

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-226701

Create Flexible CW/CF RE Appointment Batch  
Job for Migration Counties

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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ACL 21-24 requires counties to implement interview scheduling methods and provides a list of options. One of these options is flexible appointments.

This SCR outlines the necessary requirements to enable automated flexible Redetermination (RE) appointment scheduling through batch for CalWORKs (CW) and CalFresh (CF) programs for all Migration Counties.

## 1.1 Current Design

Currently when the customer reporting status is updated to Incomplete status, there are incomplete reason that the user will need to select. Two of those options that the user can select are 'Dated Before Last Day of SAR Report Month' and 'Dated Before Last Day of Report Month'.

Currently, there is an RE Appointment scheduling batch job (PBXXC907) for regular telephone interviews only.

Currently, there is an Outbound IVR campaign for Appointment Reminder and Missing Document. The Missing Document campaign checks for missing SAR7s only – there is no equivalent campaign for RE packets. The results of these IVR calls are processed by an Inbound IVR Call Results Reader (PI00M300), where a call log and journal entry are generated.

## 1.2 Requests

1. Remove the 'Dated Before Last Day of Report Month' and 'Dated Before Last Date of SAR Report Month' option from the PR - Incomplete Reasons block on the Customer Reporting Detail page and Customer Reporting Detail - Override page.
2. Create a new batch job to schedule flexible CW/CF RE appointments for Migration Counties.
3. Regression test the existing packet generation jobs in order to confirm that appointment times are populated as expected.
4. Update the verbiage for journals and call logs generated for IVR phone messages sent to customers about missing SAR7s.

## 1.3 Overview of Recommendations

1. Update the Customer Reporting Detail and Customer Reporting Detail – Override page to no longer display the 'Dated Before Last Day of SAR Report Month' and 'Dated Before Last Day of Report Month' from the PR- Incomplete Reasons block when the report status is set to Incomplete.
2. Create a new batch job to schedule flexible CW/CF RE appointments for Migration Counties.
3. Regression test the existing packet generation jobs in order to confirm that appointment times are populated as expected.

4. Update the verbiage for journals and call logs generated for IVR phone messages sent to customers about missing SAR7s.

## 1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. The existing regular appointment batch job and the new flexible appointment batch job referenced throughout this SCR pertains to all counties except LA. 'Migration counties' refers to all counties except LA.
3. Counties cannot be opted into both the existing regular appointment batch job and the new flexible appointment batch job.
4. The new flexible appointment batch job will only be scheduled to run for counties that have opted in. The logic will evaluate the Position Detail page for the worker assigned to the CW and/or CF program and evaluate that worker's availability. If the worker has availability set up on their Worker Schedule and a Daily Threshold set up for on the Position Detail page, the batch job will attempt to schedule the RE appointments.
5. Manage Personnel set up will include setting the Daily Threshold for each worker's position on the Position Detail page for "General Appointment" with "Telephone Interview Recertification type". The new flexible appointment batch job will not schedule appointments for counties that do not set up the Daily Threshold on the Position Detail page for their workers.
6. If a County opts into the batch job but fails to set up the Daily Threshold and/or Worker Schedule availability, any appointments that have yet to be scheduled manually at the time the appointment batch runs will appear on the 'Redetermination - Final Exception Report' report. Skipped cases are available in the report for viewing starting the 6th business day of the month.
7. The new flexible appointment batch job will not trigger any forms. When the batch job creates the RE appointment, all appointment details will be included in the Appointment letter, which is included in the RE packet. CA-207399 migrated the CF RE Packet (PB00R543), CW RE Packet (PB00R544) and CW/CF RE Packet (PB00R547) into CalSAWS for the 57 Migration Counties. The RE Packets are generated on the 15<sup>th</sup> of each month.
8. The new flexible appointment batch job will only schedule appointments of Category 'General Appointment' and Type 'Telephone Interview Recertification.' All other appointment types, including face-to-face appointments, must be scheduled manually. Additionally, appointments will not be scheduled on weekends or holidays by the batch job and must be scheduled manually.
9. Changes to the GEN 102 Appointment Letter and the LA RE Appointment Scheduling batch jobs are handled by SCR CA-246603.
10. The flexible appointment is introduced by SCR CA-246603, which will also define various requirements and limitations. These will not be changed in this SCR. This includes and is not limited to the following: new fields and their valid values, expected values of new fields for flexible appointments and regular appointments, and how flexible appointments and regular appointments can

overlap with each other. These will be called out in this design where applicable.

