

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-238042

Add missing Foster Care NOAs that existed in

C-IV, Phase 2

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

CalSAWS currently only has a limited number of Foster Care (FC) NOAs. This effort will add new NOA reasons into the system.

1.1 Current Design

SCR 'CA-220188 – Add missing FC NOAs that existed from C-IV, Phase 1' added verbiage into CalSAWS for three NOA reasons (for CCR and Non-CCR rate structures): Placement Ends Mid-Month, Child Eligible to Kin-GAP, and ISP Started.

1.2 Requests

Generate NOAs for the following FC reasons:

1. Child Not In Placement
2. Rate Increase
3. Rate Decrease
4. Age Changed
5. Adopted
6. Transferred to Non-FC Program
7. Petition Not Filed
8. Didn't Recert License

1.3 Overview of Recommendations

1. Update existing action fragment, FC_KG_TN_ACTION4
2. Update existing 'Child Not In Placement' NOA Reason for Non-CCR rate structures
3. Update existing 'FC Rate Increase' NOA Reason for Non-CCR rate structures
4. Update existing 'FC Rate Decrease' NOA Reason for Non-CCR rate structures
5. Add new 'Age Changed' NOA Reason for Benefit Change for both CCR, Non-CCR
6. Add new 'Adopted' NOA Reason for Discontinuance for both CCR, Non-CCR
7. Add new 'Transferred to Non-FC Program' NOA Reason Discontinuance for both CCR, Non-CCR
8. Add new 'Petition Not Filed' NOA Reason for Discontinuance for both CCR, Non-CCR
9. Add new 'Didn't Recert License' NOA Reason for Discontinuance for both CCR, Non-CCR

1.4 Assumptions

1. FC programs will only have 1 recipient (child or young parent). The infant of a young parent will not be a FC program recipient and will be considered MMO (Medi-Cal Member Only).
2. The NOAs per this effort are generatable for any county as long as its generation conditions are satisfied from the Foster Care's EDBC Summary pages.

3. Spanish language versions of certain action, message, reason fragments will be added by CA-228880.
4. Spanish language versions of certain existing reason fragments from CA-220188, CA-238042 will be scoped into CA-249509.
5. Spanish language versions of new reason fragments from CA-220188, CA-238042 will be scoped into CA-249511.
6. For this effort, the new NOA Message will be added to the Discontinuance reasons of Child Not In Placement, Adopted, Transferred to Non-FC Program, Petition Not Filed, Didn't Recert License. This new Message will be updated for all other FC Discontinuance NOAs in CA-240146.
7. Additional Foster Care NOA reasons will be added with SCRs CA-240146 and CA-229838.
8. CA-223829 is scoped to provide new verbiage of NA 403 and NA403A for proration and effective dates.

2 RECOMMENDATIONS

2.1 Update FC NOA Action Fragment, FC_KG_TN_ACTION4

2.1.1 Overview

The recommendation is updating the verbiage of the existing Foster Care Discontinuance Action.

Action Fragment Name and ID: FC_KG_TN_ACTION4 (ID = 4112)

State NOA: This verbiage comes from State NA 403

Current Program(s): Foster Care

Current Action Type(s): Discontinuance

Current Fragment Level: Program

Currently Repeatable: No, this generates once as the first fragment on the NOA.

Existing Languages (2): English, Spanish

Note: CA-228880 added this action fragment in Spanish.

2.1.2 NOA Verbiage

Update Fragment XDP

Update the FC Discontinuance Action XDP verbiage in English by bolding the word 'Discontinuing'.

NOA Mockups/Examples: See Supporting Documents #3

Description	Existing Text	Updated Text	Add'l Formatting*
Static	Your case has been discontinued. As of <MonDayYear>, the county is Discontinuing your <PgmType> aid of <PriorAmt> per month. Here's why:	Your case has been discontinued. As of <MonDayYear>, the county is Discontinuing your <PgmType> aid of <PriorAmt> per month. Here's why:	'Discontinuing' is bolded.

*English is in Arial font size 10; Spanish and threshold will generate based on project standards for that language.

2.1.3 NOA Variable Population

N/A, there are no updates to the variable population.

2.1.4 NOA Generation Conditions

N/A, there are no updates to the generation conditions.

2.2 Update FC NOA Discontinuance Reason: Child Not In Placement (Non-CCR)

2.2.1 Overview

Update an existing CalSAWS FC (CCR) Discontinuance NOA reason's generation condition to also generate for Non-CCR scenarios.

Reason Fragment Name and ID:

FC_TN_NO_LONGER_PROVIDE_FC_T310 (ID: 7496)

Known County NOA: This reason currently exists in CalSAWS and was derived from CIV's RSN_CHILD_NOT_IN_PLACEMENT

Current NOA Template: FC_NOA_TEMPLATE (Fragment ID = 3030)

Current Program(s): Foster Care

Current Action Type: Discontinuance

Current Fragment Level: Person

Currently Repeatable: Yes

Includes NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages (1): English

2.2.2 NOA Reason Verbiage

Update Fragment XDP

No updates to the existing English verbiage.

Existing EN verbiage:

*You are no longer providing foster care for: <PersonName>
He/she is no longer living in your home/facility. The County will stop
paying for Foster Care from the day the child leaves your
home/facility.*

2.2.3 NOA Reason Variable Population

1. **Fragment Variable Population**

N/A

2. **Update Fragment Regulations**

The Non-CCR regulations will be added as the following:

Non-CCR regulations: AB 403, WIC 11460, 11463, 11464, 11364, 11387
and 18358

3. **Update NOA Title and Footer Reference**

The title and footer of the NOA will be updated.

Updated NOA Title and Footer:

1. The NOA Title and Footer for the existing
FC_TN_NO_LONGER_PROVIDE_FC_T310 fragment of CCR scenarios
will remain the same.

Now with the NOA generating for Non-CCR scenarios, below
details and references will distinguish the NOA for Non-CCR
scenarios.

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
Non-CCR	Notice of Action – Termination	FC_TN_NOA_TYPE (3120)

NOA Title Requires Translations: N

NOA Footer:

NOA Type	NOA Footer
Non-CCR	NA 290 - Termination (02/14) AFDC-FC

NOA Footer Requires Translations: N

2.2.4 NOA Reason Fragment Generation

1. **Update Fragment Generation**

Update the existing generation logic to also generate for Non-CCR
rate scenarios.

Technical Note: The existing generation logic for CCR rate scenarios will not be changed.

New NOA Template: N
New Program Generation: N
New Action Type: N
Update to Fragment Level: N
New Forms/NOAs Generated with this NOA: N

Generation Type	Does this NOA reason currently generate prior to this effort?	Is this generation type being updated with this effort?
EDBC	Y for CCR rate structures	Y, to generate also for Non-CCR rate structures
Negative Action EDBC	Y for CCR rate structures	Y, to generate also for Non-CCR rate structures
Batch	N, there is currently no batch sweep for this NOA.	N

Non-CCR

Action Fragment: 4158, FC_TN_ACTION6
 Message Fragment: 5138, FC_TN_MESSAGE1

Ordering on NOA: Generate this reason following the action fragment.

2.3 Update FC NOA Change Reason: FC Rate Increase (Non-CCR)

2.3.1 Overview

Update an existing CalSAWS FC benefit change NOA reason that is currently used for CCR scenarios to be updated to also generate for Non-CCR scenarios.

Reason Fragment Name and ID:

FC_CH_RATE_INCREASE_T310 (ID: 7485)

Known County NOA: This reason currently exists in CalSAWS and is derived from CIV's RSN_FC_KG_RATE_INCREASE

Current NOA Template: FC_NOA_TEMPLATE (Fragment ID = 3030)

Current Program(s): Foster Care

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages (1): English

2.3.2 NOA Reason Verbiage

Update Fragment XDP

No updates to the existing English verbiage.

Existing EN verbiage:

Your case had a rate increase.

2.3.3 NOA Reason Variable Population

1. Fragment Variable Population

N/A

2. Update Fragment Regulations

The regulations will be updated to add the following:

Non-CCR Regulations: AB 403, WIC 11460, 11463, 11464, 11364, 11387 and 18358

3. Update NOA Title and Footer Reference

Updated NOA Title and Footer:

1. The NOA Title and Footer for the existing FC_CH_RATE_INCREASE_T310 fragment of CCR scenarios will remain the same.

Now with the NOA generating for Non-CCR scenarios, below details and references will distinguish the NOA for Non-CCR scenarios.

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
Non-CCR	Notice of Action – Rate Change	FC_CH_NOA_TYPE (3121)

NOA Title Requires Translations: N

NOA Footer:

NOA Type	NOA Footer
Non-CCR	NA 290 Rate Change (02/14) AFDC-FC

NOA Footer Requires Translations: N

2.3.4 NOA Reason Fragment Generation

1. Update Fragment Generation

- a) Update the existing generation logic to also generate for Non-CCR rate scenarios.

- b) Suppress this NOA when the Age Change (Rec 2.5) NOA generates.

Technical Note: The existing generation logic for CCR rate scenarios will not be changed.

New NOA Template: N
New Program Generation: N
New Action Type: N
Update to Fragment Level: N
New Forms/NOAs Generated with this NOA: N

Generation Type	Does this NOA reason currently generate prior to this effort?	Is this generation type being updated with this effort?
EDBC	Y for CCR rate structures	Y to generate also for Non-CCR rate structures
Negative Action EDBC	N, this is a change reason and does not exist under Negative Action dropdown.	N
Batch	N, there is currently no batch sweep for this NOA.	N

Non-CCR

Action Fragment: 4130, FC_KG_CH_ACTION4
 Message Fragment: N/A; there will be no message fragment.

Ordering on NOA: Generate this reason following the action fragment.

2.4 Update FC NOA Change Reason: FC Rate Decrease (Non-CCR)

2.4.1 Overview

Update an existing CalSAWS FC benefit change NOA reason that is currently used for CCR scenarios to be updated to also generate for Non-CCR scenarios.

Reason Fragment Name and ID:

FC_CH_RATE_DECREASE_T309 (ID: 7484)

Known County NOA: This reason currently exists in CalSAWS and is derived from CIV's RSN_FC_KG_RATE_DECREASE

Current NOA Template: FC_NOA_TEMPLATE (Fragment ID = 3030)

Current Program(s): Foster Care

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No
Includes NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages (1): English

2.4.2 NOA Reason Verbiage

Update Fragment XDP

No updates to the existing English verbiage.

Existing EN verbiage:

Your case had a rate decrease.

2.4.3 NOA Reason Variable Population

Fragment Variable Population

N/A

Update Fragment Regulations

The regulations will be updated to add the following:

Non-CCR Regulations: AB 403, WIC 11460, 11463, 11464, 11364, 11387 and 18358

Update NOA Title and Footer Reference

Updated NOA Title and Footer:

1. The NOA Title and Footer for the existing FC_CH_RATE_DECREASE_T309 fragment of CCR scenarios will remain the same.

Now with the NOA generating for Non-CCR scenarios, below details and references will distinguish the NOA for Non-CCR scenarios.

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
Non-CCR	Notice of Action – Rate Change	FC_CH_NOA_TYPE (3121)

NOA Title Requires Translations: N

NOA Footer:

NOA Type	NOA Footer
Non-CCR	NA 290 Rate Change (02/14) AFDC-FC

NOA Footer Requires Translations: N

2.4.4 NOA Reason Fragment Generation

1. Update Fragment Generation

Update the existing generation logic to also generate for Non-CCR rate scenarios.

Technical Note: The existing generation logic for CCR rate scenarios will not be changed.

New NOA Template: N
New Program Generation: N
New Action Type: N
Update to Fragment Level: N
New Forms/NOAs Generated with this NOA: N

Generation Type	Does this NOA reason currently generate prior to this effort?	Is this generation type being updated with this effort?
EDBC	Y for CCR rate structures	Y to generate also for Non-CCR rate structures
Negative Action EDBC	N, this is a change reason and does not exist under Negative Action dropdown.	N
Batch	N, there is currently no batch sweep for this NOA.	N

Non-CCR

Action Fragment: 4130, FC_KG_CH_ACTION4
 Message Fragment: N/A; there will be no message fragment.

Ordering on NOA: Generate this reason following the action fragment.

2.5 Add New FC NOA Change Reason: Age Changed

2.5.1 Overview

The recommendation is adding a new FC benefit change NOA reason which will occur with Non-CCR rate scenarios.

Known County NOA: This reason verbiage is derived from C-IV's reason fragment of: RSN_MONTHLY_RATE_CHANGE_DUE_TO_AGE.

NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)

Program(s): Foster Care

Action Type(s): Change

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A

Languages: English

Note: CA-249511 will implement the Spanish verbiage.

2.5.2 NOA Reason Verbiage

Create Fragment XDP

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

NOA Mockups/Examples: See Supporting Documents #1

Description	Text	Formatting*
<STATIC>	The child's age has changed. The monthly rate for this age is <FCMonthlyRate>.	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

2.5.3 NOA Reason Variable Population

1. Add Fragment Variable Population

Add new variables for this reason fragment.

Technical Note: The variable population of this new reason fragment can be derived from the CIV's equivalent fragment, RSN_MONTHLY_RATE_CHANGE_DUE_TO_AGE.

Variable Name	Population	Formatting*
<FCMonthlyRate>	The Non-Related Legal Guardianship (NRLG) placements (established prior to Jan 2017) monthly rate per the age of the child shown from the EDBC's FC budget. Sourced from: FC_BUDGET.FACILITY_RATE_AMT For Example: \$1,052.00	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

Variables Requiring Translations: N

2. Add Fragment Regulations

Add the following regulations, derived from C-IV:

Non-CCR Regulations: EAS 11-400, 45-203, 45-302

3. Add NOA Title and Footer Reference

The below references and details will be included for this new fragment.

Note: As NRLG placements are associated to Non-CCR rate structures, this NOA reason will only generate for Non-CCR rate structures.

NOA Reference on Document List Page: Age Changed

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
Non-CCR	Notice of Action – Rate Change	FC_CH_NOA_TYPE (3121)

NOA Title Requires Translations: N

NOA Footer:

NOA Type	NOA Footer
Non-CCR	NA 290 Rate Change (02/14) AFDC-FC

NOA Footer Requires Translations: N

2.5.4 NOA Reason Fragment Generation

Add Reason Fragment Generation

This new reason fragment will generate when EDBC is run for Foster Care (Non-CCR) and all the following are satisfied:

- The FC rate structure of the EDBC Summary page is Non-CCR
 - The Placement Information of the EDBC Summary page has details of:
 - Basic Rate Code (FC_BUDGET.BASIC_RATE_CODE): Either Schedule A or Schedule B.
 - In the most recent saved EDBC of the existing program's EDBCs for that month compared to the *prior benefit month* -
 - Prior benefit month* -
 - There is not a previously existing EDBC for the current Benefit month and there is at least one EDBC for the previous month
 - OR
 - There is at least one existing EDBC for the current Benefit month
- the FC primary applicant had the following:
- The same Basic Rate Code as the prior benefit month
 - Their age has increased
 - There is an increase to their FC facility rate (FC_BUDGET.FACILITY_RATE_AMT)
- The FC COLA NOA(FC_CH_COLA_T307) did not generate for the same EDBC

Non-CCR

Action Fragment: 4130, FC_KG_CH_ACTION4
 Update the Action fragment FC_KG_CH_ACTION4 to populate the date of birth as the effective date when this action fragment is being associated with the 'Age Changed' NOA from Rec. 2.5.2.

Fragment Text:

Fragment Name	Text
FC_KG_CH_ACTION4	As of <effectiveDate>, the county is Changing your <ProgramType> aid from <PriorBenefitAmount> to <NewBenefitAmount>. This aid is for: <Person> Here's why:

Variable Population:

Variable Name	Population
<effectiveDate>	the date of birth of the person for whom the NOA is getting generated for example: 03/01/2020

Note: The rest of the variable population remains the same

Message Fragment: N/A; there will be no message fragment

Ordering on NOA: Generate this reason following the action fragment.

