, and Vietnamese.
3. Add NA 274G (7/19) to CalSAWS Template Repository in available languages.
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
 4. Add NA 274H (12/20) to CalSAWS Template Repository in available languages.
Languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
 5. Add threshold Languages for the Demand NOA Packet with M44-352A and NA 274G.
Languages: Cambodian, Chinese, Russian, and Vietnamese.
 6. Add threshold Languages for the Demand NOA Packet with M44-352A and NA 274H.
Languages: Cambodian, Chinese, Russian, and Vietnamese.
 7. Add the M44-315A (\$10 Minimum Payment, Change NOA A752C) in English and available threshold languages.
Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, and Vietnamese.
 8. Update the NA 274G and NA 27H to remove the field "Customer ID" from header for existing English and Spanish languages.

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Add M44-207K (5/20) Over Income Discontinuance NOA in all available threshold languages to CalSAWS.

2.1.1 Overview

The M44-207K NOA will be added in all the available Threshold Languages.

Reason Fragment Name and ID: CW_TN_INC_GRT_MAX_AID_A233, (Fragment ID: 6212)

State Form/NOA: M44-207K (5/20)

Current NOA Template: CW_NOA_TEMPLATE

Current Program(s): CalWORKs

Current Action Type: Termination
Current Fragment Level: Programs
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA 1239 SAR
Existing Languages: English and Spanish

2.1.1 Form/NOA Verbiage

Create threshold fragment xdfs for NOA reason.

Add Threshold languages: Armenian, Cambodian, Chinese*, Korean, Russian, and Vietnamese.

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

NOA Mockups/Examples: Supporting Documents #1

2.1.2 Form/NOA Variable Population

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

2.1.3 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2 Add M44-352A (11/11) in all available threshold languages CalSAWS.

2.2.1 Overview

The M44-352A will be added in all the available Threshold Languages.

State Form: M44-352A (11/11)

Current Programs: CalWORKs

Current Forms Category: NOA

Current Template Repository Visibility: All counties

Existing Languages: English and Spanish

Template Description: This form is triggered for CalWORKs program at case termination when an Overpayment claim exists and collection has not been initiated, on a terminated case.

Imaging Form Name: CW Final Demand-OP Recoupment
Imaging Document Type: Overpayment/Overissuance (OP/OI)

2.2.2 Form Verbiage

Create M44-352A XDP's for Threshold Languages

M44-352A will be added to Template Repository.

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

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

Form Mockups/Examples: See Supporting Documents #2

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: Yes

2.2.3 Form Generation Conditions

M44-352A (11/11) is added in available threshold languages to the Template Repository.

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

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for M44-352A.

Print Options:

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

Mailing Options:

Mailing Options	Option for M44-352A Form
Mail-To (Recipient)	Applicant selected on the Document Parameters page
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A

Mailing Options	Option for M44-352A Form
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Form Control

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Additional Options:

Requirement	Option for M44-352A Form
Post to Self-Service Portal	Y

2.3 Add NA274G (7/19) in all available threshold languages in CalSAWS.

2.3.1 Overview

The NA 274G will be added in all the available Threshold Languages.

State Form: NA 274G (7/19)

Current Programs: CalWORKs

Current Forms Category: NOA

Current Template Repository Visibility: All counties

Existing Languages: English and Spanish

Template Description: This form is used as a continuation page for the Overpayment Computations, and it is used to notify the participant about the overpayment amount that is owed. It gives a detailed computation of the expenses and provides the participant with the rules that apply. The Hearing Rights (NA Back 9) will be printed on the back of the form.

Imaging Form Name: Cont Page - OP Computations 274G

Imaging Document Type: Notification/NOA

2.3.2 Form Verbiage

Create NA274G XDP's for Threshold Languages

NA 274G will be added to Template Repository.

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

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

Form Mockups/Examples: See Supporting Documents #3

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: Yes

2.3.3 Form Generation Conditions

NA 274G (7/19) is added in available threshold languages to the Template Repository.

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

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for NA 274G.

Print Options:

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

Mailing Options:

Mailing Options	Option for NA274G Form
Mail-To (Recipient)	N/A
Mailed From (Return)	N/A
Mail-back-to Address	N/A
Outgoing Envelope Type	N/A
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	N/A

Form Control

Tracking Barcode	BRM Barcode	Imaging Barcode
------------------	-------------	-----------------

N	N	Y
---	---	---

Additional Options:

Requirement	Option for NA 274G Form
Post to Self-Service Portal	Y

2.4 Add NA274H (12/20) in all available threshold languages in CalSAWS.

2.4.1 Overview

The NA 274H will be added in all the available Threshold Languages.

State Form: NA 274H (12/20)

Current Programs: CalWORKs

Current Forms Category: NOA

Current Template Repository Visibility: All counties

Existing Languages: English and Spanish

Template Description: This form is used as a continuation page for the Overpayment Computations, and it is used to notify the participant about the overpayment amount that is owed. It gives a detailed computation of the expenses and provides the participant with the rules that apply. The Hearing Rights (NA Back 9) will be printed on the back of the form.

Imaging Form Name: Cont Page - OP Computations 274H

Imaging Document Type: Notification/NOA

2.4.2 Form Verbiage

Create NA274H XDP's for Threshold Languages

NA 274H will be added to Template Repository.

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

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

Form Mockups/Examples: See Supporting Documents #4

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: Yes

2.4.3 Form Generation Conditions

NA 274H (7/19) is added in available threshold languages to the Template Repository.

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

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for NA 274H.

Print Options:

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

Mailing Options:

Mailing Options	Option for NA274H Form
Mail-To (Recipient)	N/A
Mailed From (Return)	N/A
Mail-back-to Address	N/A
Outgoing Envelope Type	N/A
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	N/A

Form Control

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

Additional Options:

Requirement	Option for NA 274H Form
Post to Self-Service Portal	Y

2.5 Add threshold Languages for the Demand NOA Packet with M44-352A and NA 274G.

2.5.1 Overview

The Demand NOA Packet will be added in all the available Threshold Languages.

State Form: Demand NOA Packet (M44-352A and NA 274G)

Current Programs: CalWORKs

Current Forms Category: NOA

Current Template Repository Visibility: Not visible

Existing Languages: English and Spanish

Imaging Form Name: Demand NOA Packet

Imaging Document Type: Overpayment/Overissuance (OP/OI)

2.5.2 Form Verbiage

Create Demand NOA Packet (M44-352A and NA 274G) XDP's for Threshold Languages

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

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

Form Header: CalSAWS Standard Header #1

Include NA BACK 9: Yes

2.5.3 Form Generation Conditions

Update Demand NOA Packet (M44-352A and NA 274G) generation batch job to generate threshold languages.

Update batch job (PB00F108) to generate the Demand NOA (M44-352A and NA 274G) Packet in all threshold languages.