11. Text message details and history are available for viewing on the Contact Customer History page. There will be no changes or additions to this functionality.



## 2 RECOMMENDATIONS

### 2.1 Customer Reporting Detail

#### 2.1.1 Overview

The Customer Reporting Detail page allows user to process participant/beneficiary reports such as the SAR 7. This SCR will update the Customer Reporting Detail page to no longer display the 'Dated Before Last Day of SAR Report Month' and 'Dated Before Last Day of Report Month' from the PR- Incomplete Reasons block when the report status is set to Incomplete. This change is required to comply with the changes amended under AB 79 (ACL 21-24) which eliminated the requirement for the SAR 7 to be signed no earlier than the first day of the submit month of the SAR period for the SAR 7 to be considered completed.

#### 2.1.2 Customer Reporting Detail Mockup

Status			
Program	Status	Status Detail	Date
CW	<input type="text" value="Incomplete"/>	<input type="text"/>	<input type="text"/> 
CF	<input type="text" value="Incomplete"/>	<input type="text"/>	<input type="text"/> 

PR - Incomplete Reasons	
<input type="checkbox"/> Blank	<input type="checkbox"/> Disabled Information Missing
<input type="checkbox"/> Expenses Information Missing	<input type="checkbox"/> Form Contains Conflicting Info
<input type="checkbox"/> Income Information Missing	<input type="checkbox"/> Living Situation Info Missing
<input type="checkbox"/> Signed-No boxes checked	<input type="checkbox"/> Other Changes Info Missing
<input type="checkbox"/> Pregnancy Info Missing	<input type="checkbox"/> No Signature
<input type="checkbox"/> Failed to Return Complete SAR72	<input type="checkbox"/> Failed to Return Complete SAR73

Figure 2.1.1 – Customer Reporting Detail

#### 2.1.3 Description of Changes

1. Update the Customer Reporting Detail page to no longer display the following options on the PR – Incomplete Reasons block
  - a. "Dated Before Last Day of Report Month"



- i. Option will no longer display when the Status drop down is set to Incomplete, and Program is equal to CW or CF.
  - ii. For existing records that already have the option selected, it will continue to display in both view and edit mode.
    - 1. Users will be able to unselect the option when in Edit mode.
    - 2. Option will no longer display once the user unselect the option and save the record.
    - 3. Continue to display the validation message "Status – Unable to change the Status. There is selected Incomplete Reason." when the Status is being change from Incomplete to different one but there is still an Incomplete Reason being selected. (This is an existing validation message).
- b. Dated Before Last Date of SAR Report Month
- i. Option will no longer display when the Status drop down is set to Incomplete, and Program is equal to CW or CF.
  - ii. For existing records that already have the option selected, it will continue to display in both view and edit mode.
    - 1. Users will be able to unselect the option when in Edit mode.
    - 2. Option will no longer display once the user unselect the option and save the record.
    - 3. Continue to display the validation message "Status – Unable to change the Status. There is selected Incomplete Reason." when the Status is being change from Incomplete to different one but there is still an Incomplete Reason being selected. (This is an existing validation message).

#### 2.1.4 Page Location

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer reporting.**

#### 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 Customer Reporting Detail - Override

### 2.2.1 Overview

The Customer Reporting Detail – Override page allows user with the proper security right to override the status of a reporting to allow users to process participant/beneficiary reports accordingly. This SCR will update the Customer Reporting Detail – Override page to no longer display the 'Dated Before Last Day of SAR Report Month' and 'Dated Before Last Day of Report Month' from the PR- Incomplete Reasons block when the report status is set to Incomplete. This change is required to comply with the changes amended under AB 79 (ACL 21-24) which eliminated the requirement for the SAR 7 to be signed no earlier than the first day of the submit month of the SAR period for the SAR 7 to be considered completed.