2.6 Update FC Approval Budget Generation Logic

2.6.1 Overview

The recommendation is updating the FC Budget to generate with another reason.

Known County NOA: This budget exists in CalSAWS
Current NOA Template ID(s): FC_NOA_TEMPLATE (SNIPPET_ID = 3030)
Budget Name: BUDGT_FC_APPROVAL (Fragment ID: 25)
Current Program(s): Foster Care
Current Action Type(s): Approval, Change
Current Fragment Level: Program
Currently Repeatable: No

Existing Languages (13): English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

2.6.2 NOA Budget Verbiage

No changes to the budget verbiage.

2.6.3 NOA Budget Variable Population

No changes to the variable population.

2.6.4 NOA Budget Fragment Generation

Updates to Fragment Generation

This budget fragment will now generate for the following reasons:

- The new FC Change 'Age Changed' reason from previous Recommendation

New NOA Template ID(s): N

New Program Generation: N

New Action Type: N

Update to Fragment Level: N

Repeatable: N

2.7 Add New FC NOA Discontinuance Reason: Adopted

2.7.1 Overview

The recommendation is adding a new FC Discontinuance NOA reason.

Known County NOA: This reason verbiage is derived from C-IV's reason fragment of: RSN_FC_CHILD_ADOPTED

NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A

Languages: English

2.7.2 NOA Reason Verbiage

Create new reason fragment XDP

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

NOA Mockups/Examples: See Supporting Documents #2

Description	Text	Formatting*
<STATIC>	This child is no longer eligible to Foster Care because he/she has been adopted.	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

2.7.3 NOA Reason Variable Population

1. Variable Population

There are no variables in the reason's verbiage.

2. Add Fragment Regulations

Add the following regulations derived from C-IV:

CCR Regulations: EAS 45-202.1, 41-100

Non-CCR Regulations: EAS 45-202.1, 41-100

3. Add NOA Title and Footer Reference

The below references and details will be included for this new fragment:

NOA Reference on Document List Page: Adopted

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
CCR	Notice of Action – Discontinued	FC_TN_NOA_TYPE_CCR (3141)
Non-CCR	Notice of Action – Termination	FC_TN_NOA_TYPE (3120)

NOA Title Requires Translations: N

NOA Footer:

NOA Type	NOA Footer
CCR	NA 403 (01/22) REQUIRED FORM - SUBSTITUTES PERMITTED
Non-CCR	NA 290 - Termination (02/14) AFDC-FC

NOA Footer Requires Translations: N

2.7.4 NOA Reason Fragment Generation

Add Reason Fragment Generation

- a. This new reason fragment will generate when EDBC is run for Foster Care (CCR, ISFC or Non-CCR) and the following are satisfied:
 - o The EDBC results with the primary applicant's status of Discontinued
 - o The EDBC status reason is 'Adopted' (CT73_88)
- b. If the FC primary applicant has an MMO child and this child is the only one selected/discontinued or both the FC Primary Applicant and the MMO Child are selected/discontinued for this negative action, suppress this Discontinuance NOA for the MMO child because this MMO child was never eligible to FC on their own and thus doesn't have eligibility to be discontinued from.

CCR

Action Fragment: 4112, FC_KG_TN_ACTION4

Message Fragment: 5138, FC_TN_MESSAGE1

Non-CCR

Action Fragment: 4158, FC_TN_ACTION6

Message Fragment: 5138, FC_TN_MESSAGE1

Ordering on NOA: Generate following the Action fragment.

2.8 Add New FC NOA Discontinuance Reason: Transferred to Non-FC Program

2.8.1 Overview

The recommendation is adding a new FC Discontinuance NOA reason.

Known County NOA: This reason verbiage is derived from C-IV's reason fragment of: RSN_CHILD_TRANSFERRED_TO_OTHER_PROGRAM

NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Person

Repeatable: Yes

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A

Languages: English

2.8.2 NOA Reason Verbiage

Create new reason fragment XDP

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

NOA Mockups/Examples: See Supporting Documents #3

Description	Text	Formatting*
<STATIC>	<PERSON> has been transferred to another cash aid program. You will get another notice about that child's eligibility for that program.	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

2.8.3 NOA Reason Variable Population

1. Add Fragment Variable Population

Add new variables for this reason fragment.

Technical Note: The variable population of this new reason fragment can be derived from the CIV's equivalent fragment, RSN_CHILD_TRANSFERRED_TO_OTHER_PROGRAM.

Variable Name	Population	Formatting*
<PERSON>	Name of the Child. For Example: John Doe	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

Variables Requiring Translations: N

2. Add Fragment Regulations

Add the following regulations derived from C-IV:

CCR Regulations: EAS 45-302, 45-301, 45-200, 45-202.62

Non-CCR Regulations: EAS 45-302, 45-301, 45-200, 45-202.62

3. Add NOA Title and Footer Reference

The below references and details will be included for this new fragment:

NOA Reference on Document List Page: Transfrd to NonFC Pgm

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
CCR	Notice of Action – Discontinued	FC_TN_NOA_TYPE_CCR (3141)
Non-CCR	Notice of Action – Termination	FC_TN_NOA_TYPE (3120)

NOA Title Requires Translations: N

NOA Footer:

NOA Type	NOA Footer
CCR	NA 403 (01/22) REQUIRED FORM - SUBSTITUTES PERMITTED
Non-CCR	NA 290 - Termination (02/14) AFDC-FC

NOA Footer Requires Translations: N

2.8.4 NOA Reason Fragment Generation

Add Reason Fragment Generation

- a. This new reason fragment will generate when EDBC is run for Foster Care (CCR, ISFC or Non-CCR) and the following are satisfied:
 - o The EDBC results with the primary applicant's status of Discontinued
 - o The EDBC status reason is 'Transferred to Non-FC Program' (CT73_CO)
- b. If the FC primary applicant has an MMO child and this child is the only one selected/discontinued or both the FC Primary Applicant and the MMO Child are selected/discontinued for this negative action, suppress this Discontinuance NOA for the MMO child because this MMO child was never eligible to FC on their own and thus doesn't have eligibility to be discontinued from.

CCR

Action Fragment: 4112, FC_KG_TN_ACTION4
 Message Fragment: 5138, FC_TN_MESSAGE1

Non-CCR

Action Fragment: 4158, FC_TN_ACTION6
 Message Fragment: 5138, FC_TN_MESSAGE1

Ordering on NOA: Generate following the Action fragment.

2.9 Add New FC NOA Discontinuance Reason: Petition Not Filed

2.9.1 Overview

The recommendation is adding a new FC Discontinuance NOA reason.

Known County NOA: This reason verbiage is derived from C-IV's reason fragment of: RSN_FOSTER_CARE_CHILD_REMOVED

NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Person

Repeatable: Yes

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A

Languages: English

2.9.2 NOA Reason Verbiage

Create new reason fragment XDP

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

Description	Text	Formatting*
<STATIC>	A court petition was not filed to remove the child from his/her parent(s)/relative(s).	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

2.9.3 NOA Reason Variable Population

1. Variable Population

There are no variables in the reason's verbiage.

2. Add Fragment Regulations

Add the following regulations derived from C-IV:

CCR Regulations: EAS 45-202.4, 45-202.3

Non-CCR Regulations: EAS 45-202.4, 45-202.3

3. Add NOA Title and Footer Reference

The below references and details will be included for this new fragment:

NOA Reference on Document List Page: Petition Not Filed

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
CCR	Notice of Action – Discontinued	FC_TN_NOA_TYPE_CCR (3141)
Non-CCR	Notice of Action – Termination	FC_TN_NOA_TYPE (3120)

NOA Title Requires Translations: N

NOA Footer:

NOA Type	NOA Footer
CCR	NA 403 (01/22) REQUIRED FORM - SUBSTITUTES PERMITTED
Non-CCR	NA 290 - Termination (02/14) AFDC-FC

NOA Footer Requires Translations: N

2.9.4 NOA Reason Fragment Generation

Add Reason Fragment Generation

- a. This new reason fragment will generate when EDBC is run for Foster Care (CCR, ISFC or Non-CCR) and the following are satisfied:
 - o The EDBC results with the primary applicant's status of Discontinued
 - o The EDBC status reason is 'Petition Not Filed' (CT73_91)
- b. If the FC primary applicant has an MMO child and this child is the only one selected/discontinued or both the FC Primary Applicant and the MMO Child are selected/discontinued for this negative action, suppress this Discontinuance NOA for the MMO child because this MMO child was never eligible to FC on their own and thus doesn't have eligibility to be discontinued from.

CCR

Action Fragment: 4112, FC_KG_TN_ACTION4
 Message Fragment: 5138, FC_TN_MESSAGE1

Non-CCR

Action Fragment: 4158, FC_TN_ACTION6
 Message Fragment: 5138, FC_TN_MESSAGE1

Ordering on NOA: Generate following the Action fragment.

2.10 Add New FC NOA Discontinuance Reason: Didn't Recert License

2.10.1 Overview

The recommendation is adding a new FC Discontinuance NOA reason.

Known County NOA: This reason verbiage is derived from C-IV's reason fragment of: RSN_STATUS_OF_LICENSE

NOA Template: FC_NOA_TEMPLATE (SNIPPET_ID = 3030)

Program(s): Foster Care

Action Type(s): Discontinuance

Fragment Level: Person

Repeatable: Yes

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A

Languages: English

2.10.2 NOA Reason Verbiage

Create new reason fragment XDP

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

Description	Text	Formatting*
STATIC	<PERSON> is not eligible to receive a Foster Care payment until your home is licensed or recertified by the Social Worker.	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

2.10.3 NOA Reason Variable Population

1. Add Fragment Variable Population

Add new variables for this reason fragment.

Technical Note: The variable population of this new reason fragment can be derived from the CIV's equivalent fragment, RSN_STATUS_OF_LICENSE.

Variable Name	Population	Formatting*
<PERSON>	Name of the Child. For Example: John Doe	Arial Font Size 10

*English only; the text in Spanish and threshold will generate based on project standards for that language.

Variables Requiring Translations: N

2. Add Fragment Regulations

Add the following regulations derived from C-IV:

CCR Regulations: EAS 45-301, 45-202.5, 45-203.4

Non-CCR Regulations: EAS 45-301, 45-202.5, 45-203.4

3. Add NOA Title and Footer Reference

The below references and details will be included for this new fragment:

NOA Reference on Document List Page: Didn't Recert License

NOA Title:

NOA Type	NOA Title	Fragment Name (ID) to generate Title
CCR	Notice of Action – Discontinued	FC_TN_NOA_TYPE_CCR (3141)
Non-CCR	Notice of Action – Termination	FC_TN_NOA_TYPE (3120)

NOA Title Requires Translations: N

NOA Footer:

NOA Type	NOA Footer
CCR	NA 403 (01/22) REQUIRED FORM - SUBSTITUTES PERMITTED
Non-CCR	NA 290 - Termination (02/14) AFDC-FC

NOA Footer Requires Translations: N

2.10.4 NOA Reason Fragment Generation

Add Reason Fragment Generation

- a. This new reason fragment will generate when EDBC is run for Foster Care (CCR, ISFC or Non-CCR) and the following are satisfied:
 - o The EDBC results with the primary applicant's status of Discontinued
 - o The EDBC status reason is 'Didn't Recert License' (CT73_AF)
- b. If the FC primary applicant has an MMO child and this child is the only one selected/discontinued or both the FC Primary Applicant and the MMO Child are selected/discontinued for this negative action, suppress this Discontinuance NOA for the MMO child because this

MMO child was never eligible to FC on their own and thus doesn't have eligibility to be discontinued from.

CCR

Action Fragment: 4112, FC_KG_TN_ACTION4

Message Fragment: 5138, FC_TN_MESSAGE1

Non-CCR

Action Fragment: 4158, FC_TN_ACTION6

Message Fragment: 5138, FC_TN_MESSAGE1

Ordering on NOA: Generate following the Action fragment.

2.11 Automated Regression Test

2.11.1 Overview

Create new automated regression test scripts to generate the following NOA reason/fragments: Discontinuance NOA for 'Child Not In Placement'; Change NOA for 'Age Changed'; Discontinuance NOA for 'Adopted'; Discontinuance NOA for 'Transferred to Non-FC Program'.

2.11.2 Description of Change

Create new regression scripts to verify the NOA reason/fragments generated in the following scenarios:

1. In the context of an ongoing Foster Care case with a Non-CCR rate, end-date the final placement on the last day of the previous month. Run EDBC and verify that:
 - a. The Foster Care program is Discontinued
 - b. A Discontinuance NOA generates containing the 'Child Not In Placement' fragment
2. In the context of an ongoing Foster Care case with a Non-CCR rate, run EDBC for a benefit month where the applicant's age crosses an age-based threshold (ex., age 4 to 5, 8 to 9, 11 to 12, or 14 to 15). Verify that a Change NOA generates containing the 'Age Changed' fragment.
3. In the context of an ongoing Foster Care case, run the negative action with "Adopted" and verify that:
 - a. The Foster Care program is Discontinued
 - b. A Discontinuance NOA generates containing the 'Adopted' fragment
4. In the context of an ongoing Foster Care case, run Negative Action EDBC with reason 'Transferred to Non-FC Program' and verify that:

- a. The Foster Care program is Discontinued
- b. A Discontinuance NOA generates containing the 'Transferred to Non-FC Program' fragment

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	Mockup of new Change NOA	CA 238042 - NonCCR - Change - Age Changed.pdf
2	NOA	Mockup of new Non-CCR Discontinuance NOA	CA 238042 - NonCCR - DS - Adopted.pdf
3	NOA	Mockup of new CCR Discontinuance NOA	CA 238042 - CCR - DS - Transfer to Non-FC Pgm.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.7 CAR-1243	The LRS shall identify case actions that require a notice, NOA, form, letter, stuffer, or flyer, and shall generate that appropriate notice, NOA, form, letter, stuffer, or flyer, using variable case-specific information.	This SCR will add Foster Care NOAs for reasons of: <ol style="list-style-type: none">1. Child Not In Placement (Non-CCR)2. Rate Increase (Non-CCR)3. Rate Decrease (Non-CCR)4. Age Changed (CCR, Non-CCR)5. Adopted (CCR, Non-CCR)6. Transferred to Non-FC Program (CCR, Non-CCR)7. Petition Not Filed (CCR, Non-CCR)8. Didn't Recert License (CCR, Non-CCR) <p>.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-241871

Validate E-mail Addresses Added into Contact
Detail

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

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1 OVERVIEW

This SCR will expand the logic on the Contact Detail pages to verify the entered E-mail addresses for Contacts who allow E-mail reminders.

1.1 Current Design

There is no validation in place in CalSAWS that validates participant E-mail addresses when 'Allow E-mail Reminder' is checked on the Contact Detail page. Only participants with BenefitsCal accounts who are opted-in to receive E-notifications have an E-mail validation process.

1.2 Requests

Update CalSAWS to create a process to validate a participant's E-mail address when the participant would like to receive E-mail from CalSAWS and is not opt-ed into E-Notifications through a BenefitsCal account.

