CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213047

Add Projected Hours to Employment Hours Detail Page

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/4/2023	1.0	Initial design	Connor O'Donnell

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1 OVERVIEW

This SCR will add the ability for users to create and display Projected Hours on the Employment Hours Detail page that are based on actual verified hours that a user enters. The user will be able to determine whether or not they want future hours to be predicted of the current month to account for the needs of the different counties.

1.1 Current Design

Users can add employment hours for past months and current month on the Welfare to Work Employment Hours – Employment Detail page.

1.2 Requests

Allow users to add projected Employment hours on the Welfare to Work Employment Hours – Employment Detail page based upon verified hours reported by the customer, with start and end date to auto populate employment hours projected for the each month indicated for a 6 month projection period. If the customer reports a change to hours prior to the end of the 6 month projection, allow the user to edit the projected hours as needed through the next, mid-period report, SAR or RE.

1.3 Overview of Recommendations

1. Update the Employment Hours Detail page to allow for the creation and display of Projected Hours for five future months based on verified Actual Hours.

1.4 Assumptions

1. N/A

2 RECOMMENDATIONS

2.1 Employment Hours Detail Page

2.1.1 Overview

The Employment Hours Detail page currently allows a worker to add values for the Actual Hours for a given Employment record's current and prior months. This SCR will add the ability for a worker to create and display Projected Hours based on those already verified Actual Hours.

2.1.2 Employment Hours Detail Mockup

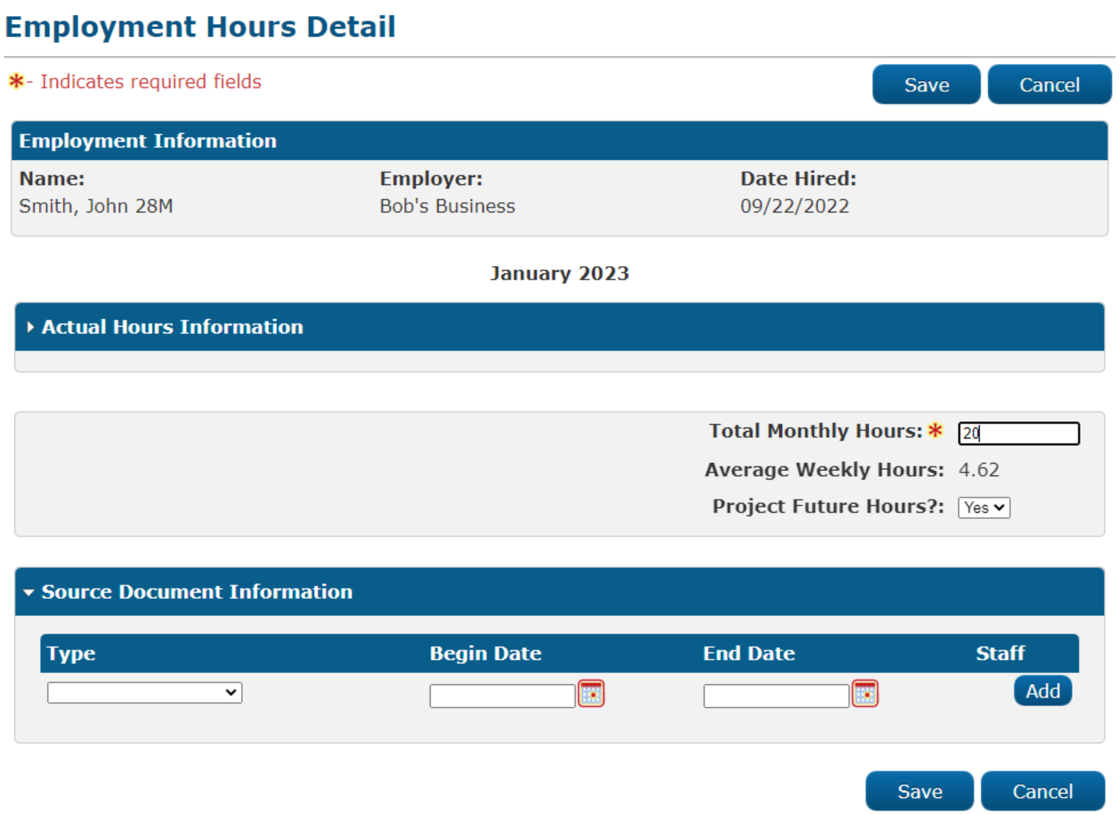

Figure 2.1.1 – Employment Hours Detail (Edit Mode – Before Projection) Mockup

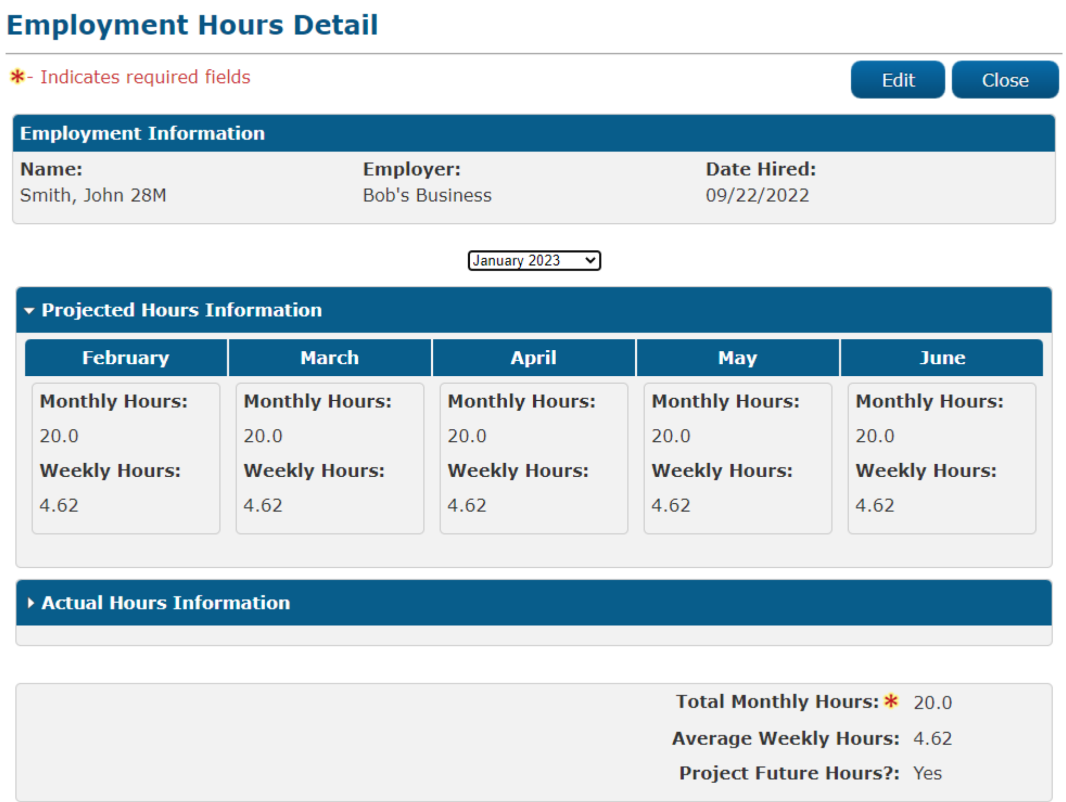

Figure 2.1.2 – Employment Hours Detail (View Mode) Mockup

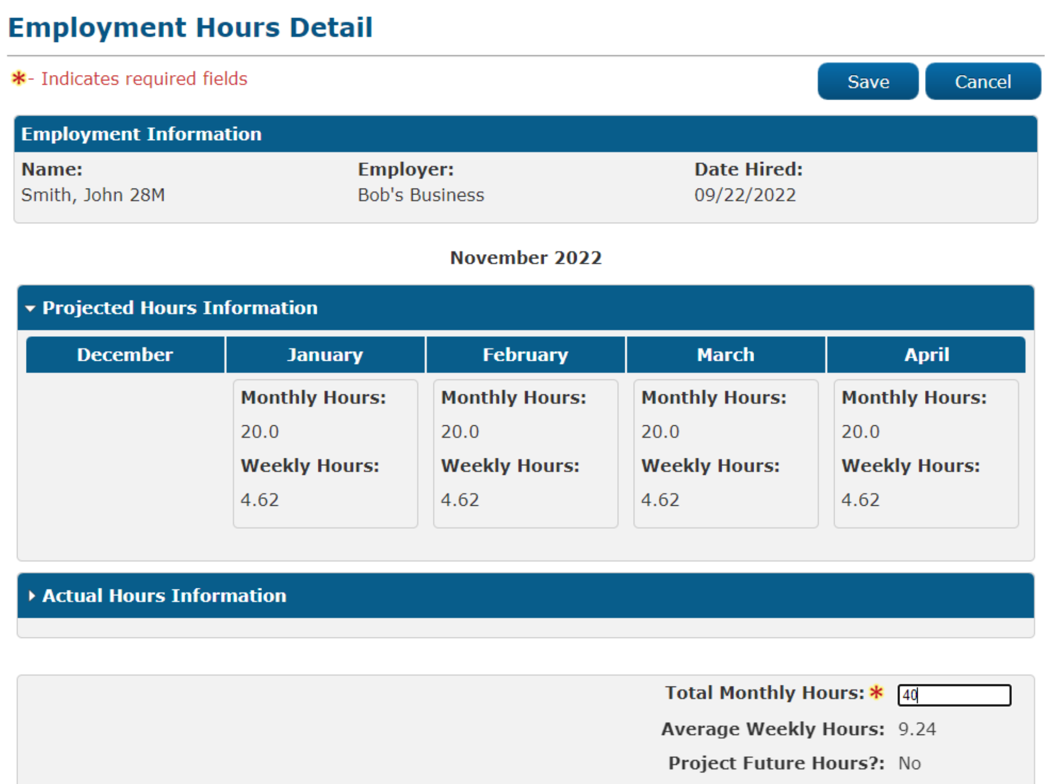

Figure 2.1.3 – Employment Hours Detail (Edit Mode – After Projection) Mockup

2.1.3 Description of Changes

1. Add a new dynamic expandable section to the page labeled 'Projected Hours Information'. This section will only appear if there is a Projected Hour value for any of the next five months. This section will contain the following information:
    a. This section will contain five smaller tables displayed horizontally. These five tables will be labeled with the five months and years after the month currently being viewed (i.e. if the viewed month is 'November 2022', then the table labels will be 'December 2022', 'January 2023', 'February 2023', 'March 2023', and 'April 2023'. These tables will display the following information if there are hours projected for that month:
        i. Monthly Hours: This will display the Projected Hour value.
        ii. Weekly Hours: This value will be populated using a calculation from the 'Monthly Hours' value. This field will be calculated in the same way that the 'Average Weekly Hours' field is calculated from the 'Total Monthly Hours' field.
2. Add a new field labeled 'Project Future Hours?' below the 'Average Weekly Hours' field. This field will show whether Projected Hours should be created based on a given month. This field will only be editable if the month being edited is the current month. The editable version of the field will have two values:
    a. 'Yes' – This is the default value. When a non-null value is saved into the 'Total Monthly Hours' field (which is shown below the 'Actual Hours information' section), 'Project Future Hours?' is set to 'Yes', and it is the current month, a 'Monthly Hours' value will be saved for the current month. This same value will be saved for the next five months. If it is not the current month a 'Monthly Hours' value will be saved only for the current month.
    b. 'No' - When a non-null value is saved into the 'Total Monthly Hours' field (which is shown below the 'Actual Hours information' section), and 'Project Future Hours?' is set to 'No', and it is the current month, a 'Monthly Hours' value will be saved for the current month, and the 'Monthly Hours' value will be deleted for any future months. If it is not the current month a 'Monthly Hours' value will be saved only for the current month.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add page mapping for the newly added fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Automated Regression Test

2.2.1 Overview

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

2.2.2 Description of Changes

Confirm that the new Projected Hours function correctly.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Design	Projected Hours Scenario Examples	CA-213047 Projected Hours Exa

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

[Document any migration impacts such as data model or potential business process changes]

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

6 OUTREACH

[Include any specific outreach that needs to occur with implementation i.e. a CIT, a special webcast or onsite demonstration, any lists, etc…]

6.1 Lists

[Include a summary of the list(s). If there is more than one list, separate them with a numbered list and include the Location and Standard Columns only once in the overall summary.]

List Name: <List Name>
List Criteria: <Describe criteria for generating list>
Standard Columns:

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

Additional Column(s): <list additional columns, if any>
Frequency: <One-time, monthly, quarterly, etc.>

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>YYYY>CA-XXXXXX

7 APPENDIX

[Include any supplementary items that my not fit in the Description section. Examples could include flow charts, lengthy code tables, etc.…]

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-229002

Update MC 372 and Add MC 373

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/21/2023	0.1	Initial Draft	Maria Jensen

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1 OVERVIEW

The MC 372 has been rewritten to provide Medi-Cal applicants and beneficiaries the two options on how to obtain more information and apply for BCCTP, while using minimal eligibility information to encourage individuals to apply. Counties shall continue to include the MC 372 flyer in all Medi-Cal intake and redetermination packets. The MC 373 has been updated to streamline the referral process between counties and BCCTP.

1.1 Current Design

The current version of the MC 372 Breast and Cervical Cancer Treatment Program (BCCTP) in the Template Repository is 09/09.

The MC 373 County Referral to the Breast and Cervical Cancer Treatment Program form referenced on the MEDIL I-22-03 is not available in the Template Repository in CalSAWS.

1.2 Requests

Per DHCS, update the MC 372 and MC 373 to the newest State versions.

1.3 Overview of Recommendations

1. Update the MC 372 form to the latest State version (12/2021) in the Template Repository and for auto generated renewal packets.

2. Add/Update the MC 373 to the newest State version (12/2021).

1.4 Assumptions

1. Currently CalSAWS only generates forms in black and white. This will not change with this effort.
2. The MC 373 State form has error checks for mandatory input fields that are outlined in red. CalSAWS does not verify mandatory fields within forms at this time and this will not be changed with this effort.
3. SCR CA-257538 will add pre-population to MC 373.

2 RECOMMENDATIONS

2.1 Update Form MC Info Notice 372

2.1.1 Overview

This SCR will update form MC Info Notice 372 in CalSAWS to match the latest version available on the State website (revision 12/2021).

State Form: MC 372 (09/09)

Current Programs: MC

Current Attached Form(s): None

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

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

2.1.2 Form/NOA Verbiage

This SCR will bring significant updates to the verbiage. The CalSAWS 1 impression form will continue to have the DHCS Standard Header (Header_3-4). This effort does not bring any updates to the form header.

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

Note: Lao is not currently available on the State website.

Form Number: MC Info Notice 372 (12/2021)

Form Mockups/Examples: See Supporting Documents #1 for newest SMC 372 Form.

The following 3 Packets will need to be updated to reference the new footer for form MC 372:

MAGI RE Packet Non LA, Mixed HH RE Packet Non LA, Non-MAGI RE Packet Non LA.

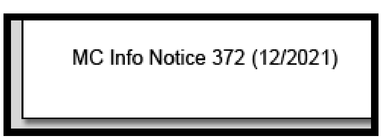


Fig. 2.1.4.1 New MC 372 Footer

2.1.3 Form/NOA Variable Population

The form does not have any variable population and will continue to be a brochure type, static form.

2.1.4 Form/NOA Generation Conditions

1. **Updates to Form Generation**

   There will be no updates to the Form Generation, Form Control, nor Print/Mailing Options. The form will continue to have all print options available.

2.2 Add Form MC 373

2.2.1 Overview

This SCR will add the State form MC 373 - County Referral to the Breast and Cervical Cancer Treatment Program (revision 12/2021) to the CalSAWS system. This was provided by MEDIL I-22-03 in order to streamline the referral process between counties and BCCTP.

State Form: MC 373 (12/2021)

Programs: Medi-Cal

Attached Forms: N/A

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: English

Commented [TH1]: provide SCR# for additional threshold

Commented [MJ2R1]: See above

2.2.2 Form/NOA Verbiage

Create Form XDP

The new form will have 1 impression which will consist of specific verbiage provided by the State with many input fields. Please see the Supporting Documents #2 for details.

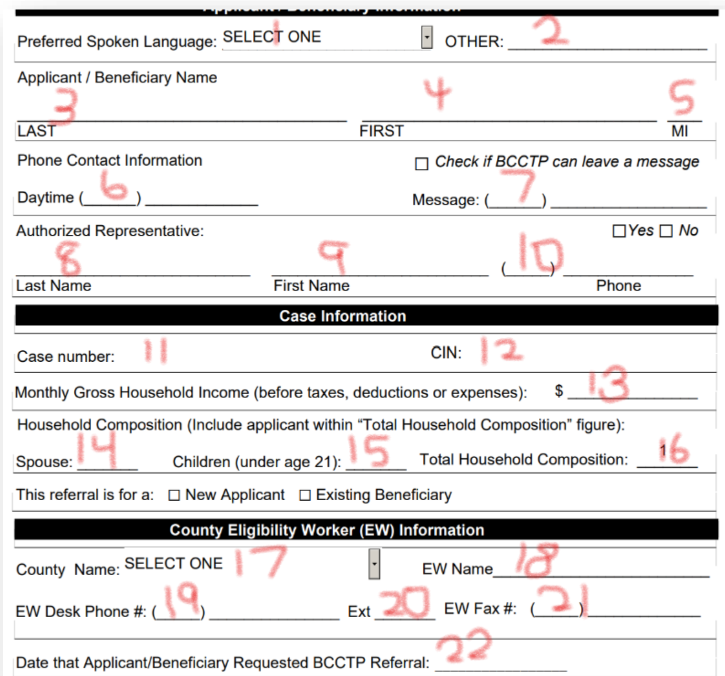
Form Header: DHCS Standard Header (Header_3-4)
Form Title (Document List Page Displayed Name): County Referral to the Breast and Cervical Cancer Treatment Program (BCCTP)
Form Number: MC 373

Include NA Back 9: No
Imaging Form Name: County Referral to the BCCTP
Imaging Document Type: Medi-Cal (MC)
Imaging Case/Person: Case
Form Mockups/Examples: See Supporting Documents #2 for PDF Mockup

2.2.3 Form/NOA Variable Population

Note: SCR CA-257538 will add pre-population to MC 373.

The following fields will be available and editable by the worker:



Preferred Spoken Language: SELECT ONE 1 OTHER: 2

Applicant / Beneficiary Name

3 4 5

LAST FIRST MI

Phone Contact Information ☐ *Check if BCCTP can leave a message*

Daytime (6) Message: (7)

Authorized Representative: ☐*Yes* ☐ *No*

8 9 (10)

Last Name First Name Phone

Case Information

Case number: 11 CIN: 12

Monthly Gross Household Income (before taxes, deductions or expenses): $ 13

Household Composition (Include applicant within "Total Household Composition" figure):

Spouse: 14 Children (under age 21): 15 Total Household Composition: 16

This referral is for a: ☐ New Applicant ☐ Existing Beneficiary

County Eligibility Worker (EW) Information

County Name: SELECT ONE 17 EW Name 18

EW Desk Phone #: (19) Ext 20 EW Fax #: (21)

Date that Applicant/Beneficiary Requested BCCTP Referral: 22

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
LANG (1)	No, pre-population.	Arial, Font size 10	Y, Text Field	N	N/A

	Worker entered only.				
OTHER (2)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
APP_LAST (3)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
APP_FIRST (4)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
APP_MI (5)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
CB_BCCTP (checkbox)	No, pre-population. Worker entered only.	N/A	Y, Checkbox	N	N/A
APP_PHONE (6)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
MESS_PHONE (7)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
AUTH_Y (checkbox)	No, pre-population. Worker entered only.	N/A	Y, Checkbox	N	N/A
AUTH_N (checkbox)	No, pre-population. Worker entered only.	N/A	Y, Checkbox	N	N/A
AUTH_LAST (8)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
AUTH_FIRST (9)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
AUTH_PHONE (10)	No, pre-population.	Arial, Font size 10	Y, Text Field	N	N/A

	Worker entered only.				
CASE_NUM (11)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
CIN (12)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
INC_AMT (13)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Numeric X,XXX.XX	N	N/A
SPOUSE (14)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Numeric X,XXX	N	N/A
CHILDREN (15)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Numeric X,XXX	N	N/A
TOTAL_HH (16)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Numeric X,XXX	N	N/A
CB_NEW_APP (checkbox)	No, pre-population. Worker entered only.	N/A	Y, Checkbox	N	N/A
CB_EXIST_APP (checkbox)	No, pre-population. Worker entered only.	N/A	Y, Checkbox	N	N/A
COUNTY (17)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
EW_NAME (18)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
EW_PHONE (19)	No, pre-population.	Arial, Font size 10	Y, Text Field	N	N/A

	Worker entered only.				
EW_EXT (20)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
EW_FAX (21)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Text Field	N	N/A
DATE_BCCTP (22)	No, pre-population. Worker entered only.	Arial, Font size 10	Y, Date Field 'mm/dd/yyyy'	N	N/A

2.2.4 Form/NOA Generation Conditions

1. **Add Form to Template Repository**

Add Form MC 373 to the Template Repository in English for all 58 counties.

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

2. **Add Form Control**

Barcode options for the MC 373 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

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

Include the following Print Options and Mailing Requirements for Form MC 373:

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

Mailing Requirements:
Mail-To (Recipient): N/A
Note: Assumption is that this will be emailed or faxed)
Mailed From (Return): N/A

Mail-back-to Address: N/A
Outgoing Envelope Type: N/A
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: N/A
Enclosures: No
Electronic Signature: No
Post to SSP: No
Clock Indicator: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	MC 372 Mockup (English)	MC372_EN.pdf
2	Forms	MC 373 Mockup (English)	MC373_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.2 CAR-1206	The LRS shall generate written material, including notices, NOAs, forms, flyers, letters, and stuffers, to applicants, participants, caregivers, sponsors, authorized representatives, and/or any other entities, in English, all threshold languages, and any other language for which the State has provided a translation.	This SCR will add State form MC 373 in English and will update State form MC Info Notice 372 in English and threshold languages, in the CalSAWS system.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-240164

Santa Cruz County Contact Center Deployment

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nicole Kenny
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/29/2022	0.1	Initial Draft	Nicole Kenny

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1 OVERVIEW

Santa Cruz County does not currently have a CalSAWS contact center in the Amazon Connect Environment. This SCR will deploy a brand-new Contact Center to handle inbound and outbound calls to customers.

1.1 Current Design

Santa Cruz County currently maintains their own contact center solution.

1.2 Requests

Build a new contact center solution in the CalSAWS contact center environment.

1.3 Overview of Recommendations

1. Continuing Service Center (CSC)
    a. Claim a new phone number for inbound calls.
        i. County owned Toll-Free Number will be pointed to this number.
    b. Build their county specific call flow
        i. See attached Call Flow (CA-240164 – Santa Cruz County Call Flow.pdf) for details
    c. Record new county specific prompts
        i. See attached Prompts Excel sheet (CA-240164 – Santa Cruz County Verbiage.xlsx) for details
    d. Build new Continuing Queues
        i. See attached Exit Reasons Excel sheet (CA-240164 – Santa Cruz County Exit Reasons.xlsx) for details
    e. Set their Hours of Operations for Inbound Queues
    f. Create Quick Connects
        i. See attached Quick Connects Excel sheet (CA-240164 – Santa Cruz County Quick Connects.xlsx) for details.
    g. Holiday Dates
        i. Upload County Holidays to the Holiday DynamoDB
    h. Office Hours and Location
        i. Upload County Zip Codes to the Office DynamoDB
        ii. See the Zip Codes Excel sheet (CA-240164 – Santa Cruz County Zip Codes) for details
    i. Upload Agents
2. Regional Call Center (RCC)
    a. Update RCC call flow to accept county code 44 as a CalSAWS county
        i. See attached Call Flow (CA-240164 - Wave 4 RCC Call Flow.pdf) for details
    b. Create new Voicemail box
    c. Build new RCC Queues
    d. Create a Generic Worker for County 44
3. Optional Features
    a. Web Chat

    b. Click to Call
    c. Post Call Survey
    d. Courtesy Call Back
    e. Scheduled Call Back
4. Third-Party Integrations
    a. Calabrio One
        i. Integrate Amazon Connect Instance with Calabrio One
        ii. Upload Agents to Calabrio
    b. eGain Analytics
        i. Integrate Amazon Connect Instance with eGain Analytics
        ii. Set Service Level Agreement Threshold

1.4 Assumptions

1. List of Agents/Staff will be provided by County
    a. Agent Template will be provided to county by CalSAWS
2. Historical Call Data will not be migrated to Amazon Connect, Calabrio, or eGain
3. Toll Free Number 888-421-8080 will be ported to Amazon Connect after go-live
    a. The County is responsible for pointing the Toll-Free numbers to the Amazon Connect phone number
4. County is licensed for 175 total agents/staff (e.g., including workers, supervisors, managers, etc.)
5. Automated Outbound reminder calls will be placed to customers that opt into reminder calls.
6. Courtesy Call Back feature by default is disabled and can be enabled through the Administration Page in the Enhanced Call Control Panel.
7. Scheduled Call Back by default is disabled and can be enabled through the Administration Page in the Enhanced Call Control Panel.
8. Email address for RCC contact and, voicemail has been provided by the County, HSDBCCIntakeMail@santacruzcounty.us
9. County Staff are responsible for creating and maintaining Routing Profiles for their staff.
    a. Initial Routing Profiles will be created prior to model office
10. Calls from CBOs, Foster Care, and other County Resources will be routed through the External Party Access line and sent to the EPA specific queue(s) if the caller successfully authenticates
11. This change does not include the LEX Authentication or Welcome bots.
12. County is responsible for providing list of Holiday Dates
13. County security admins are responsible for granting rights to their staff in CalSAWS
    a. Grant CCPAgent rights to Contact Center Agents
    b. Grant CCPSupervisor rights to Contact Center Supervisors
    c. Grant CCPMessageSender rights to Contact Center Managers/WFM
    d. Grant RCC Security Rights to RCC Staff

2 RECOMMENDATIONS

2.1 Continuing Service Center (CSC)

2.1.1 Overview

The Continuing Service Center (CSC) is built in a county specific Amazon Connect Instance. Inbound calls will be routed to the queue that corresponds with the selections the customer made.

2.1.2 Description of Changes

1. Claim a new phone number (non-toll free) for the Inbound IVR
    a) County IT are required to point their current toll-free number as well as any local numbers utilized by the IVR to this phone number as part of go live.
2. Record County Specific Prompts
    a) See verbiage Excel sheet (CA-240164 – Santa Cruz County Verbiage) for details
    b) Upload the prompts to an S3 bucket
3. Build new Queues for each program required
    a) See the attached Queues sheet (CA-240164 – Santa Cruz County Queue List) for details
4. Set the CSC Inbound Hours
    a) Self Service Hours: 24/7
    b) CSC Agents: 7:30 AM – 5:00 PM Monday – Friday
5. Create a Quick Connect for all queues
    a) See the attached Quick Connects sheet (CA-240164 – Santa Cruz County Quick Connects List) for details
6. Upload Holiday dates to Holiday DynamoDB table
7. Upload all Contact Center agents to Amazon Connect
    a) List of Agents to be provided by Santa Cruz County

2.2 Regional Contact Center (RCC)

2.2.1 Overview

Covered California sends Medi-Cal referral calls to Regional Contact Centers.

2.2.2 Description of Changes

1. Update RCC call flow to accept county code 44 as a CalSAWS county
    a. See the attached call flow (CA-240164 - Wave 4 RCC Call Flow.pdf) for details
2. Create new Voicemail box

    a. The Voicemail box will be used by Covered California agents that call during non-business hours and will be monitored by county staff
    b. Voicemails will be delivered via e-mail to the address provided by the County
3. Build new RCC Queues
    a. See the attached queues list for details

2.3 Optional Features

2.3.1 Overview

The Contact Center solution offers three optional features. They are Web Chat, Click to Call, and Post Call Survey. The county must choose if they want to enable these features or not. Courtesy Call back and Scheduled Call back are optional but can be turned on and off via the Administration Page.

2.3.2 Web Chat

Santa Cruz County has opted out of the Web Chat feature.

2.3.3 Click to Call

Santa Cruz County has opted out of the Click to Call feature.

2.3.4 Post Call Survey

Santa Cruz County has opted into the Post Call Survey feature.

2.3.4.1 Description of Changes

1. Configure the Post call survey to ask 4 questions
    a. How respected did you feel? 1, very dissatisfied, 2, dissatisfied, 3, satisfied, 4, very satisfied, 5, highly satisfied.
    b. How informed did you feel? 1, very dissatisfied, 2, dissatisfied, 3, satisfied, 4, very satisfied, 5, highly satisfied.
    c. How well were your needs addressed? 1, very dissatisfied, 2, dissatisfied, 3, satisfied, 4, very satisfied, 5, highly satisfied.
    d. How was your overall experience? 1, very dissatisfied, 2, dissatisfied, 3, satisfied, 4, very satisfied, 5, highly satisfied.
2. Send a daily report to a county provided e-mail address
    a. The report will contain the following information:
        i. Contact ID
        ii. Agent ID

iii. Queue Time
iv. Question #
v. Question Text
vi. Answer
vii. Language
viii. Caller Phone Number
ix. Answer Time

2.3.5 Courtesy Call Back

Santa Cruz County has opted to disable Courtesy Call Back at go-live but can enable the feature through the Administration Page.

2.3.6 Scheduled Call Back

Santa Cruz County has opted to disable Scheduled Call Back at go-live but can enable the feature through the Administration Page.

2.4 Third Party Integrations

2.4.1 Overview

Calabrio One, and eGain Analytics are not native to the Amazon Connect environment. The Amazon Connect instance needs to be integrated into these solutions to provide Work Force Management (WFM), Quality Assurance, and robust reporting functionality.

2.4.2 Description of Change

1. Add the new Amazon Connect Instance as an ACD in Calabrio One
    a. Upload Agents into Calabrio One
        i. Add appropriate security rights to agents, supervisors, and WFM
    b. Create a new WFM View for Santa Cruz County
        i. This limits the County to view only their resources.
    c. Set Audio Recording amount to 100% of calls per agent
    d. Set Screen Recording amount to random 25% of calls per agent
    e. Set Recording retention rate
        i. Standard retention rate is 90 days
        ii. Tagged recordings retention is 365 days
        iii. To exceed the retention period, there is an API to bulk download calls that will be provided.
2. Add the new Amazon Connect Instance in eGain Analytics
    a. Create logins for Supervisors, and Manager

b. Set the CSC Service Level Agreement Threshold to 600 Seconds.
c. Set the RCC Service Level Agreement Threshold to 30 Seconds.

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	IVR	Santa Cruz County Call Flow	CA-240164 - Santa Cruz County Call Flo
2	IVR	Santa Cruz County Exit Reasons	CA-240164 - Santa Cruz County Exit Rea
3	IVR	Santa Cruz County Queues	CA-240164 - Santa Cruz County Queue
4	IVR	Santa Cruz County Verbiage	CA-240164 - Santa Cruz County Verbiag
5	RCC	Santa Cruz County RCC Call Flow	CA-240164 - Wave 4 RCC Call Flow.pdf
6	IVR	Santa Cruz County Quick Connects	CA-240164 Santa Cruz County Quick C

4 OUTREACH

The County Contact Center go-live will include 2 weeks of enhanced support, and model office training before the go live.

4.1 Enhanced Support

Following the go live, CalSAWS staff will be onsite (or available on a virtual bridge if onsite is not possible) to provide any required support for county staff.

4.2 Model Office

Model Office will be conducted prior to go live to give contact center staff hands on experience with the software before the go live. Model office will be conducted in person or virtually if in person is not possible.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-240165

Solano County Contact Center Deployment

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nicole Kenny
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/28/2022	0.1	Initial Draft	Nicole Kenny

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1 OVERVIEW

Solano County does not currently have a CalSAWS contact center in the Amazon Connect Environment. This SCR will deploy a brand-new Contact Center to handle inbound and outbound calls to customers.