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for Demand NOA Packet.

Print Options:

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

Mailing Options:

Mailing Options	Option for Demand NOA Packet Form
Mail-To (Recipient)	When generated through the batch process, the CalWORKs Primary Applicant.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Form Control

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

Additional Options:

Requirement	Option for Demand NOA Packet Form
Post to Self-Service Portal	Y

2.6 Add threshold Languages for the Demand NOA Packet with M44-352A and NA 274H.

2.6.1 Overview

The Demand NOA Packet will be added in all the available Threshold Languages.

State Form: Demand NOA Packet (M44-352A and NA 274H)
Current Programs: CalWORKs
Current Forms Category: NOA
Current Template Repository Visibility: Not visible
Existing Languages: English and Spanish
Imaging Form Name: Demand NOA Packet
Imaging Document Type: Overpayment/Overissuance (OP/OI)

2.6.2 Form Verbiage

Create Demand NOA Packet (M44-352A and NA 274H) XDP's for Threshold Languages

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

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

Form Header: CalSAWS Standard Header #1
Include NA BACK 9: Yes

2.6.3 Form Generation Conditions

Update Demand NOA Packet (M44-352A and NA 274H) generation batch job to generate threshold languages

Update batch job (PB00F108) to generate the Demand NOA (M44-352A and NA 274H) Packet in all threshold languages.

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for Demand NOA Packet.

Print Options:

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

Mailing Options:

Mailing Options	Option for Demand NOA Packet Form
Mail-To (Recipient)	When generated through the batch process, the CalWORKs Primary Applicant.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Form Control

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

Additional Options:

Requirement	Option for Demand NOA Packet Form
Post to Self-Service Portal	Y

2.7 Add M44-315A (8/21) \$10 Minimum Payment Change NOA in English and all available threshold languages to CalSAWS.

2.7.1 Overview

The M44-315A NOA is to notify recipients that they will not receive cash aid because their monthly cash aid is less than \$10.

Reason Fragment Name and ID: CW_CH_CNTBL_INCOME_INC_A752
(Fragment ID: 6366)

State Form/NOA: M44-316B (09/2013)

Current NOA Template: CW_NOA_TEMPLATE

Current Program(s): CalWORKs

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

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

2.7.2 Form/NOA Verbiage

Add M44-315A verbiage to A752C NOA as dynamic text in English and available threshold languages.

Add Threshold languages: Spanish, Armenian, Cambodian, Chinese*, Korean, Russian, Tagalog, and Vietnamese

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

NOA Mockups/Examples: Supporting Documents #5

Reason Fragment Verbiage:

Description	Text	Formatting
<STATIC_SECTION>	You reported income of _____. This is over your family's income reporting threshold (IRT). Your IRT was _____ for a family of _____. When you report income over the IRT the County refigures your cash aid amount.	Arial Font Size 10
<DYNAMIC_SECTION>	<p>The monthly cash aid amount figured on this notice is less than \$10.00. We can't pay aid for an amount less than \$10.00. Months in which we do not pay aid do not count against your 60-month time limit, unless:</p> <ul style="list-style-type: none">• we are collecting an overpayment, or• you are eligible for less than \$10 because of a penalty, or• you get a non-recurring special need payment. <p>Contact the County if you would like more details about time on aid. You can still get other CalWORKs programs and services, if you are eligible, including:</p> <ul style="list-style-type: none">• Welfare to Work;• Child care;	Arial Font Size 10

	<ul style="list-style-type: none"> • Transportation supportive services to go to work, school, training or approved activities; • Being paid back for work and school related expenses; and • Homeless assistance <p>Contact the County for specific details about the above programs or services.</p> <p>Although you won't get a cash aid payment, you are still on the CalWORKs program and must continue to send in your reports by the dates the County tells you they are due, and you must do this to keep your Medi-Cal. If child support is being collected, the County will continue to collect it and you can always contact the County if things change to see if you can get a cash aid payment.</p>	
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2.7.3 Form/NOA Variable Population

No updates to this Section.

2.7.4 Form/NOA Generation Conditions

Populate the newly added dynamic text when the following conditions are true.

- Program is CalWORKs
- Benefit Change NOA is generated (Change Action)
- Grant amount is less than \$10
- Reporting type is 'Annual Reporting' or 'Semi Annual Reporting'

2.8 Update NA 274H and NA 274G to remove the "CUSTOMER ID" from header for existing English and Spanish languages.

2.8.1 Overview

Update the NA 274H and NA 274G to remove the field "CUSTOMER ID" from header for existing English and Spanish languages.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	NOA	M44-207K	M44_207K_Armenian.pdf M44_207K_Cambodian.pdf M44_207K_Chinese.pdf M44_207K_Korean.pdf M44_207K_Russian.pdf M44_207K_Vietnamese.pdf
2.	Forms	M44-352A	M44_352A_Cambodian.pdf M44_352A_Chinese.pdf M44_352A_Russian.pdf M44_352A_Vietnamese.pdf
3.	Forms	NA 274G	NA_274G_Arabic.pdf NA_274G_Armenian.pdf NA_274G_Cambodian.pdf NA_274G_Chinese.pdf NA_274G_Farsi.pdf NA_274G_Hmong.pdf NA_274G_Korean.pdf NA_274G_Lao.pdf NA_274G_Russian.pdf NA_274G_Tagalog.pdf NA_274G_Vietnamese.pdf
4.	Forms	NA 274H	NA_274H_Arabic.pdf NA_274H_Armenian.pdf NA_274H_Cambodian.pdf NA_274H_Chinese.pdf NA_274H_Farsi.pdf NA_274H_Hmong.pdf NA_274H_Korean.pdf NA_274H_Lao.pdf NA_274H_Russian.pdf NA_274H_Tagalog.pdf

			NA_274H_Vietnamese.pdf
5.	NOA	M44-315A	Fragments Verbiage.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; 	M44-207K, M44-352A, NA 274G, NA 274H, M44-315A are being added in all available threshold languages.

	<p>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</p> <p>t. Corrective NOAs on State Fair Hearing decisions;</p> <p>u. CSC paper ID cards with LRS-generated access information; and</p> <p>v. CSC PIN notices.</p>	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-231865

ACL 21-141, ACL 21-141E Out of State ARC Payments

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Akshay Kumar S
	Reviewed By	Ramakrishna Kuchibhotla, Paul Galloway

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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
2023-04-05	.04	Content revision for new effective date of 1/2022 from ACL 21-141E	Paul Galloway

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1 OVERVIEW

Remove the EDBC condition as of ~~1/1/2021~~ 1/1/2022 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." The effective date was corrected by ACL 21-141E (Errata) which states, "...this Errata corrects the effective date to January 1, 2022."