1.3 Overview of Recommendations

1. Update the Contact Detail page to validate participant E-mail information when the 'Allow E-mail Reminder' option is checked.
2. Send a one-time validation e-mail to certain existing active participants that currently have the 'Allow E-mail Reminder' option checked, but do not have a Verified E-mail.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically called out by this document.
2. Due to existing functionality, Contact Detail records on cases marked with a Domestic Violence Case Flag and/or Domestic Violence Confidentiality record are unable to receive E-mail reminders and the worker will receive a page validation when attempting to save the record when the 'Allow E-mail Reminder' box is checked.
3. E-mail Reminder verification process and functionality implemented with this SCR will apply a similar verification process to the existing Opt-In for E-Notifications E-mail verification process implemented in CA-234545 for the 'Allow E-mail Reminder' field.
4. The E-mail Reminder verification process implemented with this SCR will use a BenefitsCal website verification link to verify the E-mail for the participant that does not have a BenefitsCal account. This process does not create an account for the participant.
5. If the worker resends a verification e-mail, the link in the prior verification e-mail will no longer be valid and the customer will need to click the link in the latest verification e-mail to be able to successfully complete the verification.

2 RECOMMENDATIONS

2.1 Contact Detail

2.1.1 Overview

The Contact Detail page allows the worker to create, view, and edit a customer's contact information. This page allows the worker to allow E-mail reminders for a participant. This SCR will expand the logic on the Contact Detail page to have the participant verify the E-mail address entered for E-mail reminders.

2.1.2 Contact Detail Mockup

Contact Detail

*- Indicates required fields

Save Save and Return Cancel

Name: *
DOE, JOHN 22M

IVR PIN:
Reset PIN

IVR PIN Updated On:
12/13/2021 4:24:02 PM

Voice Print
No

E-mail Address:
johndoe@testcalsaws.org

Allow E-mail Reminder

E-Notification:
Opt-Out

E-mail Status:
Verified

Customer ID:
1851771220

Phone Numbers

Number	Type *	IVR Consent	Text Message	Text Message Status
<input type="checkbox"/> (123)456-7890 ext. <input type="text"/>	Cell	Opt-Out	Opt-In	
<input type="checkbox"/> (123)456-7890 ext. <input type="text"/>	Message	Opt-Out	Opt-Out	
<input type="checkbox"/> (123)456-7890 ext. <input type="text"/>	Home	Opt-In	Opt-Out	
<input type="checkbox"/> <input type="text"/> ext. <input type="text"/>				

Remove Add

Remove All Save Save and Return Cancel

Figure 2.1.1 – Contact Detail page with Verified E-mail Address

Contact Detail

*- Indicates required fields

Resend E-mail Verification Edit Close

Name: * DOE, JOHN 37M	Voice Print No	
E-mail Address: johndoe@testcalsaws.org	Allow E-mail Reminder	E-Notification: Opt-Out
E-mail Status: Pending Verification		Customer ID: 1851771220

Phone Numbers				
Number	Type	IVR Consent	Text Message	Text Message Status
(123)456-7890	ext. Cell	Opt-Out	Opt-Out	
(123)456-7890	ext. Message	Opt-Out	Opt-Out	
(123)456-7890	ext. Home	Opt-Out	Opt-Out	

Resend E-mail Verification Edit Close

Figure 2.1.2 – Contact Detail page with E-mail Address Pending Verification

2.1.3 Description of Changes

1. Update the Contact Detail page logic to also verify the E-mail Address for E-Mail Reminders.
 - a. Initiate a verification E-mail to the customer when all of the following conditions are met:
 - i. 'Allow E-mail Reminder' is checked.
 - ii. 'E-Notification' is blank or 'Opt-Out'.
 - iii. The 'E-mail status' is not 'Verified'.
 - iv. The 'E-mail Address' field value is populated, and the value entered is a properly formatted E-mail address.
 - v. The worker clicks the 'Save' button or the 'Save and Return' button in edit mode, or the worker clicks the 'Resend Verification' button in view mode.
 - vi. The 'E-mail Address' field value has changed since the last time the record was saved when the 'Save' button or 'Save and Return' button is clicked.
 - b. The verification E-mail will contain the following information:
 - i. To: <E-mail Address On Contact Detail Page E-mail Field>
 - ii. Subject
English:
CalSAWS E-mail Verification

Spanish:
Verificación del correo electrónico de CalSAWS

iii. Body

English:

Thanks for signing up for CalSAWS E-mail reminders. In order to receive E-mail reminders, we must verify your E-mail address.

Please click the following link to verify your E-mail address. The link will expire in 5 days.

<Link>

Spanish:

Gracias por registrarse para recordatorios por correo electrónico. Para recibir recordatorios por correo electrónico, debe verificar su dirección de correo electrónico.

Por favor, haga clic en el siguiente enlace para verificar su dirección de correo electrónico. El enlace caducará después de 5 días.

<Enlace>

- c. The default language for the E-mail is in English. When the participant's preferred written language is Spanish, the verification E-mail subject and body will be translated to Spanish, as shown above.
- d. The Verification Link is a unique hyperlink tied to the customer that is used for opting-in to E-mail reminders.
 - i. The verification link is only available for 5 days.
 - ii. When the worker resends another verification email before the 5 days have passed, the link will no longer be active on the prior e-mail.
 - iii. The URL will consist of the following:
"https://benefitscal.com/verify-email/" followed by a unique code.
- e. When the verification E-mail is sent successfully, set the E-mail Status to 'Pending Verification'.
- f. When the verification E-mail does not get sent successfully, set the E-mail Status to 'Verification Not Sent'.
- g. When the participant clicks the latest verification link before it has expired, set the 'E-mail Status' to 'Verified'.
- h. To restart the E-mail verification process, the worker will need to modify the E-mail field to have a different e-mail address and save the record or click the 'Resend E-mail Verification' button to restart the process on the existing e-mail.
- i. When the E-mail address is modified upon saving, the E-mail status is cleared. E-mail verification process will be re-initiated if conditions are met as stated in 2.1.3.1.a.

- j. When the verification E-mail Status is updated, update the verification E-mail status date.
Note: The E-mail status date is not viewable on the front-end.
- 2. Display buttons titled 'Resend E-mail Verification' next to the 'Edit' buttons (as shown in Figure 2.1.2).
 - a. The buttons will only display in view mode and will be protected by the same edit rights that allow the worker to edit the Contact Detail page.
 - b. The buttons will only display when the E-mail Status is either 'Pending Verification' or 'Verification Not Sent', 'Allow E-mail Reminders' is checked, and 'E-Notification' is not 'Opted-In.'
 - c. Send only one verification e-mail within two minutes. Display a validation when the worker clicks the 'Resend E-mail Verification' button more than once within a two-minute period.
 - i. The validation will display the following message "E-mail Verification has been sent. Please wait 2 minutes before sending an additional E-mail Verification."
 - ii. To bypass the validation message, the worker will need to click the 'Resend Verification' button when the two-minute period has passed or click the blue 'Close' button which will return the worker back to the Contact Summary page.

Note: If the worker resends a verification e-mail, the prior e-mail will no longer be valid, and the customer will need to click the link in the latest verification e-mail to be able to successfully complete the verification.

- 3. Update the 'Allow E-Mail Reminder' checkbox title text to instead display 'Allow E-mail Reminder'.

Note: The 'E-Notification' field is used only for participants with BenefitsCal accounts and is separate from the 'Allow E-mail Reminders' field. If the 'E-mail Status' is Verified and Opted-In for 'E-Notifications,' then another verification E-mail will not be sent when the 'Allow E-mail Reminders' option is checked.

Note: Due to existing functionality, contacts on cases marked with a Domestic Violence Case Flag and/or Domestic Violence Confidentiality are unable to receive E-mail reminders and will receive a page validation preventing the worker from saving the record.

Note: Updates made to the customer's contact information is stored as a historical record and is viewable in the Transaction History.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping to reflect the changes being made to the Contact Detail page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Customer Contact History

2.2.1 Overview

The Customer Contact History page allows the worker to access instances where a participant/beneficiary has contacted a County. This SCR will log records when a verification E-mail is sent to customers who allow E-mail reminders.

2.2.2 Customer Contact History Mockup

Customer Contact History

The screenshot shows a web interface for 'Customer Contact History'. At the top, there are search filters for 'Display From:' and 'To:', each with a text input field and a calendar icon. A 'View' button is located to the right of the 'To:' field. Below the filters is a blue header bar with 'Search Results Summary' on the left and 'Results 1 - 1 of 1' on the right. An 'Add Call' button is positioned to the right of the header. The main content is a table with the following columns: 'Date/Time', 'Name', 'Type', 'Reason', 'Status', and 'Status Reason'. The table contains one row with the following data: '01/01/2023 08:00 AM' (a hyperlink), 'John Doe', 'E-Mail', 'Email Address Verification', 'Sent', and an empty 'Status Reason' field. An 'Add Call' button is located at the bottom right of the table.

Date/Time	Name	Type	Reason	Status	Status Reason
01/01/2023 08:00 AM	John Doe	E-Mail	Email Address Verification	Sent	

Figure 2.2.1 – Customer Contact History page when E-mail Verification is Sent

2.2.3 Description of Changes

1. Create a Customer Contact History record after a verification E-mail is sent to customers who allow E-mail reminders (as shown in Figure 2.2.1). It will contain the following field values:
 - a. Date/Time
 - i. This will be a hyperlink of the date/time the record was created that will lead to the Contact Detail page for the respective customer.
 - b. Name
 - i. This will be the name of the customer who was sent the E-mail.
 - c. Type
 - i. This will display 'E-Mail' as the type of contact.
 - d. Reason
 - i. This will display 'Email Address Verification' as the reason for contact.
 - e. Status
 - i. This will display 'Sent' when the verification E-mail was sent.
 - f. Status Reason

- i. This field will not display a value.
Note: This field is currently used to capture the status reason code for text messages.

Note: Customer Contact History records are case-level records.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Customer Contact History

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 Email Reminder Verification Batch

2.3.1 Overview

Send a one-time validation e-mail to existing participants that currently have the “Allow E-Mail Reminder” option checked, but do not have a Verified e-mail. These emails will be triggered through batch.

2.3.2 Description of Change

1. Create a new batch job that does the follow:
 - a. Identifies the following target population:
 - i. Contact Detail page identifies the contact person with all the following:
 1. The ‘Allow E-mail Reminder’ field is checked.
 2. The E-mail verification status is not “Verified” and not “Pending Verification”.

Notes: A “Pending Verification” status implies that the Contact Detail page recently triggered a verification email to be sent. Contacts should not be sent additional

verification emails if they already have one that has not expired yet.

3. The E-mail Address field is not empty.
 - ii. Contact person's E-Notification dropdown is set to "Opt-Out"
 - iii. Contact person meets one or more of the following conditions:
 - Scenario #1
 - a. The person is in any program, where their person-status on the program is "Active", "Ineligible", or "Pending"
 - b. The person-status on the program is currently effective or is effective at any point in the future.
 - Scenario #2
 - a. The person has **no** programs where their person-status on the program is Active, Ineligible, or Pending
 - b. The person has any program that their person-status has been Active, Ineligible, or Pending in the past year, starting from the date when the target population is being identified.
 - Scenario #3
 - a. The person is associated to any program that was created within the last year, starting from the date when the target population is being identified.
 - ii. Contact person's email address is in a valid format.

Note: Reproduce the same email format validation that already exists on the Contact Detail page. The existing validation is not part of this design document. The Contact Detail page's validation should have already been performed on the email address' format. However, the same validation is required to be triggered again just before any email is sent to the target email address. This is a security standard.

- b. Sends a verification email to everyone in the target population. Each contact person in the target population will get a separate email.

Note: Send the same email as defined in the Contact Detail page change recommendations. That includes but is not limited to how to populate the email fields, generate the verification code, and what languages to support.

- c. Update the verification status on the Contact Detail page to reflect the success or failure of sending a verification email.

Note: Follow the same verification status change requirements as defined in the Contact Detail page change recommendations.

- d. Send a maximum of 100K verification emails per day. If there are remaining verifications email to send for the target population, wait until the following scheduled batch run to process more of the population.

Note: The CalSAWS email service has a maximum daily cap of 275K emails that can be sent during the same day. Anything over that and the email service will throw errors. To limit the potential of causing CalSAWS to no longer be able to send emails for other services, the full load of verification emails may have to be sent over multiple different days.

- e. Send a maximum of 20 emails per second.

Note: The CalSAWS email service can only process sending 25 emails a second. By limiting the verification emails to 20 per second that leaves some space for other functional areas to use the email service too.

- 2. Run the new batch job only one time a day, during nightly batch.
 - a. Stagger the job's runs over multiple days, if the target population is larger than the maximum emails the batch job is permitted to send in a single day. Each night will process a subset of the total target population until the entire population is processed.

2.3.3 Partner Integration Testing

N/A

2.3.4 Execution Frequency

Once daily, until all the target population has been sent a verification email.

2.3.5 Key Scheduling Dependencies

N/A – No dependencies required.

2.3.6 County Impacts

All counties.

2.3.7 Category

CORE

2.3.8 Data Volume/Performance

Sends an estimated 240,000 verification emails total. Limited to 100K emails per day and limited to sending 20 emails per second.

2.3.9 Interface Partner

N/A

2.3.10 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e. rerunning the job, delaying the run, contacting appropriate parties for server issues, etc.)

2.4 Appointment Email Reminders

2.4.1 Overview

Regression test some features of batch Appointment E-mail Reminders, from SCR CA-207130. CA-207130 introduced a new batch job functionality to send E-mail Reminders to customers with upcoming appointments. The appointment reminders are dependent on the customer's email being verified.

2.4.2 Description of Change

1. Regression Test the following aspects of the Appointment Email Reminder batch job:
 - a. When a sent email bounces back as "Undeliverable," all the following occurs on the customer's Customer Contact Detail page:
 - i. Update the 'Allow E-mail Reminder' checkbox to unchecked.
 - ii. Update the 'E-Notification' dropdown to 'Opt-Out'
 - iii. Update the email verification status to 'Undeliverable' (UD).
 - b. When a sent email bounces back as "Undeliverable," a journal is written stating the customer's email was undeliverable and the customer has been opted out of E-mail reminders and notifications

2.4.3 Partner Integration Testing

N/A

2.4.4 Execute Frequency

N/A

2.4.5 Key Scheduling Dependencies

N/A

2.4.6 County Impacts

N/A

2.4.7 Data/Volume/Performance

N/A

2.4.8 Interface Partner

N/A

2.4.9 Failure Procedure/Operational Instructions

N/A

2.5 Automated Regression Test

2.5.1 Overview

Create a new automated regression test script to verify that after a verification email is sent, a matching record displays on the Customer Contact History page.

2.5.2 Description of Change

1. Create a new regression script(s) to send a verification e-mail through the Contact Detail page and verify that a record with the appropriate details displays on the Customer Contact History page.

Technical Note #1: The new script(s) should cover verification e-mails that are triggered by both of the following actions:

- a. Clicking either the 'Save' or 'Save and Return' button on the Contact Detail page in edit mode
- b. Clicking the 'Resend Verification' button on the Contact Detail page in view mode

Technical Note #2: Neither verification that the e-mail is successfully delivered, nor the content of the e-mail message are in scope for these scripts.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.20	The LRS shall support multiple means of communicating appointments, appointment reminders, and critical dates and/or information that may affect a participant's eligibility, using the following means: <ol style="list-style-type: none">a. E-Mail;b. Text messaging;d. Automated phone reminder;e. USPS mail	This SCR will update the process to allow a participant to receive e-mail reminders.

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
5/9/2023	.2	Content revision to add task assignment logic for Task Bank	Jennifer Muna

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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 the above conditions cannot identify a worker for the Task, and if the county has configured a Task Bank that can receive the Category of the Task Type that is associated to the Automated Action, assign the Task to this Task Bank.