1.1 Current Design

Solano County currently maintains their own contact center solution.

1.2 Requests

Build a new contact center solution in the CalSAWS contact center environment.

1.3 Overview of Recommendations

1. Continuing Service Center (CSC)
    a. Claim a new phone number for inbound calls.
        i. County owned Toll-Free Number will be pointed to this number.
    b. Build their county specific call flow
        i. See attached Call Flow (CA-240165 – Solano County Call Flow.pdf) for details
    c. Record new county specific prompts
        i. See attached Prompts Excel sheet (CA-240165 – Solano County Verbiage.xlsx) for details
    d. Build new Continuing Queues
        i. See attached Exit Reasons Excel sheet (CA-240165 – Solano County Exit Reasons.xlsx) for details
    e. Set their Hours of Operations for Inbound Queues
    f. Create Quick Connects
        i. See attached Quick Connects Excel sheet (CA-240165 – Solano County Quick Connects.xlsx) for details.
    g. Holiday Dates
        i. Upload County Holidays to the Holiday DynamoDB
    h. Office Hours and Location
        i. Upload County Zip Codes to the Office DynamoDB
        ii. See the Zip Codes Excel sheet (CA-240165 – Solano County Zip Codes) for details
    i. Upload Agents
2. Regional Call Center (RCC)
    a. Update RCC call flow to accept county code 48 as a CalSAWS county
        i. See attached Call Flow (CA-240165 – Solano County RCC Call Flow.pdf) for details
    b. Create new Voicemail box
    c. Build new RCC Queues
    d. Create a Generic Worker for County 48
3. Optional Features
    a. Web Chat

   b. Click to Call
   c. Post Call Survey
   d. Courtesy Call Back
   e. Scheduled Call Back
4. Third-Party Integrations
   a. Calabrio One
      i. Integrate Amazon Connect Instance with Calabrio One
      ii. Upload Agents to Calabrio
   b. eGain Analytics
      i. Integrate Amazon Connect Instance with eGain Analytics
      ii. Set Service Level Agreement Threshold

1.4 Assumptions

1. List of Agents/Staff will be provided by County
   a. Agent Template will be provided to county by CalSAWS
2. Historical Call Data will not be migrated to Amazon Connect, Calabrio, or eGain
3. Toll Free Number 1-800-400-6001 will be ported to Amazon Connect after go-live
   a. The County is responsible for pointing the Toll-Free numbers to the Amazon Connect phone number
4. County is licensed for 103 total agents/staff (e.g., including workers, supervisors, managers, etc.)
5. Automated Outbound reminder calls will be placed to customers that opt into reminder calls.
6. Courtesy Call Back feature by default is enabled and can be disabled through the Administration Page in the Enhanced Call Control Panel.
7. Scheduled Call Back by default is enabled and can be disabled through the Administration Page in the Enhanced Call Control Panel.
8. Email address for RCC contact and, voicemail has been provided by the County, Coveredca@solanocounty.com
9. County Staff are responsible for creating and maintaining Routing Profiles for their staff.
   a. Initial Routing Profiles will be created during model office
10. Calls from CBOs, Foster Care, and other County Resources will be routed through the External Party Access line and sent to the EPA specific queue(s) if the caller successfully authenticates
11. This change does not include the LEX Authentication or Welcome bots.
12. County has provided the list of Holiday Dates
13. County security admins are responsible for granting rights to their staff in CalSAWS
    a. Grant CCPAgent rights to Contact Center Agents
    b. Grant CCPSupervisor rights to Contact Center Supervisors
    c. Grant CCPMessageSender rights to Contact Center Managers/WFM
    d. Grant RCC Security Rights to RCC Staff

2 RECOMMENDATIONS

2.1 Continuing Service Center (CSC)

2.1.1 Overview

The Continuing Service Center (CSC) is built in a county specific Amazon Connect Instance. Inbound calls will be routed to the queue that corresponds with the selections the customer made.

2.1.2 Description of Changes

1. Claim a new phone number (non-toll free) for the Inbound IVR
   a) County IT are required to point their current toll-free number as well as any local numbers utilized by the IVR to this phone number as part of go live.
2. Build their County specific Call Flow
   a) See the attached call flow (CA-240165 – Solano County Call Flow) for details.
3. Record County Specific Prompts
   a) See verbiage Excel sheet (CA-240165 – Solano County Verbiage) for details
   b) Upload the prompts to an S3 bucket
4. Build new Queues for each program required
   a) See the attached Queues sheet (CA-240165 – Solano County Queue List) for details
5. Set the CSC Inbound Hours
   a) Self Service Hours: 24/7
   b) CSC Agents: 8:00 AM – 5:00 PM Monday – Friday
6. Create a Quick Connect for all queues
   a) See the attached Quick Connects sheet (CA-240165 – Solano County Quick Connects List) for details
7. Upload Holiday dates to Holiday DynamoDB table
8. Upload all Contact Center agents to Amazon Connect
   a) List of Agents to be provided by Solano County

2.2 Regional Contact Center (RCC)

2.2.1 Overview

Covered California sends Medi-Cal referral calls to Regional Contact Centers.

2.2.2 Description of Changes

1. Update RCC call flow to accept county code 48 as a CalSAWS county

   a. See the attached call flow (CA-240165 – Wave 4 RCC Call Flow) for details
2. Create new Voicemail box
   a. The Voicemail box will be used by Covered California agents that call during non-business hours and will be monitored by county staff
   b. Voicemails will be delivered via e-mail to the address provided by the County
3. Build new RCC Queues
   a. See the attached queues list for details

2.3 Optional Features

2.3.1 Overview

The Contact Center solution offers three optional features. They are Web Chat, Click to Call, and Post Call Survey. The county must choose if they want to enable these features or not. Courtesy Call back and Scheduled Call back are optional but can be turned on and off via the Administration Page.

2.3.2 Web Chat

Solano County has opted out of the Web Chat feature.

2.3.3 Click to Call

Solano County has opted out of the Click to Call feature.

2.3.4 Post Call Survey

Solano County has opted into the Post Call Survey feature.

2.3.4.1 Description of Changes

1. Configure the Post call survey to ask 4 questions
   a. During this call, were you treated with respect? 1, Yes. 2, No.
   b. Regarding the last agent you spoke to, was the agent helpful in assisting with your concern? 1, Very helpful; 2, Somewhat helpful; 3, Not helpful.
   c. Is this the first time you've called regarding this matter? 1, Yes. 2, No.
   d. Was the reason for your call resolved today? 1, Yes. 2, No.

2. Send a daily report to a county provided e-mail address

a. The report will contain the following information:
    i. Contact ID
    ii. Agent ID
    iii. Queue Time
    iv. Question #
    v. Question Text
    vi. Answer
    vii. Language
    viii. Caller Phone Number
    ix. Answer Time

2.3.5 Courtesy Call Back

Solano County has opted into Courtesy Call Back but can enable or disable feature through the Administration Page.

2.3.6 Scheduled Call Back

Solano County has opted into Scheduled Call Back but can enable or disable feature through the Administration Page.

2.4 Third Party Integrations

2.4.1 Overview

Calabrio One, and eGain Analytics are not native to the Amazon Connect environment. The Amazon Connect instance needs to be integrated into these solutions to provide Work Force Management (WFM), Quality Assurance, and robust reporting functionality.

2.4.2 Description of Change

1. Add the new Amazon Connect Instance as an ACD in Calabrio One
    a. Upload Agents into Calabrio One
        i. Add appropriate security rights to agents, supervisors, and WFM
    b. Create a new WFM View for Solano County
        i. This limits the County to view only their resources.
    c. Set Audio Recording amount to 100% of calls per agent
    d. Set Screen Recording amount to random 25% of calls per agent
    e. Set Recording retention rate
        i. Standard retention rate is 90 days
        ii. Tagged recordings retention is 365 days

        iii. To exceed the retention period, there is an API to bulk download calls that will be provided.

2. Add the new Amazon Connect Instance in eGain Analytics
    a. Create logins for Supervisors, and Manager
    b. Set the CSC Service Level Agreement Threshold to 600 Seconds.
    c. Set the RCC Service Level Agreement Threshold to 30 Seconds.

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	IVR	Solano County Call Flow	CA-240165 - Solano County Call Flow.pd
2	IVR	Solano County Exit Reasons	CA-240165 - Solano County Call Flow.pd
3	IVR	Solano County Queues	CA-240165 - Solano County Queue List.x
4	IVR	Solano County Verbiage	CA-240165 - Solano County Verbiage.xls
5	RCC	Solano County RCC Call Flow	CA-240165 - Wave 4 RCC Call Flow.pdf
6	IVR	Solano County Quick Connects	CA-240165 - Solano County Quick Conne

4 OUTREACH

The County Contact Center go-live will include 2 weeks of enhanced support, and model office training before the go live.

4.1 Enhanced Support

Following the go live, CalSAWS staff will be onsite (or available on a virtual bridge if onsite is not possible) to provide any required support for county staff.

4.2 Model Office

Model Office will be conducted prior to go live to give contact center staff hands on experience with the software before the go live. Model office will be conducted in person or virtually if in person is not possible.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-240166

San Diego County Contact Center Deployment

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nicole Kenny
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/18/2022	0.1	Initial Draft	Nicole Kenny
3/31/2023	0.2	Edits requested by County. Updated License count to 34, Removal of Automated outbound RCC Calls, Removal of CCB for RCC, and Removal of Screen Recording for RCC	Nicole Kenny

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1 OVERVIEW

San Diego County does not currently have a CalSAWS contact center in the Amazon Connect Environment. This SCR will deploy a brand-new Self-Service only Interactive Voice Response (IVR) to handle inbound and outbound calls to customers.

1.1 Current Design

San Diego County currently maintains their own contact center solution.

1.2 Requests

Build a new Self-Service IVR solution in the CalSAWS contact center environment.

1.3 Overview of Recommendations

1. Self-Service only IVR
    a. Claim two new phone numbers for inbound calls.
        i. One phone number will be for English callers, and a second one will be for Spanish callers.
        ii. County is responsible for forwarding callers from their contract center solution.
    b. Build their county specific call flow
        i. See attached Call Flow (CA-240166 – San Diego County Call Flow.pdf) for details
    c. Record new county specific prompts
        i. See attached Prompts Excel sheet (CA-240166 – San Diego County Verbiage.xlsx) for details
    d. Set their Hours of Operation for Inbound Calls
        i. Hours of Operation will be set to 24/7 for self-service calls.
2. Regional Call Center (RCC)
    a. Update RCC call flow to accept county code 37 as a CalSAWS county
        i. See attached Call Flow (CA-240166 – San Diego County RCC Call Flow.pdf) for details
    b. Set RCC Hours of Operation
        i. After hour calls will be sent to Voicemail
    c. Create new Voicemail box
    d. Build new RCC Queues
    e. Upload RCC Agents
    f. Create a Generic Worker for County 37
3. Third-Party Integrations
    a. Calabrio One
        i. Integrate Amazon Connect Instance with Calabrio One
        ii. Upload Agents to Calabrio
    b. eGain Analytics
        i. Integrate Amazon Connect Instance with eGain Analytics
        ii. Set Service Level Agreement Threshold

1.4 Assumptions

1. List of RCC Agents/Staff will be provided by County
    a. Agent Template will be provided to county by CalSAWS
2. Historical Call Data will not be migrated to Amazon Connect, Calabrio, or eGain
3. No phone numbers will be ported to Amazon Connect after go-live
4. Inbound IVR Phone numbers will be provided to county after the county specific AWS Accounts are created
5. County is licensed for 34 total agents/staff (e.g., including workers, supervisors, managers, etc.)
6. Email address for RCC contact and, voicemail to be provided by the County
7. County Staff are responsible for creating and maintaining Routing Profiles for their staff.
    a. Initial Routing Profiles will be created during model office
8. This change does not include the LEX Authentication or Welcome bots.
9. County security admins are responsible for granting rights to their staff in CalSAWS
    a. Grant CCPAgent rights to Contact Center Agents
    b. Grant CCPSupervisor rights to Contact Center Supervisors
    c. Grant CCPMessageSender rights to Contact Center Managers/WFM
    d. Grant RCC Security Rights to RCC Staff

2 RECOMMENDATIONS

2.1 Self-Service only IVR

2.1.1 Overview

The Self-Service only IVR is built in a county specific Amazon Connect Instance. Inbound calls will be offered self-service only. If a customer selects an option that requires speaking to an agent, calls will be transferred back to San Diego county's contact center solution.

2.1.2 Description of Changes

1. Claim two new phone numbers (non-toll free) for the Inbound IVR
    a) County IT are required to point their IVR system to these two new phone numbers based on the customer's language selection in the County's IVR.
2. Build their County specific Call Flow
    a) See the attached call flow (CA-240166 – San Diego County Call Flow) for details.
3. Record County Specific Prompts

    a) See verbiage Excel sheet (CA-240166 – San Diego County Verbiage) for details
    b) Upload the prompts to an S3 bucket
4. Set the CSC Inbound Hours
    a) Self Service Hours: 24/7

2.2 Regional Contact Center (RCC)

2.2.1 Overview

Covered California sends Medi-Cal referral calls to Regional Contact Centers.

2.2.2 Description of Changes

1. Update RCC call flow to accept county code 37 as a CalSAWS county
    a. See the attached call flow (CA-240166 - Wave 4 RCC Call Flow) for details
2. Create new Voicemail box
    a. The Voicemail box will be used by Covered California agents that call during non-business hours and will be monitored by county staff
    b. Voicemails will be delivered via e-mail to the address provided by the County
3. Build new RCC Queues
    a. See the attached queues list for details
4. Upload all RCC agents to Amazon Connect
    a. List of Agents to be provided by San Diego County

2.3 Third Party Integrations

2.3.1 Overview

Calabrio One, and eGain Analytics are not native to the Amazon Connect environment. The Amazon Connect instance needs to be integrated into these solutions to provide Work Force Management (WFM), Quality Assurance, and robust reporting functionality.

2.3.2 Description of Change

1. Add the new Amazon Connect Instance as an ACD in Calabrio One
    a. Upload Agents into Calabrio One
        i. Add appropriate security rights to agents, supervisors, and WFM

    b. Create a new WFM View for San Diego County
        i. This limits the County to view only their resources.
    c. Set Audio Recording amount to 100% of calls per agent
    d. Set Recording retention rates
        i. Standard retention rate is 90 days
        ii. Tagged recordings retention is 365 days
        iii. To exceed the retention period, there is an API to bulk download calls that will be provided.
2. Add the new Amazon Connect Instance in eGain Analytics
    a. Create logins for Supervisors, and Managers
    b. Set the RCC Service Level Agreement Threshold to 30 Seconds.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	San Diego County Call Flow	CA-240166 - San Diego County Call F CA-240166 - San Diego County Call F
2	IVR	San Diego County Exit Reasons	CA-240166 - San Diego County Exit R
4	IVR	San Diego County Verbiage	CA-240166 - San Diego County Verbi
5	RCC	San Diego County RCC Call Flow	CA-240166 - Wave 4 RCC Call Flow.pdf CA-240166 - Wave 4 RCC Call Flow.vsdx

4 OUTREACH

The County Contact Center go-live will include 2 weeks of enhanced support, and model office training before the go live.

4.1 Enhanced Support

Following the go live, CalSAWS staff will be onsite (or available on a virtual bridge if onsite is not possible) to provide any required support for county staff.

4.2 Model Office

Model Office will be conducted prior to go live to give contact center staff hands on experience with the software before the go live. Model office will be conducted in person or virtually if in person is not possible.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-240167

San Mateo County Contact Center Deployment

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nicole Kenny
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/14/2022	0.1	Initial Draft	Nicole Kenny

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1 OVERVIEW

San Mateo County does not currently have a CalSAWS contact center in the Amazon Connect Environment. This SCR will deploy a brand-new Contact Center to handle inbound and outbound calls to customers.

1.1 Current Design

San Mateo County currently maintains their own contact center solution.

1.2 Requests

Build a new contact center solution in the CalSAWS contact center environment.

1.3 Overview of Recommendations

1. Continuing Service Center (CSC)
    a. Claim a new phone number for inbound calls.
        i. County owned Toll-Free Number, 800-223-8383, will be pointed to this number.
    b. Build their county specific call flow
        i. See attached Call Flow (CA-240167 – San Mateo County Call Flow.pdf) for details
    c. Record new county specific prompts
        i. See attached Prompts Excel sheet (CA-240167 – San Mateo County Verbiage.xlsx) for details
    d. Build new Continuing Queues
        i. See attached Exit Reasons Excel sheet (CA-240167 – San Mateo County Exit Reasons.xlsx) for details
    e. Set their Hours of Operations for Inbound Queues
    f. Create Quick Connects
        i. See attached Quick Connects Excel sheet (CA-240167 – San Mateo County Quick Connects.xlsx) for details.
    g. Holiday Dates
        i. Upload County Holidays to the Holiday DynamoDB
    h. Upload Agents
2. Regional Call Center (RCC)
    a. Update RCC call flow to accept county code 41 as a CalSAWS county
        i. See attached Call Flow (CA-240167 - Wave 4 RCC Call Flow.pdf) for details
    b. Create new Voicemail box
    c. Build new RCC Queues
    d. Create a Generic Worker for County 41
3. Optional Features
    a. Web Chat
    b. Click to Call
    c. Post Call Survey
    d. Courtesy Call Back

    e. Scheduled Call Back
4. Third-Party Integrations
    a. Calabrio One
        i. Integrate Amazon Connect Instance with Calabrio One
        ii. Upload Agents to Calabrio
    b. eGain Analytics
        i. Integrate Amazon Connect Instance with eGain Analytics
        ii. Set Service Level Agreement Threshold

1.4 Assumptions

1. List of Agents/Staff will be provided by County
    a. Agent Template will be provided to county by CalSAWS
2. Historical Call Data will not be migrated to Amazon Connect, Calabrio, or eGain
3. Toll Free Number 800-223-8383 will be ported to Amazon Connect after go-live
    a. The County is responsible for pointing the Toll-Free numbers to the Amazon Connect phone number
4. County is licensed for 56 total agents/staff (e.g., including workers, supervisors, managers, etc.)
5. Automated Outbound reminder calls will be placed to customers that opt into reminder calls.
6. Courtesy Call Back feature by default is disabled and can be enabled through the Administration Page in the Enhanced Call Control Panel.
7. Scheduled Call Back by default is disabled and can be enabled through the Administration Page in the Enhanced Call Control Panel.
8. Email address for RCC contact and, voicemail to be provided by the County
9. County Staff are responsible for creating and maintaining Routing Profiles for their staff.
    a. Initial Routing Profiles will be created during model office
10. Calls from CBOs, Foster Care, and other County Resources will be routed through the External Party Access line and sent to the EPA specific queue(s) if the caller successfully authenticates
11. This change does not include the LEX Authentication or Welcome bots.
12. County is responsible for providing list of Holiday Dates
13. County security admins are responsible for granting rights to their staff in CalSAWS
    a. Grant CCPAgent rights to Contact Center Agents
    b. Grant CCPSupervisor rights to Contact Center Supervisors
    c. Grant CCPMessageSender rights to Contact Center Managers/WFM
    d. Grant RCC Security Rights to RCC Staff

2 RECOMMENDATIONS

2.1 Continuing Service Center (CSC)

2.1.1 Overview

The Continuing Service Center (CSC) is built in a county specific Amazon Connect Instance. Inbound calls will be routed to the queue that corresponds with the selections the customer made.

2.1.2 Description of Changes

1. Claim a new phone number (non-toll free) for the Inbound IVR
    a) County IT are required to point their current toll-free number as well as any local numbers utilized by the IVR to this phone number as part of go live.
2. Build their County specific Call Flow
    a) See the attached call flow (CA-240167 – San Mateo County Call Flow) for details.
3. Record County Specific Prompts
    a) See verbiage Excel sheet (CA-240167 – San Mateo County Verbiage) for details
    b) Upload the prompts to an S3 bucket
4. Build new Queues for each program required
    a) See the attached Queues sheet (CA-240167 – San Mateo County Queue List) for details
5. Set the CSC Inbound Hours
    a) Self Service Hours: 24/7
    b) CSC Agents: 8:00 AM – 5:00 PM Monday – Friday
6. Create a Quick Connect for all queues
    a) See the attached Quick Connects sheet (CA-240167 – San Mateo County Quick Connects List) for details
7. Upload Holiday dates to Holiday DynamoDB table
8. Upload all Contact Center agents to Amazon Connect
    a) List of Agents to be provided by San Mateo County

Commented [LP1]: @Nicole Kenny We need to add a comment here that also states that any local numbers that are used by the County, need to be forwarded to the temp Amazon Connect number that is provided.

2.2 Regional Contact Center (RCC)

2.2.1 Overview

Covered California sends Medi-Cal referral calls to Regional Contact Centers.

2.2.2 Description of Changes

1. Update RCC call flow to accept county code 41 as a CalSAWS county

    a. See the attached call flow (CA-240167 – Wave 4 RCC Call Flow) for details
2. Create new Voicemail box
    a. The Voicemail box will be used by Covered California agents that call during non-business hours and will be monitored by county staff
    b. Voicemails will be delivered via e-mail to the address provided by the County
3. Build new RCC Queues
    a. See the attached queues list for details

2.3 Optional Features

2.3.1 Overview

The Contact Center solution offers three optional features. They are Web Chat, Click to Call, and Post Call Survey. The county must choose if they want to enable these features or not. Courtesy Call back and Scheduled Call back are optional but can be turned on and off via the Administration Page.

2.3.2 Web Chat

San Mateo County has opted out of the Web Chat feature.

2.3.3 Click to Call

San Mateo County has opted out of the Click to Call feature.

2.3.4 Post Call Survey

San Mateo County has opted into the Post Call Survey feature.

2.3.4.1 Description of Changes

1. Configure the Post call survey to ask 4 questions
    a. Scale: 1-5, with 1 being Poor and 5 being Excellent
       How courteous and professional was the representative?
    b. Scale: 1-5, with 1 being Poor and 5 being Excellent
       How helpful was the information provided by the representative?
    c. Scale: 1-5, with 1 being Poor and 5 being Excellent
       How satisfied were you with the service that you were provided?

d. Scale: 1-5, with 1 being Poor and 5 being Excellent
   How would you rate your overall call experience?

2. Send a daily report to a county provided e-mail address
   a. The report will contain the following information:
      i. Contact ID
      ii. Agent ID
      iii. Queue Time
      iv. Question #
      v. Question Text
      vi. Answer
      vii. Language
      viii. Caller Phone Number
      ix. Answer Time

2.3.5 Courtesy Call Back

San Mateo County has opted into Courtesy Call Back.

2.3.6 Scheduled Call Back

San Mateo County has opted out of Scheduled Call Back but can enable or disable feature through the Administration Page.

2.4 Third Party Integrations

2.4.1 Overview

Calabrio One, and eGain Analytics are not native to the Amazon Connect environment. The Amazon Connect instance needs to be integrated into these solutions to provide Work Force Management (WFM), Quality Assurance, and robust reporting functionality.

2.4.2 Description of Change

1. Add the new Amazon Connect Instance as an ACD in Calabrio One
   a. Upload Agents into Calabrio One
      i. Add appropriate security rights to agents, supervisors, and WFM
   b. Create a new WFM View for San Mateo County
      i. This limits the County to view only their resources.
   c. Set Audio Recording amount to 100% of calls per agent
   d. Set Screen Recording amount to random 25% of calls per agent
   e. Set Recording retention rates

i. Standard retention rate is 90 days
ii. Tagged recordings retention is 365 days
iii. To exceed the retention period, there is an API to bulk download calls that will be provided.

2. Add the new Amazon Connect Instance in eGain Analytics
    a. Create logins for Supervisors, and Manager
    b. Set the CSC Service Level Agreement Threshold to 30 Seconds.
    c. Set the RCC Service Level Agreement Threshold to 30 Seconds.

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	IVR	San Mateo County Call Flow	CA-240167 - San Mateo County Call F CA-240167 - San Mateo County Call F
2	IVR	San Mateo County Exit Reasons	CA-240167 - San Mateo County Exit R
3	IVR	San Mateo County Queue List	CA-240167 - San Mateo County Queu
4	IVR	San Mateo County Verbiage	CA-240167 - San Mateo County Verbi
5	RCC	San Mateo County RCC Call Flow	CA-240167 - Wave 4 RCC Call Flow.pdf
6	IVR	San Mateo County Quick Connects	CA-240167 - San Mateo County Quick

4 OUTREACH

The County Contact Center go-live will include 2 weeks of enhanced support, and model office training before the go live.

4.1 Enhanced Support

Following the go live, CalSAWS staff will be onsite (or available on a virtual bridge if onsite is not possible) to provide any required support for county staff.

4.2 Model Office

Model Office will be conducted prior to go live to give contact center staff hands on experience with the software before the go live. Model office will be conducted in person or virtually if in person is not possible.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-248014

Update the CA 1037 Report for San Mateo and Sacramento County

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/06/2022	1.0	Initial Version	Esequiel Herrera-Ortiz
02/02/2023	1.1	Updated the design to account for cases that change residency within two counties that are administered by the same CAPI administering county.	Esequiel Herrera-Ortiz
02/14/2023	1.2	Updated Part A logic to account for cases that change residency in the report month.	Esequiel Herrera-Ortiz
03/17/2023	1.3	Updated Overview of Recommendation to make clear that the original CA 1037 will be disabled for Sacramento and San Mateo.	Esequiel Herrera-Ortiz

Table of Contents

1 OVERVIEW

Sacramento and San Mateo administer the CAPI program for several counties. A modified version of the CA 1037 will be created for Sacramento and San Mateo to allow them to distinguish the counts for each of their administered counties.

Currently Sacramento and San Mateo administer the CAPI cases for the following counites:

Sacramento		San Mateo
• Alpine • Amador • Butte • Calaveras • Colusa • Del Norte • El Dorado • Glenn • Humboldt • Lake • Lassen • Mendocino • Modoc • Nevada	• Orange • Placer • Plumas • Sacramento • San Joaquin • Santa Barbara • Shasta • Sierra • Siskiyou • Sutter • Tehama • Trinity • Yolo Yuba	• Alameda • Contra Costa • Marin • Merced • Monterey • San Mateo • Santa Cruz • Solano • Sonoma • Stanislaus

For example, if a person in Alpine first applies for CAPI, Sacramento creates a new case under Sacramento, but the person will be marked as residing in Alpine.

1.1 Current Design

The CA 1037 (CAPI Monthly Statistical Report) is designed to generate in CalSAWS for the county administering its CAPI program. The CA 1037 is not generated for the county that administers CAPI programs for other counties.

1.2 Requests

Create a modified version of the CA 1037 for Sacramento and San Mateo that distinguishes the data for each of their administered counties. This change will not impact the version of the CA 1037 used by all other counties.

1.3 Overview of Recommendations

1. Create a modified version of the CA 1037 for Sacramento and San Mateo. The report will account for cases which change residency between two counties that are both administered by the same administering county within the report month.

2. Update the ‘State’ sheet to display a separate copy of the state form, to identify the CAPI programs they administer for each county.
3. Update all the detail sheets to include a ‘County of Residence’ column which will allow the counties to filter the data by an administered county.
4. Disable the original version of the CA 1037 for San Mateo and Sacramento County.

1.4 Assumptions

1. With **CA-248019 CAPI – Update Residency Detail page ‘County of Residence’**, San Mateo and Sacramento will have the ability to store the county of residency which will allow the CA 1037 to generate for the administered counties.
2. The changes outlined in this SCR will not impact the version of the CA 1037 used by all other counties. A new multicounty version of the CA 1037 will be created for Sacramento and San Mateo which filter the data by each county a case resides in. The existing logic for the base population logic and column logic will remain the same unless otherwise specified in this document.

2 RECOMMENDATIONS

2.1 CA 1037 (Multicounty)

2.1.1 Overview

The Cash Assistance Program for Immigrants (CAPI) Monthly Caseload Movement Statistical Report includes application information such as applications received, applications approved, applications denied, requests for restoration, cases approved, cases restored, cases discontinued, and the number of paid cases during the report month.

The multicounty version of the CA 1037 captures data for counties which administer CAPI for other counties and distinguishes the counts for each of the administered counties.

In ACL 00-11 page 1 under the Content section, counties are instructed to report the status of a case at the end of the report month. For this reason, the report will capture a case based on the residency as of the last day of the report month.

2.1.2 CA 1037 (Multicounty) Screenshot

Cash Assistance Program for Immigrants
Monthly Caseload Movement Statistical Report

Send one copy of this form to:
California Department of Social Services
Data Systems and Survey Design Bureau, M.S. 9-081
P. O. Box 944243
Sacramento, CA 944244-2430
FAX: (916) 657-2074

COUNTY NAME	CONSORTIUM	COUNTY CODE	REPORT MONTH/YEAR
Alameda County		1	10/2022

PART A. APPLICATIONS

1. Application(s) brought forward from last report month (Item 5 from previous report month)	1	0
2. Application(s) received during the report month (Sum of Items 2a. and 2b. below)	2	0
a. Application(s) Received	3	0
b. Request(s) for Restoration	4	0
3. Total Applications during the report month (Sum of Items 1 and 2 above)	5	0
4. Application(s) Disposed of during the report month (Sum of Items 4a., 4b., 4c., and 4d. Below)	6	0
a. Application(s) Approved	7	0
b. Restorations	8	0
c. Application(s) Denied or Withdrawn	9	0
d. Other Approval(s)	10	0
5. Application(s) carried forward to the next report month(Item 3 minus Item 4 above)	11	0

PART B. CASELOAD	ALIEN STATUS Qualified (1A)	Non-qualified (6K)	Sponsored (6M)	Limited Term (6T)	TOTAL
6. Case(s) brought forward from last report month (Item 9 from previous report month)	12 0	13 0	14 0	15 0	16 0
7. Case(s) added during the report month (Sum of Items 7a-c below)	17 0	18 0	19 0	20 0	21 0
a. Case(s) Approved	22 0	23 0	24 0	25 0	26 0
b. Case(s) Restored	27 0	28 0	29 0	30 0	31 0
c. Other Case Approval(s)	32 0	33 0	34 0	35 0	36 0
8. Case(s) Discontinued during the report month (Sum of Items 8a. and 8b. below)	37 0	38 0	39 0	40 0	41 0
a. Discontinued due to receiving Federal SSI/SSP	42 0	43 0	44 0	45 0	46 0
b. Other Discontinuance(s)	47 0	48 0	49 0	50 0	51 0
9. Case(s) carried forward to the next report month (Items 6 + 7 minus Item 8 above)	52 0	53 0	54 0	55 0	56 0
PART C. PAID RECIPIENTS					
10. Total Recipient(s) paid during the report month	57 0	58 0	59 0	60 0	61 0

Comments:

Item 5 from previous month	0
Item 9 from previous report month (Qualified)	0
Item 9 from previous report month (Non-qualified)	0
Item 9 from previous report month (Sponsored)	0
Item 9 from previous report month (Limited Term)	0

REPORT PREPARED BY:	TELEPHONE	DATE
	( )	

CA 1037 (1/2000)

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY DEPARTMENT OF SOCIAL SERVICES

Cash Assistance Program for Immigrants
Monthly Caseload Movement Statistical Report

Send one copy of this form to:
California Department of Social Services
Data Systems and Survey Design Bureau, M.S. 9-081
P. O. Box 944243
Sacramento, CA 944244-2430
FAX: (916) 657-2074

COUNTY NAME	CONSORTIUM	COUNTY CODE	REPORT MONTH/YEAR
Contra Costa		7	10/2022

PART A. APPLICATIONS

See the complete mockup attached in the Supporting Document section.

Note: For Sacramento and San Mateo, the State sheet scrolls vertically to show a copy of the state form for each of their administered counties.