1.3 Overview of Recommendations

1. Remove the EDBC condition as of ~~1/1/2021~~ 1/1/2022 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~~ 1/1/2022 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~~ 1/2022 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-232312

Retro Events Incorrectly Logged when Program
is Open

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell
	Reviewed By	Matt Lower

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/21/2022	1.0	Initial Draft	Connor O'Donnell
04/05/2022	1.1	Content Revision #1: -Update Recommendation to also include Pending and Ineligible status	Connor O'Donnell

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3.2 Migration Requirements.....	Error! Bookmark not defined.	

1 OVERVIEW

1.1 Current Design

SCR 31729 made changes to how retro events are logged. When a person is added to an open MC program, retro events will be logged on the program level if retro months are requested for the newly added person. However, these events should not be logged because the program is already open.

1.2 Requests

Update the logging of retro events so that these events are not logged at the program-level when the program is already open.

1.3 Overview of Recommendations

1. Update retro event logging logic to prevent logging at the program-level when the program is ~~active~~ open.

1.4 Assumptions

1. N/A

2 RECOMMENDATIONS

2.1 Medi-Cal Person Detail

2.1.1 Overview

Currently Retro Events will be improperly logged at the program-level if Retro Months are requested for an additional person when the program is active, pending, or ineligible. This is undesired behavior, so the logic of the page must be updated to prevent this from happening.

2.1.2 Medi-Cal Person Detail Mockup

N/A

2.1.3 Description of Changes

1. Update the logic when processing a Retro Month for an additional person on a case so that a Retro Event will not be logged at the program-level on a program if the program is already active, pending, or ineligible.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Medi-Cal Person Detail**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.17	The LRS shall include a method for retroactively determining eligibility through automated EDBC as well as user-initiated EDBC.	Logic for Retro MediCal is updated to ensure that retro events will not be logged at the program level for additional people.



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, Maria Jensen
	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/23/2022	1.0	Initial Document	Jasmine Chen
11/09/2022	1.1	Clarified Assumption 1 Removed Arabic, Hmong and Lao	Maria Jensen
11/23/2022	1.2	Removed Assumption 1 Added SP for 4 fragments	Maria Jensen
04/11/2023	1.3	Design clarification, Assumption for ID 9529 Farsi	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. Update the Spanish versions of the 4 OAE reason fragments with age ranges.
2. 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. Update the Spanish versions of the 4 OAE reason fragments with age ranges.
2. 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. There will be no changes to the verbiage, variable population, nor generation conditions of existing OAE reason fragments.
2. 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.
3. 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.
4. Per existing system functionality, GEN 1365 will be added to all the envelopes mailed to the customer.
5. Arabic, Hmong and Lao will be added after CA-214024 is implemented.
6. ID 9529 cannot be tested in Farsi until CA-259096 adds MC_AP_ACTION2 in Farsi.

2 RECOMMENDATIONS

2.1 Update Spanish for age range OAE reasons

2.1.1 Overview

CA-231692 introduced new verbiage for 8 OAE reason fragments in English and Spanish. 4 of them have age ranges and a Static section that is the same for both age ranges per fragment, for English. For Spanish the Static section has 2 versions, one for each age range per fragment. The one closest to the English verbiage was chosen.

This effort will update the Spanish versions of the 4 OAE reason fragments with age ranges to use the Static section corresponding to each age range, per fragment.

Reason Fragments (IDs):

H_AP_RESTRICTED_SCOPE_RETRO_H911_NEW (ID: 9526)

H_CH_RESTRICTED_SCOPE_TO_FULL_SCOPE_H808_NEW (ID: 9528)

MC_AP_RESTRICT_RETRO_MC_M225_NEW (ID: 9530)

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 Form/NOA Verbiage

1. Update Fragment XDP

Updated Languages: Spanish

NOA Mockups/Examples: See Supporting Documents #1

Description	Existing text	Updated text	Formatting
ID: 9526 <STATIC_SECTION> for	Si usted tiene pruebas de su situación de ciudadanía o inmigración que pueda darnos ahora o si quiere avisarnos que tiene problemas para obtener su	Si usted tiene pruebas de su ciudadanía y situación de inmigración satisfactoria que pueda darnos ahora o quiere avisarnos que tiene problemas para	Arial Font Size 10

<p>age range of 'under 50'</p> <p>MAGI restricted scope retro approval</p>	<p>documento, por favor llame a la oficina de Medi-Cal de su condado al número anotado en este aviso. Sus beneficios podrían cambiar de restringido a completo cuando usted nos proporcione sus documentos. Los beneficios completos le permiten ver un médico para todas sus necesidades médicas.</p> <p>Tomamos en cuenta el tamaño e ingresos de su hogar para tomar nuestra decisión.</p> <p>Para Medi-Cal, el tamaño de su hogar es <MagiSize> y los ingresos mensuales de su hogar son <MagilIncome>. El límite de ingresos mensuales de Medi-Cal para el tamaño de su hogar es de <MagilIncomeLimit>. Sus ingresos están por debajo de este límite, por lo que usted es elegible para Medi-Cal. Recibió Medi-Cal restringido porque usted no nos dio pruebas de su ciudadanía o de su situación migratoria satisfactoria.</p> <p><MagiRegulation> es el reglamento o ley en que nos basamos para tomar esta decisión. Usted puede apelar si le parece que cometimos un error. Lea "Su derecho a una audiencia" en la última página de este aviso para saber cómo apelar. Usted sólo tiene 90 días para pedir una audiencia. Los 90 días comenzaron el día después de la fecha de este aviso.</p>	<p>obtener su documento, por favor llame al trabajador de su condado al número anotado en este aviso. Sus beneficios podrían cambiar de restringidos a completos cuando nos proporcione sus documentos. Los beneficios completos le permiten ver un médico para todas sus necesidades médicas.</p> <p>Contamos el tamaño e ingresos de su hogar para tomar nuestra decisión.</p> <p>Para Medi-Cal, el tamaño de su hogar es <MagiSize> y los ingresos mensuales de su hogar son de <MagilIncome>. El límite de ingresos mensuales de Medi-Cal para el tamaño de su hogar es de <MagilIncomeLimit>. Sus ingresos están por debajo de este límite, por lo que usted es elegible para Medi-Cal. Usted recibió Medi-Cal restringido porque no nos dio pruebas de su ciudadanía estadounidense o situación de inmigración satisfactoria.</p> <p><MagiRegulation> es el reglamento o ley en que nos basamos para tomar esta decisión. Usted puede apelar si le parece que cometimos un error. Lea "Su derecho a una audiencia" en la última página de este aviso para saber cómo apelar. Usted sólo tiene 90 días para pedir una audiencia. Los 90 días comenzaron el día después de la fecha de este aviso.</p>	
<p>ID: 9528 <STATIC_SECTION> for age range of 'over 50'</p> <p>MAGI restricted scope to full scope</p>	<p>Su elegibilidad para beneficios de Medi-Cal completo podría cubrir los meses anteriores. Si usted pagó por cuidados médicos que no era una emergencia, relacionados con un embarazo o servicios de cuidados a largo plazo mientras usted tenía beneficios de Medi-Cal restringido, usted podría recibir una devolución de su dinero. Llame a Servicios al beneficiario de Department of Health Care Services al 1-916-403-2007 para respuestas a sus preguntas de reembolsos.</p> <p><MagiRegulation> es el reglamento o ley en que nos basamos para tomar esta</p>	<p>Su elegibilidad para los beneficios de Medi-Cal completo podría cubrir los meses anteriores. Si usted pagó por cuidados médicos fuera de una emergencia, relacionados con un embarazo o servicios de cuidados a largo plazo servicio mientras usted tenía beneficios de Medi-Cal restringido, usted podría recibir la devolución de su dinero. Llame a Servicios al beneficiario de Department of Health Care Services al 1-916-403-2007 para que respondan a sus preguntas sobre reembolsos.</p> <p><MagiRegulation> es el reglamento o ley en que nos basamos para tomar esta</p>	<p>Arial Font Size 10</p>