- f. If there is no worker found or Task Bank 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-249684

Split Payment functionality for reimbursing
GA/GR benefits to another county

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor G., Eric W., Erika K., Jason F., Esequiel Herrera
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/18/2022	1.0	Initial Draft	Eric Wu
04/03/2023	2.0	Design Clarification: Remove the Page Mapping requirement from Section 2.4.6. New drop-down option is added, but no new fields were added to the page. No updates were needed for Page Mapping	Kusndi.E
04/19/2023	2.1	Content Revision to remove Correspondence Section out to the SCR CA-259836	Nithya Chereddy

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1 OVERVIEW

1.1 Current Design

San Mateo and Sacramento administrate CAPI cases for other Counties. When a CAPI is approved, San Mateo/Sacramento will request GA information from the county of the applicant's residence. If the applicant has active GA, the CAPI-administrating county will use part of the CAPI benefits to pay the county of the residence back for overlapping GA benefits.

CalSAWS does not have functionalities to issue part of CAPI benefits to another county for reimbursements.

1.2 Requests

Update system to create Counties as resources and issue vendor payments via Money Management for CAPI program to reimburse GA/GR benefits.

1.3 Overview of Recommendations

1. Add a CAPI program option on the Money Management List page
2. Update the Money Management Detail page when the program selected is for CAPI.
3. Update the Payment Amount Used by EDBC page to work for a Money Management record for a CAPI program.
4. Add new values to the Type drop-down field for the Select Money Management Resource page, Money Management Resource Search and Money Management Detail page.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. User will need to define an End Date on the Payment Amount Used by EDBC page for a CAPI program Money Management for EDBC to no longer include it as part of the EDBC determination.
3. Reports impacted by the introduction of the Sacramento and San Mateo CAPI administration for other counties will be addressed with the following SCRs:
 - a. CA-248015 CAPI - Update SOC 808 Quarterly Report for San Mateo and Sacramento Counties
 - b. CA-248014 CAPI - Update CA 1037 Report for San Mateo and Sacramento Counties
 - c. CA-248016 CAPI - Update ABCD 350 Annual Recipient Report for San Mateo and Sacramento Counties
 - d. CA-249686 CAPI-Create or Update Monthly Integrated Reports to Include County of Residence
4. A vendor (county) can be paid up to the authorized amount calculated by CAPI EDBC via Money Management.

5. Once a vendor payment is issued, any updates on Money Management will not change the vendor payment calculation.
6. System will automatically suggest the customer to be responsible for any Overpayments when running CAPI EDBC. Users can manually create External Recovery Account for vendors (counties) when they are overpaid via Money Management.
7. The vendor payments of GA/GR reimbursements will appear in the 1099 Outbound file.
8. If an entry is created with a Begin Date, but no End Date, in Money Management, a NOA will not be generated due to missing variable information.
9. Users will need to determine the amount of GA/GR reimbursements. There will be no automation for it.
10. Counties that issue GA/GR reimbursements will be responsible for adding and managing other counties as vendors in RDB.

2 RECOMMENDATIONS

2.1 Money Management List

2.1.1 Overview

The Money Management List page allows users to view and add money management record create add vendor money management information. This SCR will add the CAPI program as an option.

2.1.2 Money Management List Mockup

Money Management List

Continue

- **Add - A CAPI program is required.**

Display From: To:

View
Add

Vendor Name	Vendor Type	Priority	Start Month	End Month
No Data Found				

Program: * CAPI Complete

Continue

This Type 1 page took 0.42 seconds to load.

Figure 2.1.1 – Money Management List

2.1.3 Description of Changes

1. Display the 'CAPI' program on the Program drop-down field on the Money Management List page.
 - a. Clicking the Add button when the 'CAPI' program is selected will take the user to the Money Management Detail page for the CAPI program (See Section 2.2 for more details on the Money Management Detail page for CAPI program).
2. Create a new validation to the Money Management List page.
 - a. Validation message will be "Add – A CAPI program is required."
 - i. Validation message will display when the user clicks on the Add button and the value selected on the Program

field equal to 'CAPI' and the Case does not have a CAPI program.

Note: Search Result Summary will continue to behave and reflect the same information for a CAPI program Money Management record.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Money Mngmt**

2.1.5 Security Updates

All existing security rights required for to the Money Management List page will apply when it is for the CAPI program.

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Money Management Detail

2.2.1 Overview

The Money Management Detail page allows users to create, edit or view vendor money management information. This SCR will create a Money Management Detail page specific for the CAPI program.

2.2.2 Money Management Detail Mockup

Money Management Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Vendor Name: * Program: Vendor Type: * Priority: *

Select CAPI - Select - - Select -

Payment Amount used by EDBC

Amount	Begin Month	End Month	Pay Code
No Data Found			

Add

Save and Add Another Save and Return Cancel

This Type 1 page took 2.34 seconds to load.

Figure 2.2.1 – Money Management Detail (Create mode – Upon loading)

Money Management Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Vendor Name: * Program: Vendor Type: * Priority: *

County Select CAPI County 1

Payment Amount used by EDBC

Amount	Begin Month	End Month	Pay Code
No Data Found			

Add

Save and Add Another Save and Return Cancel

This Type 1 page took 0.41 seconds to load.

Figure 2.2.2 – Money Management Detail (Create mode)

Money Management Detail

*- Indicates required fields

Save and Return Cancel

Vendor Name: * Select Program: CAPI Vendor Type: * Priority: *

Payment Amount used by EDBC

Display From: To: View

<input type="checkbox"/>	Amount	Begin Month	End Month	Pay Code	
<input type="checkbox"/>	100.00	11/2022		IAP Payment for Other County	Edit

Remove Add

Last Updated On 11/28/2022 5:28:47 PM By: [1058216](#) Save and Return Cancel

This [Type 1](#) page took 0.53 seconds to load.

Figure 2.2.3 – Money Management Detail (Edit mode)

Money Management Detail

*- Indicates required fields

Edit Close

Vendor Name: * [County](#) Program: CAPI Vendor Type: * County Priority: * 1

Payment Amount used by EDBC

Display From: To: View

Amount	Begin Month	End Month	Pay Code
100.00	11/2022		IAP Payment for Other County

Last Updated On 11/28/2022 5:28:47 PM By: [1058216](#) Edit Close

This [Type 1](#) page took 0.54 seconds to load.

Figure 2.2.4 – Money Management Detail (View mode)

Money Management Detail

*- Indicates required fields

Save and Return

Cancel

- **Priority** - Cannot save because there is already a vendor of this type and priority for the same dates. Please give this vendor a different priority.

Vendor Name: *
County

Program:
CAPI

Vendor Type: *
County

Priority: *
1

Payment Amount used by EDBC

Display

From:

To:

<input type="checkbox"/>	Amount	Begin Month	End Month	Pay Code	<input type="button" value="Edit"/>
<input type="checkbox"/>	100.00	11/2022		IAP Payment for Other County	<input type="button" value="Edit"/>

Last Updated On 11/28/2022 5:27:32 PM By: [1058216](#)

Save and Return

Cancel

This [Type 1](#) page took 0.45 seconds to load.

Figure 2.2.5 – Money Management Detail – with Validation

2.2.3 Description of Changes

1. Update the Money Management Detail page to work for the newly added CAPI program option.
 - a. The Money Management Detail page for the CAPI program will be accessible when the user clicks the Add button from the Money Management List page and the Program selected is CAPI.
 - b. Money Management Detail page for CAPI program will have the following fields
 - i. Vendor Name
 1. This will be a required field and will have the Select button when the page first load (Create mode).
 - a. Clicking the Select button will take the user to the Select Money Management Resource page (see section 2.4 for updates on the page).
 2. Display the selected Vendor name as a hyperlink along with a Select button once the user has selected the Vendor from the Select Money

- Management Resource page (Create and Edit mode).
3. Display the Vendor name as a hyperlink when the page is in view mode.
- ii. Program
 1. This will be an uneditable field and will auto populate with 'CAPI'
 - iii. Vendor Type
 1. This will be a required drop-down field.
 - a. Display the following option
 - i. Select (default value)
 - ii. County
 2. This field will be an editable field when the page is in Edit mode.
 - iv. Priority
 1. This will be a required drop-down field.
 - a. Display the following options
 - i. Select (default value)
 - ii. List the number 1 through 10 in order.
 2. This field will be an editable field when the page is in Edit mode.
 - v. Payment Amount used by EDBC block
 1. No changes in the information being displayed and how the block will work.
2. Apply the existing validation message "Priority – Cannot save because there is already a vendor of this type and priority for the same dates. Please give this vendor a different priority." for a CAPI program Money Management record.
 - a. This validation will display when a user is trying to save the Money Management Detail page and there's already another Money Management record (for a CAPI program) that have the same Vendor Type, Priority for the same time period (this is based on the Begin Month and End Month inputted on the Payment Amount Used By EDBC page).
 Note: The same validation currently exists for CalWORKs program. The same validation and trigger will also apply for the CAPI program.

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Money Mngmt**

2.2.5 Security Updates

All existing security rights required for to the Money Management Detail page will apply when it is for the CAPI program.

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Payment Amount Used by EDBC

2.3.1 Overview

The Payment Amount Used by EDBC page allows users to enter the amount of a vendor payment that should be included in the EDBC calculation. This SCR will update the page to display new options on the Payment Reason field specific for Money Management record being created for a CAPI program.

2.3.2 Payment Amount Used by EDBC Mockup

Payment Amount Used By EDBC

*- Indicates required fields

Save and Return Cancel

Pay Code: * IAP Payment for Other County ▾	Amount: * <input type="text"/>
Begin Month: * <input type="text"/> 📅	End Month: <input type="text"/> 📅

Last Updated On 11/30/2022 10:51:13 PM By: [90](#)

Save and Return Cancel

This Type_1 page took 1.41 seconds to load.

Figure 2.3.1 – Payment Amount Used by EDBC

Payment Amount Used By EDBC

*- Indicates required fields

Save and Return

Cancel

- **Cancel** - Cannot save because there is already a vendor of this type and priority for the same dates. Please give this vendor a different priority.

Pay Code: *

IAP Payment for Other County ▼

Amount: *

200

Begin Month: *

10/2022

End Month:

Save and Return

Cancel

This Type 1 page took 0.40 seconds to load.

Figure 2.3.2 – Payment Amount Used by EDBC (with validation)

2.3.3 Description of Changes

1. Pay Code field will be a required field when it is for a CAPI program Money Management.
 - a. Pay Code field will display the value of "IAP Payment for Other County" (this will be a newly created Pay Code).
 - i. This will be the default value.
 - b. Create a new Pay Code of "IAP Payment for Other County" for the CAPI program.
 - i. Short Description: IAP Payment for Other County
 - ii. Long Description: JZ
 - iii. Code Description: IAP Payment for Other County
2. Apply the existing validation message "Cancel – Cannot save because there is already a vendor of this type and priority for the same dates. Please give this vendor a different priority." for a CAPI program Money Management record.
 - a. This validation will display when a user is trying to create a new or editing an existing Payment Amount Used by EDBC information for a Money Management record where Vendor Type and Priority (from the Money Management Detail page) exist for the same date.

Note: The same validation currently exists for CalWORKs program. The same validation and trigger will also apply for the CAPI program.
3. Display the Effective Dating Confirmation List page when the user is adding a new Payment Amount used by EDBC when there's a record already existed.

Note: This is already an existing functionality when for the CalWORKs program and this will also apply for the CAPI program.

Note: The change to the page will be the values to be displayed on the Pay Code field when the Money Management record is for a 'CAPI' program. This page will work the same way as a Money Management record for a 'CalWORKs' program.

2.3.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Money Mngmt**

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 Select Money Management Resource

2.4.1 Overview

The Select Money Management Resource page allows users to search and select for a money management resource to associate to a page category. This SCR will update the page to only display only specific values on the Type field when the Money Management record is for a CAPI program.

2.4.2 Select Money Management Resource Mockup

Select Money Management Resource

*- Indicates required fields

Search

Name: <input type="text"/>	ID: <input type="text"/>	Status: Active ▾
Category: Money Management	Type: ▾	
City: * <input type="text"/>	State: * ▾	Zip Code: <input type="text"/>
Vendor Id: <input type="text"/>		

Results per Page: 25 ▾ Search

This Type_1 page took 0.41 seconds to load.

Figure 2.4.1 – Select Money Management Resource (reference only)

2.4.3 Description of Changes

1. Display the value 'County' on the Type field when the Money Management record is for a 'CAPI' program
 - a. This is accessible when the user clicks on the Select button from the Money Management Detail page and the Program is 'CAPI'.

Note: The change to the page will be to only display the value 'County' on the Type field when the Money Management record is for a 'CAPI' program. All other existing functionality on how the page works will search for the Money Management Resource based on the search parameter inputted or the Result Summary will be changed.

2.4.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Money Mngmt**

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 Money Management Resource

2.5.1 Overview

The Money Management Resource related pages allows users to search (Money Management Resource Search page), add, edit or view (Money Management Resource Detail page) for a Money Management resource in the Resource Databank. This SCR will add new values to the Type drop-down field on the Money Management Resource pages.

2.5.2 Money Management Resource

Money Management Resource Search

*- Indicates required fields

Name:

ID:

Status:

Category: Money Management

Approved for County Use:

Address Type:

Starting Address: *

City: *

Maximum Distance From Address: *

Type:
County
Other
Housing
Utilities
GR Board and Care
GR Crisis Housing
GR Lodging
GR Meals
GR Housing
GR Room and Board
GR Housing Subsidy

Tax ID:

Zip Code:

Results per Page: **Search**

This Type_1 page took 0.40 seconds to load.

Figure 2.5.1 – Money Management Resource Search (reference)

Money Management Resource Detail

*- Indicates required fields Save Cancel

Basic Information

ID: IVR PIN: Create PIN

Name: * Payee Name: *

Category: * Type: *

Money Management

- Select -
 - Select -
County
 Other
 Housing
 Utilities
 GR Board and Care
 GR Crisis Housing
 GR Lodging
 GR Meals
 GR Housing
 GR Room and Board
 GR Housing Subsidy

eCAPS Vendor Number:

Addresses *

	Type	
■		Add Address

Tax Information

Type: - Select -	ID: <input style="width: 100%;" type="text"/>	ID Type: - Select -
---	---	--

Figure 2.5.2 – Money Management Resource Detail (reference)

2.5.3 Description of Changes

1. Add the value 'County' Type the Type drop-down field for the Money Management Resource Search and Money Management Resource Detail pages.

Note: There is no change on how these pages currently function.

2.5.4 Page Location

- **Global: Resource Databank**
- **Local: Money Management**
- **Task: Money Management Resource Search**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Update CAPI EDBC to Calculate Vendor Payment

2.6.1 Overview

Update CAPI EDBC logic to calculate vendor payments based on Money Management records.

2.6.2 Description of Changes

1. Update CAPI EDBC logic to identify Money Management records effective for the benefit month with a Program of 'CAPI'. Vendor Payment will be the Amount from the Payment Amount Used by EDBC record.
2. For each Money Management record in ascending order based on the Priority:
 - a. Subtract the vendor amount from the EDBC Authorized Amount. If the Authorized Amount is less than the vendor amount, subtract the remaining Authorized Amount.
 - b. Create a Vendor Payment:
 - i. Payment Amount: vendor amount (or remainder of Authorized Amount if less than vendor amount)
 - ii. Program Vendor ID: Vendor Name from the Money Management record
 - iii. Pay Code: Pay Code from the Payment Amount Used by EDBC record
3. If the Authorized Amount reaches \$0, all remaining Money Management records will be ignored.

Note: This logic will behave like existing logic in the CalWORKs EDBC.

2.6.3 Programs Impacted

CAPI

2.6.4 Performance Impacts

N/A

2.7 Add Money Management Section to CAPI EDBC Summary Page and the CAPI EDBC (Manual) Pages

2.7.1 Overview

Update both the CAPI EDBC Summary Page and the CAPI EDBC (Manual) pages to display Money Management section when vendor payments are calculated.