Description of Change

1. Create a multicounty version of the CA 1037. The report will inherit the same base population logic and column definitions as the original CA 1037 used by all other counties, unless otherwise mentioned below. The report is titled CA 1037 (Multicounty). The report will generate for only Sacramento and San Mateo.
2. Update the 'State' sheet to dynamically create separate form with case level counts for each of the administered counties. See the attached mockup in the Supporting Documents section below.
3. Update the COUNTY NAME and COUNTY CODE on each form within the 'State' sheet to display the resident county of the CAPI cases. Currently, only the administering county name and code are displayed, for either Sacramento or San Mateo.

Field	Description
COUNTY NAME	Display in COUNTY NAME, on the state form, the county of residency for the CAPI cases. (CT-15)
COUNTY CODE	Display in COUNTY CODE, on the state form, code of the county of residency for the CAPI cases. (CT-15)

4. Update the report logic to account for cases which change residency from one CAPI administered county to another CAPI administered county where both counties are both administered by the same administering county. An example of this is if a case changes residency from Alpine which is administered by Sacramento to Amador which is also administered by Sacramento. This does not apply for cases which change residency from a county administered by Sacramento to a county administered by San Mateo or vice versa.

Part A

a. If an application is reported on **Line 5. Application(s) carried forward to the next report month** in the prior report month for County A and the case then changes residency to County B as of the last day of the report month, then the application will be reported as follows:
    i. County A – The application will **not** be counted under **Line 1. Applications(s) brought forward from last report month.** This will cause a discrepancy between Line 5 of the previous report month and Line 1 of the current report month. The application is captured in the '**Item 5 from previous month**' total in the comments section. The application will also appear in the 'Adjustment to Line 1' detail sheet.

ii. County B – Reports the application under **Line 1. Applications(s) brought forward from last report month.** This will cause a discrepancy between Line 5 of the previous report month and Line 1 of the current report month. The application will not appear under the '**Item 5 from previous month**' total in the comments section. The application will appear in the 'Adjustment to Line 1' detail sheet.

b. If the application was received in the report month, and there was a change in residency to County B as of the last day of the report month, then the application will be reported as received for County B using the existing logic.

Part B

a. If a case is reported by county A on **Line 9. Cases(s) carried forward to the next report month** in the prior report month and the case then changes residency to county B during the report month the case will be reported as follows:
   i. County A – Report the case on **Line 8b. Other Discontinuance(s)** to remove the case from the caseload. This is regardless of if the case remains Active in County B.
   ii. County B – Report the case under line **7.c. Other Case Approval(s)** to add the case into the caseload.
   iii. All other caseload movement events will follow the existing logic and will be reported by the county in which the case resides in as of the last day of the report month.

5. Update all the totals on the 'State' sheet to capture data for only cases residing in the CAPI administered county as of the last day of the report month. The totals filter data based on the CAPI administering county administering the case, followed by the county in which the program person (with a role of Member) resides in as of the last day of the report month. Currently the totals capture all records based on the county administering the case.

Total	Description
1. Application(s) brought forward from last report month (Item 5 from previous report month)	Displays the number of applications carried forward by the administered county from Item 5 of the previous report month. Note: If a CAPI administered county (County A) reported an application on Line 5 in the prior report month, and the case changes residency in the report month to County B where both counties are administered by the same county,

	then the application will be counted on Line 1 for County B but not for County A.
2. Application(s) received during the report month (Sum of Items 2a. and 2b. below)	Equal to the sum of Line 2.a and 2. b.
2.a. Application(s) Received	Displays the number of applications received during the report month for the administered county.
2.b. Request(s) for Restoration	Displays the number of requests for restoration for the administered county.
3. Total Applications during the report month (Sum of Items 1 and 2 above)	Equal to the sum of Line 1 and 2.
4. Application(s) Disposed of during the report month (Sum of Items 4a., 4b., 4c., and 4d. Below)	Equal to the sum of Lines 4a thru 4d.
4.a. Application(s) Approved	Displays the number of applications approved during the report month by the administered county.
4.b. Restorations	Displays the number of restorations approved in the report month by the administered county.
4.c. Application(s) Denied or Withdrawn	Displays the number of applications and restorations denied in the report month by the administered county.
4. d. Other Approval(s)	Displays the number of other approvals processed in the report month by the administered county.
5. Application(s) carried forward to the next report month (Item 3 minus Item 4 above)	Equal to the sum of Line 3 minus 4.

6. Case(s) brought forward from last report month (Item 9 from previous report month)	Displays the number of cases brought forward from Item 9 of the previous report month by the administered county.
7. Case(s) added during the report month (Sum of Items 7a-c below)	Equal to the sum of Line 7a, 7b, and 7c.
7.a. Case(s) Approved	Displays the number of cases approved by the administered county that are assigned one of the following aid codes in the report month: 1A, 5K, 6M, 6T
7.b. Case(s) Restored	Displays the number of cases restored by the administered county and assigned one of the following aid codes in the report month: 1A, 5K, 6M, 6T
7.c. Other Case Approval(s)	Displays the number of other approved cases by the administered county and assigned one of the following aid codes in the report month: 1A, 5K, 6M, 6T This include cases reported on Line 9 in the prior report month by other counties that are administered by the same CAPI administering county, but the case changes residency as of the last day of the report month. The case is considered Other Case Approval by the receiving county.
8. Case(s) Discontinued during the report month (Sum of Items 8a. and 8b. below)	Displays the number of other approved cases by the administered county and assigned one of the following aid codes for the report month: 1A, 5K, 6M, 6T
8.a. Discontinued due to receiving Federal SSI/SSP	Displays the number of CAPI cases discontinued due to receiving Federal SSI/SSP.
8.b. Other Discontinuance(s)	Displays the number of other discontinuances in the report month. This include cases reported on Line 9 in the prior report month by other counties that are administered by the same CAPI administering county, but the case changes residency as of the last day of

	the report month. The case is considered Other Discontinuance(s) by the sending county.
9. Case(s) carried forward to the next report month (Items 6 + 7 minus Item 8 above)	Equal to the sum of Lines 6 plus 7 minus 8.
10. Total Recipient(s) paid during the report month	Displays the number of cases that are paid by the administered during the report month.
Comments:	
Item 5 from previous month	Displays the total adjustments from Line 5 of the previous report month by the administered county.
Item 9 from previous report month (Qualified)	Displays the total adjustments from Line 9 (Qualified) of the previous report month by the administered county.
Item 9 from previous report month (Non-qualified)	Displays the total adjustments from Line 9 (Non-qualified) of the previous report month by the administered county.
Item 9 from previous report month (Sponsored)	Displays the total adjustments from Line 9 (Sponsored) of the previous report month by the administered county by the administered county.
Item 9 from previous report month (Limited Term)	Displays the total adjustments from Line 9 (Limited Term) of the previous report month by the administered.

6. Update the following sheets to include a 'County of Residence' column:
    a. Line 1
    b. Adjustment to Line 1
    c. Line 2a
    d. Line 2b
    e. Line 4a
    f. Line 4b
    g. Line 4c
    h. Line 5
    i. Adjustment 1A
    j. Adjustment 6K

k. Adjustment 6M
l. Adjustment 6T
m. Adjustment 7c
n. Line 8
o. Line 9

Column Name	Description
County of Residence	Displays the county name of residency for the **Member** on the CAPI program as of the last day of the report month. Technical Note: This is the decoded value of RES.COUNTY_CODE.

7. Disable the original version of the CA 1037 for San Mateo and Sacramento County. All historical version of the report will remain accessible if any exist.

2.1.3 Report Location

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

2.1.4 Counties Impacted

San Mateo and Sacramento County are directly impacted by the changes outlined in this section, with another 35 counties indirectly impacted.

2.1.5 Security Updates

The CA 1037 (Multicounty) report version will use the same rights as the original CA 1037. No new security rights, groups or roles will be created.

2.1.6 Report Usage/Performance

No notable impact to the system's performance is expected with the implementation of this section.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	CA 1037 (Multicounty)	CA 1037 (Multicounty) Mocku

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.2	The LRS shall produce reports that provide the detail LRS Data that will be used to complete the reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	This SCR will provide Sacramento and San Mateo the summary and detail data for the CA 1037 which is a state mandated report.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
CA-248014		This is a joint 58 county design where there is regional approval aligning to the governance model.	No Impact		

6 OUTREACH

None

7 APPENDIX

None

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-248273 BenefitsCal – Update RAC Task API to look for a future dated Worker ID

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Connie Buzbee, Dymas Pena

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/26/2023	.1	Initial version	Jennifer Muna

Table of Contents

1 OVERVIEW

This SCR will outline the necessary modifications to update the API that creates a task in CalSAWS when a customer submits a Report a Change (RAC) from the Self-Service Portal.

1.1 Current Design

When a customer generates and submits a RAC from the Self-Service Portal, the Report a Change API receives the request and generates a task and journal entry for the worker assigned to the case. At the same time, the form 'BenefitsCal Report a Change Summary' PDF is generated and sent to the Hyland Imaging Solution. The task is generated for the Worker with the following information:

- Task Type: Customer reported a change
- Task Category: Self Service Portal Communications
- Task Priority: Critical
- Task Expiration: 60 days (default)
- Task Due Date: 9 days (default)
- Task Long Description: Customer has reported a change information {parameter from BenefitsCal}

The task is failing to generate for the case when there is no worker assigned to the program in the current month. Correcting these failures is a manual process and impacting workload as it occurs often.

1.2 Requests

Update the RAC Task API to find a worker when there is no assigned worker for the program in the current month.

1.3 Overview of Recommendations

1. Update the RAC Task API logic to find a worker when there is no worker assigned to the program in the current month.

1.4 Assumptions

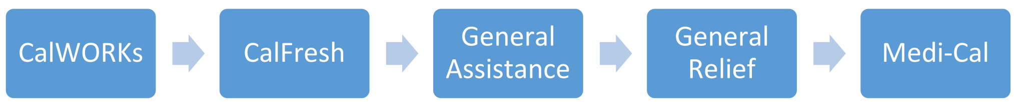
1. The RAC Task in CalSAWS is currently not available for Task Automation. Task Automation migration efforts will be addressed in a future enhancement.
2. The RAC Task API currently does not assign tasks to a Task Bank ID. This will be addressed in a future enhancement.
3. All other Task APIs will retain current functionality unless specified in the SCR.

2 RECOMMENDATIONS

2.1 Update RAC Task API

2.1.1 Overview

The Report a Change webservice enables a Report a Change task and journal entry to be created in CalSAWS when a change is reported from the Self-Service Portal. Based on the received case number in the RAC Task API, CalSAWS will determine what type of program(s) is associated to the case. If there are multiple programs on the case, the RAC Task logic determines the worker assignment based on the System's existing program hierarchy:



This section will outline the necessary modifications to the RAC API logic when it is attempting to assign the RAC task for a worker.

2.1.2 Description of Change

1. Modify the RAC Task API logic to follow the following process when determining task assignment for a worker while continuing to follow the existing program hierarchy:
    a. Check for an assigned worker for the program in the current month, then assign the task to the worker.
    b. If there is no worker assigned in the current month, then look for an assigned worker closest to the current system date in the next calendar month (one month following the current system date) and assign the task to the worker.
    c. If there is no worker found in the month following the current system date, then look in the prior month for the assigned worker closest to the current system date and assign the task to the worker.
    d. If there is no worker found in the prior month, then continue the look-up process above for each program, associated to the case, following the existing program hierarchy.
    e. If there is no worker found in the current, future, or prior month for any of the program(s) associated to the case, then send a 404 response failure to BenefitsCal.
2. Update RAC API 404 response message to display as 'Could not find a valid assignment' when a worker cannot be found.

2.1.3 Execution Frequency

Real time.

2.1.4 Key Scheduling Dependencies

NA

2.1.5 Counties Impacted

All CalSAWS Counties

2.1.6 Category

Change Report Request API

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

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

2.2 Automated Regression Test

2.2.1 Overview

Create new automated regression test scripts to verify the program- and month-based hierarchy for task assignment.

2.2.2 Description of Change

1. Create regression scripts for each of the following positive test scenarios:
    a. A worker is assigned to an applicable program in the next calendar month only (no assignment in current month): Task created and assigned to this worker.
    b. A worker is assigned to an applicable program in the prior calendar month only (no assignment in current month or next month): Task created and assigned to this worker.

c. A worker is assigned to an applicable program in the next calendar month (no assignment for the same program in current month), and a different worker is assigned to a program further down the hierarchy in the current month: Task created and assigned to the 'next month' worker for the program higher in the hierarchy.
    i. Example: A worker is assigned to the CalWORKs program in the next calendar month only, and a worker is assigned to the CalFresh program in the current month. The task is assigned to the CalWORKs program worker.

d. A worker is assigned to an applicable program in the prior calendar month (no assignment for the same program in current month or next month), and a different worker is assigned to a program further down the hierarchy in the current month: Task created and assigned to the 'prior month' worker for the program higher in the hierarchy.

2. Create regression scripts for each positive test scenario listed in #1 above, where a program higher in the hierarchy exists on the same case with no worker assignment in the current, next, or prior month.
    a. Example (*verbiage from #1.a. italicized*): A CalWORKs program exists with no worker assigned in the current, next, or prior month, and *a worker is assigned to an applicable program* [*further down the hierarchy*] *in the next calendar month only (no assignment in current month): Task created and assigned to this worker.*
3. Create a regression script to verify the 404 response message when no worker could be found for assignment.

Technical Note: If any scenario is already covered by an existing regression script, a duplicate new script does not need to be created.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	RAC API	ReportAChange YAML file	ReportAChange.yaml
2	RAC HTML	ReportAChange HTML file	ReportAChange.html

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-251209

Add Threshold Languages to

Medi-Cal NOA Generation (MC MAGI-T)

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

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

Table of Contents

1 OVERVIEW

The purpose of this change is to Add Threshold languages for Medi-Cal NOA Generation (MC MAGI-T).

1.1 Current Design

Not all NOAs generate in all Threshold Languages (Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese). Generation of a Threshold Language is dependent on the translations available for other NOA fragments and the State Template.

1.2 Requests

1. Add Threshold language to Snippet ID 6322 - MAGI Termination (NOA Code H412T) to CalSAWS.
   Languages include Arabic, Farsi, Hmong, Lao
2. Add Threshold language to Snippet ID 6323 - MAGI Termination (NOA Code H107T) to CalSAWS.
   Languages include Arabic, Farsi, Hmong, Lao
3. Add Threshold language to Snippet ID 6324 - MAGI Termination (NOA Code H108T) to CalSAWS.
   Languages include Arabic, Farsi, Hmong, Lao
4. Add Threshold language to Snippet ID 6892 - MAGI Termination (NOA Code H410T) to CalSAWS.
   Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
5. Add Threshold language to Snippet ID 6894 - MAGI Termination (NOA Code H401T) to CalSAWS.
   Languages include Arabic, Hmong, Lao
6. Add Threshold language to Snippet ID 7052 - MAGI Termination (NOA Code H101T) to CalSAWS.
   Languages include Arabic, Farsi, Hmong, Lao
7. Add Threshold language to Snippet ID 7053 - MAGI Termination (NOA Code H102T) to CalSAWS.
   Languages include Arabic, Farsi, Hmong, Lao
8. Add Threshold language to Snippet ID 7054 - MAGI Termination (NOA Code H105T) to CalSAWS.
   Languages include Arabic, Farsi, Hmong, Lao
9. Add Threshold language to Snippet ID 7055 - MAGI Termination (NOA Code H109T) to CalSAWS.
   Languages include Arabic, Farsi, Hmong, Lao
10. Add Threshold language to Snippet ID 7067 - MAGI Termination (NOA Code H113T) to CalSAWS.
    Languages include Arabic, Hmong, Lao
11. Add Threshold language to Snippet ID 7068 - MAGI Termination (NOA Code H112T) to CalSAWS.
    Languages include Arabic, Farsi, Hmong, Lao

12. Add Threshold language to Snippet ID 7451 - MAGI Termination (NOA Code H403T) to CalSAWS.
    Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
13. Add Threshold language to Snippet ID 7521 - MAGI Termination (NOA Code H412T) to CalSAWS.
    Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
14. Add Threshold language to Snippet ID 7573 - MAGI Termination (NOA Code H418T) to CalSAWS.
    Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
15. Add Threshold language to Snippet ID 7578 - MAGI Termination (NOA Code H423T) to CalSAWS.
    Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
16. Add Threshold language to Snippet ID 7579 - MAGI Termination (NOA Code H424T) to CalSAWS.
    Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
17. Add Threshold language to Snippet ID 7609 - MAGI Termination (NOA Code H425T) to CalSAWS.
    Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
18. Add Threshold language to Snippet ID 7784 - MAGI Termination (NOA Code H426T) to CalSAWS.
    Languages include Arabic, Farsi, Hmong, Lao
19. Add Threshold language to Snippet ID 7788 - MAGI Termination (NOA Code H427T) to CalSAWS.
    Languages include Arabic, Farsi, Hmong, Lao

1.3 Overview of Recommendations

Add remaining available threshold languages for the following MC MAGI – T Templates.

1. Deceased (NOA Reason Code: H106T)
2. Whereabouts Unknown (NOA Reason Code: H107T)
3. Receives SSI (NOA Reason Code: H108T)
4. MAGI Determination - Failure for Verification (NOA Reason Code: H410T)
5. MC Redetermination – Failure for Verification (NOA Reason Code: H401T)
6. Not a California Resident (NOA Reason Code: H101T)
7. Written Discontinuance (NOA Reason Code: H102T)
8. On Aid for Another Case (NOA Reason Code: H105T)
9. Stop Aid for Optional Member (NOA Reason Code: H109T)
10. Over MAGI Income Limit (NOA Reason Code: H113T)

11. Non-Payment of Premium (NOA Reason Code: H112T)
12. CATEGORICALLY INELIGIBLE (NOA Reason Code: H403T)
13. Parent/Caretaker Relative (NOA Reason Code: H412T)
14. Refused UIB Non-Compliance (NOA Reason Code: H418T)
15. Name Identity Non-Compliance (NOA Reason Code: H423T)
16. Non-Cooperation Child Non-Compliance (NOA Reason Code: H424T)
17. MAGI Termination (MC 355 Verification Not Received) (NOA Reason Code: H425T)
18. Failure to Provide Eligibility Forms (NOA Reason Code: H426T)
19. Failure to Respond (NOA Reason Code: H427T)

1.4 Assumptions

1. The triggering conditions of the NOA Fragments for Threshold Generation remain the same and are not being updated.
2. The NOA template remains the same and is not being updated.
3. The existing variable population is not being updated with this effort.
4. The common fragments will be added as part of CA-214024.

2 RECOMMENDATIONS

2.1 Add threshold Languages for the MC MAGI-T Deceased with reason code H106T.

2.1.1 Overview

Add threshold languages for Deceased NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_DECEASED_H106 (Fragment ID: 6322)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

2.1.2 Form/NOA Verbiage

Add MC MAGI-T Deceased NOA fragments in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	We received notification of the death of <Person>. Also, for your information, there are no special death or burial benefits provided under the Medi-Cal program.	Arial Font Size 10

2.1.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2 Add threshold Languages for the MC MAGI-T Whereabouts Unknown NOA Fragment with a reason code H107T.

2.2.1 Overview

Add threshold languages for Whereabouts Unknown NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_WHEREABOUTS_UNKNOWN_H107 (Fragment ID: 6323)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

2.2.2 Form/NOA Verbiage

Add MC MAGI-T Whereabouts Unknown NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	We do not know where you live and do not have a way to reach you. We sent this notice to your last known address.	Arial Font Size 10

2.2.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.3 Add threshold Languages for the MC MAGI-T Receives SSI NOA Fragment with a reason code H108T.

2.3.1 Overview

Add threshold languages for Receives SSI NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_RECEIVES_SSI_H108 (Fragment ID: 6324)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

2.3.2 Form/NOA Verbiage

Add MC MAGI-T Receives SSI NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You are already receiving Medi-Cal benefits through the Supplemental Security Income/State Supplementary Payment (SSI/SSP) program, therefore you are not entitled to receive separate Medi-Cal benefits on another case. You can use the BIC card you already have to get services. If you do not have one contact your worker right away.	Arial Font Size 10

2.3.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.3.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.4 Add threshold Languages for the MC MAGI-T MAGI Determination - Failure for Verification NOA Fragment with a reason code H410T.

2.4.1 Overview

Add threshold languages for MAGI Determination - Failure for Verification NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_FAIL_DETER_VERIF_H410 (Fragment ID: 6892)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A

Existing Languages: English, Spanish

2.4.2 Form/NOA Verbiage

Add MC MAGI-T MAGI Determination - Failure for Verification NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	The reason for this discontinuance is because you have not provided us with proof of the following information: • <Verification> We asked you for the information, but we have not received it and it is essential in determining your Medi-Cal eligibility.	Arial Font Size 10

2.4.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.4.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.5 Add threshold Languages for the MC MAGI-T MC Redetermination - Failure for Verification NOA Fragment with a reason code H401T.

2.5.1 Overview

Add threshold languages for MAGI Redetermination - Failure for Verification NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_FAIL_REDETER_VERIF_H401 (Fragment ID: 6894)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination

Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

2.5.2 Form/NOA Verbiage

Add MC MAGI-T MC Redetermination - Failure for Verification fragment in Threshold languages.

Add Threshold languages: Arabic, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You did not complete the redetermination process. In order to complete our review of your annual redetermination or change in circumstance, we needed the following information from you: You failed to give us the required proof for • <Verification> We asked you for that information, but we have not received it and it is needed to complete your annual redetermination or process your change in circumstances.	Arial Font Size 10

2.5.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.5.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.6 Add threshold Languages for the MC MAGI-T Not a California Resident NOA Fragment with a reason code H101T.

2.6.1 Overview

Add threshold languages for Not a California Resident NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_NOT_CA_RESIDENT_H101 (Fragment ID: 7052)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

2.6.2 Form/NOA Verbiage

Add MC MAGI-T Not a California Resident fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	Our information shows you are not a resident of California.	Arial Font Size 10

2.6.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.6.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.7 Add threshold Languages for the MC MAGI-T Written Discontinuance NOA Fragment with a reason code H102T.

2.7.1 Overview

Add threshold languages for Written Discontinuance NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_WRITTEN_DISCONTINUANCE_H102 (Fragment ID: 7053)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

2.7.2 Form/NOA Verbiage

Add MC MAGI-T Written Discontinuance NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You told us you wanted your Medi-Cal benefits to end.	Arial Font Size 10

2.7.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.7.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.8 Add threshold Languages for the MC MAGI-T On Aid for Another Case NOA Fragment with a reason code H105T.

2.8.1 Overview

Add threshold languages for On Aid for Another Case NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_ON_AID_ANOTHER_CASE_H105 (Fragment ID: 7054)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

2.8.2 Form/NOA Verbiage

Add MC MAGI-T On Aid for Another Case NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You are already receiving Medi-Cal benefits. Therefore you are not entitled to receive Medi-Cal benefits on this application. You can use the BIC card you already have to get services. If you do not have one contact your worker right away.	Arial Font Size 10

2.8.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.8.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.9 Add threshold Languages for the MC MAGI-T Stop Aid for Optional Member NOA Fragment with a reason code H109T.

2.9.1 Overview

Add threshold languages for Stop Aid for Optional Member NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID:
H_TN_STOP_AID_FOR_OPTIONAL_MEMBER_H109 (Fragment ID: 7055)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

2.9.2 Form/NOA Verbiage

Add MC MAGI-T Stop Aid for Optional Member NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You told us you wanted your Medi-Cal benefits to end.	Arial Font Size 10

2.9.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.9.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.10 Add threshold Languages for the MC MAGI-T Over MAGI Income Limit NOA Fragment with a reason code H113T.

2.10.1 Overview

Add threshold languages for Over MAGI Income Limit NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_OVER_MAGI_INCOME_H113 (Fragment ID: 7067)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

2.10.2 Form/NOA Verbiage

Add MC MAGI-T Over MAGI Income Limit NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	We have looked at all of the information we have about your case. Based on this information, your eligibility for Medi-Cal will end on the last day of <MonthYear1>. The reason your Medi-Cal is stopping is: You no longer qualify for Medi-Cal. This is because your household income is above the allowed amount. We counted your household size and income to make our decision. For Medi-Cal, your household size is <MagiSize> and your monthly household income is <MagiIncome>. The monthly Medi-Cal income limit based on your age and household size is<MagiIncomeLimit> . Your income is above this limit, so you do not qualify for Medi-Cal. We used the information you gave us and our records to make our decision. If you have questions or think we made a mistake, or if you have more information to give us, contact the Medi-Cal office at the number listed above immediately. You also have the right to appeal. See below for more information on your appeal rights. If you are pregnant or disabled and have not reported this information, you may be able to stay on Medi-Cal. If you would like to see if you can stay on Medi-Cal, please tell us by calling the Medi-Cal office at the number listed above to report your pregnancy or disability. **TAKE ACTION NOW TO GET NEW HEALTH COVERAGE** Since your income is now too high for Medi-Cal, you have been referred to Covered California. Through Covered California, individuals and families can get help paying for private health insurance. You may qualify for financial help that can lower monthly costs (called premiums) and copayments. The amount of financial help is based on household size and annual household income. You do not need to fill out a new application. **Your Medi-Cal is ending and you must act quickly to get covered.** You must pick a Covered California health plan before your Medi-Cal coverage ends and pay your premium by the due date provided in the first bill so that you do not go without health care coverage. You have an additional 60 days from the time your Medi-Cal ends to enroll in a Covered California health plan. **However, if you do not pick a Covered California plan before your Medi-Cal ends you will not have health coverage the following month.** Call your local county office at the number listed on this notice or Covered California at 800-300-1506 to ask questions about Covered California or to pick a plan. If you would like help picking a Covered California health plan, you can contact a Covered California Certified Enrollment Counselor or Certified Insurance Agent; they can help you figure out the best plan for you. To find an	Arial Font Size 10

	enrollment counselor or agent near you, go to www.CoveredCA.com and click on "Find Local Help. Please Note: Other family members with different eligibility may receive a separate notice. <MagiRegulation> is the regulation or law we relied on for this decision.	

2.10.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.10.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.11 Add threshold Languages for the MC MAGI-T Non-Payment of Premium NOA Fragment with a reason code H112T.

2.11.1 Overview

Add threshold languages for Non-Payment of Premium NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_NON_PAYMENT_OF_PREMIUM_H112 (Fragment ID: 7068)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

2.11.2 Form/NOA Verbiage

Add MC MAGI-T Non-Payment of Premium NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	Premiums have not been paid for two months in a row. If you wish to pay the premiums and remain eligible for Medi-Cal, please contact the Medi-Cal Premium Payment Section at (800) 880-5305 to arrange for repayment and then let your worker know you have paid your premiums. Please note that you may be required to pay past due premiums if your child(ren) become eligible for Medi-Cal with a premium in the next twelve (12) months.	Arial Font Size 10

2.11.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.11.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.12 Add threshold Languages for the MC MAGI-T CATEGORICALLY INELIGIBLE NOA Fragment with a reason code H403T.

2.12.1 Overview

Add threshold languages for CATEGORICALLY INELIGIBLE NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_CAT_INELIG_H403 (Fragment ID: 7451)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person

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

2.12.2 Form/NOA Verbiage

Add MC MAGI-T CATEGORICALLY INELIGIBLE NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You are aged 65 or older, or you are between the ages of 19 and 64 and are receiving Medicare benefits, not pregnant, and not a parent or caretaker of a child under 19. You may be eligible for other Medi-Cal programs, but you declined to have your eligibility for other Medi-Cal coverage determined.	Arial Font Size 10

2.12.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.12.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.13 Add threshold Languages for the MC MAGI-T Parent/Caretaker Relative NOA Fragment with a reason code H412T.

2.13.1 Overview

Add threshold languages for Parent/Caretaker Relative NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_PARENT_CARETAKER_H412 (Fragment ID: 7521)

State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English

2.13.2 Form/NOA Verbiage

Add MC MAGI-T Parent/Caretaker Relative NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You are a Parent or Other Caretaker Relative who is responsible for at least one child who is under 19 years of age and that lives in your home. Our records indicate one or more children in your home do not have the required amount of health coverage. In order for you to be eligible, all children in your home under the age of 19 must have health coverage that is considered minimum essential coverage. Minimum essential coverage includes Medi-Cal, the Children's Health Insurance Program, and many other kinds of health insurance. If you would like to apply for Medi-Cal health coverage for your child, you can call the Medi-Cal county office at the number listed above. If your child already has health coverage, you should report this information to the same Medi-Cal office at the number listed above.	Arial Font Size 10

2.13.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.13.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.14 Add threshold Languages for the MC MAGI-T Refused UIB Non-Compliance NOA Fragment with a reason code H418T.

2.14.1 Overview

Add threshold languages for Refused UIB Non-Compliance NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_REFUSED_UIB_NON_COMP_H418 (Fragment ID: 7573)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.14.2 Form/NOA Verbiage

Add MC MAGI-T Refused UIB Non-Compliance NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You did not try to get unconditionally available income. This person could get Unemployment Insurance Benefits (UIB) but did not apply.	Arial Font Size 10

2.14.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.14.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.15 Add threshold Languages for the MC MAGI-T Name Identity Non-Compliance NOA Fragment with a reason code H423T.

2.15.1 Overview

Add threshold languages for Name Identity Non-Compliance NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_NAME_IDENTITY_NON_COMP_H423 (Fragment ID: 7578)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.15.2 Form/NOA Verbiage

Add MC MAGI-T Name Identity Non-Compliance NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You or the person responsible for completing the application process in his/her behalf did not provide proof of identity.	Arial Font Size 10

2.15.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.15.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.16 Add threshold Languages for the MC MAGI-T Non-Cooperation Child Non-Compliance NOA Fragment with a reason code H424T.

2.16.1 Overview

Add threshold languages for Non-Cooperation Child Non-Compliance NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID:
H_TN_NON_COOP_CHILD_NON_COMP_H424 (Fragment ID: 7579)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.16.2 Form/NOA Verbiage

Add MC MAGI-T Non-Cooperation Child Non Compliance NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You refused to cooperate in medical support enforcement. You may reapply at any time, but you will not receive Medi-Cal benefits until the Local Child Support Agency (LCSA) has confirmed that you have cooperated with their office. This action does not affect the Medi-Cal benefits of your child(ren). However, your child(ren)'s case will be referred for medical support enforcement without your cooperation.	Arial Font Size 10

2.16.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.16.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.17 Add threshold Languages for the MC MAGI-T MC 355 Verification Not Received NOA Fragment with a reason code H425T.

2.17.1 Overview

Add threshold languages for MC 355 Verification Not Received NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_MC355_VERIF_NOT_RECEIVED_H425 (Fragment ID: 7609)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.17.2 Form/NOA Verbiage

Add MC MAGI-T MC 355 Verification Not Received NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You were sent a Medi-Cal Request for Information Form, the following verification(s) have not been received: <MC355Verification>	Arial Font Size 10

2.17.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.17.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.18 Add threshold Languages for the MC MAGI-T Failure to Provide Eligibility Forms NOA Fragment with a reason code H426T.

2.18.1 Overview

Add threshold languages for Failure to Provide Eligibility Forms NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_FTP_ELIG_FORMS_H426 (Fragment ID: 7784)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

2.18.2 Form/NOA Verbiage

Add MC MAGI-T Failure to Provide Eligibility Forms NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	We asked you to complete and return the paperwork we need to make a decision about your application or re-evaluation of eligibility for aid. You did not return your completed eligibility determination paperwork.	Arial Font Size 10

2.18.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.18.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.19 Add threshold Languages for the MC MAGI-T Failure to Respond NOA Fragment with a reason code H427T.

2.19.1 Overview

Add threshold languages for Failure to Respond NOA reason Fragment in CalSAWS.

Reason Fragment Name and ID: H_TN_FAIL_TO_RESPOND_H427 (Fragment ID: 7788)
State Form/NOA: MC-MAGI-T (11/2015)
Current NOA Template: H_NOA_TEMPLATE (ID: 3033)
Current Program(s): Medi-Cal
Current Action Type: Termination
Current Fragment Level: Person
Currently Repeatable: Yes
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese

2.19.2 Form/NOA Verbiage

Add MC MAGI-T Failure to Respond NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	Your Medi-Cal is ending on <EffectiveDiscontinuanceDate> because you did not provide the renewal information that we asked for. We need you to give us proof of your household income to see if you can still get Medi-Cal. Please call us, visit your county social services office, or return your completed and signed renewal form to give us this information. Some examples of proof of your income are a paystub, your most recent tax return, a letter from your employer, or a benefits award letter.	Arial Font Size 10

2.19.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English form for existing population logic.