### 2.2.2 Customer Reporting Detail - Override Mockup

Status			
Program	Status	Status Detail	Date
CW	Incomplete		
CF	Incomplete		

PR - Incomplete Reasons	
<input type="checkbox"/> Blank	<input type="checkbox"/> Disabled Information Missing
<input type="checkbox"/> Expenses Information Missing	<input type="checkbox"/> Form Contains Conflicting Info
<input type="checkbox"/> Income Information Missing	<input type="checkbox"/> Living Situation Info Missing
<input type="checkbox"/> Signed-No boxes checked	<input type="checkbox"/> Other Changes Info Missing
<input type="checkbox"/> Pregnancy Info Missing	<input type="checkbox"/> No Signature
<input type="checkbox"/> Failed to Return Complete SAR72	<input type="checkbox"/> Failed to Return Complete SAR73

Figure 2.1.1 – Customer Reporting Detail

### 2.2.3 Description of Changes

1. Update the Customer Reporting Detail - Override page to no longer display the following options on the PR – Incomplete Reasons block
  - a. "Dated Before Last Day of Report Month"

- i. Option will no longer display when the Status drop down is set to Incomplete, and Program is equal to CW or CF.
  - ii. For existing records that already have the option selected, it will continue to display.
    1. Users will be able to unselect the option.
    2. Option will no longer display once the user unselect the option and save the record.
    3. Continue to display the validation message "Status – Unable to change the Status. There is selected Incomplete Reason." when the Status is being change from Incomplete to different one but there is still an Incomplete Reason being selected. (This is an existing validation message).
- b. Dated Before Last Date of SAR Report Month
- i. Option will no longer display when the Status drop down is set to Incomplete, and Program is equal to CW or CF.
  - ii. For existing records that already have the option selected, it will continue to display.
    1. Users will be able to unselect the option.
    2. Option will no longer display once the user unselect the option and save the record.
    3. Continue to display the validation message "Status – Unable to change the Status. There is selected Incomplete Reason." when the Status is being change from Incomplete to different one but there is still an Incomplete Reason being selected. (This is an existing validation message).

#### **2.2.4 Page Location**

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer reporting.**

#### **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 New Batch Job for Flexible CW/CF RE Appointments for Migration Counties

### 2.3.1 Overview

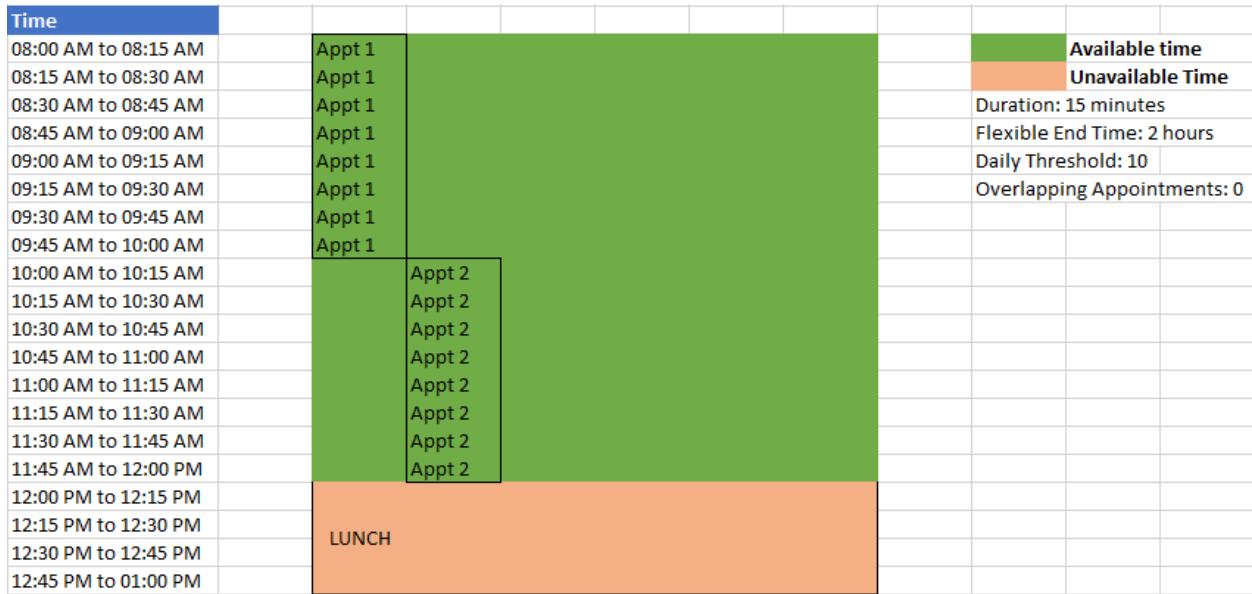
This section outlines the necessary modifications to create a new batch job that schedules flexible CW/CF RE appointments for Migration Counties for the upcoming RE Due Month.