2.7.2 Money Management List Mockup

Money Management		
Vendor	Pay Code	Amount
County	IAP Payment for Other County	\$ 100.00
		Override Money Management
Remaining Amount to Customer = 1,730.00		

Figure 2.7.1 – Money Management Section

2.7.3 Money Management Mockup

Money Management

*- Indicates required fields

[Save and Return](#) [Cancel](#)

Override Reason: *		
<input type="text"/>		
Vendor	Pay Code	Amount
<input type="checkbox"/> County	IAP Payment for Other County	\$ 100.00
Remove		
Remaining Amount to Customer = 1,730.00		
Vendor:		Amount:
<input type="text"/>		<input type="text"/>
Pay Code:		
<input type="text"/>	Add	

[Save and Return](#) [Cancel](#)

Figure 2.7.2 – Money Management

2.7.4 Description of Changes

1. Update CAPI EDBC Summary page to display a Money Management section when a Vendor Payment is calculated. This section will appear below the Aid Payment section and above the Deliver Method. This

section will appear identical to the section that appears in the CalWORKs EDBC results.

- a. Vendor: Org Name based on Vendor Payment Program Vendor ID
 - b. Pay Code: Vendor Payment Pay Code
 - c. Amount: Vendor Payment Amount. Hyperlink will open Vendor Payment Calculation page
 - d. Override Money Management button: Clicking this button will open the Money Management page
 - e. Remaining Amount to Customer: Display the remaining balance of the Authorized Amount
2. Add the Money Management page to CAPI EDBC when a user clicks on the Override Money Management button. The following items will be visible:
- a. Override Reason: A drop-down list of available override reasons
 - b. Vendor: Org Name based on Vendor Payment Program Vendor ID
 - c. Pay Code: Vendor Payment Pay Code
 - d. Amount: Vendor Payment Amount
 - e. Vendor: A drop-down list of other vendors available from the Money Management page
 - f. Amount: A text field to apply an amount.
 - g. Remaining Amount to Customer: Display the remaining balance of the Authorized Amount
 - h. Pay Code: A drop-down list of Pay Codes available for the CAPI program for the case county.
 - i. A Remove button that allows the user to remove a row. The page will refresh with the row removed and a recalculated Remaining Amount to the Customer.
 - j. An Add button allows the user to add more than row. The page will refresh with the row added and a recalculated Remaining Amount to the Customer.
 - k. Add page validation to prevent a user from entering a negative or non-numerical value in the Amount field.
 - i. Page validation message will read:
Amount - Please enter a positive amount in xx,xxx,xxx.xx format.

2.7.5 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Run EDBC / Manual EDBC**

2.7.6 Security Updates

N/A

2.7.7 Page Mapping

N/A – Page Mapping details already exist

2.7.8 Page Usage/Data Volume Impacts

N/A

2.8 Previous Potential Benefit List

2.8.1 Overview

The Previous Potential Benefit List page will allow the User to view data related to the Previous Potential Benefit. This page will be accessible through certain EDBC Summary pages by clicking on the Previous Potential Benefit value hyperlink in various budget sections. Below describe the required changes for the SCR.

2.8.2 Description of Changes

1. Confirm the page will include vendor payments issued for the benefit month of a CAPI EDBC.

Note: The current functionalities should be able to handle above requirements. This section is for regression testing only.

2.8.3 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: EDBC Results**

2.8.4 Security Updates

No changes.

2.8.5 Page Mapping

No changes.

2.8.6 Page Usage/Data Volume Impacts

No changes.

2.9 Issuance Batch

2.9.1 Overview

Issuance Batch is responsible for creating an Issuance record for each authorization that is subject to be paid on a Monthly/Nightly basis. This update is to update issuance creation logic to process authorizations with vendor payments for CAPI.

2.9.2 Description of Change

Confirm the batch will issue payments to a resource based on vendor payments calculated by CAPI EDBC.

Note: The current functionalities should be able to handle above requirements. This section is for regression testing only.

2.9.3 Execution Frequency

No changes.

2.9.4 Key Scheduling Dependencies

No changes.

2.9.5 Counties Impacted

All counties.

2.9.6 Data Volume/Performance

No changes.

2.9.7 Failure Procedure/Operational Instructions

No changes.

2.10 New Pay Code for IAP Payment for Other County

2.10.1 Description of Change

1. Add new Pay Code in the system for IAP Payment for Other County. Please refer to the attached CA-236332 Pay Codes and Fund Codes.xlsx.

2.11 Automated Regression Test

2.11.1 Overview

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

2.11.2 Description of Changes

1. Create a CAPI case. Add a Money Management record and run both Regular and Manual EDBC. Confirm the following results:
 - a. The payment is split between the applicant and the county.
 - b. The payment can be overridden on the EDBC Summary page.
 - c. The Approval NOA generates with the new split payment fragment.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

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

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

6 OUTREACH

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-251214

Add NOA Fragments in Threshold Languages for
Medi-Cal NOA Generation (MC 239)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Kamal, Keerthana
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/01/2023	1.0	Initial Document	Kamal, Keerthana
05/23/2023	1.1	Content Revision Updated section 1.2 to update the languages include for NOA MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW	Lianel

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1 OVERVIEW

The purpose of this change is to Add Threshold languages for Medi-Cal NOA Generation (MC 239).

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 NOA MC_AP_FULL_SCOPE_CEC_NO_SOC_M158 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
2. Add Threshold language to NOA MC_AP_POST_PARTUM_APPROVED_M141 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
3. Add Threshold language to NOA MC_AP_MC_PARTIAL_APP_DEN_NOA_M024 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
4. Add Threshold language to NOA MC_AP_APPROVED_PRUCOL_M140 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
5. Add Threshold language to NOA MC_DN_RETRO_FAIL_DETER_VERIF_M411 in CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
6. Add Threshold language to NOA MC_DN_MC_SUPP_COOP_FAIL_M320 in CalSAWS.
Languages include Spanish, Arabic, Armenian, Farsi, Hmong, Lao, Russian, Tagalog
7. Add Threshold language to NOA MC_DN_FAIL_DETER_VERIF_M410 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
8. Add Threshold language to NOA MC_DN_RCA_RECIPIENT_M023 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
9. Add Threshold language to NOA MC_DN_MC_SSI_DEN_NOA_M024 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
10. Add Threshold language to NOA MC_DN_NOT_A_CTZN_M345 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

11. Add Threshold language to NOA MC_DN_OVERLAP_AID_M333 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
12. Add Threshold language to NOA MC_DN_CLIENT_REQ_FOR_DEN_M031 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
13. Add Threshold language to NOA MC_DN_INDIV_APP_NOT_IN_HOME_M030 in CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
14. Add Threshold language to NOA MC_DN_PICKLE_NOT_CITIZEN_M349 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
15. Add Threshold language to NOA MC_DN_WHRABTS_UNKNWN_M032 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
16. Add Threshold language to NOA MC_DN_HIC_NUM_VERIF_M301 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
17. Add Threshold language to NOA MC_DN_MC13_NOT_SIGNED_M038 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
18. Add Threshold language to NOA MC_DN_STMNT_OF_FACT_NOT_SIGNED_M035 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
19. Add Threshold language to NOA MC_CH_DENY_PRUCOL_NURSING_M762 in CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese
20. Add Threshold language to NOA MC_CH_ALIEN_STATUS_VERIF_FAIL_M780 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
21. Add Threshold language to NOA MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW in CalSAWS.
Languages include Arabic, Hmong, Lao,
22. Add Threshold language to NOA MC_CH_CEC_NO_PROOF_INCOME_M161 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
23. Add Threshold language to NOA MC_CH_CEC_UNVERIF_RESOURCE_M206 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
24. Add Threshold language to NOA MC_CH_CEC_RESOURCE_OVER_LIMIT_M357 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

25. Add Threshold language to NOA MC_CH_DENY_PRUCOL_RENAL_DIALYSIS_M763 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
26. Add Threshold language to NOA MC_CH_ALIEN_STATUS_VERIF_FAIL_M159 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
27. Add Threshold language to NOA MC_TN_NO_CHILD_UNDER_21_M331 in CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
28. Add Threshold language to NOA MC_TN_FAIL_PICKLE_REQUIREMENTS_M702 in CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
29. Add Threshold language to NOA MC_TN_INDIV_DESCEASED_M029 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
30. Add Threshold language to NOA MC_TN_ICT_OUT_TERM_M033 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
31. Add Threshold language to NOA MC_TN_SSI_RCPNT_M024 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
32. Add Threshold language to NOA MC_TN_FAIL_TO_RESPOND_M427 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
33. Add Threshold language to NOA MC_TN_OVERLAP_AID_M333 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
34. Add Threshold language to NOA MC_TN_CLIENT-REQ_TERMINATION_M706 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
35. Add Threshold language to NOA MC_TN_CEC_CHILD_TURNED_19_M352 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
36. Add Threshold language to NOA MC_TN_NON_COOP_CHILD_NON_COMP_M424 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
37. Add Threshold language to NOA MC_TN_CEC_OVERLAP_AID_M359 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
38. Add Threshold language to NOA MC_TN_CEC_ENDS_CHILD_MOVES_M358 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
39. Add Threshold language to NOA MC_TN_NAME_IDENTITY_NON_COMP_M423 in CalSAWS.

- Languages include** Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
40. Add Threshold language to NOA MC_TN_SOC_TO_NO_SOC_INCOME_DECREASE_M154 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
41. Add Threshold language to NOA MC_TN_CEC_CLIENT_REQUEST_M362 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
42. Add Threshold language to NOA MC_TN_DISCON_SENTENCED_JAIL_OR_INSTITUTION_M020 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
43. Add Threshold language to NOA MC_TN_WHRABTS_UNKNWN_M032 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
44. Add Threshold language to NOA MC_TN_REFUSED_UIB_NON_COMP_M418 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
45. Add Threshold language to NOA MC_TN_TMC_NO_ELIG_CHILD_IN_HOME_M169 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
46. Add Threshold language to NOA MC_TN_FAIL_REDETER_VERIF_M401 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
47. Add Threshold language to NOA MC_TN_MC355_VERIF_NOT_RECEIVED_M425 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
48. Add Threshold language to NOA MC_TN_DID_NOT_APPLY_MEDICARE_NON_COMP_M422 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
49. Add Threshold language to NOA MC_TN_FAIL_LTCRP_TRANSFER_M095 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
50. Add Threshold language to NOA MC_TN_CEC_WHREABTS_UNKNOWN_M353 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
51. Add Threshold language to NOA MC_TN_REFUSED_DIB_NON_COMP_M414 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
52. Add Threshold language to NOA MC_TN_FAIL_VERIF_DETERM_M410 in CalSAWS.

Languages include Arabic, Farsi, Hmong, Lao

1.3 Overview of Recommendations

Add remaining available threshold languages for the following MC 239 Templates.

1. MC_AP_FULL_SCOPE_CEC_NO_SOC_M158
2. MC_AP_POST_PARTUM_APPROVED_M141
3. MC_AP_MC_PARTIAL_APP_DEN_NOA_M024
4. MC_AP_APPROVED_PRUCOL_M140
5. MC_DN_RETRO_FAIL_DETER_VERIF_M411
6. MC_DN_MC_SUPP_COOP_FAIL_M320
7. MC_DN_FAIL_DETER_VERIF_M410
8. MC_DN_RCA_RECIPIENT_M023
9. MC_DN_MC_SSI_DEN_NOA_M024
10. MC_DN_NOT_A_CTZN_M345
11. MC_DN_OVERLAP_AID_M333
12. MC_DN_CLIENT_REQ_FOR_DEN_M031
13. MC_DN_INDIV_APP_NOT_IN_HOME_M030
14. MC_DN_PICKLE_NOT_CITIZEN_M349
15. MC_DN_WHRABTS_UNKNWN_M032
16. MC_DN_HIC_NUM_VERIF_M301
17. MC_DN_MC13_NOT_SIGNED_M038
18. MC_DN_STMNT_OF_FACT_NOT_SIGNED_M035
19. MC_CH_DENY_PRUCOL_NURSING_M762
20. MC_CH_ALIEN_STATUS_VERIF_FAIL_M780
21. MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW
22. MC_CH_CEC_NO_PROOF_INCOME_M161
23. MC_CH_CEC_UNVERIF_RESOURCE_M206
24. MC_CH_CEC_RESOURCE_OVER_LIMIT_M357
25. MC_CH_DENY_PRUCOL_RENAL_DIALYSIS_M763
26. MC_CH_ALIEN_STATUS_VERIF_FAIL_M159
27. MC_TN_NO_CHILD_UNDER_21_M331
28. MC_TN_FAIL_PICKLE_REQUIREMENTS_M702
29. MC_TN_INDIV_DESCEASED_M029
30. MC_TN ICT_OUT_TERM_M033
31. MC_TN_SSI_RCPNT_M024
32. MC_TN_FAIL_TO_RESPOND_M427
33. MC_TN_OVERLAP_AID_M333
34. MC_TN_CLIENT-REQ_TERMINATION_M706
35. MC_TN_CEC_CHILD_TURNED_19_M352
36. MC_TN_NON_COOP_CHILD_NON_COMP_M424
37. MC_TN_CEC_OVERLAP_AID_M359
38. MC_TN_CEC_ENDS_CHILD_MOVES_M358
39. MC_TN_NAME_IDENTITY_NON_COMP_M423

- 40. MC_TN_SOC_TO_NO_SOC_INCOME_DECREASE_M154
- 41. MC_TN_CEC_CLIENT_REQUEST_M362
- 42. MC_TN_DISCON_SENTENCED_JAIL_OR_INSTITUTION_M020
- 43. MC_TN_WHRABTS_UNKNWN_M032
- 44. MC_TN_REFUSED_UIB_NON_COMP_M418
- 45. MC_TN_TMC_NO_ELIG_CHILD_IN_HOME_M169
- 46. MC_TN_FAIL_REDETER_VERIF_M401
- 47. MC_TN_MC355_VERIF_NOT_RECEIVED_M425
- 48. MC_TN_DID_NOT_APPLY_MEDICARE_NON_COMP_M422
- 49. MC_TN_FAIL_LTCRP_TRANSFER_M095
- 50. MC_TN_CEC_WHREABTS_UNKNOWN_M353
- 51. MC_TN_REFUSED_DIB_NON_COMP_M414
- 52. MC_TN_FAIL_VERIF_DETERM_M410

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 NOA MC 239 (6/16) - NO SOC TO SOC FULL SC INC INCR in CalSAWS

2.1.1 Overview

Add NOA Reasons for MC 239 (6/16) - NO SOC TO SOC FULL SC INC INCR in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_AP_FULL_SCOPE_CEC_NO_SOC_M158 (Fragment ID: 6572)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Approval

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.1.2 Form/NOA Verbiage

Add MC 239 NOA fragments in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong, Lao

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - APRVD POSTPARTUM MEDICAL in CalSAWS

2.2.1 Overview

Add NOA Reasons for MC 239 (6/16) - APRVD POSTPARTUM MEDICAL in CalSAWS in available threshold languages.

Reason Fragment Name and ID: MC_AP_POST_PARTUM_APPROVED_M141
(Fragment ID: 6566)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Approval

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish.

2.2.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - SSI RECIPIENT in CalSAWS.