2.19.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	MC MAGI-T NOAs	Fragment_Verbiage.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. RedeDenial, Recertification, and/or Annual Agreement notices and forms;	H106T, H107T, H108T, H410T, H401T, H101T, H102T, H105T, H109T, H113T, H112T, H403T, H412T, H418T, H423T, H424T, H425T, H426T, H427T Reason Codes are added in threshold languages.

	c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-252068

Restrict RCC Workers to Only Live Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gerald Limbrick
	Reviewed By	Jared Kuester, Aaron Fowler; Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
	1.0	Initial	G. Limbrick

Table of Contents

1 OVERVIEW

1.1 Current Design

An RCC Worker has two pathways to access a county outside of their home county, to assist their subscriber counties. There is a county dropdown on the Homepage or the IVR can change the county, when a call comes in for another county.

When a call comes in thru the IVR, The System redirects the user to the Call Log Detail page and to the Case Summary page or either the Person Search page, or the New Person Search page.

1.2 Requests

Only allow RCC workers to access counties that are live in the CalSAWS system.

1.3 Overview of Recommendations

1. Update the Homepage to show a validation message, if an RCC user chooses a county that is not live in the CalSAWS system.
2. Update the Call Log Detail page to display a validation message, if the IVR attempts to navigate the user to the page, for a county that is not live in CalSAWS.
3. Update the Person Search page to display a validation message, if the IVR attempts to navigate the user to the page, for a county that is not live in CalSAWS.
4. Update the New Person Search page to display a validation message, if the IVR attempts to navigate the user to the page, for a county that is not live in CalSAWS.
5. Remove cases that exist in counties that are not yet live in CalSAWS.
6. Create a CIT listing removed cases and the contact information for them.

1.4 Assumptions

1. Fields and functionality not mentioned in this document will not be changed.

2 RECOMMENDATIONS

2.1 Home page

2.1.1 Overview

Update the Homepage to show a validation message, if an RCC user chooses a county that is not live in the CalSAWS system.

2.1.2 Home page Mockup

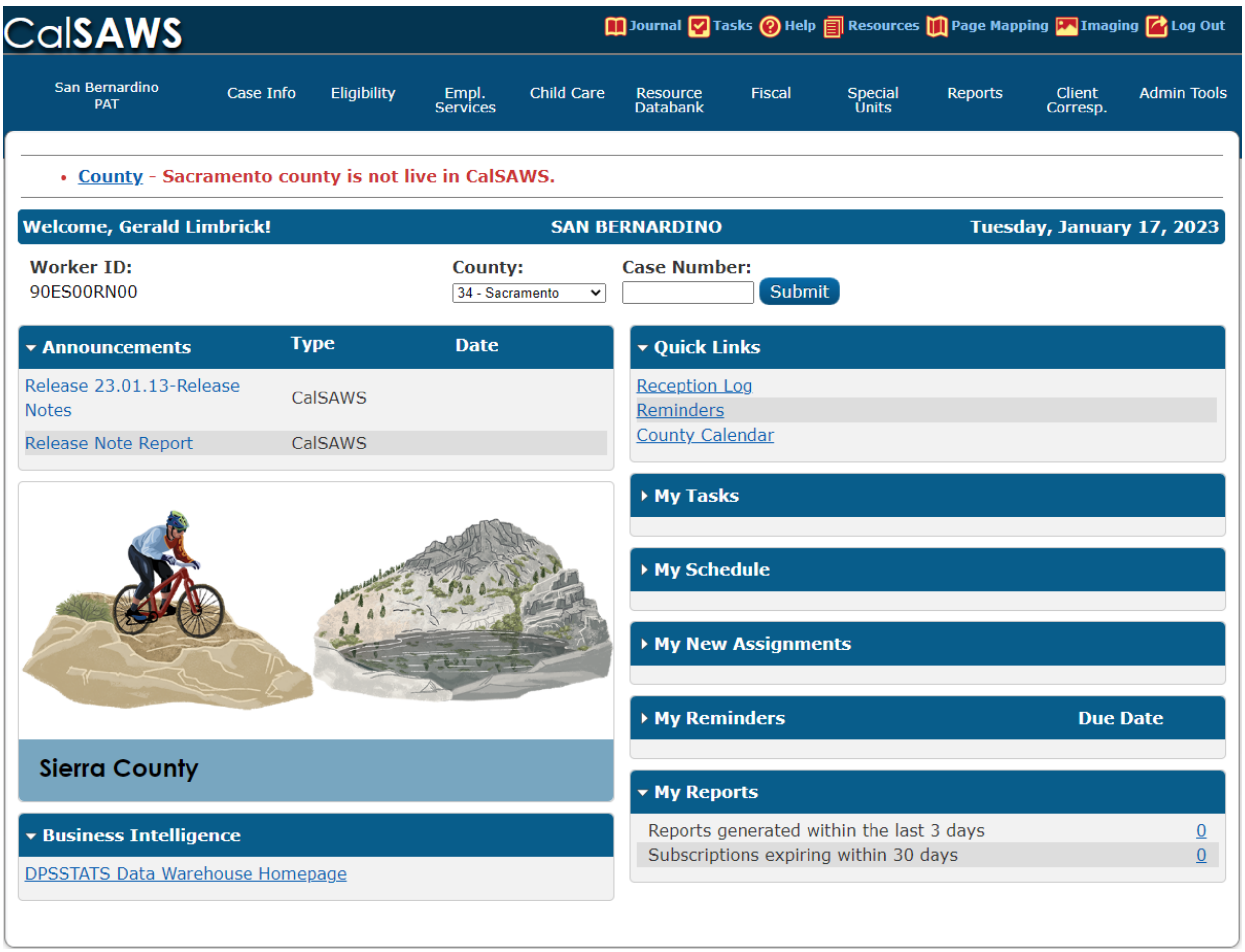


Figure 2.1.2.1 - Homepage Validation Message

2.1.3 Description of Changes

1. Update the Homepage to show a validation message, if an RCC user chooses a county that is not live in the CalSAWS system:
    a. Validate on press of the “Submit” button
    b. Show the validation message as: “County – [County_Name] county is not live in CalSAWS.”, e.g., “County - Sacramento county is not live in CalSAWS.”

    Note: County 90 & 92 users (the county numbers used for project users and Oversight Agency users) will keep the ability to choose counties that are not live.

2.1.4 Page Location

- **Home page**

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 Call Log Detail page

2.2.1 Overview

Update the Call Log Detail page to display a validation message, if the IVR attempts to create a Call Log for a county that is not live in CalSAWS.

2.2.2 Call Log Detail Mockup

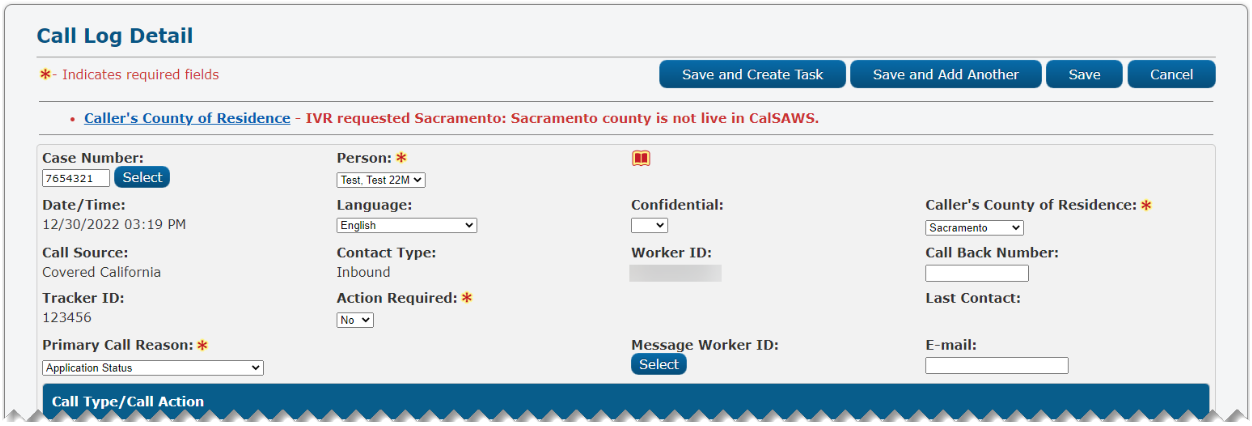


Figure 2.2.2.1- Call Log Detail Validation Message

2.2.3 Description of Changes

1. If the IVR attempts to create a Call Log for a county that is not live in CalSAWS, update the CalSAWS System context (what The System remembers about what the user is trying to do) to the user's home/signed in county.
2. Update the Call Log Detail page to display a validation message, if the IVR attempts to create a Call Log for a county that is not live in CalSAWS. Display the validation message as: "Caller's County of Residence - IVR requested [County_Name]: [County_Name] county is not live in CalSAWS.", e.g., "Caller's County of Residence - IVR requested Sacramento: Sacramento county is not live in CalSAWS."
3. Update the Call Log Detail page to display a validation message, if any user, RCC user or other user, attempts to save a Call Log for a county that is not live in CalSAWS. Display the validation message as: "Caller's County of Residence - [County_Name] county is not live in CalSAWS.", e.g., "Caller's County of Residence - Sacramento county is not live in CalSAWS."

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Call Log > Click the 'Add' button**

Note: For the workflow associated to this system change, the IVR/CTI pop will open the Call Log Detail page.

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 Person Search page

2.3.1 Overview

Update the Person Search page to display a validation message, if the IVR attempts to navigate the user to a county that is not live in CalSAWS.

2.3.2 Person Search page Mockup

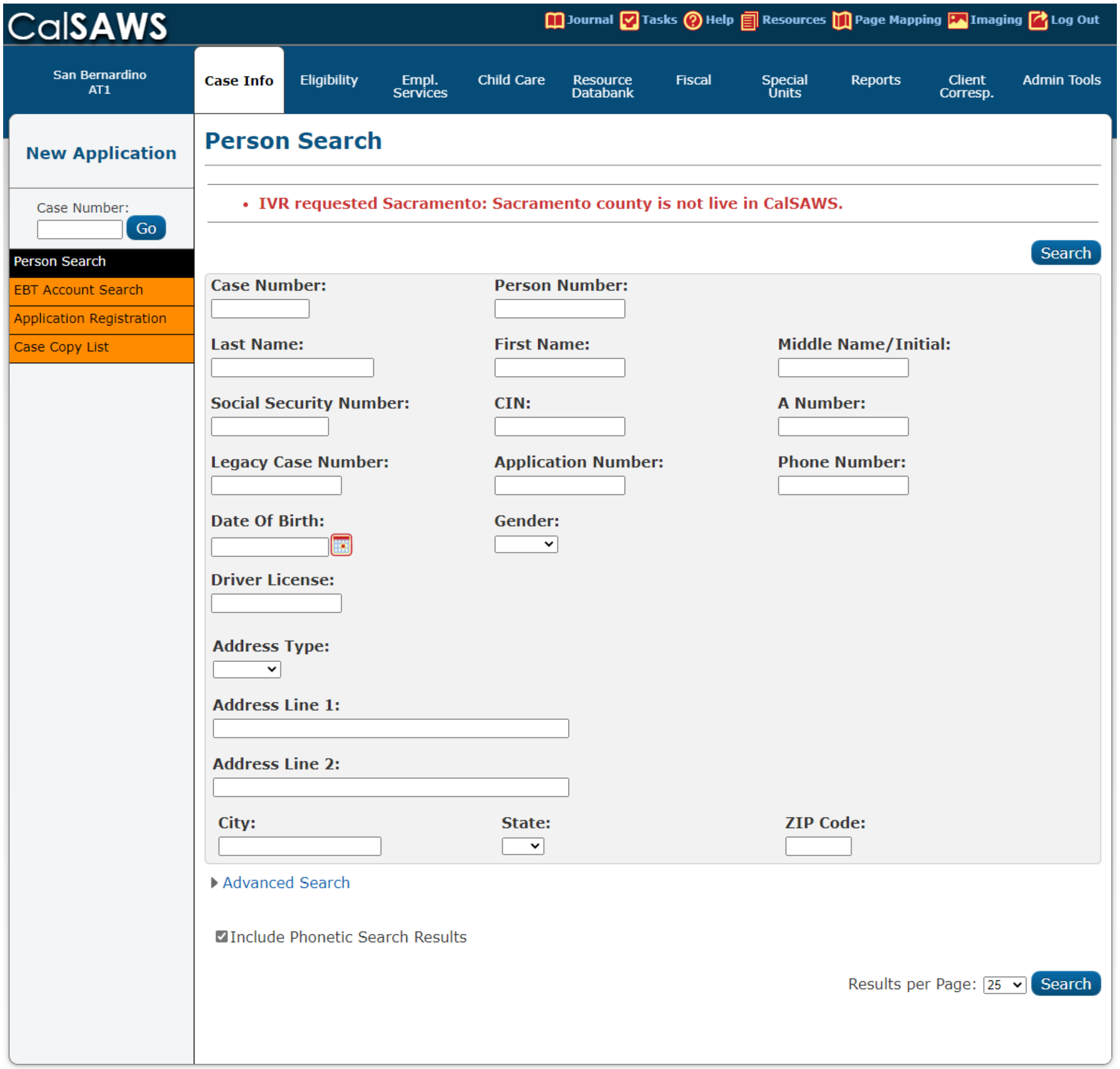


Figure 2.3.2.1 - Person Search Validation Message

2.3.3 Description of Changes

1. Update the Person Search page to display a validation message, if the IVR attempts to navigate the user to a county that is not live in CalSAWS:
   a. Display the validation message as: “IVR requested [County_Name]: [County_Name] county is not live in CalSAWS.”, e.g., “IVR requested Sacramento: Sacramento county is not live in CalSAWS.”

b. Update the CalSAWS System context (what The System remembers about what the user is trying to do) to the user's home/signed in county

2.3.4 Page Location

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

Note: For the workflow associated to this system change, the IVR/CTI pop will open the Person Search page.

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 New Person Search page

2.4.1 Overview

Update the New Person Search page to display a validation message, if the IVR attempts to navigate the user to a county that is not live in CalSAWS.

2.4.2 New Person Search page Mockup

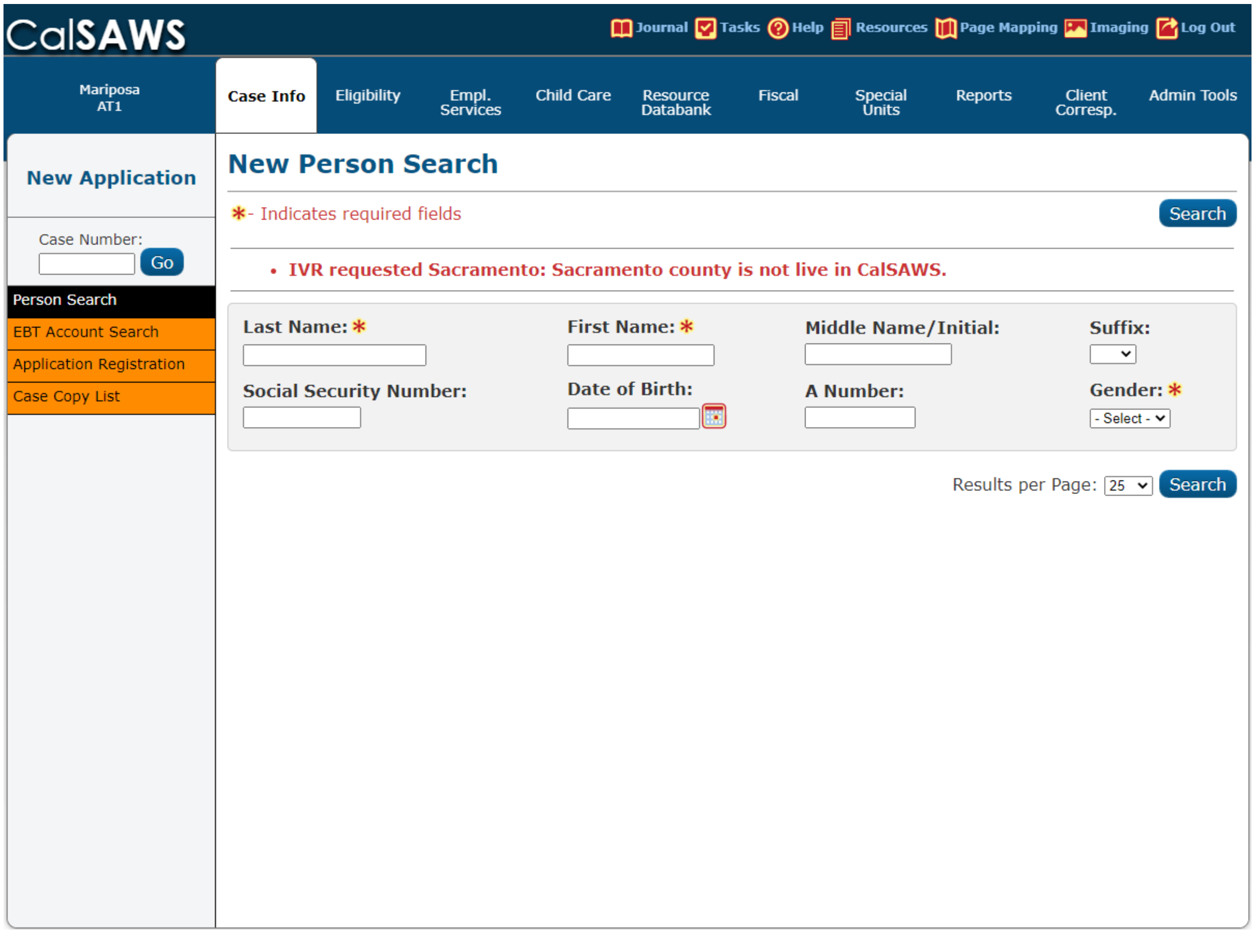


Figure 2.4.2.1 - New Person Search Validation Message

2.4.3 Description of Changes

1. Update the New Person Search page to display a validation message, if the IVR attempts to navigate the user to a county that is not live in CalSAWS.
    a. Display the validation message as: “IVR requested [County_Name]: [County_Name] county is not live in CalSAWS.”, e.g., “IVR requested Sacramento: Sacramento county is not live in CalSAWS.”
    b. Update the CalSAWS System context (what The System remembers about what the user is trying to do) to the user’s home/signed in county.

2.4.4 Page Location

- **Global: Eligibility**

- **Local: Case Summary**
- **Task: New Person**

Note: For the workflow associated to this system change, the IVR/CTI pop will open the New Person Search page.

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Data Change

2.5.1 Overview

Remove cases created before the county was live.

2.5.2 Description of Change

1. Delete Cases, without programs, that have been created in counties not yet live in the CalSAWS system:
    a. Remove CASE data, e-Applications, and Journal entries
    b. Remove Person data, only if the Person is not associated with another Case in the CalSAWS system
    c. Do not Delete Person level data, if the Person is associated with a Case in a county that is live in the CalSAWS system
    d. Do not Delete Call Log information (if any)
2. Delete these erroneous Cases in counties, now, live in CalSAWS:
    a. Remove CASE data, e-Applications, and Journal entries
    b. Remove Person data, only if the Person is not associated with another Case in the CalSAWS system
    c. Do not Delete Person level data, if the Person is associated with a Case in a county that **is** live in the CalSAWS system
    d. Do not Delete Call Log information (if any)

CASE__CREATE_DATE	COUNTY	CASE#
2/21/2023 10:05:14 AM	07-Contra Costa	L000001

1/23/2023 11:34:18 AM	43-Santa Clara	L000001
2/1/2023 4:03:58 PM	43-Santa Clara	L000002
2/1/2023 4:09:27 PM	43-Santa Clara	L000003
2/2/2023 11:37:53 AM	43-Santa Clara	L000004
2/8/2023 10:53:26 AM	43-Santa Clara	L000005
2/21/2023 11:54:36 AM	43-Santa Clara	L000006
2/24/2023 9:31:49 AM	43-Santa Clara	L000007
2/23/2023 4:05:26 PM	54-Tulare	L000001
2/23/2023 4:16:00 PM	54-Tulare	L000002

3. Create a list of removed cases and the contact information for them: (See **Outreach** Section)

Note: A "shell Case" will not be left in The System, for these removed cases; they are unsigned and erroneous.
Note: Please note Project Requirement # 2.4.2.12.2, listed in the Project Requirements section of this document, "The LRS shall not retain unsigned applications that have been determined to be erroneous."

2.5.3 Estimated Number of Records Impacted/Performance

21+ records

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.1.6	The LRS shall track applications taken at locations other than a Local Office Site.	This SCR facilitates tracking applications taken at other locations by associating them with a county that uses the CalSAWS system.
2.4.2.12.2	The LRS shall not retain unsigned applications that have been determined to be erroneous.	This SCR will delete some unsigned applications that have been determined to be erroneous, i.e., applications erroneously started in counties not yet live in The System.

3.2 Migration Requirements

N/A

4 MIGRATION IMPACTS

N/A

5 OUTREACH

5.1 Lists

Create a List of Customer Contact Information for Deleted Cases

List Name: Cases_Created_Before_County_GoLive

List Criteria: The case was deleted by this SCR

Standard Columns:

Include more than one list item/row per case where needed to accommodate more than one person, address, phone number and/or e-mail, etc. per deleted case:

- Case County - (decoded county)
- Case Number - (serial_num_identif)
- Case Name – (as shown on the Case Summary page)
- Person – (Last, First) **Note:** May be same as Case Name
- DOB – (as formatted on the Case Summary page)
- Gender – (as formatted on the Case Summary page)
- SSN – (as formatted on the Case Summary page
- CIN – (as formatted on the Case Summary page)
- Address Type - (formatted as on the Contact Summary page) (include any address without an end date)
- Address - (formatted as on the Contact Summary page)
- Phone Number - (formatted as on the Contact Summary page)
- Phone Type - (formatted as on the Contact Summary page)
- E-mail - (formatted as on the Contact Summary page)

Frequency: One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-252068

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253605

Task Mgmt Update Dashboard for Task Mgmt Part 2

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/15/2023	1.0	Esequiel Herrera-Ortiz	Esequiel Herrera-Ortiz

Table of Contents

1 OVERVIEW

1.1 Current Design

1. The Task Management Dashboard is missing the following functionality:
    a. Unable to identify Expedited Service and Immediate Need related tasks.
    b. Does not include Month, Day, Week parameters on all sheets.
    c. Does not include all organization level parameters on all the sheets.
    d. Does not have a widget related to task statuses.
    e. Does not provide an easy way to identify tasks that are coming due.
    f. Does not have statistics on tasks completed before or after due date.
    g. Does not provide an easy way to compare side-by-side the processing time of tasks for workers, units, offices, and divisions.
2. The Task Management Dashboard has inconsistent functionality between its sheets.

1.2 Requests

1. Add Expedited Service and Immediate Need information.
2. All tasks should be filterable by day, week, month.
3. All tasks should be filterable by all organization levels.
4. Provide counts and listing of tasks in Expired status by day, week, and month.
5. Provide counts and listing of tasks in Void status by day, week, and month.
6. Provide counts of tasks by task status: Assigned/In Process, Assigned, Completed, Expired, In Process, Void and any other statuses in the database including blank/other.
7. Provide individual counts for all task status types.
8. Provide counts and list of programs for tasks due in the current month.
9. Provide counts and lists of programs for tasks due in the following month.
10. Provide counts of tasks completed before due date and counts of tasks completed after due date.
11. Enable side-by-side comparison by worker, unit, office, and division for average days to complete a task.
12. Provide average transaction time by task category, task type, worker, unit, office, division, and department.
13. Update inconsistent functionality throughout the dashboard.

1.3 Overview of Recommendations

1. Historical Task Management Updates:
    a. Add a Task Status Date parameter. This will replace the existing Month parameter.
    b. Add a Task Type parameter. This can be used to filter the base population to those tasks created from an Expedited Service or Immediate Need automated action.
    c. Rename the existing 'Bank Number' parameter to 'Bank'.

    d. Add a new widget and case list which shows the count of tasks in each status by month, week, and day.
    e. Update the Task Assign Date column on all case lists to match the Assign Date value on the Task Detail page. Currently the column displays the assign date if the task is Assigned or In Process or the Close Date if the task is Completed, Expired or Void.
    f. Update the Task Type column on every case list to display the user defined Task Type rather than the pre-defined codes table task types.
    g. Update the Tasks by Category widget to include tasks that are in Process status. Currently the widget only reports on tasks in Assigned status.
    h. Update the sheet to consider a task Open if it is Assigned or In Process. Currently the sheet only considers a case Open if it is in Assigned status.
    i. Remove the condition on the base population which excludes tasks that have been closed for more than a year. The system no longer stores tasks that are closed for over a year and this condition is no longer needed.
    j. Update all existing case lists to include a Time Recorded by Assigned Worker column and Total Time Recorded column which shows the time spend on a given task.
    k. Update the sheet template to match the mockup in the Supporting Documents section.
2. Real Time Task Management Updates:
    a. Add a Task Status Date parameter.
    b. Add a Task Type parameter. This can be used to filter the base population to those tasks created from an Expedited Service or Immediate Need automated action.
    c. Add a new widget and case list which reports tasks by programs that are coming due.
    d. Add a 'Never Assigned to Worker Indicator' column to the '# Tasks Assigned to Banks' case list.
    e. Update the Task Type column on every case list to display the user defined Task Type rather than the old codes pre-defined task types.
    f. Update the sheet to consider a task overdue if the due date is less than or equal to the day prior to the current date. Currently tasks that have a due date equal to the current date are being considered overdue.
    g. Update the sheet template to match the mockup in the Supporting Documents section.
3. Historical Task Management Productivity Updates:
    a. Add a Task Status Date parameter to the dashboard. This will replace the existing Month and Week parameters.
    b. Add a Division parameter.
    c. Add a Task Type parameter. This can be used to filter the base population to those tasks created from an Expedited Service or Immediate Need automated action.
    d. Rename the existing 'Bank Number' parameter to 'Bank'.
    e. Add a widget and case list which shows the count of tasks that are completed timely and those completed late.

    f. Add widgets which allows side-by-side comparison by worker, unit, office, and division for average time spend to process tasks.
    g. Add a new Time Recorded by Assigned Worker column and Total Time Recorded column to every case list in the sheet.
    h. Add the 'Days to Complete from Created On' column to the Tasks Completed case list.
    i. Update the Task Type column on every case list to display the user defined Task Type rather than the old codes pre-defined task types.
    j. Update the Task Assign Date column found in every case list to match the Assign Date value displayed in the Task Detail page. Currently the column displays the assign date if the task is Assigned or In Process or the Close Date if the task is Completed, Expired or Void.
    k. Update the Average Days to Complete Task total to restrict the numerator to Completed tasks and to only include tasks that are assigned to a worker. Currently the calculation can result in a negative value.
    l. Update the # Overdue Tasks total to consider tasks that are In Process. Currently the widget only looks at tasks that are Assigned.
    m. Update the % Overdue Tasks total to include tasks that are In Process. Currently the widget only includes tasks that are Assigned.
    n. Update the sheet to consider a task Open if it is In Process. Currently the sheet only considers a task open if it is in Assigned.
    o. Remove the condition on the base population which excludes tasks that have been closed for more than a year. The system no longer stores tasks that are closed for over a year and this condition is no longer needed.
    p. Update the sheet template to match the mockup in the Supporting Documents section.
4. Real Time Task Management Productivity Updates:
    a. Add a Task Status Date parameter.
    b. Add a Division parameter.
    c. Add a Task Type parameter. This can be used to filter the base population to those tasks created from an Expedited Service or Immediate Need automated action.
    d. Add a new total which shows the percent of tasks that are completed timely in the day.
    e. Remove the header titled 'Real Time Tasks Department' from the top of the sheet. This type of header is not consistent with the other sheets.
    f. Update the Real Time Task Management widget to include a new column which shows the % Completion Rate.
    g. Update the Task Type column on every case list to display the user defined Task Type rather than the old codes pre-defined task types.
    h. Update the # Overdue Tasks total to restrict to only tasks in Assigned or In Process status. Currently the total includes any tasks that is marked as Overdue regardless of status.
    i. Update the % Overdue Tasks total such that the numerator restricts to only tasks that are Assigned or In Process. Currently the total does not restrict by any status.

j. Update the Average Days to Complete Tasks total to restrict the numerator to Completed tasks and to only include tasks that are assigned to a worker. Currently the calculation can result in a negative value.
k. Update the sheet to consider a task overdue if the due date is less than or equal to the day prior to the current date. Currently the sheet considers some tasks overdue when the due date is equal to the current date.
l. Update the sheet template to match the mockup in the Supporting Documents section.

1.4 Assumptions

1. The original request requested an Expedited Service and Immediate Need Indicator. With **CA-255938 Automated Actions for Expedited Service and Immediate Need** the system will be updated to include new automated actions which a county can use to generate new ES and IN Task Types. The new Task Type parameter and existing Task Type column can be used to identify ES and IN tasks.
2. This SCR has a dependency to **CA-253348 Task Mgmt: Track Time Spent Working Task functionality.** With CA-253348 the system will be updated to allow workers to record their time spent processing each task. This information will be included as part of this SCR.
3. The new # Average Days to Complete Tasks by Month/Week/Day is calculated from the assignment date until the completion date. This means if a task is reassigned, all previous work is lost in the calculation.

2 RECOMMENDATIONS

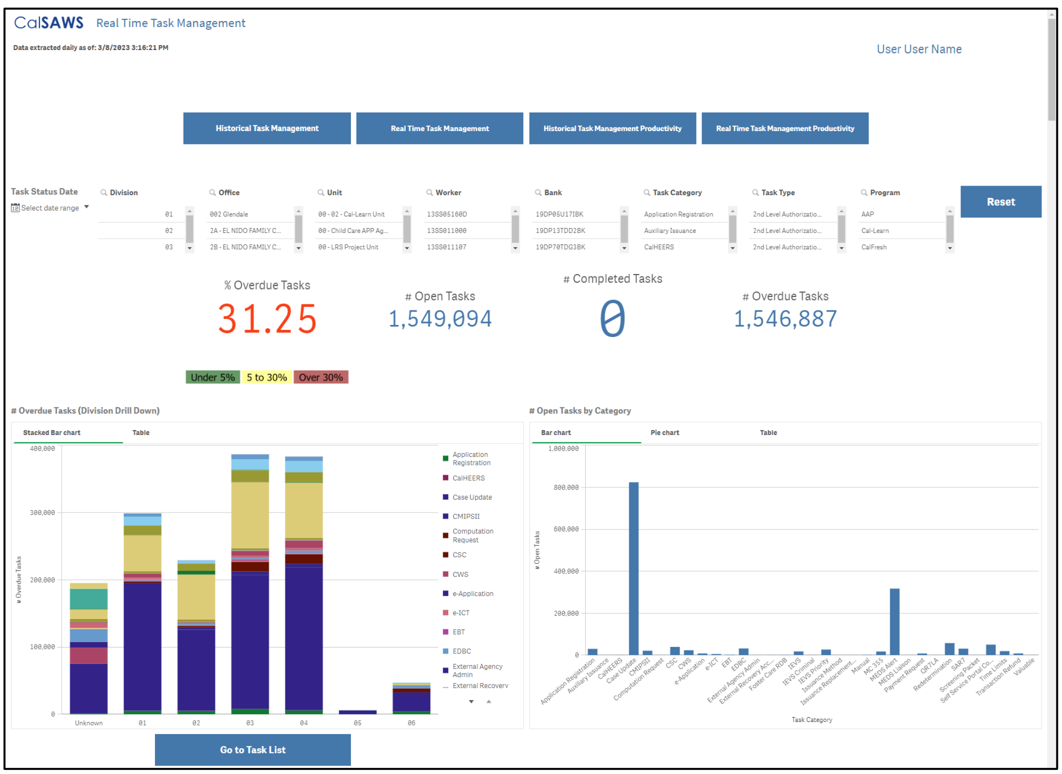
2.1 Task Management Dashboard

2.1.1 Overview

The Task Management Dashboard consists of the following sheets:

- Historical Task Management – Provides statistics on all tasks that are open or have been closed within a year. The data is refreshed nightly.
- Real Time Task Management – Provides statistics on all tasks that are currently Assigned and In Process or were completed in the current day. The data is refreshed every three hours.
- Historical Task Management Productivity - Provides productivity statistics on all tasks that are open or have been closed within a year. The data is refreshed nightly.
- Real Time Task Management Productivity - Provides productivity statistics on all tasks that are currently Assigned or In Process or were completed within the current day. The data is refreshed every three hours.