### 2.3.2 Description of Change

1. Create a batch job for Migration Counties to schedule an RE appointment for Active CalWORKs (CW) only, CalFresh (CF) only, and CalWORKs/CalFresh (CW/CF) combination cases (including Transitional CalFresh) with their assigned worker for which the RE due Date falls in the upcoming month. Exclude CF-only ESAP households from automatically scheduling an RE appointment. An ESAP household is identified as the following:
  - a. Active CalFresh program
  - b. Meets ESAP Criteria is 'Yes'
2. The batch job should not attempt to schedule an appointment if one already exists with one of the following appointment types for all Migration Counties. If an appointment exists, then skip the case.
  - a. 'Re-Evaluation CW/CF Interview'
  - b. 'RE Interview'
  - c. 'Telephone CW/CF RE Interview'
  - d. 'General Appointment - Telephone Interview Recertification'
3. If there is a phone number with Type of Main, Home, or Cell available for the CW/CF program Payee and the value is not blank, empty, null, or (999) 999-9999, then the customer is determined to have a valid phone number.
4. If there is not a valid phone number for the customer and the County has enabled the Automated Action for 'CalWORKs/CalFresh: RE Appointment Not Scheduled', then create a task for the worker and do not create an appointment.
5. If there is a valid phone number for the customer, then determine the worker's Daily Threshold amount for appointments. The batch job will only consider the Daily Threshold amount entered for "General Appointment" with sub-type "Telephone Interview Recertification". The number of RE appointments will be scheduled based on the Daily Threshold amount entered in the worker's Position Detail record. If the Daily Threshold entered is "0" or blank, then the batch job will not schedule any appointments for the worker and will not generate a task.
6. Determine available dates and time slots based on the worker's schedule indicated as 'Available for Appointments'. The worker's blocked times will be bypassed when scheduling RE appointments

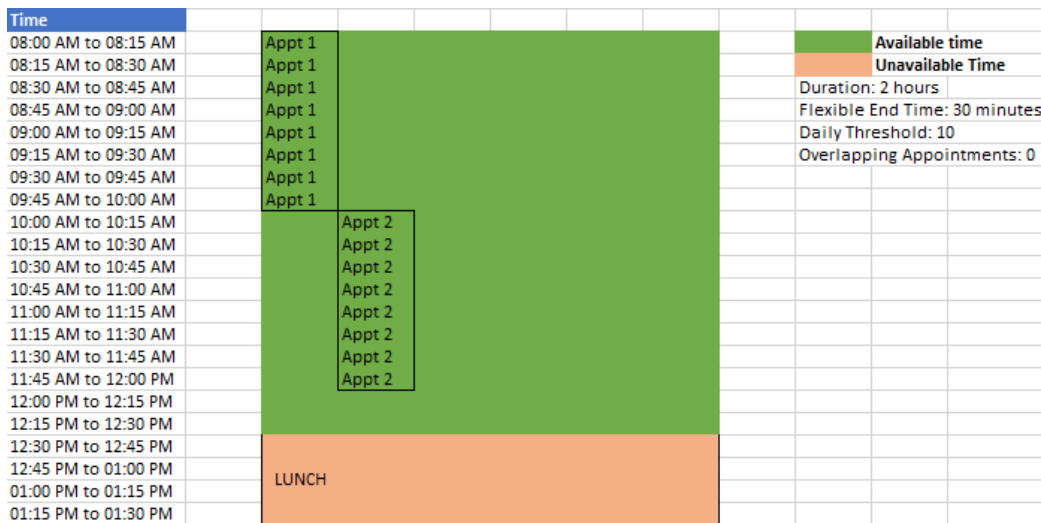
- (i.e., lunch time, break time, vacation, etc.). Additionally, the batch job will not schedule appointments on weekends or holidays.
7. If the batch job cannot find an available date/time slot for an appointment and the County has enabled the Automated Action for 'CalWORKs/CalFresh: RE Appointment Not Scheduled', then create a task for the worker.
  8. The batch job should attempt to create an appointment with the following details:
    - a. Category: "General Appointment"
    - b. Sub-Type: Telephone Interview Recertification
    - c. Begin Date: Appointment dates will be scheduled for the following period in the RE due month: the first business day of the RE due month until the day that is 2 business days prior to the 10-day cutoff date of the RE due month.
      - i. Example: If RE Due Month is in December, appointment dates will be scheduled from Dec 1st through Dec 20th.
    - d. Begin Time: Available appointment time based on worker's schedule.
    - e. Initiate Call (new field): See Table 2 below for details per county.
      - i. "Worker": Indicates that worker will call customer.
        1. If the customer is determined to not have a valid phone number, the value should be set to "Customer".
      - ii. "Customer": Indicates that customer will call worker.
      - iii. This field will be introduced as part of SCR CA-246603.
    - f. Phone number (new field): The main phone number of the Assigned Worker. Please refer to SCR CA-246603.
    - g. Flexible Block Appointment (new field): This field should be checked. Please refer to SCR CA-246603.
    - h. Duration: See Table 1 and Table 2 below for details per county per program type. Please refer to SCR CA-246603.
    - i. Flexible End Time: See Table 1 and Table 2 below for details per county per program type. Please refer to SCR CA-246603.
      - i. The appointment will last from Begin Time until Begin Time plus the defined Flexible End Time. For example, if the appointment begins at 8am and the Flexible End Time is 2 hours, then the appointment will end at 10am.
  9. Book appointments only if the entire Duration or Flexible End Time block is available, whichever is longer.
    - a. In Figure 1 below, the Duration is set to 15 minutes and the Flexible End Time is set to 2 hours after Begin Time. "Appt 1" has a Begin Time of 8am and a Flexible End Time of 10am. In other words, "Appt 1" will start sometime between 8am and 10am, and it will take 15 minutes to complete.
      - i. Since overlapping appointments has been set to 0, "Appt 2" is scheduled for the next 2-hour block, from 10am to 12pm.