2.3.1 Overview

Add NOA Reasons for MC 239 (6/16) - SSI RECIPIENT in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_AP_MC_PARTIAL_APP_DEN_NOA_M024
(Fragment ID: 6504)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Approval

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.3.2 Form/NOA Verbiage

Add MC 239 SSI NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - APPROVED PRUCOL MEDICAL in CalSAWS

2.4.1 Overview

Add NOA Reasons for MC 239 (6/16) - APPROVED PRUCOL MEDICAL in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_AP_APPROVED_PRUCOL_M140

(Fragment ID: 6565)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Approval

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.4.2 Form/NOA Verbiage

Add MC 239 NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) – MC Determination - Retro Failure for Verification in CalSAWS

2.5.1 Overview

Add NOA Reasons for MC 239 (6/16) - MC Determination -Retro Failure for Verification in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_RETRO_FAIL_DETER_VERIF_M411

(Fragment ID: 6314)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.5.2 Form/NOA Verbiage

Add MC 239 NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - FAIL TO COOP WITH MC SUPPORT in CalSAWS

2.6.1 Overview

Add NOA Reasons for MC 239 (6/16) - FAIL TO COOP WITH MC SUPPORT in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_MC_SUPP_COOP_FAIL_M320

(Fragment ID: 6620)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.6.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Spanish, Arabic, Armenian, Farsi, Hmong, Lao, Russian, Tagalog.

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - MC Determination - Failure for Verification in CalSAWS

2.7.1 Overview

Add NOA Reasons for MC 239 (6/16) - MC Determination - Failure for

Verification in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_FAIL_DETER_VERIF_M410
(Fragment ID: 6895)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.7.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - CALWORKS/RCA RECIPIENT in CalSAWS

2.8.1 Overview

Add NOA Reasons for MC 239 (6/16) - CALWORKS/RCA RECIPIENT in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_RCA_RECIPIENT_M023
(Fragment ID: 6503)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.8.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - SSI RECIPIENT in CalSAWS

2.9.1 Overview

Add NOA Reasons for MC 239 (6/16) - SSI RECIPIENT in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_MC_SSI_DEN_NOA_M024

(Fragment ID: 6505)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.9.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - UNDOC NOT ELIGIBLE FOR DAC in CalSAWS

2.10.1 Overview

Add NOA Reasons for MC 239 (6/16) - UNDOC NOT ELIGIBLE FOR DAC in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_NOT_A_CTZN_M345

(Fragment ID: 6631)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.10.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - OVERLAPING AID in CalSAWS

2.11.1 Overview

Add NOA Reasons for MC 239 (6/16) - OVERLAPING AID in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_OVERLAP_AID_M333

(Fragment ID: 6626)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.11.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - DENIAL: CLIENT'S REQUEST in CalSAWS

2.12.1 Overview

Add NOA Reasons for MC 239 (6/16) - DENIAL: CLIENT'S REQUEST in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_CLIENT_REQ_FOR_DEN_M031
(Fragment ID: 6512)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.12.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - PERSON NOT IN HOME in CalSAWS

2.13.1 Overview

Add NOA Reasons for MC 239 (6/16) - PERSON NOT IN HOME in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_INDIV_APP_NOT_IN_HOME_M030

(Fragment ID: 6511)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.13.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - UNDOC NOT ELIGIBLE FOR PICKLE in CalSAWS

2.14.1 Overview

Add NOA Reasons for MC 239 (6/16) - UNDOC NOT ELIGIBLE FOR PICKLE

in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_PICKLE_NOT_CITIZEN_M349

(Fragment ID: 6634)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.14.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - WHEREABOUTS UNKNOWN in CalSAWS

2.15.1 Overview

Add NOA Reasons for MC 239 (6/16) - WHEREABOUTS UNKNOWN in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_WHRABTS_UNKNWN_M032

(Fragment ID: 6513)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239
Current Program(s): Medi-Cal
Current Action Type: Denied
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA
Existing Languages: English and Spanish

2.15.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - HIC NUMBER VERIFICATION in CalSAWS

2.16.1 Overview

Add NOA Reasons for MC 239 (6/16) - HIC NUMBER VERIFICATION in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_HIC_NUM_VERIF_M301
(Fragment ID: 6608)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.16.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - MC13 NOT SIGNED in CalSAWS

2.17.1 Overview

Add NOA Reasons for MC 239 (6/16) - MC13 NOT SIGNED in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_MC13_NOT_SIGNED_M038
(Fragment ID: 6519)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.17.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.
NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - STATEMENT OF FACTS NOT SIGNED in CalSAWS

2.18.1 Overview

Add NOA Reasons for MC 239 (6/16) - STATEMENT OF FACTS NOT SIGNED in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_DN_STMNT_OF_FACT_NOT_SIGNED_M035
(Fragment ID: 6517)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Denied

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.18.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

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 NOA MC 239 (6/16) - DENIED: PRUCOL STATUS NURSING in CalSAWS

2.19.1 Overview

Add NOA Reasons for MC 239 (6/16) - DENIED: PRUCOL STATUS NURSING in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_CH_DENY_PRUCOL_NURSING_M762

(Fragment ID: 6671)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Change

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English

2.19.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

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

2.20 Add threshold Languages for NOA MC 239 (6/16) - ALIEN STATUS - FULL SCOPE TO RESTRICTED SCOPE in CalSAWS

2.20.1 Overview

Add NOA Reasons for MC 239 (6/16) - ALIEN STATUS - FULL SCOPE TO RESTRICTED SCOPE in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_CH_ALIEN_STATUS_VERIF_FAIL_M780

(Fragment ID: 7631)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Change

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.20.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.20.3 Form/NOA Variable Population

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

2.20.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.21 Add threshold Languages for NOA MC 239 (6/16) - ALIEN STATUS - FULL SCOPE TO RESTRICTED SCOPE in CalSAWS

2.21.1 Overview

Add NOA Reasons for MC 239 (6/16) - ALIEN STATUS - FULL SCOPE TO RESTRICTED SCOPE in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW

(Fragment ID: 9531)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Change

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.21.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Hmong, Lao

.

NOA Mockups/Examples: Supporting Documents #1

2.21.3 Form/NOA Variable Population

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

2.21.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.22 Add threshold Languages for NOA MC 239 (6/16) - CEC NO PROOF: INCOME in CalSAWS

2.22.1 Overview

Add NOA Reasons for MC 239 (6/16) - CEC NO PROOF: INCOME in

CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_CH_CEC_NO_PROOF_INCOME_M161
(Fragment ID: 6574)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Change

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.22.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.22.3 Form/NOA Variable Population

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

2.22.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.23 Add threshold Languages for NOA MC 239 (6/16) - ASSET WAIVER NO PROOF: RESOURC in CalSAWS

2.23.1 Overview

Add NOA Reasons for MC 239 (6/16) - ASSET WAIVER NO PROOF: RESOURC in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_CH_CEC_UNVERIF_RESOURCE_M206
(Fragment ID: 6603)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Change

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.23.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.23.3 Form/NOA Variable Population

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

2.23.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.24 Add threshold Languages for NOA MC 239 (6/16) - INDV FAIL RESOURCE OVER LIMIT in CalSAWS

2.24.1 Overview

Add NOA Reasons for MC 239 (6/16) - INDV FAIL RESOURCE OVER LIMIT in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_CH_CEC_RESOURCE_OVER_LIMIT_M357

(Fragment ID: 6641)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Change

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.24.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.24.3 Form/NOA Variable Population

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

2.24.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.25 Add threshold Languages for NOA MC 239 (6/16) - DENIED: PRUCOL STATUS RENAL in CalSAWS

2.25.1 Overview

Add NOA Reasons for MC 239 (6/16) - DENIED: PRUCOL STATUS RENAL in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_CH_DENY_PRUCOL_RENAL_DIALYSIS_M763

(Fragment ID: 6672)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Change

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.25.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.25.3 Form/NOA Variable Population

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

2.25.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.26 Add threshold Languages for NOA MC 239 (6/16) - ALIEN STATUS - FULL TO RESTRIC in CalSAWS

2.26.1 Overview

Add NOA Reasons for MC 239 (6/16) - ALIEN STATUS - FULL TO RESTRIC in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_CH_ALIEN_STATUS_VERIF_FAIL_M159
(Fragment ID: 6573)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Change

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.26.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.26.3 Form/NOA Variable Population

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

2.26.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.27 Add threshold Languages for NOA MC 239 (6/16) - NO ELIGIBLE CHILD UNDER 21 YRS in CalSAWS

2.27.1 Overview

Add NOA Reasons for MC 239 (6/16) - NO ELIGIBLE CHILD UNDER 21 YRS in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_NO_CHILD_UNDER_21_M331

(Fragment ID: 6624)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.27.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.27.3 Form/NOA Variable Population

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

2.27.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.28 Add threshold Languages for NOA MC 239 (6/16) - NOT MEETING PICKLE REQUIREMENT in CalSAWS

2.28.1 Overview

Add NOA Reasons for MC 239 (6/16) - NOT MEETING PICKLE REQUIREMENT in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_FAIL_PICKLE_REQUIREMENTS_M702

(Fragment ID: 6662)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.28.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.28.3 Form/NOA Variable Population

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

2.28.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.29 Add threshold Languages for NOA MC 239 (6/16) - INDIVIDUAL DECEASED in CalSAWS

2.29.1 Overview

Add NOA Reasons for MC 239 (6/16) - INDIVIDUAL DECEASED in CalSAWS

in available threshold languages.

Reason Fragment Name and ID:

MC_TN_INDIV_DESCEASED_M029
(Fragment ID: 6510)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.29.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.29.3 Form/NOA Variable Population

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

2.29.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.30 Add threshold Languages for NOA MC 239 (6/16) - NOT IN COUNTY/ICT OUT in CalSAWS

2.30.1 Overview

Add NOA Reasons for MC 239 (6/16) - NOT IN COUNTY/ICT OUT in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_ICT_OUT_TERM_M033

(Fragment ID: 6515)
Current NOA Template: CF_NOA_TEMPLATE (3027)
State Form/NOA: MC 239
Current Program(s): Medi-Cal
Current Action Type: Terminate
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA
Existing Languages: English and Spanish

2.30.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.30.3 Form/NOA Variable Population

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

2.30.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.31 Add threshold Languages for NOA MC 239 (6/16) - SSI RECIPIENT in CalSAWS

2.31.1 Overview

Add NOA Reasons for MC 239 (6/16) - SSI RECIPIENT in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_SSI_RCPNT_M024

(Fragment ID: 6506)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA
Existing Languages: English, Spanish, Korean, Tagalog, Vietnamese, Cambodian, Chinese, Armenian and Russian

2.31.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.31.3 Form/NOA Variable Population

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

2.31.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.32 Add threshold Languages for NOA MC 239 (6/16) - FAILED TO RESPOND in CalSAWS

2.32.1 Overview

Add NOA Reasons for MC 239 (6/16) - FAILED TO RESPOND in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_FAIL_TO_RESPOND_M427

(Fragment ID: 7787)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.32.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.32.3 Form/NOA Variable Population

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

2.32.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.33 Add threshold Languages for NOA MC 239 (6/16) - OVERLAPING AID in CalSAWS

2.33.1 Overview

Add NOA Reasons for MC 239 (6/16) - OVERLAPING AID in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_OVERLAP_AID_M333

(Fragment ID: 6627)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.33.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.33.3 Form/NOA Variable Population

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

2.33.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.34 Add threshold Languages for NOA MC 239 (6/16) - TERMINATION: CLIENT'S REQUEST in CalSAWS

2.34.1 Overview

Add NOA Reasons for MC 239 (6/16) - TERMINATION: CLIENT'S REQUEST in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_CLIENT-REQ_TERMINATION_M706
(Fragment ID: 6663)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.34.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.34.3 Form/NOA Variable Population

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

2.34.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.35 Add threshold Languages for NOA MC 239 (6/16) - ATTAINMENT OF 19 YEARS OF AGE in CalSAWS

2.35.1 Overview

Add NOA Reasons for MC 239 (6/16) - ATTAINMENT OF 19 YEARS OF AGE in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_CEC_CHILD_TURNED_19_M352

(Fragment ID: 6636)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.35.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.35.3 Form/NOA Variable Population

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

2.35.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.36 Add threshold Languages for NOA MC 239 (6/16) - Did not Cooperate in Med Supp in CalSAWS

2.36.1 Overview

Add NOA Reasons for MC 239 (6/16) - Did not Cooperate in Med Supp in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_NON_COOP_CHILD_NON_COMP_M424

(Fragment ID: 7601)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.36.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.36.3 Form/NOA Variable Population

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

2.36.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.37 Add threshold Languages for NOA MC 239 (6/16) - CEC OVERLAPPING AID in CalSAWS

2.37.1 Overview

Add NOA Reasons for MC 239 (6/16) - CEC OVERLAPPING AID in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_CEC_OVERLAP_AID_M359

(Fragment ID: 6643)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.37.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.37.3 Form/NOA Variable Population

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

2.37.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.38 Add threshold Languages for NOA MC 239 (6/16) - CEC CHILD MOVES INTO ANOTHER H in CalSAWS

2.38.1 Overview

Add NOA Reasons for MC 239 (6/16) - CEC CHILD MOVES INTO ANOTHER

H in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_CEC_ENDS_CHILD_MOVES_M358
(Fragment ID: 6642)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.38.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.38.3 Form/NOA Variable Population

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

2.38.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.39 Add threshold Languages for NOA MC 239 (6/16) - FTP Name/Identity in CalSAWS

2.39.1 Overview

Add NOA Reasons for MC 239 (6/16) - FTP Name/Identity in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_NAME_IDENTITY_NON_COMP_M423
(Fragment ID: 7600)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal
Current Action Type: Terminate
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA
Existing Languages: English and Spanish

2.39.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.39.3 Form/NOA Variable Population

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

2.39.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.40 Add threshold Languages for NOA MC 239 (6/16) - SOC TO NO SOC INCOME DECREASE in CalSAWS

2.40.1 Overview

Add NOA Reasons for MC 239 (6/16) - SOC TO NO SOC INCOME DECREASE in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_SOC_TO_NO_SOC_INCOME_DECREASE_M154
(Fragment ID: 6569)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal
Current Action Type: Terminate
Currently Repeatable: No
Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.40.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.40.3 Form/NOA Variable Population

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

2.40.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.41 Add threshold Languages for NOA MC 239 (6/16) - CEC CLIENT REQUEST in CalSAWS

2.41.1 Overview

Add NOA Reasons for MC 239 (6/16) - CEC CLIENT REQUEST in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_CEC_CLIENT_REQUEST_M362

(Fragment ID: 6646)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.41.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.41.3 Form/NOA Variable Population

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

2.41.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.42 Add threshold Languages for NOA MC 239 (6/16) - JAIL, WORK FURLOUGHOR HWH JUR in CalSAWS

2.42.1 Overview

Add NOA Reasons for MC 239 (6/16) - JAIL, WORK FURLOUGHOR HWH JUR in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_DISCON_SENTENCED_JAIL_OR_INSTITUTION_M020
(Fragment ID: 6502)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.42.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.42.3 Form/NOA Variable Population

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

2.42.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.43 Add threshold Languages for NOA MC 239 (6/16) - WHEREABOUTS UNKNOWN in CalSAWS

2.43.1 Overview

Add NOA Reasons for MC 239 (6/16) - WHEREABOUTS UNKNOWN in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_WHRABTS_UNKNWN_M032

(Fragment ID: 6514)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.43.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.43.3 Form/NOA Variable Population

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

2.43.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.44 Add threshold Languages for NOA MC 239 (6/16) - Did not apply for UIB in CalSAWS

2.44.1 Overview

Add NOA Reasons for MC 239 (6/16) - Did not apply for UIB in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_REFUSED_UIB_NON_COMP_M418

(Fragment ID: 7595)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.44.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.44.3 Form/NOA Variable Population

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

2.44.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.45 Add threshold Languages for NOA MC 239 (6/16) - TMC No elig child in the home in CalSAWS

2.45.1 Overview

Add NOA Reasons for MC 239 (6/16) - TMC No elig child in the home in CalSAWS in available threshold languages.