2.1.2 Task Management Dashboard Screenshot



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

2.1.3 Description of Change

Historical Task Management

1. Add a Task Status Date parameter. This replaces the existing Month parameter. See the Parameter Definitions section below.
2. Add a Division parameter. See the Parameter Definitions section below.
3. Add a Task Type parameter. This can be used to filter the base population to those tasks created from an Expedited Service or Immediate Need automated action.
   Note: Applying a parameter impacts all the widgets on the sheet due to a filtered base population. See the Parameter Definitions section below.
4. Rename the existing 'Bank Number' parameter to 'Bank'.
5. Add a new widget titled '# Tasks by Status and Status Date Month/Week/Day'. The widget is placed to the right of the # Open Tasks by Category (Division Drill Down) widget. The widget captures all tasks in the sheet's base population and groups them by Status and Status Date. The widget has a link titled 'Go to Task List' which links to a new '# Tasks by Status and Status Date' case list. See the attached mockups in the Supporting Documents section for more information.

 # Tasks by Status and Status Date Month/Week/Day

View 1: Table

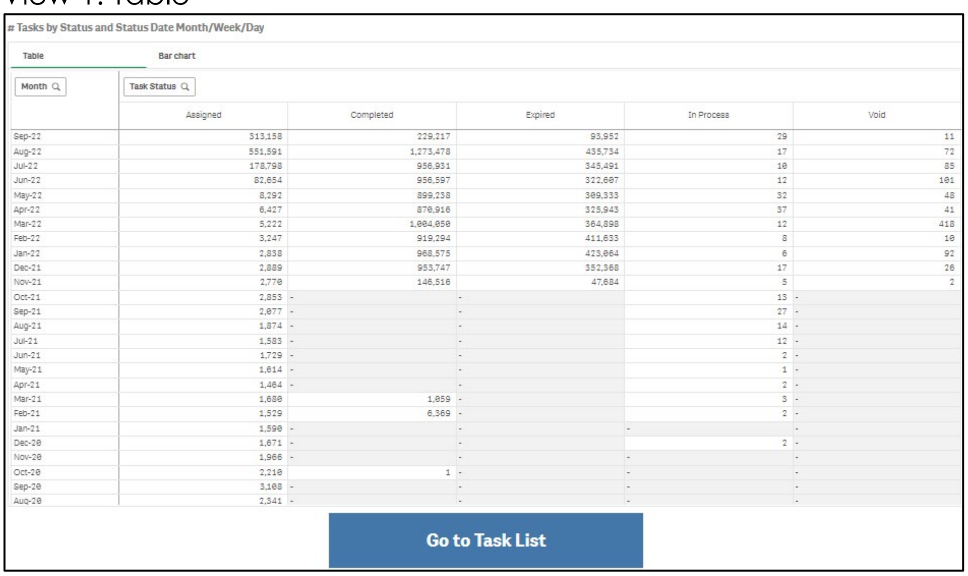

Tasks by Status and Status Date Month/Week/Day

Table | Bar chart

Month	Assigned	Completed	Expired	In Process	Void
Sep-22	313,158	229,217	93,952	29	11
Aug-22	551,591	1,273,478	435,734	17	72
Jul-22	178,798	956,931	345,491	10	85
Jun-22	82,654	956,597	322,607	12	101
May-22	8,292	899,238	309,333	32	48
Apr-22	6,427	870,916	325,943	37	41
Mar-22	5,222	1,004,050	364,898	12	418
Feb-22	3,247	919,294	411,633	8	10
Jan-22	2,838	968,575	423,064	6	92
Dec-21	2,889	953,747	352,368	17	26
Nov-21	2,770	146,516	47,684	5	2
Oct-21	2,853	-	-	13	-
Sep-21	2,077	-	-	27	-
Aug-21	1,874	-	-	14	-
Jul-21	1,583	-	-	12	-
Jun-21	1,729	-	-	2	-
May-21	1,614	-	-	1	-
Apr-21	1,464	-	-	2	-
Mar-21	1,680	1,059	-	3	-
Feb-21	1,529	6,369	-	2	-
Jan-21	1,590	-	-	-	-
Dec-20	1,671	-	-	2	-
Nov-20	1,966	-	-	-	-
Oct-20	2,210	1	-	-	-
Sep-20	3,108	-	-	-	-
Aug-20	2,341	-	-	-	-

Go to Task List

Row = Status Date Drill Down
Month: Mon-YYYY
Week: Mon–DD–YYYY (The first day of each week in the month)
Day: Mon-DD-YYYY

Order: Descending order.

Column = Task Status

Order: Ascending

Values = # Tasks

View 2: Bar chart

Group: Status Date Drill Down

Month: Mon-YYYY

Week: Mon–DD–YYYY (The first day of each week in the month)

Day: Mon-DD-YYYY

Ordered: Descending order

Bars: Task Status

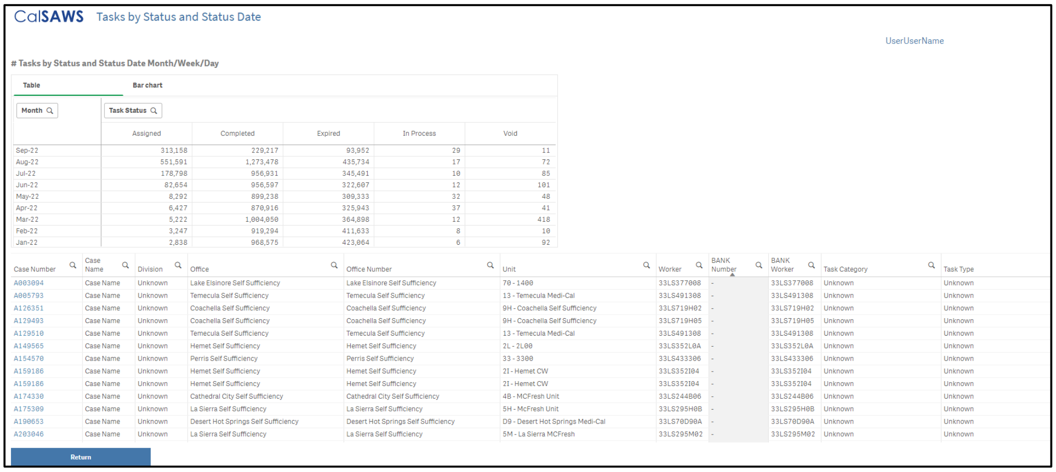
Order: Ascending

Length of Bars: # Tasks

6. Create a new case list titled '# Tasks by Status and Status Date' for the '#Tasks by Status and Status Date Month/Week/Day' widget. The case list has a copy of the '#Tasks by Status and Status Date Month/Week/Day' widget placed at the top. The case list includes a 'Return' button at the bottom of the page which returns the user to the 'Historical Task Management' sheet. See the attached mockup in the Supporting Documents section for reference.

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

Tasks by Status and Status Date Case List Screenshot



CalSAWS Tasks by Status and Status Date

UserUserName

Tasks by Status and Status Date Month/Week/Day

Table | Bar chart

Month	Assigned	Completed	Expired	In Process	Void
Sep-22	313,158	229,217	93,952	29	11
Aug-22	551,591	1,273,478	435,734	17	72
Jul-22	178,798	956,931	345,491	10	85
Jun-22	82,654	956,597	322,607	12	101
May-22	8,292	899,238	309,333	32	48
Apr-22	6,427	870,916	325,943	37	41
Mar-22	5,222	1,004,050	364,898	12	418
Feb-22	3,247	919,294	411,633	8	10
Jan-22	2,838	968,575	423,064	6	92

Case Number	Case Name	Division	Office	Office Number	Unit	Worker	BANK Number	BANK Worker	Task Category	Task Type
A003094	Case Name	Unknown	Lake Elsinore Self Sufficiency	Lake Elsinore Self Sufficiency	70 - 1400	33LS377008	-	33LS377008	Unknown	Unknown
A005793	Case Name	Unknown	Temecula Self Sufficiency	Temecula Self Sufficiency	13 - Temecula Medi-Cal	33LS491308	-	33LS491308	Unknown	Unknown
A126351	Case Name	Unknown	Coachella Self Sufficiency	Coachella Self Sufficiency	9H - Coachella Self Sufficiency	33LS719H02	-	33LS719H02	Unknown	Unknown
A129493	Case Name	Unknown	Coachella Self Sufficiency	Coachella Self Sufficiency	9H - Coachella Self Sufficiency	33LS719H05	-	33LS719H05	Unknown	Unknown
A129510	Case Name	Unknown	Temecula Self Sufficiency	Temecula Self Sufficiency	13 - Temecula Medi-Cal	33LS491308	-	33LS491308	Unknown	Unknown
A149565	Case Name	Unknown	Hemet Self Sufficiency	Hemet Self Sufficiency	2L - 2L00	33LS352L0A	-	33LS352L0A	Unknown	Unknown
A154570	Case Name	Unknown	Perris Self Sufficiency	Perris Self Sufficiency	33 - 3300	33LS433306	-	33LS433306	Unknown	Unknown
A159186	Case Name	Unknown	Hemet Self Sufficiency	Hemet Self Sufficiency	2I - Hemet CW	33LS352I04	-	33LS352I04	Unknown	Unknown
A159186	Case Name	Unknown	Hemet Self Sufficiency	Hemet Self Sufficiency	2I - Hemet CW	33LS352I04	-	33LS352I04	Unknown	Unknown
A174330	Case Name	Unknown	Cathedral City Self Sufficiency	Cathedral City Self Sufficiency	4B - MCFresh Unit	33LS244B06	-	33LS244B06	Unknown	Unknown
A175309	Case Name	Unknown	La Sierra Self Sufficiency	La Sierra Self Sufficiency	5H - McFresh Unit	33LS295H0B	-	33LS295H0B	Unknown	Unknown
A190653	Case Name	Unknown	Desert Hot Springs Self Sufficiency	Desert Hot Springs Self Sufficiency	D9 - Desert Hot Springs Medi-Cal	33LS70D90A	-	33LS70D90A	Unknown	Unknown
A203046	Case Name	Unknown	La Sierra Self Sufficiency	La Sierra Self Sufficiency	5M - La Sierra MCFresh	33LS295M02	-	33LS295M02	Unknown	Unknown

Return

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

Base Population:
Includes all tasks in the Historical Time Task Management Sheet's base population.

Columns:

Add the following columns to the case list. The columns are placed in the order that they appear on this table. The column definitions can be found in Column Definitions section.

1. Case Number
2. Case Name
3. Division
4. Office Number
5. Office
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task Type
11. Program
12. Program Status
13. Primary Applicant
14. Spoken Language
15. Application Date
16. Task Status
17. Task Status Date
18. Days Elapsed from Status Date
19. Task Assign Date
20. Task Due Date

21. Task Create Date
22. Task Start Date
23. # Days to Complete Task
24. Days to Complete Task from Created On
25. Time Recorded by Assigned Worker
26. Total Time Recorded
27. Overdue Indicator
28. Append Date
29. Customer Report Type
30. Customer Report Submit Month
31. Confidential Description
32. Qlik ID

7. Update the Task Assign Date column on all case lists to match the Assign Date value on the Task Detail page. Currently the column displays the assign date if the task is Assigned or In Process or the Close Date if the task is Completed, Expired or Void. The column definitions can be found in Column Definitions section.

   Technical Note: The impacts the following case lists:
   # Open Tasks vs # Workers – Tasks List
   # Open Tasks by Category
   # Completed Tasks by Category

8. Update the Task Type column on every case list to display the user defined Task Type rather than the pre-defined codes value. The column definitions can be found in Column Definitions section.

   Technical Note: The impacts the following case lists:
   # Open Tasks vs # Workers – Tasks List
   # Open Tasks by Category
   # Completed Tasks by Category

9. Update the sheet to consider a task Open if it is 'Assigned' or 'In Process'. Currently the sheet only considers a case Open if it is in 'Assigned' status.
   Technical Note: This impacts the following.
   Widgets:
   # Open Tasks by Category
   # Open Task vs Workers
   # Open Tasks by Category (Division Drill Down)

   Case List

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

10. Remove the condition on the base population which excludes tasks that have been closed for more than a year. The system no longer stores tasks that are closed for over a year and this condition is no longer needed.

11. Update the following case lists to include the new columns in **bold**. The column definitions can be found in Column Definitions section. The columns are placed in the order that they appear:

    #Open Tasks by Category

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

    #Completed Tasks by Category

    1. Case Number
    2. Case Name
    3. Division
    4. Office
    5. Office Number

6. Unit
7. Worker
8. Worker Name
9. Bank Number
10. Task Category
11. Task Type
12. Program
13. Program Status
14. Primary Applicant
15. Spoken Language
16. Application Date
17. Task Assign Date
18. Task Due Date
19. Task Create Date
20. Task Start Date
21. Task Completion Date
22. #Days to Complete Task
23. **Days to Complete Task from Created On**
24. **Time Recorded by Assigned Worker**
25. **Total Time Recorded**
26. Append Date
27. Customer Report Type
28. Customer Report Submit Month
29. Confidential Description
30. Qlik ID

12. Update the sheet template to match the attached mockup in the Supporting Documents section.

Real Time Task Management

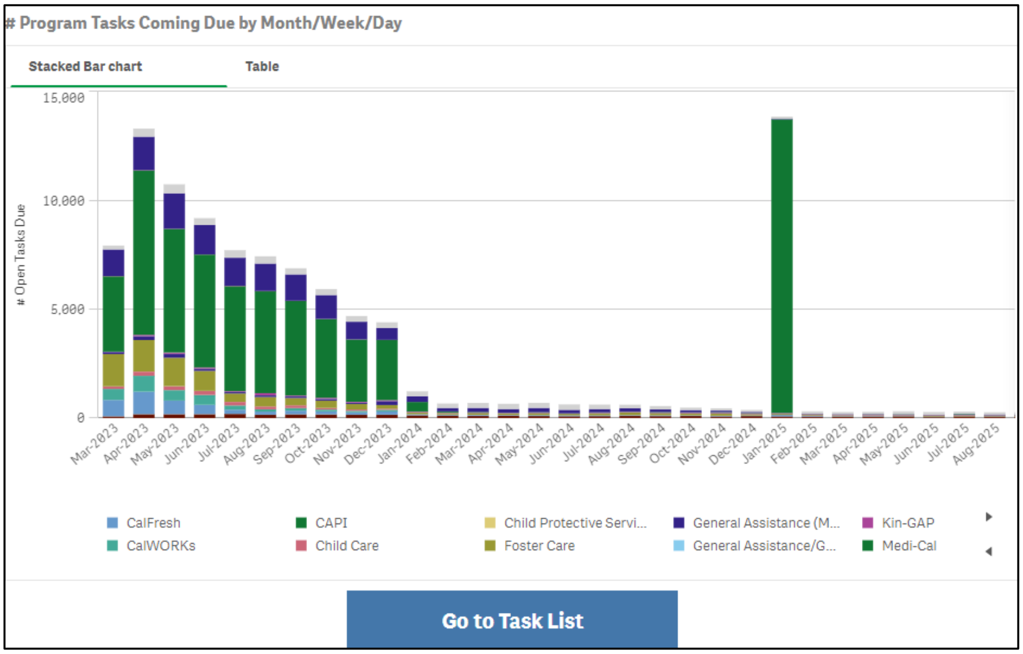
13. Add a Task Status Date parameter. This replaces the existing Month parameter. See the Parameter Definitions section below.
14. Add a Task Type parameter. This can be used to filter the base population to those tasks created from an Expedited Service or Immediate Need automated action. See the Parameter Definitions section below.

15. Add a new widget titled # Program Tasks Coming Due by Month/Week/Day. The existing # Completed Tasks During Current Day By Division is shifted to the left of the page and the new # Program Tasks Coming Due by Month/Week/Day is placed to the right of it. The widget captures all open tasks that have a Due Date greater than or equal to the current date. The widget has a link titled 'Go to Task List'

which links to a new '# Tasks Coming Due' case list. The widget includes tasks that have no associated program.

Program Tasks Coming Due by Month/Week/Day

View 1: Stacked Bar chart



Stack = Due Date Drill Down

Month: Mon-YYYY

Week: Mon–DD–YYYY (The first day of each week in the month)

Day: Mon-DD-YYYY

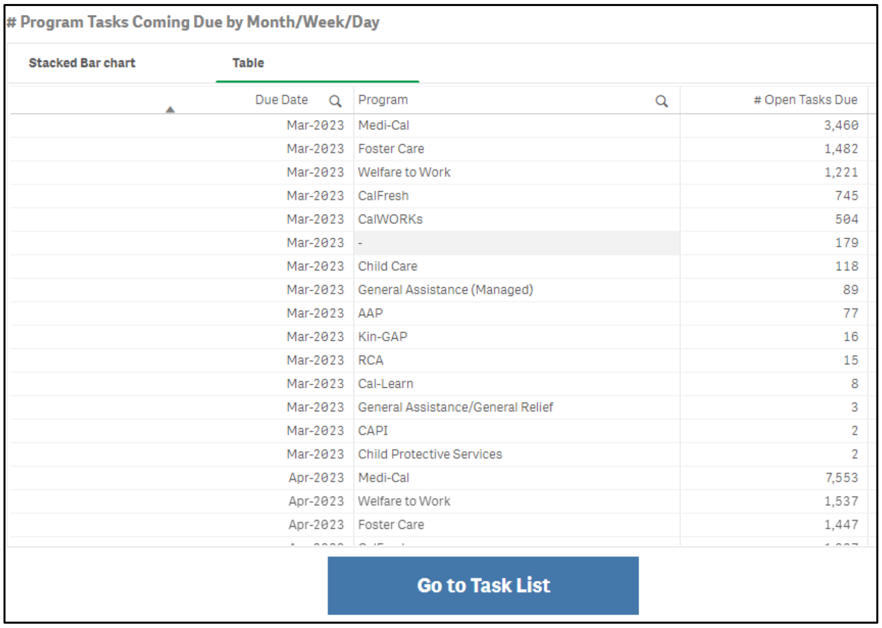
Order: Descending

Bars = Program (Includes tasks with no associated programs)

Order: Ascending

Length of bars = # Open Tasks Due

View 2: Pivot Table


Program Tasks Coming Due by Month/Week/Day

Stacked Bar chart | Table

Due Date	Program	# Open Tasks Due
Mar-2023	Medi-Cal	3,460
Mar-2023	Foster Care	1,482
Mar-2023	Welfare to Work	1,221
Mar-2023	CalFresh	745
Mar-2023	CalWORKs	504
Mar-2023	-	179
Mar-2023	Child Care	118
Mar-2023	General Assistance (Managed)	89
Mar-2023	AAP	77
Mar-2023	Kin-GAP	16
Mar-2023	RCA	15
Mar-2023	Cal-Learn	8
Mar-2023	General Assistance/General Relief	3
Mar-2023	CAPI	2
Mar-2023	Child Protective Services	2
Apr-2023	Medi-Cal	7,553
Apr-2023	Welfare to Work	1,537
Apr-2023	Foster Care	1,447

Go to Task List

Column 1: Due Date Drill Down

Month: Mon-YYYY
Week: Mon–DD–YYYY (The first day of each week in the month)
Day: Mon-DD-YYYY
Order: Descending

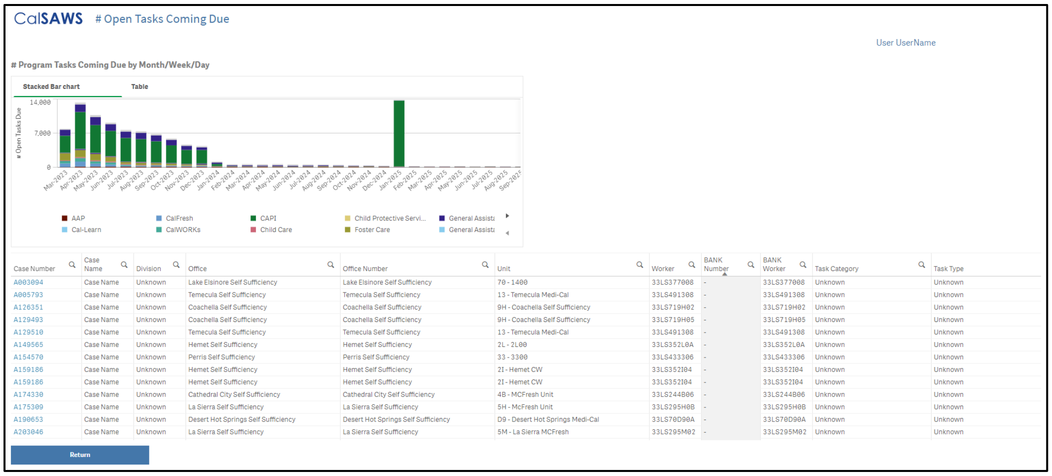
Column 2: Program (Includes tasks with no associated programs)
Order: Ascending

Column 3: # Open Tasks Due

16. Create a new case list for the '#Program Tasks Coming Due by Month/Week/Day' widget. The case list has a copy of the '#Program Tasks Coming Due by Month/Week/Day' widget placed at the top. The case list includes a 'Return' button at the bottom of the page which returns the user to the 'Realtime Task Management' sheet. See the attached mockup in the Supporting Documents section for reference.

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

 # Open Tasks Coming Due Case List Screenshot



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

Base Population:
Includes all tasks in the Real Time Task Management Sheet that are open and have a Due Date greater than or equal to the current date.

Columns:

Add the following columns to the case list. The columns are placed in the order that they appear on this table. The column definitions are in Column Definitions section.

1. Case Number
2. Case Name
3. Division
4. Office Number
5. Office
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task Type
11. Program
12. Program Status
13. Primary Applicant
14. Spoken Language
15. Application Date
16. Task Status
17. Task Status Date
18. Days Elapsed from Status Date
19. Task Assign Date
20. Task Due Date
21. Task Create Date
22. Task Start Date

23. #Remaining Days
24. Append Date
25. Customer Report Type
26. Customer Report Submit Month
27. Confidential Description
28. Qlik ID

17. Add a 'Never Assigned to Worker Indicator' column to the '# Tasks Assigned to Banks' case list. The columns placed in the order it appear below. The column definition is located in the Column Definition section below.

    1. Case Number
    2. Case Name
    3. Division
    4. Office
    5. Office Number
    6. Unit
    7. Worker
    8. Bank Number
    9. Task Category
    10. Task Type
    11. Program
    12. Program Status
    13. Primary Applicant
    14. Spoken Language
    15. Application Date
    16. Task Status
    17. Task Status Date
    18. Days Elapsed from Status Date
    19. Task Assign Date
    20. Task Due Date
    21. Task Create Date
    22. Task Start Date
    23. #Remaining Days
    24. Append Date
    25. Overdue Indicator
    26. Customer Report Type
    27. Customer Report Submit Month
    28. Confidential Description
    29. **Never Assigned to a Worker**
    30. Qlik ID

18. Update the Task Type column on every case list to display the user defined Task Type rather than the old codes pre-defined task types.

    Technical Note: This impacts the following case lists:

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

19. Update the sheet to consider a task overdue if the due date is less than or equal to the day prior to the current date. Currently tasks that have a due date equal to the current date are being considered overdue.
    Technical Note: This impacts the following:
    Totals:
        % Overdue Tasks
        # Overdue Tasks
    Widgets:
        # Overdue Tasks (Division Drill Down)
    Case List:
        #Open Tasks by Category – Overdue Indicator

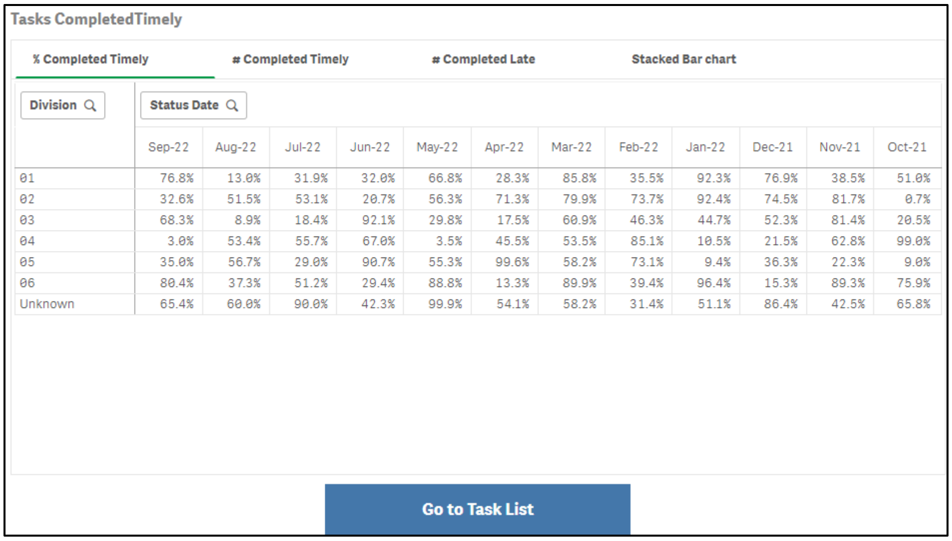
20. Update the widget placement to match the attached mockup in the Supporting Documents section.

Historical Tasks Management Productivity

21. Add a Task Status Date parameter. This replaces the existing Month and Week parameters. See the Parameter Definitions section below.
22. Add a Division parameter. See the Parameter Definitions section below.
23. Add a Task Type parameter. This can be used to filter the base population to those tasks created from an Expedited Service or Immediate Need automated action. See the Parameter Definitions section below.
24. Rename the existing ‘Bank Number’ parameter to ‘Bank’.
25. Add a new widget titled ‘Tasks Completed Timely’. The widget is placed to the right of ‘# Open Tasks by Category (Division Drill Down)’. The widget captures all tasks in the sheet’s base population that are in Completed status. The widget has a link titled ‘Go to Task List’ which links to a new ‘Tasks Completed Timely’ case list.

    Tasks Completed Timely

    View 1: Pivot Table - % Completed Timely



Tasks CompletedTimely

% Completed Timely | # Completed Timely | # Completed Late | Stacked Bar chart

Division | Status Date

	Sep-22	Aug-22	Jul-22	Jun-22	May-22	Apr-22	Mar-22	Feb-22	Jan-22	Dec-21	Nov-21	Oct-21
01	76.8%	13.0%	31.9%	32.0%	66.8%	28.3%	85.8%	35.5%	92.3%	76.9%	38.5%	51.0%
02	32.6%	51.5%	53.1%	20.7%	56.3%	71.3%	79.9%	73.7%	92.4%	74.5%	81.7%	0.7%
03	68.3%	8.9%	18.4%	92.1%	29.8%	17.5%	60.9%	46.3%	44.7%	52.3%	81.4%	20.5%
04	3.0%	53.4%	55.7%	67.0%	3.5%	45.5%	53.5%	85.1%	10.5%	21.5%	62.8%	99.0%
05	35.0%	56.7%	29.0%	90.7%	55.3%	99.6%	58.2%	73.1%	9.4%	36.3%	22.3%	9.0%
06	80.4%	37.3%	51.2%	29.4%	88.8%	13.3%	89.9%	39.4%	96.4%	15.3%	89.3%	75.9%
Unknown	65.4%	60.0%	90.0%	42.3%	99.9%	54.1%	58.2%	31.4%	51.1%	86.4%	42.5%	65.8%

Go to Task List

Row = Division Drill Down

County

Division

Office

Unit

Worker

Order: Ascending

Column = Status Date Drill Down

Month: Mon-YYYY

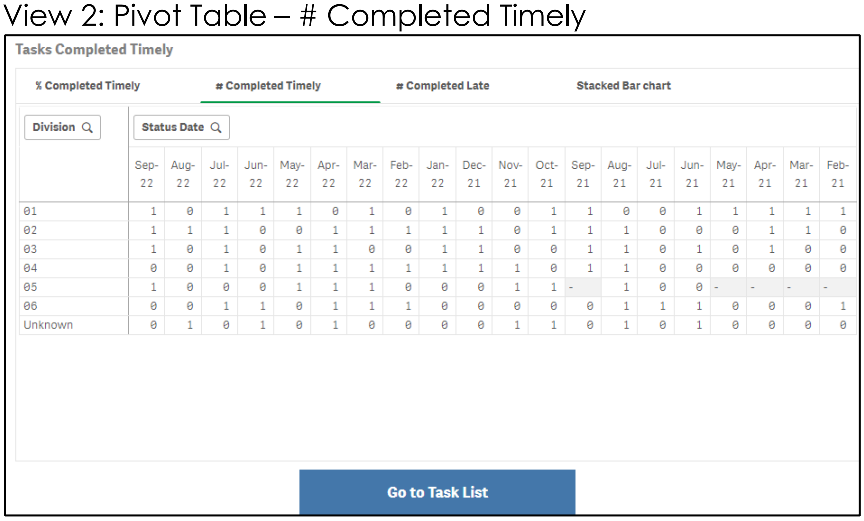
Week: Mon–DD–YYYY (The first day of each week in the month)

Day: Mon-DD-YYYY

Order: Descending

Values = % Completed Timely (# Tasks Completed where Completion Date <= Due Date / # Tasks Completed)

View 2: Pivot Table – # Completed Timely



Tasks Completed Timely

% Completed Timely | # Completed Timely | # Completed Late | Stacked Bar chart

Division | Status Date

	Sep-22	Aug-22	Jul-22	Jun-22	May-22	Apr-22	Mar-22	Feb-22	Jan-22	Dec-21	Nov-21	Oct-21	Sep-21	Aug-21	Jul-21	Jun-21	May-21	Apr-21	Mar-21	Feb-21
01	1	0	1	1	1	0	1	0	1	0	0	1	1	0	0	1	1	1	1	1
02	1	1	1	0	0	1	1	1	1	1	0	1	1	1	0	0	0	1	1	0
03	1	0	1	0	1	1	0	0	1	1	0	0	1	1	0	1	0	1	0	0
04	0	0	1	0	1	1	1	1	1	1	1	0	1	1	0	0	0	0	0	0
05	1	0	0	0	1	1	1	0	0	0	1	1	-	1	0	0	-	-	-	-
06	0	0	1	1	0	1	1	1	0	0	0	0	0	1	1	1	0	0	0	1
Unknown	0	1	0	1	0	1	0	0	0	0	1	1	0	1	0	1	0	0	0	0