	decisión. Usted puede apelar si le parece que cometimos un error. Lea "Su derecho a una audiencia" en la última página de este aviso para saber cómo apelar. Usted sólo tiene 90 días para pedir una audiencia. Los 90 días comenzaron el día después de la fecha de este aviso.	decisión. Usted puede apelar si le parece que cometimos un error. Lea "Su derecho a una audiencia" en la última página de este aviso para saber cómo apelar. Usted sólo tiene 90 días para pedir una audiencia. Los 90 días comenzaron el día después de la fecha de este aviso.	
ID: 9530 <STATIC_SECTION> for age range of 'under 50' Non-MAGI restricted scope retro approval	<p>Si usted tiene pruebas de su situación de ciudadanía o inmigración que pueda darnos ahora o si quiere avisarnos que tiene problemas para obtener su documento, por favor llame a la oficina de Medi-Cal de su condado al número anotado en este aviso. Sus beneficios podrían cambiar de restringido a completo cuando usted nos proporcione sus documentos. Los beneficios completos le permiten ver un médico para todas sus necesidades médicas.</p> <p>California Code of Regulations, Title 22, Section(s) 51056, 50159, 50173, 50501, 50601, 50653, 50701, 50731, WIC 14007.8 es el reglamento o ley en que nos basamos para tomar esta decisión. Usted puede apelar si le parece que cometimos un error. Lea "Su derecho a una audiencia" en la última página de este aviso para saber cómo apelar. Usted sólo tiene 90 días para pedir una audiencia. Los 90 días comenzaron el día después de la fecha de este aviso.</p>	<p>Si usted tiene pruebas de su ciudadanía o situación de inmigración satisfactoria que pueda darnos ahora o quiere avisarnos que tiene problemas para obtener su documento, por favor llame al trabajador de su condado al número anotado en este aviso. Sus beneficios podrían cambiar de restringidos a completos cuando nos proporcione sus documentos. Los beneficios completos le permiten ver un médico para todas sus necesidades médicas.</p> <p>California Code of Regulations, Title 22, Section(s) 51056, 50159, 50173, 50501, 50601, 50653, 50701, 50731, WIC 14007.8 es el reglamento o ley en que nos basamos para tomar esta decisión. Usted puede apelar si le parece que cometimos un error. Lea "Su derecho a una audiencia" en la última página de este aviso para saber cómo apelar. Usted sólo tiene 90 días para pedir una audiencia. Los 90 días comenzaron el día después de la fecha de este aviso.</p>	Arial Font Size 10
ID: 9532 <DYNAMIC_SECTION> for age range of 'under 50' Non-MAGI restricted scope to full scope (Note: 'probar' changed to 'comprobar')	<p><Person></p> <p>¡Buenas noticias! Su Medi-Cal cambió a completo el <MonthDayYear1>.</p> <p>Su Medi-Cal está cambiando de restringido a completo porque usted pudo probar su ciudadanía estadounidense o una situación de inmigración satisfactoria o usted tiene menos de 26 años de edad. Su cobertura de Medi-Cal seguirá a menos que encontremos que usted ya no es elegible. Esto podría suceder al momento en que se renueve su elegibilidad o cuando cambie su situación.</p>	<p><Person></p> <p>¡Buenas noticias! Su Medi-Cal cambió a completo el <MonthDayYear1>.</p> <p>Su Medi-Cal está cambiando de restringido a completo porque usted pudo comprobar su ciudadanía estadounidense o una situación de inmigración satisfactoria o usted tiene menos de 26 años de edad. Su cobertura de Medi-Cal seguirá a menos que encontremos que usted ya no es elegible. Esto podría suceder al momento en que se renueve su elegibilidad o cuando cambie su situación.</p>	Arial Font Size 10

ID: 9532 <STATIC_SECTION> for age range of 'over 50' Non-MAGI restricted scope to full scope	Su elegibilidad para beneficios de Medi-Cal completo podría cubrir los meses anteriores. Si usted pagó por cuidados médicos que no era una emergencia relacionados con un embarazo mientras usted tenía beneficios de Medi-Cal restringido, usted podría recibir una devolución de su dinero. Llame a Servicios al beneficiario de Department of Health Care Services al 1-916-403-2007 para respuestas a sus preguntas de reembolsos. California Code of Regulations, Title 22, Section(s) 51056, 50159, 50173, 50601, 50653, 50701, 50731, 14007.8. es el reglamento o ley en que nos basamos para tomar esta decisión. Usted puede apelar si le parece que cometimos un error. Lea "Su derecho a una audiencia" en la última página de este aviso para saber cómo apelar. Usted sólo tiene 90 días para pedir una audiencia. Los 90 días comenzaron el día después de la fecha de este aviso.	Su elegibilidad para los beneficios de Medi-Cal completo podría cubrir los meses anteriores. Si usted pagó por cuidados médicos fuera de una emergencia o relacionados con un embarazo mientras usted tenía beneficios de Medi-Cal restringido, usted podría recibir la devolución de su dinero. Llame a Servicios al beneficiario de Department of Health Care Services al 1-916-403-2007 para que respondan a sus preguntas sobre reembolsos. California Code of Regulations, Title 22, Section(s) 51056, 50159, 50173, 50601, 50653, 50701, 50731, 14007.8 es el reglamento o ley en que nos basamos para tomar esta decisión. Usted puede apelar si le parece que cometimos un error. Lea "Su derecho a una audiencia" en la última página de este aviso para saber cómo apelar. Usted sólo tiene 90 días para pedir una audiencia. Los 90 días comenzaron el día después de la fecha de este aviso.	Arial Font Size 10
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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.