Reason Fragment Name and ID:
MC_TN_TMC_NO_ELIG_CHILD_IN_HOME_M169
(Fragment ID: 6578)
Current NOA Template: CF_NOA_TEMPLATE (3027)
State Form/NOA: MC 239
Current Program(s): Medi-Cal
Current Action Type: Terminate
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA
Existing Languages: English and Spanish

2.45.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.45.3 Form/NOA Variable Population

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

2.45.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.46 Add threshold Languages for NOA MC 239 (6/16) - MC Redetermination - Failure for Verification in CalSAWS

2.46.1 Overview

Add NOA Reasons for MC 239 (6/16) - MC Redetermination - Failure for Verification in CalSAWS in available threshold languages.

Reason Fragment Name and ID:
MC_TN_FAIL_REDETER_VERIF_M401
(Fragment ID: 6898)
Current NOA Template: CF_NOA_TEMPLATE (3027)
State Form/NOA: MC 239

Current Program(s): Medi-Cal
Current Action Type: Terminate
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA
Existing Languages: English, Spanish, Korean, Tagalog, Vietnamese, Cambodian, Chinese, Armenian and Russian

2.46.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao

NOA Mockups/Examples: Supporting Documents #1

2.46.3 Form/NOA Variable Population

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

2.46.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.47 Add threshold Languages for NOA MC 239 (6/16) - Verification(s) Not Received in CalSAWS

2.47.1 Overview

Add NOA Reasons for MC 239 (6/16) - Verification(s) Not Received in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_MC355_VERIF_NOT_RECEIVED_M425
(Fragment ID: 7608)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal
Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.47.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.47.3 Form/NOA Variable Population

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

2.47.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.48 Add threshold Languages for NOA MC 239 (6/16) - Did not apply for Medicare in CalSAWS

2.48.1 Overview

Add NOA Reasons for MC 239 (6/16) - Did not apply for Medicare in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_DID_NOT_APPLY_MEDICARE_NON_COMP_M422
(Fragment ID: 7599)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.48.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.48.3 Form/NOA Variable Population

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

2.48.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.49 Add threshold Languages for NOA MC 239 (6/16) - FAILED DUE TO LTCRP TRANSFER in CalSAWS

2.49.1 Overview

Add NOA Reasons for MC 239 (6/16) - FAILED DUE TO LTCRP TRANSFER in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_FAIL_LTCRP_TRANSFER_M095

(Fragment ID: 6545)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.49.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.49.3 Form/NOA Variable Population

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

2.49.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.50 Add threshold Languages for NOA MC 239 (6/16) - WHEREABOUTS UNKNOWN MORE THAN in CalSAWS

2.50.1 Overview

Add NOA Reasons for MC 239 (6/16) - WHEREABOUTS UNKNOWN MORE THAN in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_CEC_WHREABTS_UNKNOWN_M353
(Fragment ID: 6637)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.50.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.50.3 Form/NOA Variable Population

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

2.50.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.51 Add threshold Languages for NOA MC 239 (6/16) - Did not apply for DIB ME in CalSAWS

2.51.1 Overview

Add NOA Reasons for MC 239 (6/16) - Did not apply for DIB in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_REFUSED_DIB_NON_COMP_M414

(Fragment ID: 7591)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

Existing Languages: English and Spanish

2.51.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.51.3 Form/NOA Variable Population

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

2.51.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.52 Add threshold Languages for NOA MC 239 (6/16) - MC Determination - Failure for Verification in CalSAWS

2.52.1 Overview

Add NOA Reasons for MC 239 (6/16) - MC Determination - Failure for Verification in CalSAWS in available threshold languages.

Reason Fragment Name and ID:

MC_TN_FAIL_VERIF_DETERM_M410

(Fragment ID: 6896)

Current NOA Template: CF_NOA_TEMPLATE (3027)

State Form/NOA: MC 239

Current Program(s): Medi-Cal

Current Action Type: Terminate

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA

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

2.52.2 Form/NOA Verbiage

Add MC 239 NOA fragment in Threshold languages.

Add Threshold languages: Arabic, Hmong and Lao

NOA Mockups/Examples: Supporting Documents #1

2.52.3 Form/NOA Variable Population

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

2.52.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	NOA MC 239 (6/16)	Fragments_Verbiage.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. RedeDenial, 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 	MC 239 NOAs reason fragments are added in available threshold languages.

	<p>change in worker, telephone hours or Local Office Site;</p> <p>g. Information notices and stuffers;</p> <p>h. Case-specific verification/referral forms;</p> <p>i. GR Vendor notices;</p> <p>k. Court-mandated notices, including Balderas notices;</p> <p>l. SSIAP appointment notices;</p> <p>m. Withdrawal forms;</p> <p>n. COLA notices;</p> <p>o. Time limit notices;</p> <p>p. Transitioning of aid notices;</p> <p>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</p> <p>r. Non-compliance and sanction notices;</p> <p>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</p> <p>t. Corrective NOAs on State Fair Hearing decisions;</p> <p>u. CSC paper ID cards with LRS-generated access information; and</p> <p>v. CSC PIN notices.</p>	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-251447

Modify the Use of the GA Annual Agreement for
LA County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Chereddy, Phong Xiong, Thao Ta, Esequiel Herrera-Ortiz, Yale Yee, Matthew Lower, Erika Kusnadi, Shining Liu
	Reviewed By	Priya Sridharan, Gokul Suresh, Richard Weeks, Michael Wu, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/28/2023	1.0	Initial Design Document	Nithya Chereddy, Phong Xiong
04/26/2023	2.0	Design Draft post-LA County clarification	Phong Xiong, Nithya Chereddy, Esequiel Herrera-Ortiz, Yale Yee, Erika Kusnadi, Shining Liu
05/03/2023	2.1	Updated as per LA County comments for Client Correspondence and Eligibility sections. For Online, added another Note to the end of Section 2.1.3 to provide some information regarding the 'General Relief Annual Agreement', 'General Relief Annual Renewal Packet', 'GA/GR RE Packet' since all 3 options are available from the Display Type drop-down.	Erika Kusnadi, Phong Xiong
05/17/2023	2.2	Content Revision to make few cosmetic changes for Client Correspondence Sections.	Nithya Chereddy
05/18/2023	2.3	Content Revision - Fixed two mockups and several column definitions for the RE Date report.	Esequiel Herrera-Ortiz
05/19/2023	2.4	Content Revision – Clarified new eligibility status reason effective dating.	Phong Xiong, Yale Yee
05/23/2023	2.5	Content Revision – The '% General Relief Renewals Completed Timely' was defined twice. Removed	Esequiel Herrera-Ortiz

		<p>one of the duplicates. Removed the Qlik ID column from the General Relief – Renewals sheet. The column is a technical column and is not needed. Removed the column definitions for # of Days Delinquent and Termination Indicator because they are not used in the General Relief dashboard. Fixed the report location for the General Relief – Renewals sheet.</p>	
05/25/2023	2.6	<p>Content Revision – Added that BRM logic for the SSP 14 will be used for all counties. All other logic in the SCR is specific to LA County.</p>	Phong Xiong
05/30/2023	2.7	<p>Fixed format issues in the General Relief case list mockups.</p>	Esequiel Herrera-Ortiz

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1 OVERVIEW

This effort is to replace the 'GR Annual Agreement Packet - ABP 898-16' with the new 'General Relief Annual Renewal Packet – GR RE Packet.' The Renewal Submit Month for all GR cases will be established based on current CalSAWS functionality. The new GR RE Packet will be used for all GR Renewals with this SCR.

1.1 Current Design

The current GR Annual Agreement Packet has the ABP 898-16 form.

LA County Only-The verbiage on the SSP 14 discontinuance NOA is incorrect and causing customers to think they need to make payments to the Social Security Administration to continue to receive GR benefits. Under the "Reason for Proposed Decision" the NOA currently states, "You did not turn in a completed State Supplementary Payment on time. This is incorrect as customer did not need to submit a payment, but an SSP 14 form. 2. Currently, the ABP 898-16 and SSP-14 are mailed out together.

1.2 Requests

The GR 22, General Relief Annual Renewal form is to replace the ABP 898-16, Annual Agreement for General Relief. The Renewal Submit Month for all GR cases will be established based on current CalSAWS functionality. The new GR RE packet will be the Renewal for all GR cases

LA County Only- 1. Change statement above in issue #1 to, You did not turn in a completed SSP 14 form on time. 2. To have the SSP-14 mailed out on the 3rd of the month before the GR RE due month but separate from the GR RE Packet. 3. To have the GR RE Packet generated and mailed out 10-days before the end of the Report Month (batch 10-day cutoff). The Report Month is the month prior to when the packet is due. The SSP 14 will continue to be generated on the 3rd of the Report Month. The due date for both the SSP 14 and GR 22 will be the same – 10th of the Due/Submit Month.

Update reports to include the new GR Annual Renewal information.

1.3 Overview of Recommendations

1. Update both the Customer Reporting List and Customer Reporting Detail page to capture the 'General Relief Annual Renewal Packet' reporting type.
2. Update the RE Date Report to include a new sheet for the General Relief REs.
3. Add a new sheet to the General Relief dashboard for Renewals.
4. End-date the GR Annual Agreement Packet (ABP 898-16 form) and replace with GR 22 GR Annual Renewal form in threshold languages.
5. Create a new GR Annual Renewal Packet.
6. Add the GR 22 form to Template Repository.
7. Separate the SSP 14 from the packet.

8. Update the verbiage of the discontinuance NOAs when the SSP 14 and/or the GR Annual Renewal form is not returned.
9. Update the GR Discontinuance batch sweep to check for the new GR RE Packet

1.4 Assumptions

1. There will be no change to when the SSP 14 is generated/mailed and controlled by the System.
2. The new General Relief Annual Renewal Packet will be tracked forms in the System and will utilize the existing Customer Reporting list page and statuses. If the status of either form is still "Sent," and hence not received by the 10th of the Submit Month, a Discontinuance Notice of Action ("NOA") will be generated.
3. All existing functionalities will remain the same unless called out as part of the design document.
4. The following forms will be inserted into the General Relief Annual Renewal Packet at the Central Print facility.
 - a. PA 1675-2, Direct Deposit Overview
 - b. PA 2457, Civil Rights Information Notice
 - c. MV 1, California Voter Registration Form.
 - d. NVRA Voter Preference Form, "Would You Like to Register to Vote?"
 - e. PA 2126, Have You Heard?
 - f. CW 2223 Demographic Questionnaire
 - g. PUB 430, Mental Health Assessment and Use of the Third-Party Verification
 - h. GEN 1365, Notice of Language Services
5. The GR RE Packet will be generated in the threshold languages specified in section 2 of the design document.
6. SCR CA-256939 will remove the automated changes of SCR CA-220229 to no longer advance the packet's status to "Complete – EDBC Accepted."
7. There exists a framework for task creation by the counties that can be used for when the SSP 14 is received. This is configurable by the counties.
8. Both the NOA for the SSP 14 and GR RE Packet can be generated at the same time; however, due to eligibility status reason hierarchy rules, only the status reason for the packet would display.
9. There is an overlap month (August 2023) in which both the GR AA Packet and GR RE Packet (including related logic such as eligibility status reasons and NOA generation) are active in the system at the same time.
10. The current NOA generation logic for the two NOAs will not be changed with this SCR.
11. There is existing NOA suppression logic that prevents duplicate NOAs from being sent in the same month. If a GR discontinuance NOA is generated on the 11th of the month, at the 10-day batch cutoff, a GR discontinuance NOA will not generate.
12. If the GR AA Packet or the GR RE Packet is received and marked "Incomplete" on the RE due date, then no GR discontinuance NOA will generate. If it remains incomplete until the GR discontinuance batch sweep on the batch 10-day cutoff will pick up the case and send the discontinuance NOA.

13. The current batch sweep for GR discontinuance only checks for a customer reporting status of "Sent," "Incomplete," and "Error." Any other status, including a "Generated" status will not be picked up by the batch.
14. If the Worker generates a new General Relief Annual Renewal packet while there is already an unprocessed packet for the program, then the worker must take responsibility for resolving the Customer Reporting Record linked to the previous packet.
15. If the 10th of the Due/Submit Month is a weekend or holiday, then the due date will be the next business day.

2 RECOMMENDATIONS

2.1 Customer Reporting List

2.1.1 Overview

The Customer Reporting List page allows users to add, edit or view participant/beneficiary reports. This SCR will update the Customer Reporting List page to start capturing the General Relief Annual Renewal Packet which will replace the existing ABP 898-16, Annual Agreement for General Relief for LA County.

2.1.2 Customer Reporting List Mockup

Customer Reporting List

Images

Search Results Summary Results 1 - 2 of 2

Display Type: Display Name: All From: To: View

Type	Name	Submit Month	Program	Status	Status Date	
General Relief Annual Agreement	MOUSE, MICKEY 28M	09/2022	GA	Complete- EDBC Accepted	09/16/2022	Edit
General Relief Annual Renewal Packet	MOUSE, MICKEY 28M	09/2023	GA	Sent	09/15/2023	Edit

Images

This Type_1 page took 0.36 seconds to load.

Figure 2.1.2.1 – Customer Reporting List page

Customer Reporting List

The screenshot shows the 'Customer Reporting List' interface. At the top right, there is an 'Images' button. Below it is a 'Search Results Summary' header with 'Results 1 - 2 of 2' on the right. The main area contains a search filter section with a 'Display Type:' dropdown menu open, showing a list of options including 'General Relief Annual Renewal Packet'. To the right of the dropdown are fields for 'Display Name:' (set to 'All'), 'From:', and 'To:', each with a calendar icon. A 'View' button is located to the right of these fields. Below the search filters is a table with columns: 'Name', 'Submit Month', 'Program', 'Status', and 'Status Date'. Two rows are visible in the table, each with an 'Edit' button. At the bottom right of the table area is another 'Images' button. A footer bar at the bottom of the interface states 'This Type_1 page took 0.36 seconds to load.'

Name	Submit Month	Program	Status	Status Date	
SE, KEY 28M	09/2022	GA	Complete- EDBC Accepted	09/16/2022	Edit
SE, KEY 28M	09/2023	GA	Sent	09/15/2023	Edit

Figure 2.1.2.2 – Customer Reporting List – Display type drop-down

2.1.3 Description of Changes

1. Update the Customer Reporting List page to start capturing 'General Relief Annual Renewal Packet' (GR RE).
 - a. Add 'General Relief Annual Renewal Packet' as an option to the 'Display Type' drop down field.
 - b. Display the 'General Relief Annual Renewal Packet' type on the Search Result Summary section when 'General Relief Annual Renewal Packet' is generated in CalSAWS.

Note: The 'General Relief Annual Renewal Packet' is specific to LA County only. Even though, it will still be listed under the Display Type drop down field for all other counties, it will not display on their Search Result Summary.

Note: The existing Annual Agreement for General Relief (ABP 898-16) will continue to display under the Display Type drop down field to allow users to search for historical data.

Note: The 'General Relief Annual Agreement' is what LA county is currently using which will be obsolete when the new 'General Relief

Annual Renewal Packet' (which is what is being added and what will be replacing the existing General Relief Annual Agreement) is added as part of this SCR. The 'GA/GR RE Packet' is used by the CalWIN counties.

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 page

2.2.1 Overview

The Customer Reporting Detail page allows users to process participant/beneficiary reports. This SCR will update the Customer Reporting Detail page to start capturing the General Relief Annual Renewal Packet which will replace the existing ABP 898-16, Annual Agreement for General Relief for LA County.

2.2.2 Customer Reporting Detail Mockup

Customer Reporting Detail

*- Indicates required fields

Images

Override

Save and Return

Cancel

Report Type:

General Relief Annual Renewal Packet

Submit Month:

09/2023

Date Received:

09/16/2023

Personal Contact:

No ▾

Status			
Program	Status	Status Detail	Date
GA	▾		<input type="text"/> 

General Assistance/General Relief Status History

Status	Status Date	Action Date	Updated By
Complete- EDBC Accepted	09/16/2023	09/16/2023 20:24:39 PM	999999
Reviewed- Ready to Run EDBC	09/16/2023	09/16/2023 20:24:39 PM	999999
Received	09/16/2023	09/16/2023 20:24:39 PM	999999
Sent	08/03/2023	08/03/2023 23:54:30 PM	582878
Generated	08/03/2023	08/03/2023 22:40:00 PM	1001442

Images

Override

Save and Return

Cancel

This Type 1 page took 0.69 seconds to load.