Go to Task List

Row = Division Drill Down

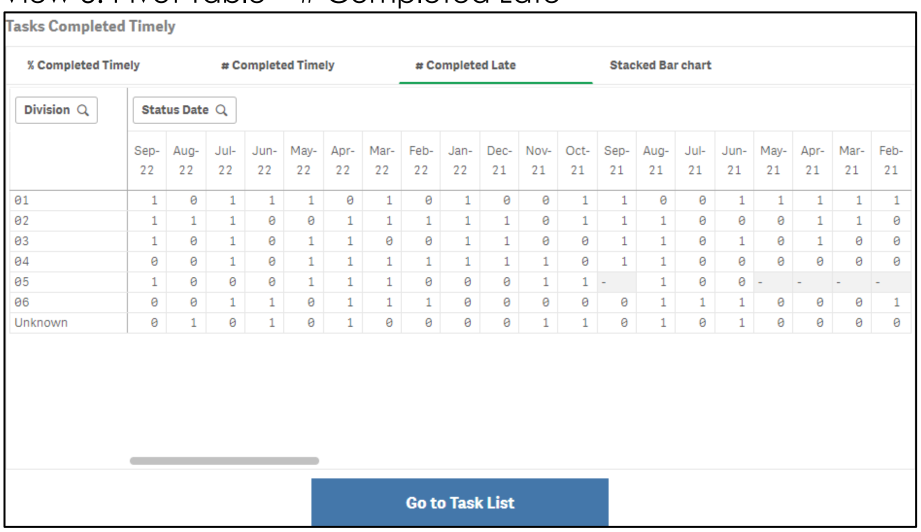
County
Division
Office
Unit
Worker
Order: Ascending

Column = Status Date Drill Down

Month: Mon-YYYY
Week: Mon–DD–YYYY (The first day of each week in the month)
Day: Mon-DD-YYYY
Order: Descending

Values = #Tasks Completed Timely where Completion Date <= Due Date

View 3: Pivot Table – # Completed Late



	Sep-22	Aug-22	Jul-22	Jun-22	May-22	Apr-22	Mar-22	Feb-22	Jan-22	Dec-21	Nov-21	Oct-21	Sep-21	Aug-21	Jul-21	Jun-21	May-21	Apr-21	Mar-21	Feb-21
01	1	0	1	1	1	0	1	0	1	0	0	1	1	0	0	1	1	1	1	1
02	1	1	1	0	0	1	1	1	1	1	0	1	1	1	0	0	0	1	1	0
03	1	0	1	0	1	1	0	0	1	1	0	0	1	1	0	1	0	1	0	0
04	0	0	1	0	1	1	1	1	1	1	1	0	1	1	0	0	0	0	0	0
05	1	0	0	0	1	1	1	0	0	0	1	1	-	1	0	0	-	-	-	-
06	0	0	1	1	0	1	1	1	0	0	0	0	0	1	1	1	0	0	0	1
Unknown	0	1	0	1	0	1	0	0	0	0	1	1	0	1	0	1	0	0	0	0

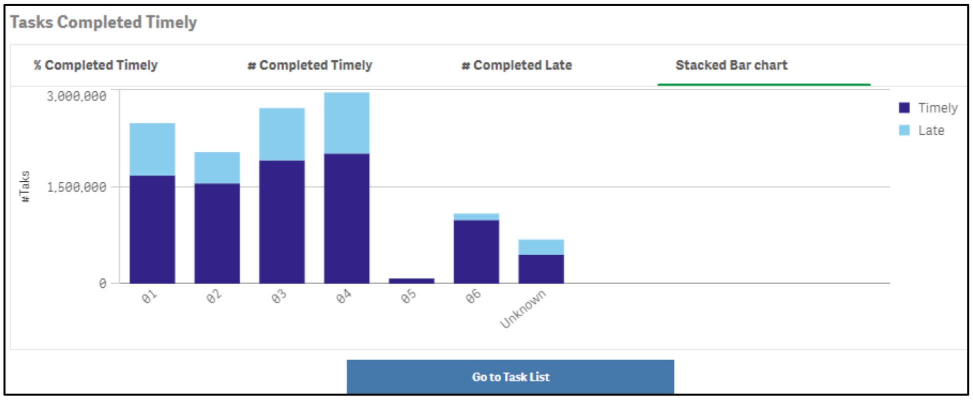
Row = Division Drill Down

County
Division
Office
Unit
Worker
Order: Ascending

Column = Status Date Drill Down

Month: Mon-YYYY
Week: Mon–DD–YYYY (The first day of each week in the month)
Day: Mon-DD-YYYY
Order: Descending
Values = # Tasks Completed Late where Completion Date > Due Date

View 4: Stacked Bar chart

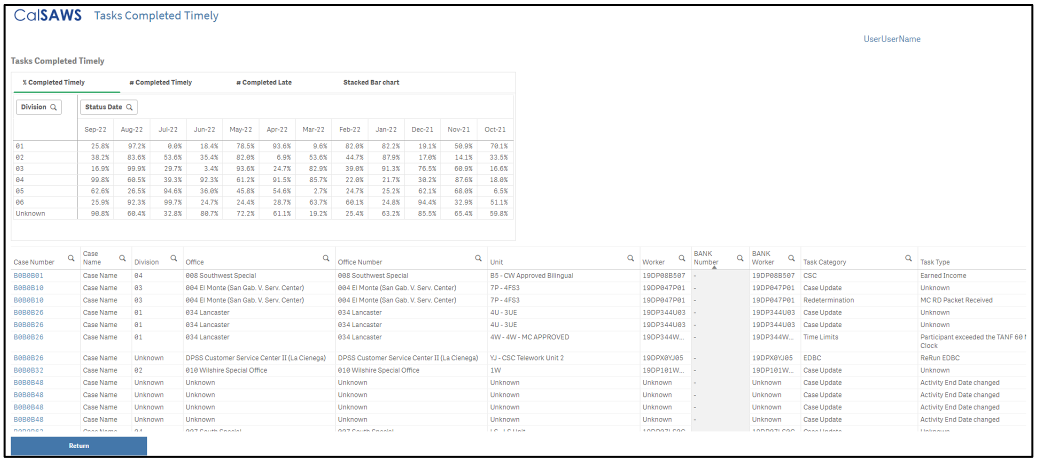


Stack = Division Drill Down
County
Division
Office
Unit
Worker
Order: Ascending
Bars = Timely (Tasks competed on or before their due date)
Late (Tasks completed after due date)
Length of bars = # Completed

26. Create a new case list titled 'Tasks Completed Timely' for the 'Tasks Completed Timely' widget. The case list has a copy of the 'Tasks Completed Timely' widget placed at the top. The case list includes a 'Return' button at the bottom of the page which returns the user to the 'Historical Task Management Productivity sheet. See the attached mockup in the Supporting Documents section for reference.

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

 # Tasks Completed Timely Case List Screenshot



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

Base Population:
Includes all tasks in the Real Time Task Management Sheet that are Completed.

Columns:

Add the following columns to the case list. The columns are placed in the order that they appear on this table. The columns are defined in the Column Definitions section below.

1. Case Number
2. Case Name
3. Division
4. Office Number
5. Office
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task Type
11. Program
12. Program Status
13. Primary Applicant
14. Spoken Language
15. Application Date
16. Task Status
17. Task Status Date
18. Days Elapsed from Status Date
19. Task Assign Date
20. Task Due Date
21. Task Create Date
22. Task Start Date

23. # Days to Complete
24. Days to Complete Task from Created On
25. Time Recorded by Assigned Worker
26. Total Time Recorded
27. Append Date
28. Customer Report Type
29. Customer Report Submit Month
30. Confidential Description
31. Qlik ID

27. Add a new widget titled '# Average Days to Complete Tasks by Month/Week/Day'. The widget is placed at the bottom left of the sheet. The widget captures all tasks in the sheet's base population that are in Completed and are assigned to a worker. The widget has a link titled 'Go to Task List' which links to a new '# Task Processing Time' case list. See the attached mockups in the Supporting Documents section for more information.

 # Average Days to Compete Tasks by Month/Week/Day (Division Drilldown)

View 1: Pivot Table – Avg. Days from Created On Date

Average Days to Complete Tasks by Month/Week/Day (Division Drill Down)

Avg. Days from Created On ... | Avg. Days from Assign Date | Avg. Days by Category (Assi... | Avg. Days by Type (Assign)

Division	Month										
	Sep-22	Aug-22	Jul-22	Jun-22	May-22	Apr-22	Mar-22	Feb-22	Jan-22	Dec-21	Nov-21	Mar-21
01	81	102	131	162	193	223	254	285	312	345	362	631
02	80	101	131	162	193	223	255	284	312	345	361	631
03	80	102	131	162	193	223	254	284	312	345	362	632
04	81	102	131	162	193	223	254	284	312	345	361	632
05	81	100	131	162	193	223	254	285	313	344	361	-
06	81	101	131	162	193	223	254	284	312	345	362	-
Unknown	81	100	131	160	193	221	253	284	311	343	362	-

Go to Task List

Row = County Division Drill Down
County
Division
Office
Unit
Worker
Order: Ascending

Column = Status Date Drill Down

Month: Mon-YYYY

Week: Mon–DD–YYYY (The first day of each week in the month)

Day: Mon-DD-YYYY

Order: Descending

Values = # Average Days to Complete Task (Task Completion Date – Task Record Create Date). The value is rounded down to the whole number. If the value is negative, then it will be set to 0.

View 2: Pivot Table – Avg. Days from Assign Date

 # Average Days to Complete Tasks by Month/Week/Day (Division Drill Down)

Avg. Days from Created On ... | Avg. Days from Assign Date | Avg. Days by Category (Assi... | Avg. Days by Type (Assign)

Division	Month											
	Sep-22	Aug-22	Jul-22	Jun-22	May-22	Apr-22	Mar-22	Feb-22	Jan-22	Dec-21	Nov-21	Mar-21
01	81	102	131	162	193	223	254	285	312	345	362	631
02	80	101	131	162	193	223	255	284	312	345	361	631
03	80	102	131	162	193	223	254	284	312	345	362	632
04	81	102	131	162	193	223	254	284	312	345	361	632
05	81	100	131	162	193	223	254	285	313	344	361	-
06	81	101	131	162	193	223	254	284	312	345	362	-
Unknown	81	100	131	160	193	221	253	284	311	343	362	-

Go to Task List

Row = County Division Drill Down

County

Division

Office

Unit

Worker

Order: Ascending

Column = Status Date Drill Down

Month: Mon-YYYY

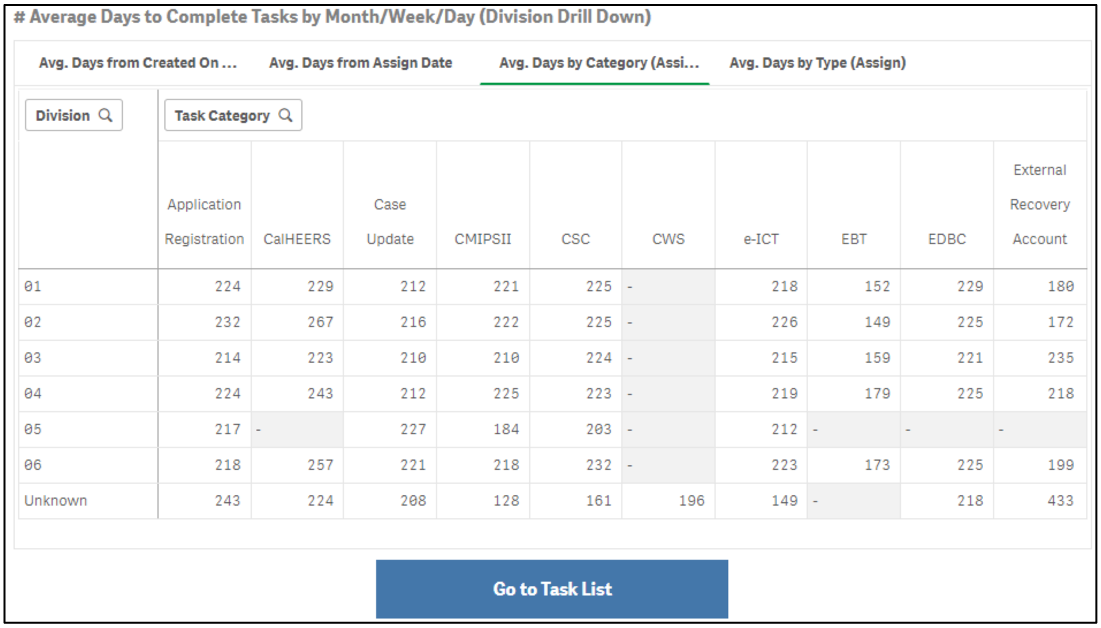
Week: Mon–DD–YYYY (The first day of each week in the month)

Day: Mon-DD-YYYY

Order: Descending

Values = # Average Days to Complete Task (Task Completion Date - Task Assign Date). The value is rounded down to the whole number. If the value is negative, then it will be set to 0.

View 3: Pivot Table – Avg. Days by Category



Average Days to Complete Tasks by Month/Week/Day (Division Drill Down)

Avg. Days from Created On ... | Avg. Days from Assign Date | Avg. Days by Category (Assi... | Avg. Days by Type (Assign)

Division	Application Registration	CalHEERS	Case Update	CMIPSII	CSC	CWS	e-ICT	EBT	EDBC	External Recovery Account
01	224	229	212	221	225	-	218	152	229	180
02	232	267	216	222	225	-	226	149	225	172
03	214	223	210	210	224	-	215	159	221	235
04	224	243	212	225	223	-	219	179	225	218
05	217	-	227	184	203	-	212	-	-	-
06	218	257	221	218	232	-	223	173	225	199
Unknown	243	224	208	128	161	196	149	-	218	433

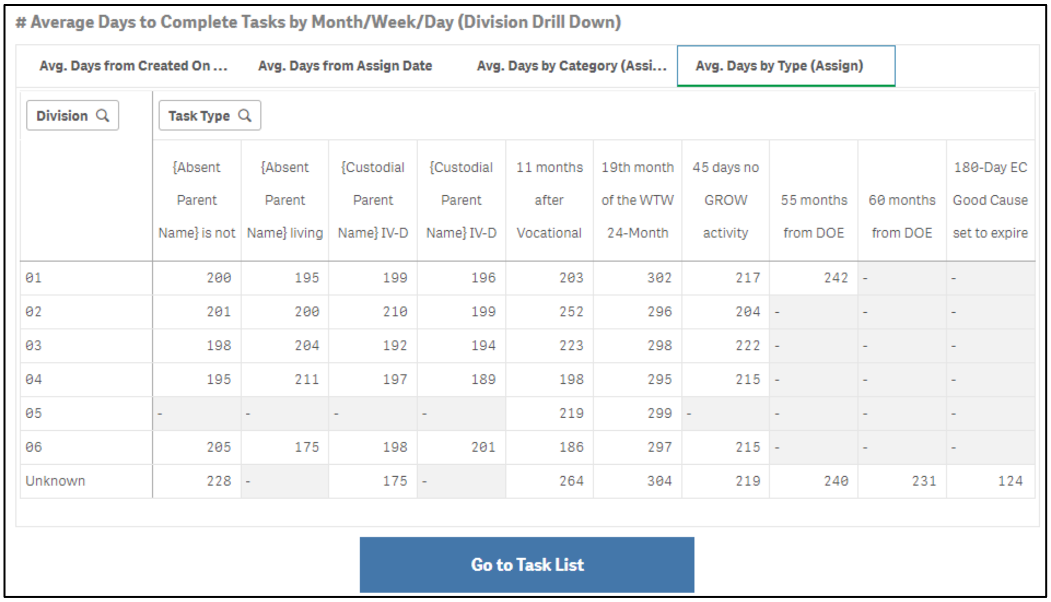
Go to Task List

Row = County Division Drill Down
- County
- Division
- Office
- Unit
- Worker
- Order: Ascending

Column = Task Category
- Order: Ascending

Values = # Average Days to Complete Task (Task Completion Date – Task Assign Date). The value is rounded down to the whole number. If the value is negative, then it will be set to 0.

View 4: Pivot Table – Avg. Days by Type (Assign)



	{Absent Parent Name} is not	{Absent Parent Name} living	{Custodial Parent Name} IV-D	{Custodial Parent Name} IV-D	11 months after Vocational	19th month of the WTW 24-Month	45 days no GROW activity	55 months from DOE	60 months from DOE	180-Day EC Good Cause set to expire
01	200	195	199	196	203	302	217	242	-	-
02	201	200	210	199	252	296	204	-	-	-
03	198	204	192	194	223	298	222	-	-	-
04	195	211	197	189	198	295	215	-	-	-
05	-	-	-	-	219	299	-	-	-	-
06	205	175	198	201	186	297	215	-	-	-
Unknown	228	-	175	-	264	304	219	240	231	124

Row = County Division Drill Down
County
Division
Office
Unit
Worker
Order: Ascending
Column = Task Type
Order: Ascending
Values = # Average Days to Complete Task (Task Completion Date – Task Assign Date). The value is rounded down to the whole number.

28. Add a new widget titled '# Average Time Spent on Tasks by Month/Week/Day'. The widget is placed at the bottom right of the sheet. The widget captures all tasks in the sheet's base population that are Completed and are assigned to a worker. The widget has a link titled 'Go to Task List' which links to a new '# Task Processing Time' case list. See the attached mockups in the Supporting Documents section for more information.

 # Average Time Spent on Tasks by Month/Week/Day (Division Drilldown)

View 1: Pivot Table – Avg. Time by Assigned Worker

 # Average Time Spent on Task by Month/Week/Day (Division Drill Down)

Avg. Time by Assigned Wor… | **Avg. Total Time** | **Avg. Total Time by Category** | **Avg. Total Time by Type**

Division	Sep-22	Aug-22	Jul-22	Jun-22	May-22	Apr-22	Mar-22
01	80:12:03	101:15:58	131:00:07	162:05:47	192:21:20	223:01:35	254:11:24
02	80:07:39	101:05:47	131:05:53	162:02:24	193:09:20	222:20:50	254:12:34
03	80:10:25	102:00:52	130:23:10	161:20:57	192:20:26	222:14:15	254:10:04
04	80:12:38	101:21:30	130:23:34	161:18:05	192:21:33	222:23:43	254:10:10
05	80:18:08	100:07:42	131:00:25	161:14:34	192:23:00	222:14:05	253:23:35
06	80:15:55	101:01:48	131:02:34	161:22:48	193:06:06	223:01:19	254:05:14
Unknown	80:17:58	100:08:56	130:12:54	159:20:02	192:18:16	221:06:38	252:17:09

Month

Go to Task List

Row = County Division Drill Down
- County
- Division
- Office
- Unit
- Worker
- Order: Ascending

Column = Status Date Drill Down
- Month: Mon-YYYY
- Week: Mon–DD–YYYY (The first day of each week in the month)
- Day: Mon-DD-YYYY
- Column Order: Descending

Values = # Average Time Spent on Task (This time only includes the time of the assigned worker from Completed date to Assign Date)
- Format: DD:HH:MM

View 2: Pivot Table – Avg. Total Time

Average Time Spent on Task by Month/Week/Day (Division Drill Down)

Avg. Time by Assigned Wor... | Avg. Total Time | Avg. Total Time by Category | Avg. Total Time by Type

Division	Sep-22	Aug-22	Jul-22	Jun-22	May-22	Apr-22	Mar-22
01	80:12:03	101:15:58	131:00:07	162:05:47	192:21:20	223:01:35	254:11:24
02	80:07:39	101:05:47	131:05:53	162:02:24	193:09:20	222:20:50	254:12:34
03	80:10:25	102:00:52	130:23:10	161:20:57	192:20:26	222:14:15	254:10:04
04	80:12:38	101:21:30	130:23:34	161:18:05	192:21:33	222:23:43	254:10:10
05	80:18:08	100:07:42	131:00:25	161:14:34	192:23:00	222:14:05	253:23:35
06	80:15:55	101:01:48	131:02:34	161:22:48	193:06:06	223:01:19	254:05:14
Unknown	80:17:58	100:08:56	130:12:54	159:20:02	192:18:16	221:06:38	252:17:09

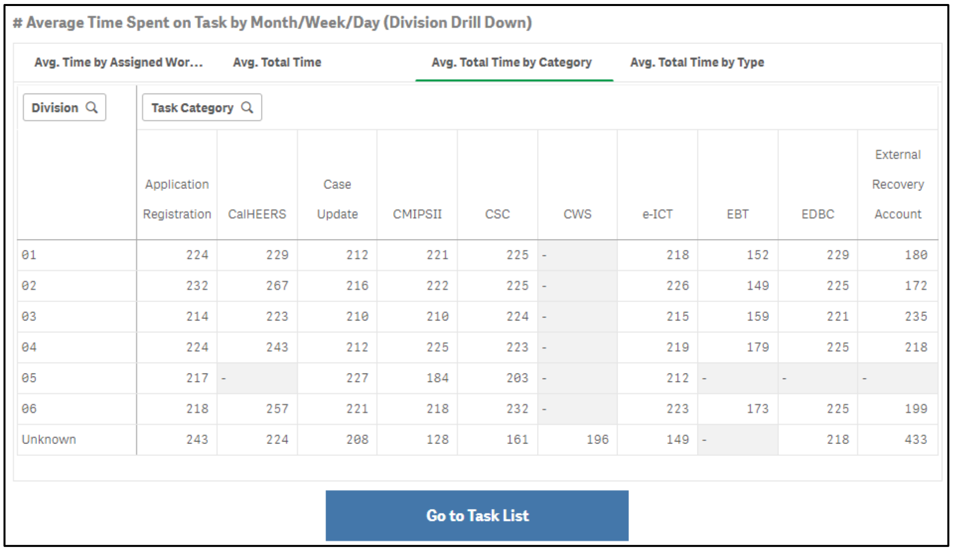
Go to Task List

Row = County Division Drill Down
- County
- Division
- Office
- Unit
- Worker
- Order: Ascending

Column = Status Date Drill Down
- Month: Mon-YYYY
- Week: Mon–DD–YYYY (The first day of each week in the month)
- Day: Mon-DD-YYYY
- Column Order: Descending

Values = # Average Total Time Spent on Task (This time includes all recorded time of the task as shown on the Task Detail page)
- Format: DD:HH:MM

View 3: Pivot Table – Avg. Total Time by Category


Average Time Spent on Task by Month/Week/Day (Division Drill Down)

Avg. Time by Assigned Wor... | Avg. Total Time | Avg. Total Time by Category | Avg. Total Time by Type

Division | Task Category

	Application Registration	CalHEERS	Case Update	CMIPSII	CSC	CWS	e-ICT	EBT	EDBC	External Recovery Account
01	224	229	212	221	225	-	218	152	229	180
02	232	267	216	222	225	-	226	149	225	172
03	214	223	210	210	224	-	215	159	221	235
04	224	243	212	225	223	-	219	179	225	218
05	217	-	227	184	203	-	212	-	-	-
06	218	257	221	218	232	-	223	173	225	199
Unknown	243	224	208	128	161	196	149	-	218	433

Go to Task List

Row = County Division Drill Down
County
Division
Office
Unit
Worker
Order: Ascending
Column = Task Category
Order: Ascending
Values = # Average Total Time Spent on Task
Note: For a given task, the total time recorded can include times recorded by other workers. The total time will be associated to the current assigned worker.

View 4: Pivot Table – Avg. Total Time by Type

Average Time Spent on Task by Month/Week/Day (Division Drill Down)

Avg. Time by Assigned Wor... | Avg. Total Time | Avg. Total Time by Category | Avg. Total Time by Type

Division | Task Type

Division	{Absent Parent Name} is not living with applicant	{Absent Parent Name} living with applicant	{Custodial Parent Name} IV-D Coop	{Custodial Parent Name} IV-D Non-Coop	11 months after Vocational Training Activity Start Date	19th month of the WTW 24-Month Time Clock
01	199:21:46	194:12:36	198:21:54	196:05:24	202:18:25	301:12:57
02	200:12:34	200:11:36	209:19:54	198:21:30	251:18:18	295:23:08
03	198:01:50	203:17:33	192:05:32	193:13:02	223:09:58	297:12:35
04	194:23:08	210:22:53	196:16:00	188:18:56	198:11:48	295:04:33
05	-	-	-	-	219:07:16	298:23:44
06	204:14:11	175:02:46	198:10:46	201:10:46	185:22:46	296:15:37
Unknown	228:02:11	-	174:18:46	-	264:06:56	304:10:46

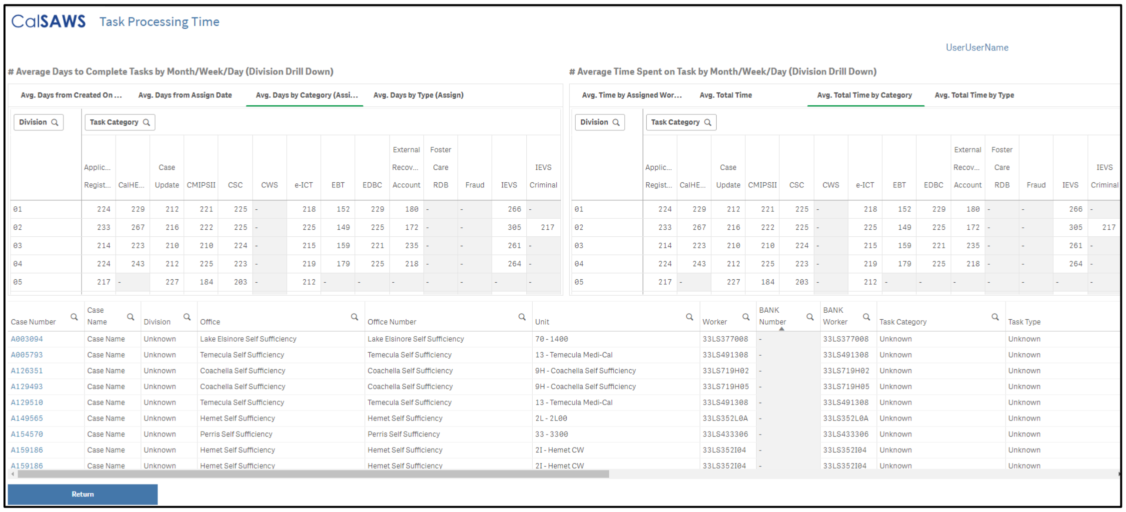
Go to Task List

Row = County Division Drill Down
County
Division
Office
Unit
Worker
Order: Ascending
Column = Task Type
Column Order: Ascending
Values = # Average Total Time Spent on Task
Note: For a given task, the total time recorded can include times recorded by other workers. The total time will be associated to the current assigned worker.

29. Create a new case list titled '# Task Processing Time' for the '#Average Days to Complete Tasks by Month/Week/Day' and the '# Average Time Spent on Tasks' widgets. The case list has a copy of the '#Average Days to Complete Tasks by Month/Week/Day' and '# Average Time Spent on Tasks' widgets placed at the top. The case list includes a 'Return' button at the bottom of the page which returns the user to the 'Historical Task Management' sheet. See the attached mockup in the Supporting Documents section for reference.

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

Task Processing Time Case List Screenshot



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

Base Population:
Includes all tasks in the Historical Time Task Management Sheet's base population that are Completed and are assigned to a worker.

Columns:

Add the following columns to the case list. The columns are placed in the order that they appear on this table. The columns are defined in Column Definitions listed below.

1. Case Number
2. Case Name
3. Division
4. Office Number
5. Office
6. Unit
7. Worker
8. Bank Number
9. Task Category
10. Task Type
11. Program
12. Program Status
13. Primary Applicant
14. Spoken Language
15. Application Date
16. Task Status
17. Task Status Date
18. Days Elapsed from Status Date
19. Task Assign Date

20. Task Due Date
21. Task Create Date
22. Task Start Date
23. # Days to Complete Task
24. Days to Complete Task from Created On
25. Time Recorded by Assigned Worker
26. Total Time Recorded
27. Overdue Indicator
28. Append Date
29. Customer Report Type
30. Customer Report Submit Month
31. Confidential Description
32. Qlik ID

30. Update the following case lists to include the new columns in **bold**. The columns are placed in the order they appear. See the Column Definitions section below for the column definition.

    #Open Tasks by Category

    1. Case Number
    2. Case Name
    3. Division
    4. Unit
    5. Office
    6. Office Number
    7. Worker
    8. Worker Name
    9. Bank Number
    10. Task Category
    11. Task Type
    12. Task Source
    13. Program
    14. Program Status
    15. Primary Applicant
    16. Spoken Language
    17. Application Date
    18. Task Status
    19. Task Status Date
    20. Days Elapsed from Status Date
    21. Task Assign Date
    22. Task Due Date
    23. Task Create Date
    24. Task Start Date
    25. # Remining Days
    26. Overdue Indicator
    27. **Time Recorded by Assigned Worker**

28. **Total Time Recorded**
29. Append Date
30. Customer Report Type
31. Customer Report Submit Month
32. Confidential Description
33. Qlik ID

Completed Tasks by Category

1. Case Number
2. Case Name
3. Division
4. Office
5. Office Number
6. Unit
7. Worker
8. Worker Name
9. Bank Number
10. Task Category
11. Task Type
12. Program
13. Program Status
14. Primary Applicant
15. Spoken Language
16. Application Date
17. Task Assign Date
18. Task Due Date
19. Task Create Date
20. Task Start Date
21. Task Completion Date
22. #Days to Complete Task
23. **Days to Complete Task from Created On**
24. **Time Recorded by Assigned Worker**
25. **Total Time Recorded**
26. Append Date
27. Customer Report Type
28. Customer Report Submit Month
29. Confidential Description
30. Qlik ID

Overdue Tasks

1. Case Number
2. Case Name
3. Division
4. Office
5. Office Number
6. Unit

7. Worker
8. Worker Name
9. Bank Number
10. Task Category
11. Task Type
12. Program
13. Program Status
14. Primary Applicant
15. Spoken Language
16. Application Date
17. Task Status
18. Task Status Date
19. Days Elapsed from Status Date
20. Task Assign Date
21. Task Due Date
22. Task Create Date
23. Task Start Date
24. #Days Overdue
25. **Time Recorded by Assigned Worker**
26. **Total Time Recorded**
27. Append Date
28. Customer Report Type
29. Customer Report Submit Month
30. Confidential Description

31. Update the Task Type column on every case list to display the user defined Task Type rather than the old codes pre-defined task types.

    Technical Note: This impacts the following case lists:
    Case Lists:
    - # Open Tasks by Category
    - # Completed Tasks by Category
    - # Overdue Tasks

32. Update the Task Assign Date column on all case lists to match the Assign Date value on the Task Detail page. Currently the column displays the assign date if the task is Assigned or In Process or the Close Date if the task is Completed, Expired or Void.

    Technical Note: This impacts the following case lists:
    Case Lists:
    - # Open Tasks by Category
    - # Completed Tasks by Category
    - # Overdue Tasks

33. Update the Average Days to Complete Task total in the sheet to restrict the numerator to Completed tasks and to only include tasks that are assigned to a worker.
    Note: Average Days to Complete does not include Expired tasks.

34. Update the # Overdue Tasks total to consider tasks that are In Process. Currently the widget only looks at tasks that are Assigned.
    Technical Note: This impacts the following fields:
    Totals:
      # Overdue Tasks
      % Overdue Tasks
    Widgets
      Historical Task Management
      # Overdue Tasks

35. Update the sheet to consider a task as Open if it is in Assigned or In Process. Currently the sheet only considers a task open if it is in Assigned status.
    Technical Note: This impacts the following fields:
    Totals:
      # Open Tasks
    Widgets
      Historical Task Management
      # Open Task by Category
      # Open Tasks by Category (Division Drill Down)

36. Remove the condition on the base population which excludes tasks that have been closed for more than a year. The system no longer stores tasks that are closed for over a year and this condition is no longer needed.

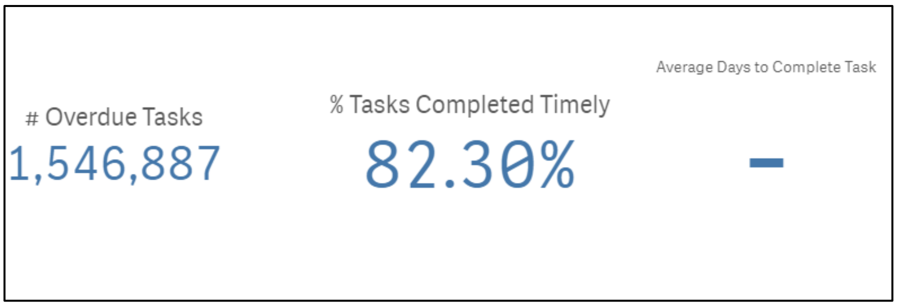
37. Update the sheet template to match the attached mockup in the Supporting Documents section.