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

2.2.1 Overview

CA-231692 introduced new reason verbiage and fragments related to OAE. 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

2.2.2 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 and Spanish.

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

NOA Mockups/Examples: See Supporting Documents #1

2.2.3 NOA Reason Variable Population

No changes to any variable population.

2.2.4 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 OAE NOAs in the following threshold languages: Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-250301

Expand Task Search

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/03/2022	1.0	Initial Revision	Vallari Bathala
03/30/2023	1.1	Updated section 2.1.4 Page Validations to include Case Number in the validation message for "All" or "Completed".	Vallari Bathala

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to allow the Users to search for “All” or “Completed” Tasks without providing a Case Number as a search parameter.

1.1 Current Design

When searching for Tasks through the Task Search utility bar, the System requires the User to enter a Case Number for “All” and “Completed” statuses. Additionally, the page also does not have a mechanism for Users to search for “General” Tasks since these Tasks do not require a Case Number or Program when they are created.

1.2 Requests

Remove the Case Number restriction to allow “All” and “Completed” when a specific Worker Number is provided as a search parameter.

1.3 Overview of Recommendations

1. Update the search logic to return results when Users search for Tasks with Status of “All” and Case Number is not provided.
2. Update the search logic to return results when Users search for Tasks with Status of “Completed” and Case Number is not provided.
3. Update the Task Search page to allow Users to search by General Tasks.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Task Search

2.1.1 Overview

This section outlines the modifications to the Task Search page to allow Users to search for General Tasks and Tasks with “All” or “Completed” status without providing a Case Number as a parameter.

2.1.2 Task Search Mockup

My Tasks
My Watchlist
Task Search
My Banks

Task Search

Help

* - Indicates required fields

• **Status** - Case Number, Program, Category or Type is needed to search with a status of All or Completed.

▼ Refine Your Search

Case Number: [Select](#)
Worker ID: [Select](#)
Status:
Priority:
Due Date
From:

Program:
Bank ID: [Select](#)
Category:
Newly Assigned:
To:

Office Name: [Select](#)
Type:
Expedited:

Unit ID:
Sub-Type:

▼ Advanced Search

Assign Date
From:
Created Date
From:
Long Description:

To:
To:
General:

Completed/Voiced/Expired Date
From:
Created By: [Select](#)

To:

Results per Page: [Search](#)

Search Results Summary

Results 1 - 1 of 1

[Add Task](#)

	Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	
<input type="checkbox"/>	09/30/2022	4515734	Case Name	CS	Manual	Add Programs	Assigned	19ES00FJ00		Complete Edit

Action: * [Add Task](#)

Remove Bank Assignment: [Submit](#)

Figure 2.1.2-1 – Task Search Mockup

My Tasks

My Watchlist

Task Search

My Banks

Task Search

Help

*- Indicates required fields

Max search results threshold exceeded. Only showing the first 5000 results. Please refine the search if necessary.

Refine Your Search

Case Number:

Select

Program:

Worker ID:

Select

Bank ID:

Select

Office Name:

Select

Unit ID:

00

Status:

Assigned

Category:

Type:

Sub-Type:

Priority:

Newly Assigned:

Expedited:

Due Date From:

To:

Advanced Search

Assign Date From:

To:

Completed/Voiced/Expired Date From:

To:

Created Date From:

To:

Created By:

Select

Long Description:

Results per Page: 100 Search

Search Results Summary

Results 1 - 100 of 5000

1 2 3 4 5 6 7 8 9 10 Next

Add Task

	Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID
<input type="checkbox"/>	07/03/2022				e-Application	Clearance BenefitsCal	Assigned		
<input type="checkbox"/>	07/03/2022				e-Application	Clearance BenefitsCal	Assigned		

Figure 2.1.2-2 – Task Search Mockup

showing the first 5000 results. Please refine the search if necessary.

Reference *Figure 2.1.2-2 – Task Search Mockup* in section 2.1.2 Task Search Mockup.

3. Add General dropdown to the Task Search page in the Advanced Search section:
 - a. Blank (Default)
 - b. No
 - c. Yes

Reference *Figure 2.1.2-3 – Task Search Mockup; General = Yes* in section 2.1.2 Task Search Mockup.

4. If General filter is applied, the results will only display Tasks created as a General Task.

Note: If additional search parameters are applied that are different than General, such as Case or Program, the search will not return results.

2.1.4 Page Validations

Add page validations to Task Search page when a User tries to search for Tasks in the following scenarios:

1. The User searches for Tasks with "All" or "Completed" without providing Case Number, Program, Category or Type, display the following validation: Status – Case Number, Program, Category or Type is needed to search with a status of All or Completed.
 - a. This validation will not trigger when running a search by an organization level and an "Expedited" value of 'Yes'. This allows Users to perform a search for Expedited Tasks with a specific organization level.
2. The User searches for Tasks with the General filter applied without providing a Worker ID, Office name, Unit ID, or Bank ID, display the following validation: General – Please select a Worker ID, Office, Unit ID or Bank ID.

2.1.5 Page Location

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

Page is accessible through Utility bar's Tasks Option.

2.1.6 Security Updates

N/A

2.1.7 Page Mapping

Update the page mapping for the added fields.

2.1.8 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.5	<p>The LRS shall allow COUNTY-specified Users to access alerts, reminders, and controls by using the following criteria in order to initiate a search:</p> <ul style="list-style-type: none">a. All alerts, reminders, and controls on a case or a file;b. A specified due date or a range of due dates;c. Type of alert, reminder, or control; andd. Status of alert, reminder, or control.	<ul style="list-style-type: none">1. Update the search logic to return results when Users search for Tasks with Status of "All" and Case Number is not provided.2. Update the search logic to return results when Users search for Tasks with Status of "Completed" and Case Number is not provided.3. Update the Task Search page to allow Users to search by General Tasks.



California Statewide Automated Welfare System

Design Document

CA-250529

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

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Trevor Torres
	Reviewed By	Brian Munce, Michael Wu

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/6/2023	1.0	Initial Revision	Trevor Torres
3/30/2023	2.1	Updated Section 2.2 since Cancel button is already existing on the page. Change is to just make it display at all times	Kusnadi.E

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1 OVERVIEW

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

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Security Assignment

2.1.1 Overview

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

2.1.2 Security Assignment Mockups

Security Assignment

*- Indicates required fields

Edit

Close

Security Profile

Staff Name:

Testing Johnson

Add User Name

Assigned Security Roles

No Data Found

Assigned Security Groups

No Data Found

Edit

Close

This Type_1 page took 0.96 seconds to load.

