

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200325

Hide SAR Due Month when Reporting Period is
less than or equal to Report Frequency

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/11/2022	1.0	Initial	Andrea Rodriguez

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Case Summary	5
	2.1.1 Overview	5
	2.1.2 Case Summary Mockup.....	5
	2.1.3 Description of Changes	7
	2.1.4 Page Location	8
	2.1.5 Security Updates.....	8
	2.1.6 Page Mapping.....	8
	2.1.7 Page Usage/Data Volume Impacts	8
	2.2 Program Detail.....	9
	2.2.1 Overview	9
	2.2.2 Program Detail Mockup.....	9
	2.2.3 Description of Changes	11
	2.2.4 Page Location	11
	2.2.5 Security Updates.....	12
	2.2.6 Page Mapping.....	12
	2.2.7 Page Usage/Data Volume Impacts	12
3	Requirements.....	12
	3.1 Project Requirements.....	12

1 OVERVIEW

This SCR will update the SAR Due Month field to not display on the Case Summary page or Program Detail page when the reporting period between the RE Begin Month and the RE Due Month is less than or equal to the report frequency.

1.1 Current Design

In CalSAWS, the SAR Due Month is calculated by taking the RE Due Month minus 6 months. The date can be prior to the RE Begin Month and does not represent the date the last SAR 7 was due.

1.2 Requests

This SCR will update the SAR Due Month field to not display on the Case Summary page or Program Detail page (for CalFresh, CalWORKs, or RCA Detail only) when the reporting period between the RE Begin Month and the RE Due Month is less than or equal to the report frequency (6 months for SAR and 12 months for SARA).

1.3 Overview of Recommendations

1. When the reporting period between the RE Begin Month and the RE Due Month is less than or equal to the report frequency (6 months for SAR and 12 months for SARA), the SAR Due Month field will not be displayed on the Case Summary page and on the Program Detail page (for CalFresh, CalWORKs, or RCA Detail).

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically called out by this document.
2. This SCR will only impact the CalWORKs, CalFresh, and RCA programs.
3. No changes will be made to SARN date display functionality.
4. The logic for when the SAR Due Month field displays is calculated separately for each program according to the RE Begin Month and RE Due Month dates assigned on each program.

2 RECOMMENDATIONS

In CalSAWS, the SAR Due Month is calculated by taking the RE Due Month minus 6 months. The date can be prior to the RE Begin Month and does not represent the date the last SAR 7 was due. This SCR will update the SAR Due Month field to not display on the Case Summary page or Program Detail page for CalFresh, CalWORKs or RCA when the reporting period between the RE Begin Month and the RE Due Month is less than or equal to the report frequency.

2.1 Case Summary

2.1.1 Overview

The Case Summary page allows a user to access the case summary of an entire case, including summaries of the programs on the selected case. This SCR will update the SAR Due Month field to not display on the Case Summary page for CalFresh, CalWORKs, or RCA when the reporting period between the RE Begin Month and the RE Due Month is less than or equal to the report frequency. The report frequency is 6 months for SAR and 12 months for SARA.

2.1.2 Case Summary Mockup

▼ CalFresh

Worker:	Worker Name	Primary Applicant/Recipient:	Doe, Jane 45F	
Worker ID:	19DP026A05	Language:	Spanish	
Program Status:	Active	Phone Number:	(123)456-7890	
RE Due Month:	06/2022 Re-Evaluate	Email:		
Reporting Type:	Semi-Annual Reporting	Payee:	Doe, Jane 45F	
Aid Code:	01	Application Date:	03/02/2022	
Meets ESAP Criteria:	No			
Public Assistance Indicator:	No			
FBU:	1			
Name	Role	Role Reason	Status	Status Reason
Doe, Jane 45F	MEM		Active	
Doe, John 19M	MEM		Active	

[View Details](#)

Figure 2.1.1 – Case Summary for CalFresh with SAR Reporting Type

▼ CalFresh

Worker:	Worker Name	Primary Applicant/Recipient:	DOE, JOHN 81M
Worker ID:	19DPL4Q31B	Language:	English
Program Status:	Active	Phone Number:	
RE Due Month:	02/2022 Re-Evaluate	Email:	
Reporting Type:	Semi-Annual Reporting Annually	Payee:	DOE, JOHN 81M
Reporting Type Reason:	Elderly/Disabled	Application Date:	06/01/2019
Aid Code:	09 - CalFresh		
Meets ESAP Criteria:	Yes		
Public Assistance Indicator:	Yes		
FBU:	1		
Expedited Service:	Yes		
Postponed Verif:	No		

Name	Role	Role Reason	Status	Status Reason
DOE, JOHN 81M	MEM		Active	

[View Details](#)

Figure 2.1.2 – Case Summary for CalFresh with SARA Reporting Type

▼ CalWORKs

Worker:	Worker Name	Primary Applicant/Recipient:	Doe, Jane 34F
Worker ID:	07LS009Q00	Language:	English
Program Status:	Active	Phone Number:	
RE Due Month:	03/2022 Re-Evaluate	Email:	
Reporting Type:	Semi-Annual Reporting	Payee:	Doe, Jane 34F
Aid Code:	30 - CW-All Other Families (Fed)	Application Date:	04/01/2022
Public Assistance Indicator:			
FBU:	1		