Real Time Task Management

38. Add a Task Status Date parameter. See the Parameter Definitions section below.
39. Add a Division parameter. See the Parameter Definitions section below.
40. Add a Task Type parameter. This can be used to filter the base population to those tasks created from an Expedited Service or Immediate Need automated action. See the Parameter Definitions section below.

41. Add a new total titled % Tasks Completed Timely which shows the percent of tasks that are completed timely in the day. The total is placed between the # Overdue Tasks total and the Average Days to Complete Task total. See the attacked mockup in the Supporting Documents section for reference.

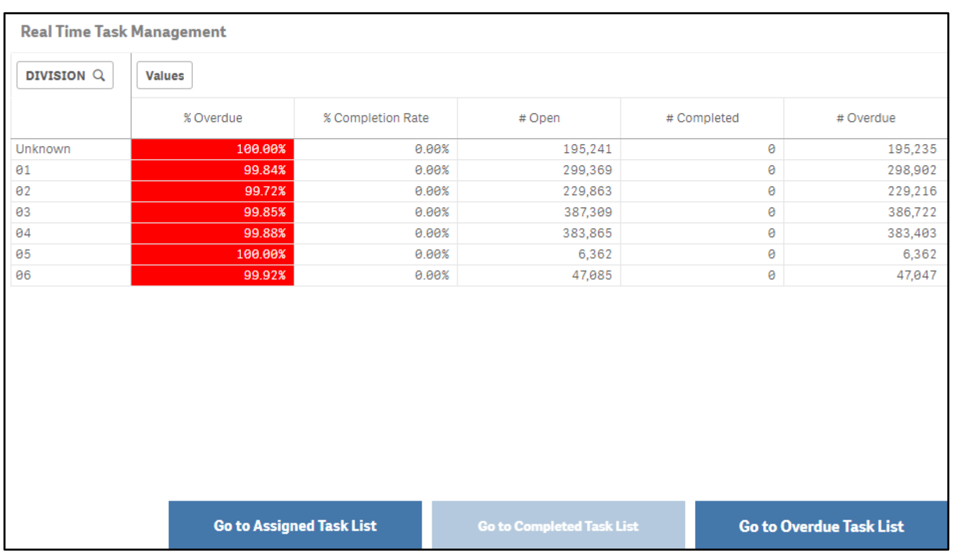
    %Tasks Completed Timely = #Tasks Completed in the day where the Due Date is less than or equal to Completion Date / #Tasks Completed in the day



42. Remove the 'Real Time Tasks Department' header in the Real Time Task Management Productivity sheet. The header is located between the parameters and the '# Completed Tasks'. See the attached mockup for reference.

43. Update the Real Time Task Management widget in the Real Time Task Management Productivity sheet to include a new column which shows the % Completion Rate for each organization level.

    %Completion Rate = #Completed Tasks / #Open Tasks



	% Overdue	% Completion Rate	# Open	# Completed	# Overdue
Unknown	100.00%	0.00%	195,241	0	195,235
01	99.84%	0.00%	299,369	0	298,902
02	99.72%	0.00%	229,863	0	229,216
03	99.85%	0.00%	387,309	0	386,722
04	99.88%	0.00%	383,865	0	383,403
05	100.00%	0.00%	6,362	0	6,362
06	99.92%	0.00%	47,085	0	47,047

44. Update the Task Type column on every case list to display the user defined Task Type rather than the old codes pre-defined task types.

45. Update the # Overdue Tasks total to restrict to only tasks in Assigned or In Process status. Currently the total includes any tasks that is marked as Overdue regardless of status.

46. Update the % Overdue Tasks total such that the numerator restricts to only tasks that are 'n Process or Complete status. Currently the total does not restrict by any status.

    Update the Average Days to Complete Tasks total to restrict the numerator to Completed tasks and to only include tasks that are assigned to a worker.
    Note: Average Days to Complete does not include Expired tasks.

47. Update the sheet to consider a task overdue if the due date is less than or equal to the day prior to the current date. Currently the sheet considers some tasks overdue when the due date is equal to the current date.

48. Update the widget placement to match the attached mockup in the Supporting Documents section.

Parameter Definitions:

Parameter Name	Description
Task Status Date	A Date picker which filters the data on the dashboard to those tasks whose current status' date is between the selected begin and end date. By default, the parameter will not restrict the data by any Begin or End date.
Division	A multi select parameter which filters the base population to the division associated with the task. If a worker is assigned to the task, this value is the division of the worker; otherwise, this is the division of the assigned Bank.
Task Type	A multi select parameter which filters the base population to only tasks with the selected Task

	Type(s). By default, the parameter will not restrict the base population by any task type.

Column Definitions:

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

Bank Number	Displays the Bank ID of the Bank assigned to the task. This column will be blank if the data is not available.
Task Category	Displays the Task Category of the task.
Task Type	Displays the Task Type of the task. Technical Note: TASK_TYPE.TYPE_NAME
Program	Displays the program associated to the task. The column will be blank if the data is not available.
Program Status	Displays the current program status of the program associated to the task. This column will be blank if data is not available.
Primary Applicant	Displays the first name and last name of the primary applicant of the program that is associated to the task. This column will be blank if the data is not available. Format: [First Name] [Last Name]
Spoken Language	Displays the current spoken language of the primary applicant at the time of task creation. The column will be blank if the data is not available. Technical Note: TASK.LANG_CODE
Application Date	Displays the Application Date on the current application of the program that is associated to the task. This column will be blank if data is not available. Technical Note: PGM_APP.APP_DATE
Task Status	Displays the current Task Status of the task.
Task Status Date	Displays the task status date of the task. Format: MM/DD/YYYY Technical Note: Void = TASK.CLOSE_DATE Completed = TASK.CLOSE_DATE Expired = TASK.CLOSE_DATE Assigned = TASK.ASSIGN_DATE

	In Process = NVL(TASK_HST_DETL, TASK ASSIGN DATE)
Days Elapsed from Status Date	Displays the number of days the task has been in the same status. Days Elapsed from Status Date = Current Date – Task Status Date
Task Assign Date	Displays the date the task was assigned to a position. This column will be blank if the data is not available. Format: MM/DD/YYYY Technical Note: TASK.ASSIGN_DATE
Task Due Date	Displays the due date of the task. Format: MM/DD/YYYY
Task Create Date	Displays the date the task was created. Format: MM/DD/YYYY Technical Note: TASK.RECRD_CREATE_DATE
Task Start Date	Displays the start date the task. This column will be blank if a start date was not configured. Format: MM/DD/YYYY Technical Note: TASK.START_DATE
#Remaining Days	Displays the number of days remaining on the task before reaching the Due Date. #Remaining Days = Current Date – Task Due Date
Append Date	Displays the most recent date that the task has been appended. This column will be blank if the data is not available. Format: MM/DD/YYYY
Overdue Indicator	Displays Y/N if the task is overdue. Possible Values: • Y – The current date is greater than the task overdue date.

	• N - The current date is less than or equal to the task overdue date.
Customer Report Type	If the task is generated from a Document Routing Rule, displays the customer report type. This column will be blank if the data is not available. Technical Note: This information can be derived from TASK_ATTR.
Customer Report Submit Month	If the task is generated from a Document Routing Rule, displays the customer report submit month. This column will be blank if the data is not available. Format: MM/YYYY
Confidential Description	Displays the confidentiality type assigned to the case. The column will be blank if data is not available or if the removal date on the record is equal to or less than the current date. Technical Note: CONFID_DETL.TYPE_CODE The following Confidential Types are excluded: AAP Mask Address should be excluded: • CWS AAP Mask Address • CWS Foster Care/KinGAP Mask Address • CWS Sealed Mask Address • CWS Sensitive Mask Address If the user has multiple confidential types in the month, then the latest created is selected.
Never Assigned to a Worker	A multi select parameter which filters data based on those tasks which have never been assigned to a worker. If no option is selected, then the data will not be filtered by this condition. Possible Value: • Y – The task has never been assigned to a worker. N – The task has been assigned to a worker.
# Days to Complete Task	Displays the number of days that elapsed from the date the task was assigned until the task was closed (Completed, Expired, Void). This number is rounded down to the whole number. This column is blank if the task is not closed.

Days to Complete Task from Created On	Displays the number of days that elapsed from the date the task was created until the task was closed (Completed, Expired, Void). This number is rounded down to the whole number. This column is blank if the task is not closed.
Time Recorded by Assigned Worker	Displays the total time recorded for a task by the assigned worker. This column is blank if the task is not assigned. Format: DD:HH:SS
Total Time Recorded	Displays the total time recorded for a task by the assigned worker. This column is blank if the task is not assigned. Format: DD:HH:SS
Never Assigned to a Worker Indicator	Indicates whether the tasks have been assigned to a worker. Possible Value: • Y – The task has never been assigned to a worker. • N – The task has been assigned to a worker.
Qlik ID	Displays the Qlik ID unique identifier.

2.1.4 Report Location

- **Global: Business Intelligence**
- **Local: Real Time Task Management**
- **Task: Real Time Task Management**

2.1.5 Counties Impacted

All counties are impacted by the changes outlined in this section.

2.1.6 Security Updates

1. No updates are made to the Dashboard's existing security.

2.1.7 Report Usage/Performance

The reports performance should not dramatically increase for the Real Time Task Management sheet and the Real Time Task Management Productivity sheet. These are real time dashboards, and the data should not load more than 5 minutes.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Real Time Task Management Mockup	Real Time Task Management Screer
2	Reports	Open Tasks Coming Due Case List Mockup	Open Tasks Coming Due Case Li
3	Reports	Real Time Task Management Productivity Mockup	Real Time Task Management Produ
4	Reports	Historical Task Management Mockup	Historical Task Management Mocku
5	Reports	Tasks Completed Timely Case List	Tasks Completed Timely Case List.jpg
6	Reports	Task Processing Time Case List	Task Processing Time Case List.PNG
7	Reports	Historical Task Management Productivity Mockup	Historical Task Management Produ

4 APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-254021

eCCP Single Log-off Button

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Olivia Arnold
	Reviewed By	Jared Kuester

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/10/2023	0.1	Initial Documentation	Olivia Arnold

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1 OVERVIEW

This recommendation is to remove the Reload button prompt when logging out of eCCP. Logging out currently requires a page reload in order to fully log out, which is an unnecessary step. The logout button should function to log out and return automatically to the login page.

1.1 Current Design

When logout button is pressed, a prompt to reload the page pops up.

1.2 Requests

This current design requires an unnecessary extra step for the user.

1.3 Overview of Recommendations

1. Remove the reload prompt when logging out of eCCP
    a. Have the logout button return to the login page automatically.

1.4 Assumptions

1. No other features of the product will be impacted
2. Logout button will log user out of eCCP
3. Logout button will return user to login page
4. No other actions will be required by the user to log out other than pressing the Logout button

2 RECOMMENDATIONS

2.1 Removal of Refresh prompt

2.1.1 Overview

This recommendation is to remove the Reload button prompt when logging out of eCCP. Logging out currently requires a page reload in order to fully log out, which is an unnecessary step. The logout button should function to log out and return automatically to the login page.

2.1.2 Description of Changes

1. Remove the reload prompt when logging out of eCCP
    a. Have the logout button return to the login page

2.1.3 Page Location

- **Global:** Admin tools
- **Local:** Office Admin
- **Task:** Call Control Panel

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-255247

Add the M40-105E Form in Template Repository and Chronic Truant NOA

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tiffany Huckaby
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/23/2023	0.1	Initial Draft	Tiffany Huckaby
3/7/2023	0.2	Updates per Analyst Review	Tiffany Huckaby
3/23/2023	0.3	Updates per Committee Comments	Tiffany Huckaby

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1 OVERVIEW

This SCR will add the M40-105E in Template Repository and add an NOA, based off M40-105E, that generates from EDBC for Chronic Truancy.

1.1 Current Design

CalSAWS does not currently have the M40-105E in Template Repository.

There does not exist a NOA for the person status reason of 'Chronic Truant'.

Note: 'Chronic Truant' refers to a person aged 16 and over who does not regularly attend school.

1.2 Requests

1. Add M40-105E in Template Repository.
2. Add a NOA that generates from EDBC based off M40-105E for Chronic Truant person status reason.

1.3 Overview of Recommendations

1. Add M40-105E (2/15) in Template Repository in English, Chinese, Russian and Spanish. This Form will be available with a NA 200 budget and with a NA 1239 SAR budget in Template Repository. (Note: This is the currently available CalSAWS supported languages that are available from the State).
2. Add a NOA reason that generates for the 'Chronic Truant' EDBC person status reason.

1.4 Assumptions

1. There will be no updates to EDBC with this effort. The status reason for 'Chronic Truant' already exists so no updates will be made.
2. A new SCR will be created when the State provides additional Threshold Languages of the M40-105E.
3. The CalSAWS version of the NA 1239 SAR/NA 200 budget will be attached to the end of the NOA that generates from EDBC per current logic.
4. Per existing functionality, a GEN 1365 will be in every envelope including for these new Form and NOA versions of the M40-105E.
5. Currently CalWORKs EDBC has logic to set a child as a 'Chronic Truant, however this logic is currently not available for the RCA program. SCR CA-258879 will add RCA EDBC logic and NOA for 'Chronic Truant' role reason.

2 RECOMMENDATIONS

2.1 Add the M40-105E/NA 200 newest State version to Template Repository

2.1.1 Overview

Add the M40-105E (2/15) to Template Repository. This version will have the NA 200 Budget attached. (See Recommendation 2.2 for version with NA 1239 SAR budget)

State Form: M40-105E (2/15)

Program(s): CalWORKs/RCA

Attached Forms: NA 200

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English, Chinese, Russian and Spanish

(Note: This is the currently available CalSAWS supported languages that are available from the State)

2.1.2 Form/NOA Verbiage

Create Form XDP

Add XDPs for Template Repository version of the M40-105E (2/15) with NA 200 Budget attached.

Note: This will be like the existing M40-181F Template Repository implementation where it is available with either a NA 200 or a NA 1239 SAR budget.

Form Header: Standard CalSAWS Header (Header_1)

Form Title (Distributed Documents Page displayed name): School Attendance Child Age 16 And Over

Form Number: M40-105E/NA 200

Include NA Back 9: Yes

- **Includes standard NA Back 9 variable population:** Yes

Imaging Form Name: School Attend Child Age 16 And Over NA 200

Imaging Document Type: Notice of Action

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form/NOA Variable Population

There will be no pre-population for this Form outside of the standard Header, NA Back 9, and Regulation pre-population.

Below are the fields that will be available on the Form:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
<AS_OF_DATE>	Worker editable field. Not system populated.	Arial Font size 10 "MM/DD/YYYY"	Yes, Date Field	No	N/A, Template Repository only
<FROM_AMT>	Worker editable field. Not system populated.	Arial Font size 10 "$X,XXX.XX"	Yes, Numerical field	No	N/A, Template Repository only
<TO_AMT>	Worker editable field. Not system populated.	Arial Font size 10 "$X,XXX.XX"	Yes, Numerical field	No	N/A, Template Repository only
<CB_ONE>	Worker editable field. Not system populated.	N/A	Yes, Checkbox	No	N/A, Template Repository only
<CB_TWO>	Worker editable field. Not system populated.	N/A	Yes, Checkbox	No	N/A, Template Repository only
<CHILD_NAME>	Worker editable field. Not system populated.	Arial Font size 10 "John Doe"	Yes, Text	No	N/A, Template Repository only
<REGS>	Worker editable field. Pre-populates with "Assembly Bill (AB) 2382 (Chapter 905, Statutes of 2014)"	Arial Font size 10 "Assembly Bill (AB) 2382 (Chapter 905, Statutes of 2014)"	Yes, Text	Yes	N/A, Template Repository only

* Note: All Form Body Variables will be editable by default. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated.

Variables Requiring Translations: REGS (Chinese, Russian and Spanish)

2.1.4 Form/NOA Generation Conditions

1. **Add Form to Template Repository**
   This form will be made available in Template Repository.

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

2. **Add Form Control**

   This will not be a tracked Form and will only have imaging barcode.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

1. **Add Form Print Options and Mailing Requirements**
   The following Print and Mailing options will be available for the M40-105E.

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

Mailing Requirements:

Mail-To (Recipient): Primary Applicant of the Program

Mailed From (Return): Worker's Office Address

Mail-Back-To Address: N/A

Outgoing Envelope Type: Standard Outgoing Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

Post to Self Service Portal (SSP): Yes

2.2 Add the M40-105E/NA 1239 SAR newest State version to Template Repository

2.2.1 Overview

Add the M40-105E (2/15) to Template Repository. This version will have the NA 1239 SAR Budget attached. (See Recommendation 2.1 for version with NA 200 budget)

State Form: M40-105E (2/15)

Program(s): CalWORKs/RCA

Attached Forms: NA 1239 SAR

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English, Chinese, Russian and Spanish

(Note: This is the currently available CalSAWS supported languages that are available from the State)

2.2.2 Form/NOA Verbiage

<u>**Create Form XDP**</u>

Add XDPs for Template Repository version of the M40-105E (2/15) with NA 1239 SAR Budget attached.

Note: This will be like the existing M40-181F Template Repository implementation where it is available with either a NA 200 or a NA 1239 SAR budget.

Form Header: Standard CalSAWS Header (Header_1)

Form Title (Distributed Documents Page displayed name): School Attendance Child Age 16 And Over

Form Number: M40-105E/NA 1239 SAR

Include NA Back 9: Yes

- **Includes standard NA Back 9 variable population:** Yes

Imaging Form Name: School Attend Child Age 16 And Over NA 1239 SAR

Imaging Document Type: Notice of Action

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #2

2.2.3 Form/NOA Variable Population

There will be no pre-population for this Form outside of the standard Header, NA Back 9, and Regulation pre-population.

Below are the fields that will be available on the Form:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation
<AS_OF_DATE>	Worker editable field. Not system populated.	Arial Font size 10 "MM/DD/YYYY"	Yes, Date Field	No	N/A, Template Repository only
<FROM_AMT>	Worker editable field. Not system populated.	Arial Font size 10 "$X,XXX.XX"	Yes, Numerical field	No	N/A, Template Repository only
<TO_AMT>	Worker editable field. Not system populated.	Arial Font size 10 "$X,XXX.XX"	Yes, Numerical field	No	N/A, Template Repository only
<CB_ONE>	Worker editable field. Not system populated.	N/A	Yes, Checkbox	No	N/A, Template Repository only
<CB_TWO>	Worker editable field. Not system populated.	N/A	Yes, Checkbox	No	N/A, Template Repository only
<CHILD_NAME>	Worker editable field. Not system populated.	Arial Font size 10 "John Doe"	Yes, Text	No	N/A, Template Repository only
<REGS>	Worker editable field. Pre-populates with "Assembly Bill (AB) 2382 (Chapter 905, Statutes of 2014)"	Arial Font size 10 "Assembly Bill (AB) 2382 (Chapter 905, Statutes of 2014)"	Yes, Text	Yes	N/A, Template Repository only

* Note: All Form Body Variables will be editable by default. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated.

Variables Requiring Translations: REGS (Chinese, Russian and Spanish)

2.2.4 Form/NOA Generation Conditions

3. **Add Form to Template Repository**
   This form will be made available in Template Repository.

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

4. **Add Form Control**
   This will not be a tracked Form and will only have imaging barcode.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

2. **Add Form Print Options and Mailing Requirements**
   The following Print and Mailing options will be available for the M40-105E.

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

Mailing Requirements:

Mail-To (Recipient): Primary Applicant of the Program

Mailed From (Return): Worker's Office Address

Mail-Back-To Address: N/A

Outgoing Envelope Type: Standard Outgoing Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

Post to Self Service Portal (SSP): Yes

2.3 Add new NOA Reason for Chronic Truant

2.3.1 Overview

Add a new NOA Reason to generate for the existing CalWORKs EDBC person role reason of 'Chronic Truant'.

Note: 'Chronic Truant' refers to a person aged 16 and over who does not regularly attend school.

State Form/NOA: M40-105E (2/15)

NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)

Program(s): CalWORKs

Note: SCR CA-258879 will add RCA EDBC logic and NOA for 'Chronic Truant' role reason.

Action Type(s): Change

Fragment Level: Program Level

Repeatable: No, generates once on the NOA will all applicable children's names listed.

Includes NA Back 9: Yes

- **Includes standard NA Back 9 variable population:** Yes

Forms/NOAs Generated with this NOA: N/A

Languages: English, Chinese, Russian and Spanish

2.3.2 Form/NOA Verbiage

Create new Chronic Truant Reason Fragment XDP

NOA Mockups/Examples: See Supporting Documents #3

Description	Text	Formatting*
Static	You have given us proof of school attendance for all of the children age 16 and over in your assistance unit. However, the proof you gave us shows that <CHILD_NAME> has been deemed a chronic truant. If your child between 16 and 18 years of age and the county school attendance review board tells us that he or she is a chronic truant (misses a lot of school without a good reason	Arial Font size 10

	by law), your grant will get lowered. Your grant will not go down if: - You give us proof your child is attending school; - You give us proof that your child's attendance records are not available; - You give us proof that you or your child are cooperating with the school attendance review board, county probation department, District Attorney or someone in your home is cooperating with a plan created by a county child welfare services worker; - Someone in your home is eligible for family stabilization services; or - The county finds that your child has good cause for not attending school. The penalty for not giving us proof we ask for in this notice is that we are lowering your grant. The needs of <CHILD_NAME2> (name 16-17 year old child) were not counted in figuring the amount of your cash aid. Your cash aid may go back up by giving the county proof of regular school attendance. Once you turn in proof that your child(ren) is going to school regularly or that you have one of the reasons listed above, the county will stop the penalty. Your cash aid will go back up the 1st of the month following the month after we get this proof. If you show good reason, you may get all your lost aid back. If your child is between age 16 and 17 and not attending school, he or she will be put in the Welfare to Work program. You will get another notice telling you about the welfare to work program rules. If he or she is a pregnant or parenting teen, please ask your worker about the CalLearn program that can help your child get back into school.	

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

2.3.3 Form/NOA Variable Population

1. **Add Fragment Variable Population**

   There are two variables in the new Chronic Truant fragment reason.

Variable Name	Population	Formatting*

CHILD_NAME	Populates with the child or children's names that are listed as 'Chronic Truant'. When more than one child is 'Chronic Truant' add ',' between each name. For example, one child: "John Doe" For example, more than one child: "John Doe, Jane Doe"	Arial Font Size 10
CHILD_NAME2	Same as CHILD_NAME	Arial Font Size 10

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

Variables Requiring Translations: No, only names populate in this fragment.

3. **Add Fragment Regulations**
   Add the following regulations when this new fragment reason generates on the NOA:
   Assembly Bill (AB) 2382 (Chapter 905, Statutes of 2014);

4. **Add NOA Title and Footer Reference for new Reason**

   NOA Reference on Document List Page: CHRONIC TRUANT

   NOA Title: School Attendance Child Age 16 And Over

   NOA Title Requires Translations: Yes, in Chinese, Russian and Spanish

   NOA Footer: M40-105E (02/15)

   NOA Title Requires Translations: No

2.3.4 Form/NOA Generation Conditions

Add Fragment Generation

Generate this new reason fragment on a NOA when all the following is true:

- The program is CalWORKs.
- The program in the newly run EDBC is active.
- There is at least one person with the role reason of 'Chronic Truant' (CT73_E10) on the newly run EDBC.
- there is at least one existing CalWORKs EDBC for the current Benefit month and in the most recent saved CalWORKs EDBC of the existing CalWORKs EDBCs for that month the person(s) did not have a role reason of 'Chronic Truant' (CT73_E10)

or

there is not a previously existing CalWORKs EDBC for the current Benefit month and there is at least one CalWORKs EDBC for the previous month and in the most recent saved CalWORKs EDBC for the previous month the person did not have a role reason of 'Chronic Truant'.

Action Fragment: CW_CH_ACTION6
Message Fragment: CW_CH_MESSAGE1
Ordering on the NOA: New NOA reason will generate after the action fragment and before the message fragment.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	M40-105E/NA 200 Mockup Note: NA Back 9 and Budget fragment will not be changed with this effort. This will pull the current CalSAWS version of these Form Fragments.	CA-255247_M40-105E_NA200_Mockup
2	Form	M40-105E/NA 1239 SAR Mockup Note: NA Back 9 and Budget fragment will not be changed with this effort. This will pull the current CalSAWS version of these Form Fragments.	CA-255247_M40-105E_NA1239SAR_Mockup
3	NOA	New NOA reason for 'Chronic Truant' Mockup Note: The current CalSAWS version of the NA Back 9 will generate on the back of the first page. The current CalSAWS version of the NA 1239 SAR/NA 200 budget will be attached to the end of the NOA as applicable per existing logic.	CA-255247_NOA_Mockup

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1243 (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.	Chronic Truant NOA will be determined and generated by CalSAWS.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-256878

Update Valuable Voucher Type for CalWIN Wave 3, 4, 5 and 6.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	John B., Kapil S.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/21/2023	1.0	Initial Version	Jimmy Tu

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1 OVERVIEW

1.1 Current Design

Valuable Voucher Types are stored in the database and appear in the drop-down list for Valuable Category Voucher. When there are no Voucher Types stored for a County, the drop-down is empty.

1.2 Requests

1. Add Valuable Voucher Types for the CalWIN Waves 3, 4, 5 and 6.

1.3 Overview of Recommendations

1. Update the Valuable Type table to include new Valuable Types.
2. Update the Valuable Type Program table to include new mappings for Valuable Voucher types.

1.4 Assumptions

None.

2 RECOMMENDATIONS

2.1 Data Change Request

2.1.1 Overview

This Data Change Request is to add additional Valuable Voucher Types for Alameda, Fresno, Sacramento, San Francisco, and Santa Barbara.

2.1.2 Description of Change

1. Update the Valuable Type (Valbl_type) table to include the following new Valuable Voucher Types:

Category Code (Cat_Code)	Valuable Description	County Code
Voucher ('VO')	Emergency Shelter Voucher	Alameda (01)
Voucher ('VO')	WtW Voucher	Fresno (10)
Voucher ('VO')	Homeless Assistance Voucher	Sacramento (34)
Voucher ('VO')	Other Program Voucher	Sacramento (34)
Voucher ('VO')	GA Voucher	San Francisco (38)
Voucher ('VO')	Voucher	San Francisco (38)
Voucher ('VO')	Banner Uniform	San Francisco (38)
Voucher ('VO')	CalLearn Voucher	Santa Barbara (42)
Voucher ('VO')	Homeless Assistance Voucher	Santa Barbara (42)
Voucher ('VO')	WtW Voucher	Santa Barbara (42)
Voucher ('VO')	DMV Reduced Fee	San Luis Obispo (40)
Voucher ('VO')	DMV No Fee	San Luis Obispo (40)

2. Update the Valuable Type Program (Valbl_type_pgm_code) table to include new program to voucher type mappings for the new voucher types above.

Program Code (PGM_CODE)	Valuable Type (Valbl_type_ID)
CW, GAGR Automated Sol (GR), CF, RCA	Emergency Shelter Voucher (For Alameda)
WTW, CalLearn	WtW Voucher (For Fresno)

CalWORKS, WTW	Homeless Assistance Voucher (For Sacramento)
CalWORKS, WTW	Other Program Voucher (For Sacramento)
GA/GR Automated Solution (GR)	GA Voucher (For San Francisco)
CalWORKS	Voucher (For San Francisco)
CalWORKS, GA/GR Automated Solution, WTW	Banner Uniform (For San Francisco)
CalLearn	CalLearn Voucher (For Santa Barbara)
CalWORKS, WTW, GA/GR Automated Solution	Homeless Assistance Voucher (For Santa Barbara)
WTW	WTW Voucher (For Santa Barbara)
CalWORKs, RCA, CalFresh, GA/GR Automated Solution, CAPI, Foster Care	DMV Reduced Fee (For San Luis Obispo)
CalWORKs, RCA, CalFresh, GA/GR Automated Solution, CAPI, Foster Care	DMV No Fee (For San Luis Obispo)

2.1.3 Estimated Number of Records Impacted/Performance

39 records impacted.

3 SUPPORTING DOCUMENTS

None.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

5 MIGRATION IMPACTS

None.

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-257301

MEDS: Add new MEDS alerts 9601 and 2208

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti
	Reviewed By	Angela Zhao

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/09/2023	1.0	Initial Doc	Howard Suksanti
04/04/2023	1.1	Added Alert 2208	Howard Suksanti

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1 OVERVIEW

Add the following new MEDS Alerts into CalSAWS.

1. 9601 INCAR-DATE AND CORRECTION INCAR-DATE CANNOT BE SAME DATE
2. 2208 DATE CONFLICTS WITH EXISTING INCARCERATION

1.1 Current Design

Currently CalSAWS does not list MEDS alerts 9601, 2208 on the MEDS Alert Search page and MEDS Alert Admin Search page.

Under the MEDS Network Change Cycle 489 Installed:

- Alert 9601 is created.

Under the 60-Day County Notification for New Batch EW32 Transaction Alerts:

- Alert 2208 is created.

1.2 Requests

Add new MEDS alerts 9601, 2208 to MEDS Alert Search page and MEDS Alert Admin Search page.

1.3 Overview of Recommendations

Add new MEDS alerts 9601, 2208 to MEDS Alert Search page and MEDS Alert Admin Search page.

1.4 Assumptions

N/A.

2 RECOMMENDATIONS

2.1 Add new MEDS Alerts.

2.1.1 Overview

This SCR will setup the External # 9601, 2208 alerts in The System so user can view that alert from the application.

2.1.2 Description of Change

Add the following MEDS alerts into CalSAWS.

1. Alert #9601 (Internal #0843).

Alert Description (TITLE_DESCR)	INCAR-DATE AND CORRECTION INCAR-DATE CANNOT BE SAME DATE
Explanation (TEXT_DESCR)	This alert is generated when the Incarceration Date and the Correction Incarceration Date are the same date on the EW32.
Automation	No.
Task Creation	No.
Alert Type	PRI-REJ
Action (ACTN_DESCR)	Once the Corrected Incarceration Date has been obtained, enter the Incarceration Date that matches the existing Incarceration Date on MEDS, then enter the Correction Incarceration Date and submit the EW32.

2. Alert #2208 (Internal #0320).

Alert Description (TITLE_DESCR)	DATE CONFLICTS WITH EXISTING INCARCERATION
Explanation (TEXT_DESCR)	User has entered a new Incarceration/Release Date or Correction Incarceration/Release Date on the EW32 screen, but the Incarceration and/or Release Date(s) overlap with another existing incarceration.
Automation	No.
Task Creation	No.
Alert Type	PRI-REJ
Action (ACTN_DESCR)	User must check MEDS and confirm Incarceration and Release Date(s). If an open incarceration needs to be closed, submit the Release Date to close the open period and submit prior to adding a new open period. If the Incarceration Date needs to be corrected, follow correction procedures.

- Set MEDS Alerts 9601, 2208 to 'Active' on the MEDS_ALERT_CONFIG table.
- Set the following default values for the Task Information on the MEDS Alert Admin Detail page for the new MEDS Alerts:
  a. Status: Inactive
  b. Type: Blank
  c. Long Description: MEDS Alert {Alert ID} – {Alert Description} has been received.
  d. Due Date: Default Due Date

e. Default Due Date: 10 Days
f. Initial Assignment: Default Assignment
g. Default Assignment: MEDS Alert Task Distribution

2.1.3 Counties Impacted

All Counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-258418

Add ESAP CF RE Packet in Threshold Languages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lianel Richwin
	Reviewed By	Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/28/2023	1.0	Initial document	Lianel Richwin

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1 OVERVIEW

The purpose of this change is to add the ESAP CF RE Packet in threshold languages to CalSAWS for Migration counties.

1.1 Current Design

Currently the ESAP CF RE Packet is available in English and Spanish languages in CalSAWS for Migration counties.

1.2 Requests

Add ESAP CF RE Packet in all threshold languages for Migration counties.