**Figure 1: Example of Booked Flexible Appointments with Longer Flexible End Time**



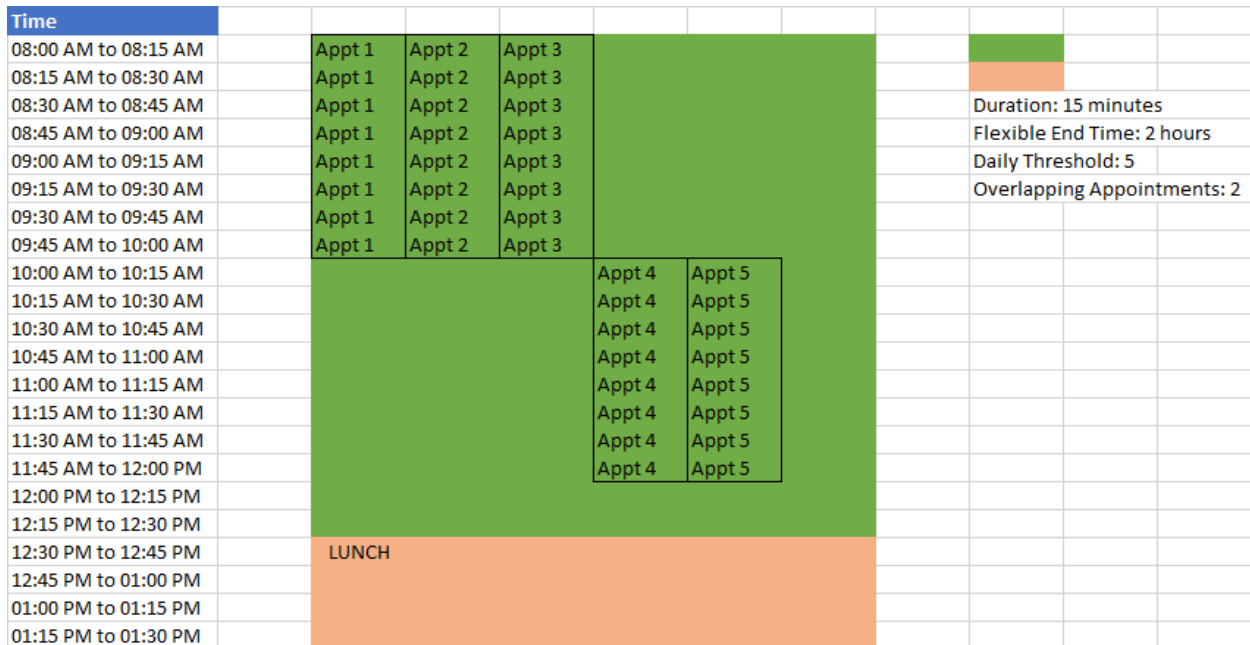
- b. In Figure 2 below, the Duration is set to 2 hours and the Flexible End Time is set to 30 minutes after Begin Time. "Appt 1" has a Begin Time of 8am and a Flexible End Time of 8:30am, but the schedule is blocked until 10am. In other words, "Appt 1" will start sometime between 8am and 8:30am and will take 2 hours to complete.
  - i. Since overlapping appointments has been set to 0, "Appt 2" is scheduled for the next available 2-hour block, from 10am to 12pm.
  - ii. A hypothetical "Appt 3" cannot be scheduled before the unavailable lunch block starts at 12:30pm. "Appt 3" would be blocked from 12pm to 2pm, which overlaps with the unavailable lunch block.