Name	Deprivation	Role	Role Reason	Status	Status Reason
▶ Does, Jane 34F		MEM		Active	
▶ Doe, John 17M	Absence	MEM		Active	

View WPR
View Details

Figure 2.1.3 – Case Summary for CalWORKs with SAR Reporting Type

▼ RCA

Worker:	Worker Name	Primary Applicant/Recipient:	DOE, JANE 60F
Worker ID:	19DP048201	Language:	English
Program Status:	Active	Phone Number:	(123)456-7890
RE Due Month:		Email:	
Reporting Type:	Semi-Annual Reporting	Payee:	DOE, JANE 60F
FBU:	1	Authorized Representative(s)	DOE, JOHN
		Application Date:	09/28/2022

Name	Role	Role Reason	Status	Status Reason
DOE, JANE 60F	MEM		Active	

View Details

Figure 2.1.4. – Case Summary for RCA with SAR Reporting Type

2.1.3 Description of Changes

1. Update the current logic for when the SAR Due Month field displays on the Case Summary page for the CalFresh, CalWORKS, or RCA program sections.
 - a. The SAR Due Month field will not be displayed when the reporting period between the RE Begin Month and the RE Due Month is less than or equal to the report frequency for SAR or

SARA.

Note: This will also apply when a user changes the RE Due Month on the Program Detail page so that the reporting period is less than or equal to the report frequency for SAR or SARA.

- b. The SAR Due Month field will be calculated and displayed when the reporting period between the RE Begin Month and the RE Due Month is greater than the report frequency for SAR or SARA.

Note: If the field is not displayed and the user later changes the RE Due Month on the Program Detail page so that the reporting period is greater than the report frequency for SAR or SARA, then the SAR Due Month field will display.

Note: The report frequency is 6 months for SAR and 12 months for SARA.

2.1.4 Page Location

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

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 Program Detail

2.2.1 Overview

The Program Detail page allows a user to access the program information for an associated case and program participant/beneficiary. This SCR will update the SAR Due Month field to not display on the Program Detail page for CalFresh Detail, CalWORKs Detail, or RCA Detail when the reporting period between the RE Begin Month and the RE Due Month is less than or equal to the report frequency. The report frequency is 6 months for SAR and 12 months for SARA.

2.2.2 Program Detail Mockup

CalFresh Detail

*- Indicates required fields

View History

Save and Return

Cancel

Date: *

06/01/2022



View Date

Program Information

Status: *

Active

Status Reason:

Source: *

In Person

Application Date: *

03/02/2022

Edit

RE Begin Month:

03/2022

RE Due Month: *

06/2022



Reporting Type:

Semi-Annual Reporting

Public Assistance Indicator:

N

Automatically Reassign When Activated:

No

Figure 2.1.1 – Program Detail for CalFresh with SAR Reporting Type (Edit)

CalFresh Detail

*- Indicates required fields

View History

Issuance Method

Edit

Close

Date: *

06/01/2022

Program Information

Status: *

Active

Status Reason:

Source: *

Self-Service Portal

Application Date: *

[04/21/2020](#)

RE Begin Month:

04/2021

RE Due Month: *

02/2022

Reporting Type:

Semi-Annual Reporting Annually

Reporting Type Reason:

Elderly/Disabled

Public Assistance Indicator:

Y

Automatically Reassign When Activated:

No

Figure 2.1.2 – Program Detail for CalFresh with SARA Reporting Type (View)

CalWORKs Detail

*- Indicates required fields

View History

Issuance Method

Edit

Close

Date: *

06/01/2021

Program Information

Status: *

Active

Status Reason:

Source: *

Self-Service Portal

Application Date: *

[12/17/2021](#)

RE Begin Month:

02/2021

RE Due Month: *

06/2021

Reporting Type:

Semi-Annual Reporting

Figure 2.1.3 – Program Detail for CalWORKs with SAR Reporting Type (View)

RCA Detail

*- Indicates required fields

View History

Issuance Method

Edit

Close

Date: *

01/01/2023

Program Information		
Status: *	Status Reason:	Source: *
Active		In Person
Application Date: *		
09/28/2022		
Reporting Type:		
Semi-Annual Reporting		
Automatically Reassign When Activated:		
No		

Figure 2.1.4. – Program Detail for RCA with SAR Reporting Type (View)

2.2.3 Description of Changes

1. Update the current logic for when the SAR Due Month field displays on the Program Detail page for the CalFresh, CalWORKS, or RCA program pages.
 - a. The SAR Due Month field will not be displayed when the reporting period between the RE Begin Month and the RE Due Month is less than or equal to the report frequency.

Note: This will also apply when a user updates the RE Due Month on the page so that the reporting period is less than or equal to the report frequency.

- b. The SAR Due Month field will be calculated and displayed on the Program Detail page when the reporting period between the RE Begin Month and the RE Due Month is greater than the report frequency.

Note: If the field is initially not displayed and the user later updates the RE Due Month on the page so that the reporting period is greater than the report frequency, then the SAR Due Month field will be displayed.

Note: The report frequency is 6 months for SAR and 12 months for SARA.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.8.1	The LRS shall track the processing timeframes for all applications and types of benefits in order to alert workers regarding upcoming deadlines and for reporting purposes.	This SCR will update the Case Summary and Program Detail to only show the SAR Due Month field when the RE Begin and Due Dates are greater than the reporting frequency.