Figure 2.1.1 – Security Assignment Page “Add User Name”

2.1.3 Description of Changes

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

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

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

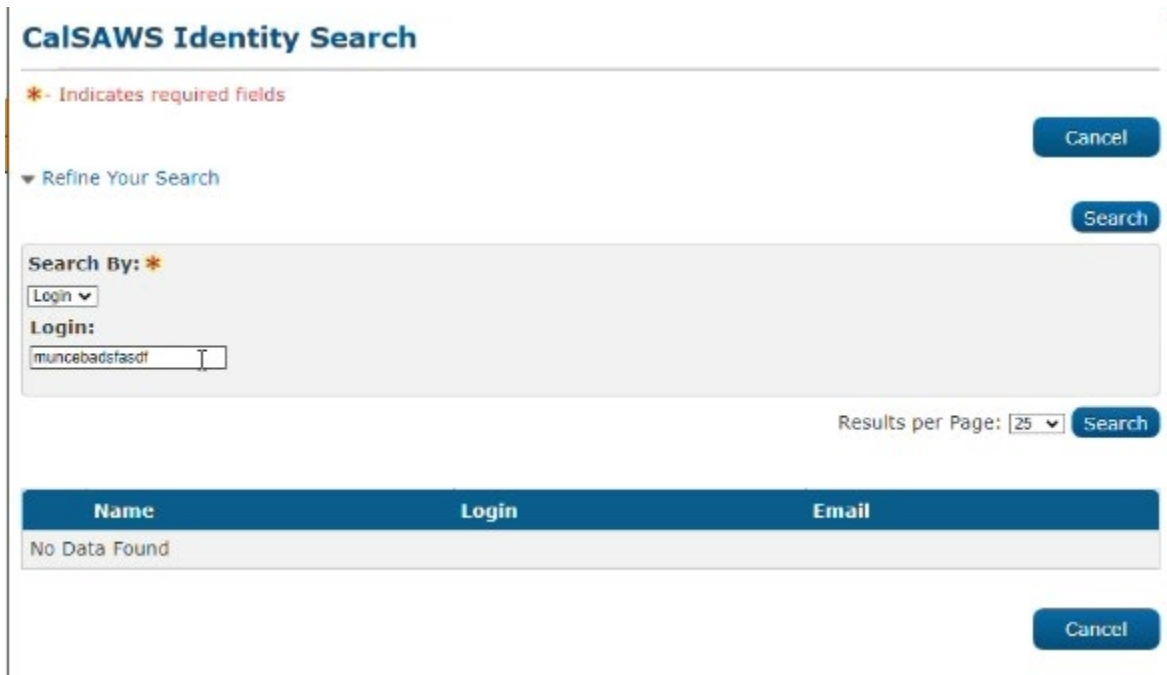
N/A

2.2 CalSAWS Identity Search

2.2.1 Overview

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

2.2.2 CalSAWS Identity Search Mockups



This mockup shows the CalSAWS Identity Search page with no search results. The page includes a header, a legend for required fields, a search refinement section, a search form, and a results table.

CalSAWS Identity Search

*- Indicates required fields

Cancel

▼ Refine Your Search

Search

Search By: *

Login ▼

Login:

muncbadstasdt

Results per Page: 25 Search

Name	Login	Email
No Data Found		

Cancel

Figure 2.2.1 – CalSAWS Identity Search Page “Cancel” Button Mockup



This mockup shows the CalSAWS Identity Search page with one search result. The page includes a header, a legend for required fields, a search refinement section, a search form, and a results table.

CalSAWS Identity Search

*- Indicates required fields

Cancel

► Refine Your Search

Search Results Summary Results 1 - 1 of 1

Select

Name	Login	Email
<input type="radio"/> B Munce	MunceB	MunceB@CalSAWS.org

Select

Cancel

Figure 2.2.2 – CalSAWS Identity Search Page “Cancel” Button Mockup

2.2.3 Description of Changes

1. Update the CalSAWS Identity Search page to always display the “Cancel” button.
Note: The Cancel button will continue to function as it currently is (currently the Cancel button will only display under the Search Result Summary section).

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

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

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

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

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Automated Regression Test

2.3.1 Overview

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

2.3.2 Description of Changes

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

3 REQUIREMENTS

3.1 Project Requirements

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253348

Task Mgmt: Track Time Spent Working Task

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/04/2023	1.0	Initial Revision	Vallari Bathala
03/27/2023	1.1	Section 2.2.3 Description of Changes Added clarification to 1.a and 1.b specify that the "Start Task" and "Stop Task" buttons will not be available when a Task's status is Complete, Void or Expired.	Vallari Bathala