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

1.3 Overview of Recommendations

Add ESAP CF RE Packet in all threshold languages for Migration counties.

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

1.4 Assumptions

1. The generation condition and variable population will remain the same as existing English and Spanish packets.
2. The GEN 1365 and VRC will be added to each ESAP CF RE Packet envelope at the central print facility.

2 RECOMMENDATIONS

2.1 Add ESAP CF RE packet in Threshold Languages

2.1.1 Overview

This effort is to add ESAP CF RE Packet in threshold languages for Migration counties.

Existing Languages: English and Spanish

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

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

Form Mockups/Examples: See Supporting Documents #1.

2.1.2 Create Threshold Form XDPs

1. Add ESAP CF RE Packet in threshold languages to CalSAWS for Migration counties.

    Existing Languages: English and Spanish

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

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

    Form Mockup/Example: See Supporting Document #1

2. ESAP CF RE Packet will have the following forms: CF PACKET with RD_MIG_HEADER, MC200_NVRA with BRM_HEADER, CF377.2B with standard header, NA Back9, CF 37, EBT 2216, PUB 13, PUB 275, PUB 388. See Supporting Document #1 for English mockup.

2.1.3 Form Variable Population

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

2.1.4 Form Generation Conditions

Update batch job (PB00R2002) to generate the ESAP CF RE Packet in all available threshold languages.

The ESAP CF RE Packet is also available from the template repository page.

The printing and mailing options will be same as English and Spanish packets.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	ESAP CF RE PACKET	ESAP_CF_RE_Packet.pdf

4 REQUIREMENTS

4.1 Project Requirements

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

	v. CSC PIN notices.	

CalSAWS | Enhancement Request (CER)

PPOCs: Please send the completed request to CER@CalSAWS.org and cc your RM.

Submission Date	03/29/2023
Title	Solano – Direct Deposit Outbound ACH Record Formats

Region #: 1	**County: Solano**	
Submitter: Katrina Dillon	**Email:** kmdillon@solanocounty.com	**Phone:** 707-784-3801

Program(s) Impacted:

☐ Adoptive Services	☐ ARC	☐ CalFresh	☐ Cal-Learn
☐ CalWORKS / RCA	☐ CAPI	☐ Child Care	☐ CMSP
☐ Foster Care	☐ GA/GR	☐ GAIN/REP/WTW	☐ GROW
☐ Kin-GAP	☐ Medi-Cal / RMA	☐	☐

☒ Other – specify: Possible impact to programs using Direct Deposit, see explanation below.

Area(s) Impacted:

☐ Call Center	☐ Case Assignment	☐ Client Correspondence	☐ Eligibility
☐ Fiscal / Collections	☐ Hearings	☐ Imaging	☐ Lobby Management
☐ Reports	☐ Resource Data Bank	☐ Schedule Appt	☐ Security
☐ Self Service Portal	☐ Special Investigation	☐ Task Mgmt	☐ Time Limits
☐ Training			

☒ Interface(s) - specify

There are a number of discrepancies found in the Direct Deposit Outbound record formats when compared to the CalWIN similar record formats. Our bank account hasn't changed. (NACHAD/M files)

Record Types:

101 Immediate Destination (pos 4-13) value should be 0091000019.

101 Reference Code (pos 87-94) value should be spaces.

520 Originator DFI ID (pos 80-87) value should be '09100001'

820 Originator DFI ID (pos 80-87) value should be '09100001'

999 what is this record type for. Don't have in CalWIN.

☐ Other – specify

Justification / Request Summary:
Requesting the changes above for each record types.
Proposed Recommendation: Prioirity/Implementation Consideration(s): ASAP – Solano is currently in the process of IPT for Wave 4.

CalSAWS Response:	
CER Tracking #: (automatically generate by JIRA)	SCR #
Rejected By:	Date:
Rejection Reason(s) or other Comments:	

CA-259201– Description of Changes

030-WBT-CLE-Clerical Support-07

CA-231495: Employment Services Workload Inventory (display an Imaging icon)
N/A As there are no related scenarios in the WBT.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-259564

CalSAWS VA Expansion – Release 6

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Alexa Kideys, Uzochi Oparaji
	Reviewed By	Sarah Cordano

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/06/23	1.0	Original Draft	Alexa Kideys

Table of Contents

1 OVERVIEW

1.1 Current Design

The Virtual Assistant (VA) allows CalSAWS workers to access a series of pre-defined questions (use cases) for the CalWORKs, CalFresh, Medi-Cal, and Welfare-to-Work programs. These use cases (UCs) are designed to provide workers information on CalSAWS functionalities and instructions on how to perform certain job functions.

1.2 Requests

Add more content to the VA and edit previously deployed content.

1.3 Overview of Recommendations

In Release 6 of the CalSAWS VA, we will release additional UCs within the VA and make enhancements to existing content. The scope of this SCR is as follows:

Summary of New Content:

Category	Current Design	Release 6	Total (All Releases)
Number of UCs	136	14	150
Number of Keywords	300	34	334
Main Menu Branch	6	2	8
Sub-Menu Branches	19	0	19

Summary of Enhancements to Existing Content:

Category	Release 6
Number of Edited UCs	12
New UX/UI Features	0

1.4 Assumptions

1. To chat with the VA, the user would click the orange chat icon in the bottom right corner of the website (shown below).

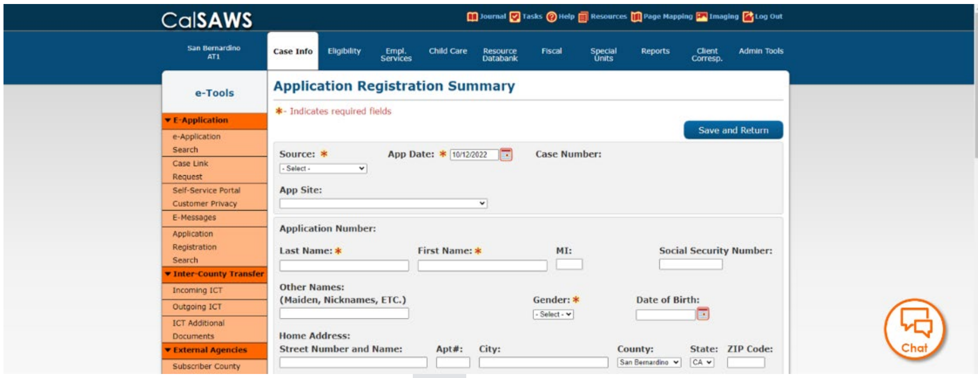

Figure 1.4.1 - VA Chat Icon

2. Once clicked, the VA will open as a pop-up window with the URL: virtualassistant.calsaws.net.

2 RECOMMENDATIONS

2.1 Internal VA Items

2.1.1 Overview

In this release, we will be adding more content to the VA and making enhancements to existing content. This content will include 14 more UCs, 12 edits to existing UCs, 33 new keywords, and 2 new Main Menu branches.

2.1.2 CalSAWS VA Mockups

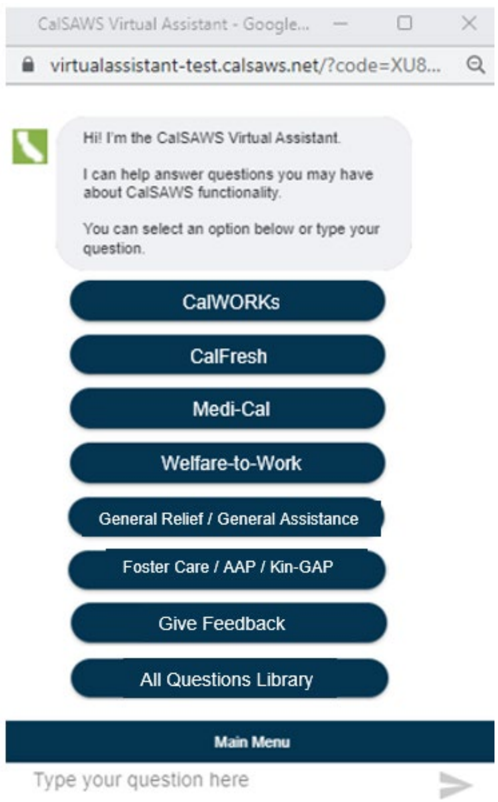

Figure 2.1.2.1 - VA Window

2.1.3 Description of Changes

1. **New UCs**

   Below is a table containing all new Use Cases in Release 6:

Program	Question	Answer	Buttons

Imaging Sub-Menu	What is the Barcode Verification Queue?	The **Barcode Verification / Barcode Verification Confidential** queue holds time-sensitive, System-generated barcoded documents with scanned barcodes (i.e., printed QR code or 16-digit barcode value) that OCR cannot confidently extract or validate. If users need to update the Barcode field, documents can also be manually routed to this queue from the **Exception / Exception Confidential** queue by selecting **Barcode Verification** from the **Send To** options. It is important to validate the **Barcode** field for all documents pending in this queue, as the System initially retrieves the case context and information (i.e., Case Number/CIN, Case/Person Name, Form Number & Form Name) based on the Barcode value stored in CalSAWS. Documents must be routed out of this queue to trigger task creation, if applicable based on Document Routing Rules, and to make any updates to the **Customer Reporting** and/or **Distributed Documents Search** pages in CalSAWS.	**Button**: More Imaging-related Topics
Imaging Sub-Menu	What is the No Case Assigned Queue?	The **No Case Assigned** queue holds documents that are scanned using an **Imaging No Case Coversheet**. Counties may use this queue to hold documents associated to a case that has not yet been created in CalSAWS. Note: Use of this queue and the **Imaging No Case Coversheet** is dependent on County business process. Documents that are pending in this queue are essentially treated like documents pending in the **QA & Indexing** queue. Once the case is created in CalSAWS, County staff should update the document and route it forward, at which point it will follow the standard Imaging flow. This includes the following: • Optical Character Recognition (OCR) Processing	**Button**: More Imaging-related Topics

		• Exception, Barcode Verification and/or Person Selection, if necessary • Task Generation, if Document Routing Rules are set up • Archival	
Imaging Sub-Menu	What is the Person Selection Queue?	All person-level documents are eventually routed to the **Person Selection** queue, unless a scanning user has set the **Person Override** flag to **True** during initial QA. The System identifies whether a document is person-level during OCR processing, based on the **Document Type**. Note: The System automatically routes documents to the **Person Selection** queue from the **Exception** queue, if a County user assigns a **Form Name** value that is person-level and selects the **Exception Handling** routing option. If a document is incorrectly archived at the case-level in the **All-Case Archived** drawer, you can update it to person-level by routing the document to the **Reindex All** queue from archival. See the CalSAWS Fact Sheet – Basic Imaging (on LMS) or the JA Imaging – Workflow Queues and Exception for more information. Documents that are not routed out of this queue will remain in the **All-Case Archived** drawer, stored as case-level documents and cannot be sent to the **Reindex** or **Reindex All** queues until they are routed out of the **Person Selection** queue per the steps below.	**Button**: More Imaging-related Topics
Imaging Sub-Menu	What is the Reindex / Reindex All Queue?	The **Reindex / Reindex Confidential** and **Reindex All / Reindex All Confidential** queues hold previously archived documents that have been manually added to the workflow to update their Case context, form information or County Code. Note: Documents are added to the workflow by clicking the **Add to Workflow** icon on the Document Viewer toolbar. See the CalSAWS Fact Sheet – Basic Imaging (on LMS) or the JA	**Button**: More Imaging-related Topics

		Imaging – Workflow Queues and Exception for more information. Updates to the document's Case context or form information are dependent on County staff manually updating the relevant document properties and routing the document out of the Reindex or Reindex All queue.	
Reports Sub-Menu	How to view the reports calendar?	The Reports Calendar contains a table with each report category and their individual availabilities. Click the button below for the Reports Calendar.	**Button**: Report Overview (OLH) **Button**: More Reported-related Topics
Income Sub-Menu	How to add new amounts to an existing income record?	When the income amount changes for an existing income detail record, you should add a new income amount. In the context of a case: 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Select **Customer Information** from the **Local** navigator 3. Click the **Expand** caret to expand the **Financial** section on the **Task** navigation bar 4. Click the **Income** link on the **Task** navigation bar 5. On the **Income List** page: a. Click the **Edit** button of the income detail record you want to edit 6. On the **Income Detail** page: a. Select <**Program**> from the **Display Program** drop list if the income amount you want to edit does not display b. Enter the **From** and **To** months list and click the **View** button if the income amount you want to edit does not display c. Click the **Add** button in the **Income Amounts** page section to add new income amounts to an existing record 7. On the **Income Amount Detail** page: a. Select <**Change Reason**> from the **New Change Reason** drop list b. Enter <**Reported Date**> in the **New Reported Date** field c. Enter <**Corrected Reported Amount**> in the **Reported Amount** field	**Button**: Income Management (JA) **Button**: More Income-related Topics

		d. Enter/update additional information as needed e. Click the **Save and Return** button 8. On the **Income Detail** page: a. Click the **Save and Return** button	
Income Sub-Menu	How to edit an incorrect income amount?	**If the income amount information is incorrect and needs to be corrected**, you should navigate to the **Income Detail** page and click the **Edit** button next to the amount that needs to be corrected in the **Income Amount** section. Before you edit any income record, follow your County processes. **Note**: If the program selected on the Income Detail page is Cash/CalFresh or Medi-Cal, depending on the income category, you can add multiple amounts and dates received to calculate the average of the entered amounts. This cannot be done for Transitional Medi-Cal (TMC)/Pickle, in which only actual income is used. When entering multiple checks for TMC/Pickle income, the Calculate button will add all the checks and display the total in the Reported Amount field. To find the steps on how to edit income amount information, click the button below.	**Button**: Income Categories and Types in the System (JA) **Button**: More Income-related Topics
CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance and Foster Care / AAP / Kin-GAP	How to rescind a case?	If you need to undo a denial or discontinuance of a person and/or program, without logging a new application, then you use the **Rescind** button on the **<Program> Detail** page to complete the process. The **Rescind** button can only rescind a group of people that share the same event effective date and event type (Denial or Discontinuance) and will not display when there is a pending application for ANY persons in the future. The **Rescind** button is available based on the view date of	**Button**: Reapplications and Rescissions (JA) **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics

		denial/discontinuance for all EDBC programs except General Assistance/General Relief. When clicking the Rescind button, the BDA and application date are automatically populated based on the last valid application. If it is necessary to rescind two different groups of people, the process below will need to be repeated for each group. Start with the earliest effective date. To rescind a case, start by accessing the **<Program> Detail** page. To get to the **<Program> Detail** page: 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigator 3. On the **Case Summary** page: a. Change the **<Display Date>** to the month in which you want to rescind b. Click the **View** button to refresh the page with the new display date c. Click the **View Details** button in the **<Program>** block Click the button below for a complete set of instructions on how to rescind a case.	**Button**: More Medi-Cal-related Topics **Button**: More Welfare-to-Work-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics
CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance, and Foster Care / AAP / Kin-GAP	How to reassign a worker?	To reassign a worker: 1. Place the cursor over **Admin Tools** on the **Global** navigation bar 2. Select **Workload Assignment** from the Local navigator **Note**: the Workload Assignment page is only accessible if you have the appropriate security clearance 3. On the **Workload Reassignment Detail** page: a. In the **From** section, select the radio button next to Case Number and enter the Case Number in the field b. In the **Reassign Quantity** section, select the radio button next to Number of Cases (enter 1) c. Select **[Program]** in the Program list d. Select the language from the **Language** drop list e. In the **To** section, click the **Select** button under **Worker ID**	**Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More Welfare-to-Work-related Topics

		4. On the **Select Worker** page: a. Enter search criteria b. Click the **Search** button c. Confirm or click the radio button for the desired worker d. Click the **Select** button 5. On the **Workload Reassignment Detail** page: a. In the **Effective Date** section, select the radio button next to Immediate Assignment b. In the **Reassignment Option** section, select **No** in the **Automatically Reassign When Activated field** and **Yes** in the **Send Worker Alert** field c. Click the **Reassign** button	**Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics
EDBC Sub-Menu	How to create a Manual EDBC?	The Manual EDBC process allows you to create a manual EDBC when the system data is not determining the correct or expected result and the data collection pages are accurate. For these circumstances, the Manual EDBC allows issuances to be tracked and reports generated within the System. **Note**: Appropriate security rights are required to create a Manual EDBC. Follow County policy to determine if a manual EDBC is needed. A Manual EDBC may also be required when regulations change prior to the System being updated, to compute overpayments and/or over-issuances for regulations prior to QA/QC. The following are Manual EDBC Reasons: **DCFP, New Policy, Month Prior to the System, Retro CW/CF. Saldivar, SUPP DCFP**, **Vital Statistics**, and **Unable to Complete Conversion**. For information about creating Manual EDBCs, click the button below.	**Button**: EDBC – Manual EDBC and Clarifications (JA) **Button**: More EDBC-related Topics
CalWORKs, General Relief / General Assistance	How to request a Lodging Invoice?	A Lodging Invoice is offered to General Relief / General Assistance and CalWORKs applicants to assist in homeless situations. Applicants may use the Lodging Invoice at contracted facilities or vendor hotels.	**Button**: General Relief Meal and Lodging (JA) **Button**: Authorize

		To request a Lodging Invoice within the context of a case: 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigator 3. Click **Invoice History** on the **Task** navigation bar 4. On the **Invoice History** page: a. Select **<Lodging>** in the **Invoice Type** drop list (bottom right) b. Click the **<Request>** button 5. On the **Invoice Detail (Request – Lodging)** page: a. Select **<Participant>** from the **Participant Name** field b. Click the **Select** button in the **Provider Name** field in the **Service Detail** section 6. On the **Select Money Management Resource** page: a. Enter search criteria in the appropriate fields b. Click the **Search** button c. Confirm that the correct record appears in the **Search Results Summary** section. If multiple records appear, select the radio button that corresponds to the appropriate record d. Click the **Select** button 7. On the **Invoice Detail (Request – Lodging)** page: a. Enter **<Date>** in the **Begin Date** and **End Date** fields b. Enter **<Invoice Amount>** in the **Invoice Amount** field c. Click the **Save and Continue** button Note: Some Lodging Invoices may require an authorization and be placed in a status of Pending Authorization. Click the "Lodging Invoice Authorization" button for steps on how to authorize a Lodging Invoice.	Lodging Invoice **Button**: More CalWORKs-related Topics **Button**: More General Relief / General Assistance-related Topics
CalWORKs, General Relief / General Assistance	How to authorize a Lodging Invoice?	Some Lodging Invoices may require an authorization and be placed in a status of Pending Authorization. To authorize a Lodging Invoice:	**Button**: General Relief Meal and Lodging (JA)

		1. Place the cursor over **Fiscal** on the **Global** navigation bar 2. Select **Invoice** from the **Local** navigator 3. On the **Invoice Search** page: a. Select **<Invoice Status>** from the **Search By** drop list b. Select **<Pending Authorization>** from the **Invoice Status** drop list c. Click the **Search** button d. Click the **<Invoice Number>** hyperlink in the **Search Results Summary** section 4. On **Invoice Detail (Payment-Lodging)** page: a. Click the **Authorize** button **Note:** Follow your County's policy on authorizing a Lodging Invoice. Appropriate security rights are required to authorize a Lodging Invoice.	**Button**: Lodging Invoice **Button**: More CalWORKs-related Topics **Button**: More General Relief / General Assistance-related Topics
Income Sub-Menu	How to enter Income In-Kind (IIK) earned?	Income in-kind (IIK) is used for CalWORKs and/or Medi-Cal applicants and recipients. When **IIK earned** is the income type, the **Income Amount Detail** page allows you to select each person who should receive IIK. This is necessary only when earned IIK should NOT be distributed evenly across all family members. If **No** is selected from the **Specify Person(s) Receiving Income In-Kind** drop list, the System will distribute the IIK to all persons with an **Active** status and any role other than **UP**. This includes parents and spouses pulled in the EDBC as financially responsible persons. The IIK is also allocated for unborns of any of the Active persons. For instructions on how to enter income in-kind (IIK) within the context of a case, click the button below.	**Button**: Medi-Cal – Income In-Kind – Unearned (JA) **Button**: More Income-related Topics
Foster Care / AAP / Kin-GAP	How to discontinue a Foster Care program end date placement?	Refer to your County's policy when determining if a Foster Care program should be discontinued using Negative Action. For LA County, please refer to your CWS/CMS process.	**Button**: Foster Care Program Discontinuance – Continuing Eligibility for

		To discontinue a Foster Care program: 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Select **Customer Information** from the **Local** navigator 3. Click the **Foster Care** expand caret on the **Task** navigation bar 4. Click the **Child Placement** link on the **Task** navigation bar 5. On the **Child Placement List** page: a. Click the **Edit** button for the appropriate placement record 6. On the **Child Placement Detail** page: a. Enter **<Placement End Date>** in the **End Date** field b. Select **<Placement End Reason>** from the **Placement End Reason** drop list c. Click the **Save and Return** button 7. Run EDBC through future month For a complete set of instructions on how to discontinue a Foster Care Case, click the button below.	Children (CEC) (JA) **Button**: More Foster-Care-related Topics

2. Edited UCs

Below is a table containing all edited Use Cases in Release 6. Text highlighted signals edits:

Program	Question/Title	Answer	Buttons
Income Sub-Menu	How to add a new income?	1. On the **Income List** page: a. Select <**Income Category**> from the **Income Category** drop list b. Click the **Add** button 2. On the **Income Detail** page: a. Select <**Name**>, <**Type**>, <**Frequency**> from their respective drop lists b. Enter <**Description**> in the **Description** field, if applicable c. Click the **Shared with RDP** page section expand caret and select <**Yes or No**> from the **Is this income shared with a Registered Domestic Partner?** drop list, if applicable	**Button:** Income Categories and Types in the System (JA) **Button:** More Income-related Topics

		d. Select <**Program**> from the **Display Program** drop list e. Click the **Add** button 3. In the **Income Amount Detail** page section: a. Select <**Change Reason**> from the **Change Reason** drop list b. Enter <**Date**> in the **Reported Date** field c. Utilize the **Average Calculator**, based on your County business process d. Enter the applicable income amount(s) **Note**: The **Add** button does not display until a program is selected from the **Display Program** drop list. When adding income be sure to select/link the correct employment record. For more information on how to add an income record, click the button below.	
CalWORKS, CalFresh, Medi-Cal, General Relief / General Assistance, and Foster Care / AAP / Kin-GAP	How to assign a worker for a pending program?	To assign a worker to a new or pending program: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **Worker Assignment** from the **Local** navigator 3. On the **Pending Assignment List** page: a. Click the program(s) check box(es) in the **Program Information** section to select the program(s) you want to assign b. Click the **Manual Assignment** radio button in the **Assignment Options** section to manually assign a worker c. Click the **Select** button 4. On the **Select Worker** page: a. Enter the appropriate search criteria	**Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics ~~**Button**: More Welfare-to-Work-related Topics~~ **Button**: More General Relief / General

		b. Click the **Search** button c. Click the radio button for the appropriate **Worker** d. Click the **Select** button 5. On the **Pending Assignment List** page: a. **Automatically Reassign When Activated** will default to **<No>**. Based on your County business process, you can select **<Yes>** b. Click the **Assign** button Note: Worker assignment assumes you are within the context of a case. Users with the correct security rights can also reassign programs using the Worker Assignment page in Admin Tools.	Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics
CalWORKS, CalFresh, Medi-Cal, and Foster Care / AAP / Kin-GAP	How to initiate a negative action?	Follow the steps below to run negative action on the Negative Action Detail page: 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Click the **Case Summary** link on the **Local** navigator 3. Click the **Negative Action** link on the **Task** navigation bar 4. On the **Negative Action Detail** page: a. Select **<Month>** from the **Benefit Month** drop list b. Select **Run EDBC for this program** by clicking the check box for the program on which the Negative Action is being taken c. Select the checkbox(es) next to the **Person(s)** name d. Select **<Reason>** from the **Negative Action** reason drop list e. Click the **Run EDBC** button Note: Care should be taken when using this process as it can	**Button**: Negative Action Detail – Withdrawal or Discontinuance (JA) **Button**: Link to UC: Request MAGI Negative Action **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics

		be used to close an entire program or selected individuals. For Negative Actions on MAGI Medi-Cal, workers should request a Negative Action on the MAGI eligibility page first.	
CalWORKS, CalFresh, Medi-Cal, and Foster Care / AAP / Kin-GAP	How do I hide a person?	These instructions will allow you to select person/s to hide from view on the data collection pages. The steps require that you are in the context of a case. 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigator 3. Click the **Hide Person** link on the **Task** navigation bar 4. On the **Hide Person** page: a. Click the **Person** checkbox for each appropriate person b. Click the **Save and Continue** button Note: Once a person is associated with a case, you cannot remove that person. You cannot hide a person that is pending or active on a case.	**Button**: Hide Person (OLH) **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics
CalWORKS, CalFresh, Medi-Cal, General Relief / General Assistance, and Foster Care / AAP / Kin-GAP	How to add someone to a program?	When adding a new person to a case and program, follow County policy. Click the Job Aid below for step-by-step instructions on how to add a person to a program for two scenarios: (1) a person that is known to the System, and (2) a person that is not yet known to the system. Note: Confirm that the view month matches the beginning date of aid.	**Button**: Add a Person to an Existing Case and Existing Program (JA) **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics

			Button: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics
CalWORKs, General Relief / General Assistance, and Foster Care / AAP / Kin-GAP	How to set up direct deposit?	Direct deposit accounts are used in the System to issue direct deposit benefits to participants and resources for cash programs. Direct deposit accounts can be created using the Issuance Method Detail page for participants and resources. Once the direct deposit is active, benefits can be issued to that account. For detailed instructions on how to set up Direct deposit for a Case or Resource, click the button below.	**Button**: Direct Deposit – Manage (JA) **Button**: More CalWORKs-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics
CalWORKs, CalFresh, Medi-Cal, and Foster Care / AAP / Kin-GAP	How to verify non-citizenship citizenship status?	This information can be verified via immigration documents from USCIS or by an eSAVE being requested. For more information, click one of the buttons below.	**Button**: Lawful Permanent Resident Codes (DHS) **Button**: Noncitizen Eligibility Guide (CalFresh) (CDSS) **Button**: Proof of Citizenship/U.S National Status (Covered CA) **Button**: Medi-Cal CalHEERS – Reviewing Immigration

			Information for a MAGI Determination (JA) **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics
CalWORKs, Medi-Cal, and Foster Care / AAP / Kin-GAP	How to request new BIC?	If a participant loses their BIC, you may request a new one by following the steps below: 1. Place the cursor over **Case Info** in the **Global** navigation bar 2. Click **Case Summary** in the **Local** navigation bar 3. On the **Case Summary** page, click the **View Details** button belonging to the appropriate **<Program>** block 4. On the **<Program> Detail** page, click the **<Program Person>** hyperlink for the person you wish to request a new BIC in the **<Program> Detail** page 5. On the **<Program> Person Detail** page, click the **Request New BIC** button Note: Please verify the participant's address is correct in CalSAWS and MEDS. To learn more about requesting a new BIC, click the button below	**Button**: Requesting a Benefit Identification Card (BIC) Replacement (JA) **Button**: More CalWORKs-related Topics **Button**: More Medi-Cal-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics

CalWORKS, CalFresh, General Relief / General Assistance, and Foster Care / AAP / Kin-GAP	How to create a recovery account?	Recovery accounts in CalSAWS are used to manage overpayments (cash aid) or over-issuances (CalFresh) discovered and being collected by the County. EDBC determines if an overpayment or an over-issuance was made based on information on the data collection pages. There are some instances where you'll need to set up an external recovery account. For more detailed information on creating a recovery account, click the relevant button below. The Recovery Account Search page allows you to search for a Recovery Account by the following criteria: • Case • Recovery Account • Discovery Date • Responsible Party • LEADER Claim Number	**Button**: Creating External Recovery Accounts for Non-Fraud Overpayments (JA) **Button**: Recovery Account – Internal – Create (JA) **Button**: Recovery Account – External – Create (JA) **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics
CalWORKS, CalFresh, Medi-Cal, and General Relief / General Assistance	How to add an authorized representative to a case?	Authorized Representatives are persons or resources authorized by customers to act on their behalf regarding their case. The Authorized Representative List page displays all the Authorized Representatives for the case, including the program(s) and effective dates. From the Authorized Representative List page, you may access the	**Button**: Authorized Representative and Additional Correspondence Recipients (JA) **Button**: More CalWORKs-related Topics

		Authorized Representative Detail page. For detailed instructions and information on adding and updating Authorized Representatives, click the button below.	**Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More General Relief / General Assistance-related Topics
CalWORKs, CalFresh, Medi-Cal, and General Relief / General Assistance	What Change Reason should I use?	The following change reasons can be selected from the Change Reason drop list on the Non-Financial and Financial Detail pages. Follow your County policy when using the Journal to record why a change was made: 1. **Participant Provided – Verbal**: Customer provided information verbally that is not part of a periodic report (e.g., RE or SAR 7). 2. **Participant Provided – Written**: Customer provided information that is not part of a periodic report (e.g., RE or SAR 7). Use information from IEVS, PVS, MEDS, or county-initiated actions. 3. **Intake**: Customer provided information during the intake process. Use when any program on the case is in a pending status. 4. **Reported on PR/RE**: Customer provided information during the periodic reporting period (e.g., RE, or SAR 7). 5. **Fraud Findings**: Information received from fraud findings from a specific type of action. The use of this type is rare.	**Button**: Change Reason (JA) **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More General Relief / General Assistance-related Topics

		6. **State Hearing Decision**: Mandated Information provided by a State Hearing. 7. **Child in Foster Care/Kin-GAP**: Information that a child has been removed from the CalWORKs Assistance Unit marked as Permanently Out of the Home and is entering Foster Care or Kin-Gap. 8. **Interface**: Information entered or updated by interfaces and is not user selectable. 9. **COLA**: Information entered or updated by Batch EDBC for COLA updates and is not user selectable.	
CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, and General Relief / General Assistance	How do I add, edit, view, or remove a non-compliance record?	The Eligibility Non-Compliance List page allows you to add, edit, view, or remove Eligibility Non-Compliance information for all applicants/participants associated to a case who have not complied with program rules, who are avoiding the law, or who have been convicted of a drug felony. Note: Most instances of non-compliance are added by the system. This page can still be used for corrective actions or limited instances not related to automated functions. For more information on non-compliance records, click the button below.	**Button**: Eligibility Non-Compliance Process (JA) **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More Welfare-to-Work-related Topics **Button**: More General Relief / General Assistance-related Topics

3. New Keywords

Below is a table containing all new Keywords in Release 6.

UC #	Title	Keywords
GR.01	Lodging Invoice	hotel, hotel voucher, lodging voucher, lodge invoice, lodge voucher, motel invoice
GR.02	Authorize Lodging Invoice	lodging authorization, lodge authorization, lodging auth, hotel authorization, hotel approval, hotel voucher authorization
CF.38	Rescind Case	recsind case, rescind a case, rescind case, reactivate case, reactivate
CF.39	Worker Reassignment	reassign, reassignment, reassign worker, case load assignment
FC.01	Discontinue Foster Care Program End Placement	discontinue Foster Care program, discontinue fc case, fc discontinuance, fc end date placement
FR.12	Imaging Sub-Menu	barcode verification queue, no case assigned queue, person selection queue, reindex queue, reindex all queue
FR.22	Income Sub-Menu	add income to existing record, income in-kind earned, income in kind unearned, edit incorrect income

4. **New Main Menu/Sub-Menu Branches**
Release 6 we will include 2 new Main Menu programs.

The new main menu programs are:
1. General Relief / General Assistance
2. Foster Care / AAP / Kin-GAP

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Design	Release Tracker	VirtualAssistant_Release6Tracker.xlsx
2	Design	Miro Board – VA flow and use cases are documents	R6 - CalSAWS Worker-Facing VA.pdf

4 REQUIREMENTS

4.1 Project Requirements

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

5 OUTREACH

N/A

6 APPENDIX

N/A