**Figure 2: Example of Booked Flexible Appointments with Longer Duration**



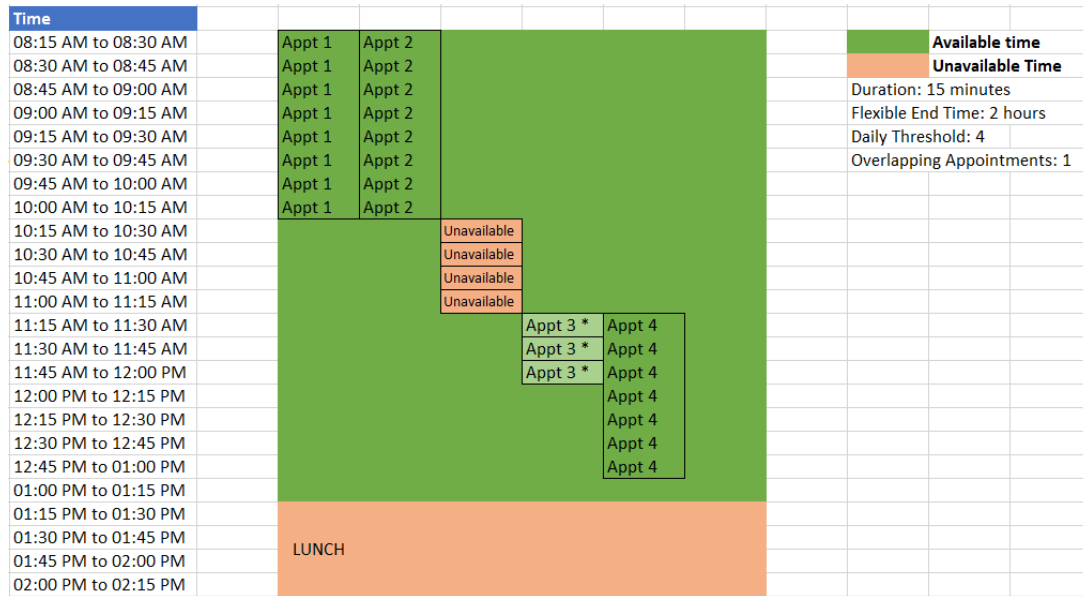
10. Appointments will be scheduled on the earliest available date and time slot indicated on the worker's schedule. Schedule the number of overlapping appointments for a worker based on the information entered on the Position Detail page. If there is no overlapping appointment information entered, then the batch job will not schedule overlapping appointments for the worker. When scheduling overlapping appointments, the batch job will schedule appointments in the earliest available time slot(s) until the maximum number of overlapping appointments is reached and will continue throughout the worker's available time slot(s) until the worker's Daily Threshold is reached. The number of overlapping appointments cannot exceed the Daily Threshold amount.
- See Figure 3 below. "Appt 1", "Appt 2", and "Appt 3" can be scheduled in overlapping blocks, but "Appt 4" cannot since the number of overlapping appointments cannot exceed 2. "Appt 5" can be scheduled for the same 2-hour block as "Appt 4", but a hypothetical "Appt 6" cannot be scheduled on the same day since the Daily Threshold is 5.
  - In Figure 3, overlapping appointments is set to 2. "Appt 2" and "Appt 3" are the two overlapping appointments that count toward the limit.