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1 OVERVIEW

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

1.1 Current Design

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

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

N/A

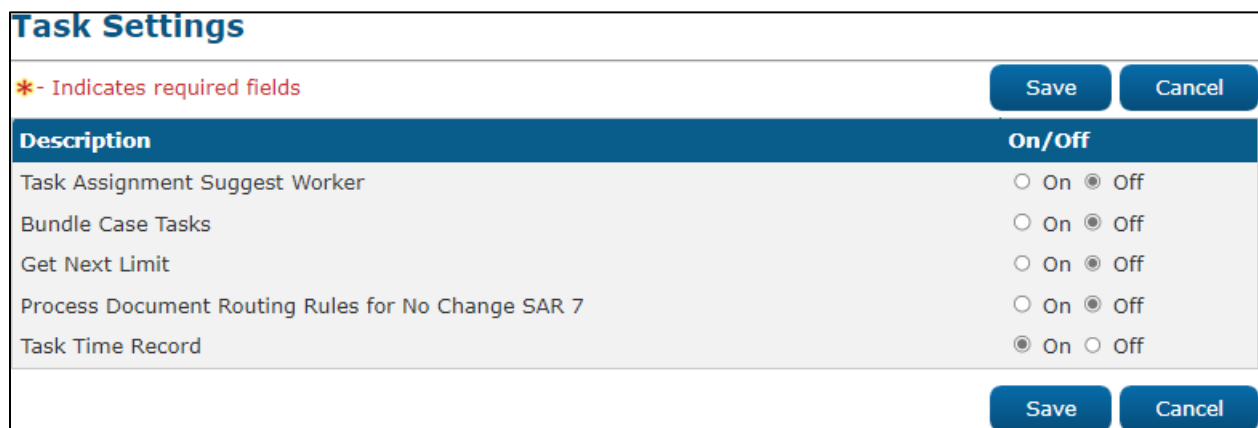
2 RECOMMENDATIONS

2.1 Task Settings Page

2.1.1 Overview

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

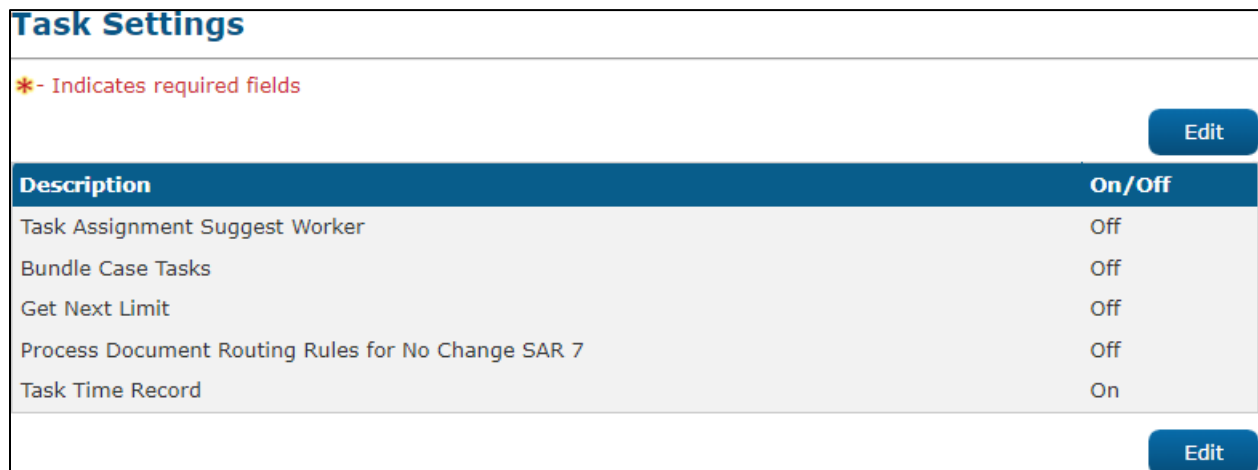
2.1.2 Task Settings Mockup



The mockup shows the 'Task Settings' page in edit mode. It features a title bar, a legend for required fields, a table of settings with 'On/Off' radio buttons, and 'Save' and 'Cancel' buttons at the top and bottom right.

Description	On/Off
Task Assignment Suggest Worker	<input type="radio"/> On <input checked="" type="radio"/> Off
Bundle Case Tasks	<input type="radio"/> On <input checked="" type="radio"/> Off
Get Next Limit	<input type="radio"/> On <input checked="" type="radio"/> Off
Process Document Routing Rules for No Change SAR 7	<input type="radio"/> On <input checked="" type="radio"/> Off
Task Time Record	<input checked="" type="radio"/> On <input type="radio"/> Off

Figure 2.1.2-1 – Task Settings – Edit Mode



The mockup shows the 'Task Settings' page in view mode. It features a title bar, a legend for required fields, a table of settings with 'On/Off' text labels, and an 'Edit' button at the top right and bottom right.

Description	On/Off
Task Assignment Suggest Worker	Off
Bundle Case Tasks	Off
Get Next Limit	Off
Process Document Routing Rules for No Change SAR 7	Off
Task Time Record	On

Figure 2.1.2-2 – Task Settings – View Mode

2.1.3 Description of Changes

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

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

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Task Pop-Up: Task Detail Page

2.2.1 Overview

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

2.2.2 Task Detail Mockup

Task Detail

Result 1 of 1 - 100

Help

* - Indicates required fields

Start Task

Save and Return

Save

Cancel

Case Number:	Case Name:	Program(s): *	Status: * Assigned	Reference Number:
Category: * e-Application	Type: * Clearance BenefitsCal	Sub-Type: 	Priority: Critical	Expedited: No
Due Date: * 12/20/2022	Date Created: 12/15/2022	Worker Assigned Date:	Start Date:	
Assign to Program Worker: No	Worker ID: Select	Bank ID: Select	Automated Action: No	

Long Description:

Instructions

Task History

Task Time Record

No Data Found

Save and Return

Save

Cancel

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

Task Detail

Result 1 of 1 - 100

[Help](#)

*- Indicates required fields

Start Task
Save and Return
Save
Cancel

Case Number:	Case Name:	Program(s): *	Status: * Assigned
Category: * e-Application	Type: * Clearance BenefitsCal	Sub-Type: 	Reference Number:
Due Date: * 12/20/2022	Date Created: 12/15/2022	Worker Assigned Date:	Priority: Critical Expedited: No
Assign to Program Worker: No	Worker ID: <input type="text"/> Select	Bank ID: <input type="text"/> Select	Start Date: <input type="text"/>
Automated Action: No			

Long Description:

▶ Instructions

▶ Task History

▼ Task Time Record

Total Duration: 01:25:00

Worker Name	Worker ID	Start Time	Stop Time	Stop Type	Total Time
John Doe	19XX000000	12/20/22 02:00:00 PM	12/20/22 03:25:00 PM	Manual Stop	01:25:00

Save and Return
Save
Cancel

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

Task Detail

Result 1 of 1 - 100

[Help](#)

* - Indicates required fields

Stop Task
Save and Return
Save
Cancel

Case Number:

Category: *
e-Application

Due Date: *
12/20/2022

Assign to Program Worker:
No

Case Name:

Type: *
Clearance BenefitsCal

Date Created:
12/15/2022

Worker ID:
 Select

Program(s): *

Sub-Type:

Worker Assigned Date:

Bank ID:
 Select

Status: *
Assigned

Priority:
Critical

Automated Action:
No

Reference Number:

Expedited:
No

Start Date:

Long Description:

▶ Instructions

▶ Task History

▼ Task Time Record

Total Duration: 01:25:00

Worker Name	Worker ID	Start Time	Stop Time	Stop Type	Total Time
Jane Doe	19WW000000	12/20/22 04:30:00 PM			
John Doe	19XX000000	12/20/22 04:15:00 PM			
John Doe	19XX000000	12/20/22 02:00:00 PM	12/20/22 03:25:00 PM	Manual Stop	01:25:00

Save and Return
Save
Cancel

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

Task Detail
Help

←
Result 1 of 1 - 100
→

* - Indicates required fields

Stop Task

Start Watching

Edit

Print

Close

Case Number	Case Name:	Program(s): *	Status: *
			Assigned
Category: *	Type:	Sub-Type:	Priority: Expedited:
e-Application	Clearance BenefitsCal		Critical No
Due Date: *	Date Created:	Worker Assigned Date:	Start Date:
12/20/2022	12/15/2022		
Assign to Program Worker:	Worker ID:	Bank ID:	Automated Action:
No			No

Long Description:

▶ Instructions

▶ Task History

▼ Task Time Record

Total Duration: 01:25:00

Worker Name	Worker ID	Start Time	Stop Time	Stop Type	Total Time
John Doe	19XX000000	12/20/22 04:15:00 PM			
John Doe	19XX000000	12/20/22 02:00:00 PM	12/20/22 03:25:00 PM	Manual Stop	01:25:00

Save and Return

Save

Cancel

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

2.2.3 Description of Changes

1. Update the Task Pop-Up: Task Detail page to add the following:
 - a. **BUTTON:** Start Task – This button will display when:
 - i. The page is in View or Edit mode
 - ii. The “Task Time Record” Task Setting is enabled for the county
 - iii. The viewing Worker does not already have an active Task Time Record entry for the Task that has not been stopped.
 When clicked, the “Start Task” button will be replaced by a “Stop Task” button and a row will be added to the Task Time Record panel with the start time and worker information. This entry is considered an active Task Time Record entry for the Worker/Task.