**Figure 3: Effect of Daily Threshold and Overlapping Appointments**



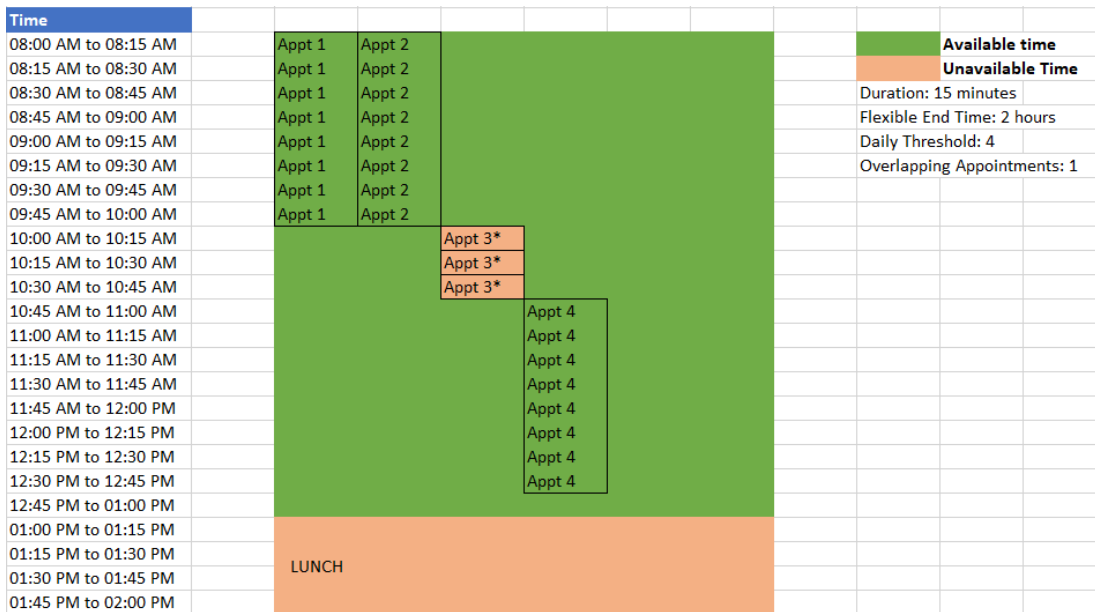
11. Flexible appointments can overlap other flexible appointments. Flexible appointments cannot overlap existing regular appointments. Regular appointments can overlap existing flexible appointments.
- In Figure 4 below, "Appt 3" is a manually scheduled **flexible** appointment. "Appt 4" is a flexible appointment scheduled by the batch job, which can overlap with "Appt 3".

**Figure 4: Flexible Appointments Can Overlap Existing Flexible Appointments**



b. In Figure 5 below, “Appt 3” is a manually scheduled **regular** appointment. “Appt 4” is a flexible appointment scheduled by the batch job, which cannot overlap with “Appt 3”.

**Figure 5: Flexible Appointments Cannot Overlap Existing Regular Appointments**



12. Create a Journal entry for the case with appointment details when the appointment is created. Use the existing template for 'RE Appointment Scheduled' in category 363.

- a. Appointment Type: Telephone RE Flexible
- b. Appointment Date: MM/DD/YYYY
- c. Program Type: CW, CF, CW/CF or TCF
- d. RE Description: 'Recertification' for CF only or TCF and 'Redetermination' for all other program types



Journal Entry	Description
Journal Category	All
Journal Type	CT363_83 - RE Appointment Scheduled
Short Description	{Appointment Type} Appointment Scheduled.
Long Description	{Appointment Type} appointment was scheduled for {Appointment Date} for {Program Type} {RE Description}
Trigger Condition	When CW, CF, CW/CF, TCF RE Appointment is scheduled for case

13. The batch job should send an appointment email to workers for successfully created appointments. The batch job should only send an appointment email for counties that opted into the functionality as part of DDID 1526 (SCR CA-207303). Email details should match PBXXC907.
14. If the batch job attempts to but cannot schedule an appointment for any reason, the case should be included in the 'Redetermination - Final Exception Report'.
15. Create BPCR(s) to run the Flexible CW/CF RE Appointment Scheduling for Migration Counties. Flexible End Time is defaulted to 15 minutes after Begin Time and Duration is defaulted to 60 minutes. Initiate Call is defaulted to Customer Calls. Additional changes to the appointment duration must follow the CalSAWS Enhancement Request (CER) process.

**Table 1: Appointment Details Per County (Category, Type, Initiate Call, CW only)**

County	Appointment Category (all programs)	Appointment Type (all programs)	Initiate Call (all programs)	Flexible End Time (CW only)	Duration (CW only)
County A	General Appointment	Telephone Interview Recertification	Customer Calls	15 minutes after Begin Time	60 minutes
County B	General Appointment	Telephone Interview Recertification	Worker Calls	120 minutes after Begin Time	60 minutes

**Table 2: Appointment Details Per County (CF only/TCF, CW/CF combo)**

County	Flexible End Time (CF only, TCF)	Duration (CF only, TCF)	Flexible End Time (CW/CF combo)	Duration (CW/CF combo)
County A	60 minutes after Begin Time	50 minutes	15 minutes after Begin Time	60 minutes
County B	120 minutes after Begin Time	120 minutes	120 minutes after Begin Time	60 minutes

16. Create BSCRs to schedule Migration Counties for either the new Flexible CW/CF RE Appointment Scheduling batch job or the CW/CF RE Appointment Scheduling for Migration Counties batch job (PBXXC907). Counties cannot opt into both jobs but may choose to opt out of both jobs. Counties that do not respond will be automatically opted out of the new Flexible CW/CF RE Appointment Scheduling batch job and the opt-in/opt-out response will remain unchanged for PBXXC907. Additional changes must follow the CalSAWS Enhancement Request (CER) process.

**Table 3: Opt-In/Opt-Out Decisions**

County	Opt into New Batch Job	Opt into PBXXC907
County A	Opt-In	Opt-Out
County B	Opt-Out	Opt-Out
County C	Opt-Out	Opt-In
County D	Opt-Out	No Change

### 2.3.3 Execution Frequency

Monthly on the 5<sup>th</sup> business day of the month.

### 2.3.4 Key Scheduling Dependencies

The new batch job must complete before 'Redetermination - Final Exception Report'.

### **2.3.5 Counties Impacted**

Former C-IV Counties, CalWIN Counties

### **2.3.6 Category**

Job should complete within the batch window.

### **2.3.7 Data Volume/Performance**

N/A

### **2.3.8 Failure Procedure/Operational Instructions**

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

## 2.4 Regression Test CW/CF RE Packet Generation Jobs

### 2.4.1 Overview

RE Packets for Migration Counties are generated on the 15th of each month. The Appointment letter is included in the RE packet and provides details of the recipient's RE appointment. This section outlines the regression test activities needed for the existing batch jobs that generates the CW/CF RE Packet and Appointment letter.

### 2.4.2 Description of Change

1. Test existing CW/CF RE Packet Batch jobs (PB00R543, PB00R544, and PB00R547) to confirm that the RE appointment details created by the new Batch RE Appointment job are properly displayed in the Appointment letter.
  - a. GEN 102 is generated for all program types.
  - b. Regardless of how the worker's schedule is blocked, the Appointment letter should contain the correct appointment time for the customer.
    - i. For example, if the Begin Time is 8am and Flexible End Time is 30 minutes after Begin Time, the appointment letter should specify an appointment time between 8am and 8:30am.
    - ii. For example, if the Begin Time is 8am and Flexible End Time is 2 hours, the appointment letter should specify an appointment time between 8am and 10am.

## 2.5 Update Journals for IVR

### 2.5.1 Overview

This section outlines the necessary updates to the journal and call log generated for IVR Inbound Call Results for the Missing Document campaign.

### 2.5.2 Description of Change

1. Update the Call Type (CT284) in the short description of the journal entries and call logs generated by PI00M300 for Missing Document call types to be 'Missing Periodic Report' instead of 'Missing Document'.

Short Description	Example
Current	Call Log - Outbound IVR Attempt – Missing Document – {Call Result CT2810}

New	Call Log - Outbound IVR Attempt – Missing Periodic Report – {Call Result CT2810}
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### 2.5.3 Execution Frequency

Daily (no change)

### 2.5.4 Key Scheduling Dependencies

PI00M300 runs after PI00M360, which handles the file transfer process.

### 2.5.5 Counties Impacted

Former C-IV Counties, CalWIN Counties

### 2.5.6 Category

Job should complete within the batch window.

### 2.5.7 Data Volume/Performance

N/A

### 2.5.8 Failure Procedure/Operational Instructions

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

### 3 REQUIREMENTS

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#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.13.2.2	The LRS shall set appointments for cases requiring Redetermination and/or Recertification, based on program rules.	Modify batch RE appointment scheduling functionality for non-LA counties.