The “Start Task” button will not be available once Tasks are in one of the following statuses: Complete, Void or Expired.

- b. **BUTTON:** Stop Task – This button will display when:
 - i. The page is in View or Edit mode
 - ii. The “Task Time Record” Task Setting is enabled for the county

- iii. The viewing Worker has an active Task Time Record entry for the Task that does not have a Stop Time.
When clicked, the “Stop Task” button will be replaced by a “Start Task” button and the active Task Time Record entry for the worker will be updated with the Stop Time as the time the button was clicked. The Stop Type will be set to “Manual Stop”.

The “Stop Task” button will not be available once Tasks are in one of the following statuses: Complete, Void or Expired.

c. Task Time Record

A new collapsible panel below the ‘Task History’ panel. The panel will display as collapsed in all page modes whether the panel includes information or not. This panel display whether the “Task Time Record” Task Setting has been enabled for the county or not.

The following field and columns will display in this panel for each Start event:

- a. Total Duration – A single field that will show the sum of the “Total Time” column from each row in the panel.
 - i. The time will display formatted as HH:MM:SS.
- b. Worker Name – This column will display the staff first and last name of the User who clicked the “Start Task” button to initiate recording of the time spent working on the Task.
- c. Worker ID – This column will display the Worker ID of the User who clicked the “Start Task” button to initiate recording of the time spent working on the Task.
- d. Start Time – This column will display the date and time indicating when the User clicked the “Start Task” button to initiate recording of the time spent working on the Task.
 - i. The time will be displayed as MM/DD/YYYY HH:MM:SS AM/PM.
- e. Stop Time - This column will display the date and time indicating when the User clicked the “Stop Task” button to stop the active Task Time Record entry or the date and time that a Stop Event occurred for the Task. (See [Section 2.3](#) for additional information)
 - i. The time will be displayed as MM/DD/YYYY HH:MM:SS AM/PM.
- f. Stop Type – This column indicates the type of stop event that occurred (Reference [Section 2.3](#) for additional details). Possible values within this column are:
 - i. Manual Stop – A worker manually clicked the “Stop Task” button to end the active Task Time Record.
 - ii. End Task – The Task Status was set to Complete or Void.
 - iii. Logout – A Timeout or a Logout event occurred resulting in the logged Stop Time.

- iv. Batch – Batch processing logged the Stop Time for the active Task Time Record (Reference [Section 2.4](#) for additional details)
- g. Total Time – This column will display the total time between the “Start Time” and “Stop Time” values for each row. This field will only be calculated for rows with a Stop Time. This column will be blank for rows that do not have a Stop Time.

2.2.4 Page Location

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

Page is accessible through Utility bar's Tasks Option.

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

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

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Stop Events and Behavior

2.3.1 Overview

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

2.3.2 Description of Changes

1. Stop Events

A Stop Event is an event or action that will result in Stop Times being recorded for active Task Time Record entries.

- a. Task End State Reached

- i. If a Worker Completes or Voids a Task, all active Task Time Record entries will be updated with the Stop Time and a Stop Type of "End Task".
 - 1. Example: A Worker clicks the "Start Task" button to initiate work on the task and log an active Task Time Record entry. The Worker takes the appropriate action for the Task and updates the Task to Complete. The action of updating the Task to Complete will log the date/time as the Stop Time of the active Task Time Record entry with a Stop Type of "End Task". The Worker is not required to click the "Stop Task" button separately.
- b. Timeout
 - i. If the Worker's CalSAWS session times out, all active Task Time Record entries for the Worker will be updated with the Stop Time and a Stop Type of "Logout".
- c. Logout
 - i. If a Worker clicks the Logout hyperlink to log out of CalSAWS, all active Task Time Record entries for the Worker will be updated with the Stop Time and a Stop Type of "Logout".

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

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

2. Active Task Time Record Prompt

When a Worker leaves the context of a Case within the CalSAWS System and the worker has an active Task Time Record for a Task that is associated to the Case, an overlay prompt will display as follows:

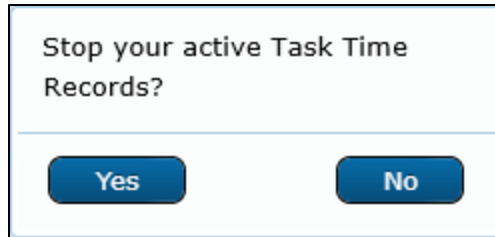


Figure 2.3.2-1 – Active Task Time Record Overlay Mockup

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

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

Example 1:

A Worker has a Task assigned to them for Case 123 and they click the "Start Task" button for the Task. The Worker then navigates into Case context for the Case in the CalSAWS window to action the Task/Case.

Result: Soft Validation DOES NOT display

Worker Action: N/A

Example 2:

A Worker has a Task assigned to them for Case 123 and they click the "Start Task" button for the Task. The Worker then navigates into Case context for the Case in the CalSAWS window and spends some time within Case context. The Worker then attempts to leave Case context by navigating to the Homepage prior to manually stopping the active Task Time Record.

Result: Soft Validation DOES display

Worker Action: Worker clicks "Yes"

The active Task Time Record that the Worker started for the Task on Case 123 will be updated with the appropriate Stop Time and a Stop Type of "Manual Stop".

Example 3:

A Worker has two Tasks assigned to them, one for Case 123 and one for Case 789. The Worker clicks the "Start Task" button for the Task associated to Case 123, navigates into the Case context for Case 123 and works the Case. The Worker then chooses to begin work on the Task for Case 789 and clicks "Start Task". The Worker attempts to leave the context of Case 123 and enter Case context for Case 789.

Result: Soft Validation DOES display

Worker Action: Worker clicks "No"

The active Task Time Record that the Worker started for the Task on Case 123 will not be modified.

The Worker then spends time actioning Case 789 and after some time attempts to leave Case context by navigating to the Homepage.

Result: Soft Validation DOES display

Worker Action: Worker clicks "Yes"

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

2.4 Task Time Record: Stop Task Batch Job

2.4.1 Overview

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

2.4.2 Description of Change

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

2.4.3 Execution Frequency

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

2.4.4 Key Scheduling Dependencies

None.

2.4.5 Counties Impacted

All CalSAWS Counties.

2.4.6 Category

Non-Core.

2.4.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.4.8 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

N/A