Figure 2.2.1 – Customer Reporting Detail page

Customer Reporting Detail

* - Indicates required fields

Images

Override

Save and Return

Cancel

Report Type:

General Relief Annual Renewal Packet

Submit Month:

09/2023

Date Received:

09/16/2023

Personal Contact:

No

Status

Program	Status	Status Detail	Date
GA	Incomplete		

Incomplete Reasons

- SoF not Signed/Dated
- Missing Verifications
- Missing Answers on SoF

General Assistance/General Relief Status History

Status	Status Date	Action Date	Updated By
Received	09/16/2023	09/16/2023 20:24:39 PM	999999
Sent	08/03/2023	08/03/2023 00:00:00 AM	582878

Images

Override

Save and Return

Cancel

This [Type 1](#) page took 0.35 seconds to load.

Figure 2.2.1 – Customer Reporting Detail page with Incomplete Reasons

2.2.3 Description of Changes

1. Update the Customer Reporting Detail page to start capturing the 'General Relief Annual Renewal Packet' reporting type when the form is generated in CalSAWS.
 - a. Report Type field will display as 'General Relief Annual Renewal Packet' and it is not an editable field.
 - b. Submit Month will display the Submit Month for the corresponding 'General Relief Annual Renewal Packet' when its generated.
 - i. This is not an editable field.
 - c. Date Received will display the Status Date when the status of the 'General Relief Annual Renewal Packet' is updated to 'Received' status.
 - i. The Date Received will display as blank when the 'General Relief Annual Renewal Packet' is not yet updated to 'Received' status.
 - ii. This is not an editable field.

d. Personal Contact will display the selected value ('No' or 'Yes') when in view mode.

i. When in Edit mode, this field will display as a drop down and will have the option of "Blank", "No" and "Yes".

1. When "Blank" is selected, it will be save as "No".

Note: This field will work the same way as all other existing reporting type that is currently already captured on the Customer Reporting Detail page.

e. Status Section

i. Program

1. This will display the program that the 'General Relief Annual Renewal Packet' is associated to.

2. This is not an editable field when in Edit mode.

ii. Status

1. This will display the latest status for the selected 'General Relief Annual Renewal Packet' when the page is in View mode.

2. This field will be a drop-down field when the page is in Edit mode and will have the following options based on the latest status:

a. When the latest status is 'Sent' or 'Generated'.

i. The drop-down field will display the following options: 'Blank', 'Not Applicable' and 'Received'.

1. Blank will be the default value when the page first load in Edit mode. Selecting 'blank' and saving the record will not update the status (this is existing functionality).

b. When the latest status is 'Not Applicable'.

i. The drop-down field will display 'blank' only.

1. Blank will be the default value when the page first load in Edit mode. Selecting 'blank' and saving the record will not update the status (this is existing functionality).

c. When the latest status is 'Received'.

i. The drop-down field will display the following options: 'Blank', 'Incomplete', 'Not Applicable' and 'Reviewed – Ready to Run EDBC'.

1. Blank will be the default value when the page first load in

Edit mode. Selecting 'blank' and saving the record will not update the status (this is existing functionality).

- d. When the latest status is 'Incomplete'.
 - i. The drop-down field will display the following options: 'Blank', 'Not Applicable' and 'Reviewed – Ready to Run EDBC'.
 - 1. Blank will be the default value when the page first load in Edit mode. Selecting 'blank' and saving the record will not update the status (this is existing functionality).

Note: When the status of Incomplete is selected, the Incomplete Reason section will display. Selecting a status of Incomplete will not advance the RE.

- e. When the latest status is 'Reviewed-Ready to Run EDBC'.
 - i. The drop-down field will display the following options: 'Blank' and 'Not Applicable'.
 - 1. Blank will be the default value when the page first load in Edit mode. Selecting 'blank' and saving the record will not update the status (this is existing functionality).
- f. When the latest status is 'Complete- EDBC Accepted'.
 - i. The drop-down field will display 'blank' only.
 - 1. Blank will be the default value when the page first load in Edit mode. Selecting 'blank' and saving the record will not update the status (this is existing functionality).

iii. Status Detail

- 1. This field will default to blank when in Edit mode and the selected value on the Status drop-down field is 'Received'.
 - a. Status Detail field will have the following options: 'Blank' and 'Action Required'.

iv. Date

1. When in view mode, the field will display the Date that was entered for the latest status.
2. When in Edit mode, it will be a text field.
 - a. When there is no Date entered in Edit mode, it will default to the system date upon saving the record.
- v. Incomplete Reasons section
 1. This section will display when the value selected from the Status field is "Incomplete".
 2. The following options will be listed when in Edit mode.
 - a. SoF not Signed/Dated
 - b. Missing Verifications
 - c. Missing Answers on SoF
- f. {Program} Status History Section
 - i. {Program} will be the program that the 'General Relief Annual Renewal Packet' is being generated for.
 - ii. It will have 4 columns:
 1. Status
 - a. This will list all the status for the selected 'General Relief Annual Renewal Packet'
 - b. The latest status will always be displayed on top.
 2. Status Date
 - a. This will display the date of the status change.
 - i. Date that was saved on the Date field from the Status Section.
 3. Action Date
 - a. This will display the date and time that the action that updated the customer reporting status was taken.
 4. Updated By
 - a. This will display the staff id of the person that last updated the status.
 - i. This will be a hyperlink and clicking the hyperlink will take the user to the Worker Detail page.
- g. Override button will display for 'General Relief Annual Renewal Packet' reporting type, for users that are assigned to the appropriate security right.
 - i. The Customer Reporting Detail – Override page will be available for the 'General Relief Annual Renewal Packet' reporting type.
- h. Apply existing validations on the Customer Reporting Detail page for the 'General Relief Annual Renewal Packet' reporting type:

Note: The Customer Reporting Detail page will work the same way as other existing reporting type, specifically it'll work the same way as the existing 'General Relief Annual Agreement' Report Type.

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 Update ABP 898 Form Not Received Status Reason

2.3.1 Overview

'ABP 898 Form Not Received' status reason will be updated to 'General Relief Annual Renewal Packet Not Received'.

2.3.2 Description of Changes

1. End date ABP 898 Form Not Received to '08/31/2023'.
2. Add General Relief Annual Renewal Packet Not Received with an effective date of '09/01/2023' to high date.

Note: RE Packets generated in July, and due in August, are the GR AA Packet; not the new GR RE Packet. Both packets will be in use in this period from July and August. However, the start date of the new status reason will not start until September because the packet generated in July and due in August (old GR AA Packet) will still generate the old status reason; while the new packets generated in August and due in September will generate the new status reason. There will not be a scenario where the new status reason is generated in August.

2.3.3 Programs Impacted

General Assistance/General Relief

2.3.4 Performance Impacts

N/A

2.4 Create GA/GR Hearing with New Status Reason

2.4.1 Overview

A hearing will be created when EDBC fails for ABP 898 Form Not Received. The existing logic will be updated to use the new status reason of General Relief Annual Renewal Packet Not Received.

2.4.2 Description of Changes

1. Update the logic that creates a GA/GR Hearing to use the new status reason with an effective date of '08/01/2023'.
2. Update the logic that creates a GA/GR Hearing to use the old status reason with an effective date on or before '08/31/2023'.

2.4.3 Programs Impacted

General Assistance/General Relief

2.4.4 Performance Impacts

N/A

2.5 End Date the General Relief Annual Agreement

2.5.1 Overview

This effort is to end date the existing "General Relief Annual Agreement Packet - ABP 898-16" packet as of this SCR deployment date.

2.5.2 Description of Change

End date the "General Relief Annual Agreement" packet as of the deployment date of this SCR.

Form Title (Document List Page Displayed Name): GR Annual Agreement Packet - ABP 898-16

Form Number: GR AA Packet

2.6 Add the General Relief Annual Renewal Packet

2.6.1 Overview

The effort is to add the “General Relief Annual Renewal Packet” that will have the following forms.

- a) Coversheet
- b) GR 22, General Relief Annual Renewal
- c) GR 21, General Relief Rights and Responsibilities
- d) GEN 1365, Notice of Language Services
- e) PA 1675-2, Direct Deposit Overview
- f) PA 2457, Civil Rights Information Notice
- g) MV 1, California Voter Registration Form
- h) NVRA Voter Preference Form, “Would You Like to Register to Vote?”
- i) PA 2126, Have You Heard?
- j) CW 2223 Demographic Questionnaire
- k) PUB 430, Mental Health Assessment and Use of the Third-Party Verification

2.6.2 Description of Change

Add the “General Relief Annual Renewal Packet” to the system.

2.6.2.1 List of Forms

1. The General Relief Annual Renewal Packet will consist of the following forms when generated from the system.
 - a) Coversheet
 - b) GR 22, General Relief Annual Renewal
 - c) GR 21, General Relief Rights and Responsibilities
 - d) GEN 1365, Notice of Language Services
2. The following forms will be added to the General Relief Annual Renewal Packet at the Central Print Facility.
 - a) PA 1675-2, Direct Deposit Overview
 - b) PA 2457, Civil Rights Information Notice
 - c) MV 1, California Voter Registration Form
 - d) NVRA Voter Preference Form, “Would You Like to Register to Vote?”
 - e) PA 2126, Have You Heard?
 - f) CW 2223 Demographic Questionnaire
 - g) PUB 430, Mental Health Assessment and Use of the Third-Party Verification
 - h) GEN 1365, Notice of Language Services**
3. General Relief Annual Renewal Packet will be added to the system in the following languages.
English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog and Vietnamese.

2.6.2.2 Packet Generation Schedule

1. Update the Batch Job PB19R515 to replace the “General Relief Annual Agreement Packet - ABP 898-16” with the “General Relief Annual Renewal Packet”.
2. Update the Batch schedule for the General Relief Annual Renewal Packet (**PB19R515**) to run on the Batch cut-off date instead of the 3rd Calendar Day of the month.

Note: Batch cut-off dates could vary per month based on the holidays, the batch cut-off dates for the next few months are listed below for reference.

April 18th, 2023

May 18th, 2023

June 17th, 2023

July 20th, 2023

August 19th, 2023

2.6.2.3 Variable Population

Populate the following variables on GR 22 form.

a) GR RE, General Relief Annual Renewal

Variable	Description	Population
DUE_DATE	Due Date will be the 10 th Calendar Day of the RE due month, if the 10 th calendar day falls on a weekend or on a holiday the due date will be the next calendar day which is not a weekend and not a holiday.	Example 1: For the month of May the due date will be 05/10/2023 Example 2: For the month of June the due date will be 06/12/2023 as 10 th and 11 th are not weekdays.
Report month	Report month and year will be the month prior to the RE submit month	Example: RE due month is 04/2023. Report month on GR 22: March
Report Year	Report month and year will be the month prior to the RE submit month	Example: RE due month is 04/2023. Report year on GR 22: 2023

2.6.2.4 Template Repository Details

1. Create General Relief Annual Renewal Packet

Form Header for Coversheet: Existing BRM Header (Header_BRM_EN)

Form Header for GR 22 form: Existing Header (Header_1)

Programs: General Assistance/General Relief

Forms Category: Application

Template Repository Visibility: LA County Only

Form Title (Document List Page Displayed Name): General Relief Annual Renewal Packet

Form Number: GR RE Packet

Include NA Back9: No

Imaging Form Name: GR RE Packet

Imaging Document Type: Gen. Assistance/Gen. Relief (GA/GR)

Form Mockups/Examples: See Supporting Document #7

2. The following parameters should be included in the Document Parameters Page for the GR RE Packet
 - Case Number
 - Customer Name
 - Program
 - Language
 - RE Month
3. Add Form Print Options and Mailing Requirements

The following print options will be included for the GR RE Packet form:

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

Mailing Requirements:

Mail-To (Recipient): Primary Applicant of the GR Program when generated from the batch and the case person selected on the Document Parameters page when generated from the Template Repository.

Mailed From (Return): Office tied to the Worker

Mail-back-to Address: BRM Address

Outgoing Envelope Type: Flat Mail

Return Envelope Type: BRM

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

 CW/CF Electronic Signature (IVR/Text): No

 Check to Sign: No

Post to Self Service Portal (SSP): Yes

2.6.2.5 Journal Entry

Add the following custom Journal entry when the GR RE Packet is generated through Online or Batch

Journal Category: All

Journal Type: Document

Short description: GR RE Packet

Long description: The following forms were included for the {REDETER_DATE} RE: Coversheet, GR 22, GR 21, GEN 1365. The GR 22 is due on the <DUE_DATE> of the Submit Month.

Variable population for the Journal Entry:

Variable	Description	Population
REDETER_DATE	Redeter date will be the month the RE is due.	Example: RE due month is 04/2023. Redeter date will 04/2023
DUE_DATE	Due Date will be the 10 th Calendar Day of the RE due month, if the 10 th calendar day falls on a weekend or on a holiday the due date will be the next calendar day which is not a weekend and not a holiday.	Example 1: For the month of May the due date will be 05/10/2023 Example 2: For the month of June the due date will be 06/12/2023 as 10 th and 11 th are not weekdays.

2.6.2.6 Regression Test

Regression test the tracking barcode logic to check that the tracking barcode is being populated on the updated General Relief Annual Agreement packet.

Note: As per the existing logic the tracking barcode will be populated on every page of the packet (generated from the system).

2.7 Add GR 22 form

2.7.1 Overview

This effort is to add the GR 22 - General Relief Annual Renewal form to the Template Repository.

Programs: General Assistance/General Relief

Forms Category: Form

Template Repository Visibility: LA County Only

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

2.7.2 Form Verbiage

Create GR 22 Form XDP

Form Header: Existing Header (Header_1)

Form Title (Document List Page Displayed Name): General Relief Annual Renewal

Form Number: GR 22

Include NA Back9: No

Imaging Form Name: GR 22

Imaging Document Type: Gen. Assistance/Gen. Relief (GA/GR)

Form Mockups/Examples: See Supporting Document #8

2.7.3 Variable Population

Populate the following variables on GR 22 form.

Form Body Variables:

Variable	Description	Population
Report month and year	Report month and year will be the month prior to the RE submit month	Example: RE due month is 04/2023. Report month/year on GR 22: March/2023

2.7.4 Form generation Conditions

1. Add Form to Template Repository

The GR 22 form will be added to Template Repository. The fields that will be pre-populated on the form are listed in the section above (in Variable population)

2. Add Form Print Options and Mailing Requirements

The following print options will be included for the GR 22 form:

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

Y	Y	Y	Y	Y	Y
---	---	---	---	---	---

Mailing Requirements:

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

Mailed From (Return): Office tied to the Worker

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: No

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

CW/CF Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): Yes

3. The following parameters should be included in the Document Parameters Page for the GR RE Packet

- Case Number
- Customer Name
- Program
- Language
- RE Month

2.8 Update GR 21 form in Template Repository

2.8.1 Overview

This effort is to update the GR 21 form to the latest version. This for is currently part of the “General Relief Annual Renewal Packet” and available in Template Repository.

State Forms: GR 21 (LA County Form)

Current Programs: General Assistance/General Relief

Current Attached Forms: NA

Current Forms Category: Forms

Current Template Repository Visibility: LA County

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

2.8.2 Form/NOA Verbiage

Update GR 21 Form XDP

This form has verbiage updates.

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

Form Mockups: See Supporting Document 12

Note: There is no variable population associated with this Form and the print options remain the same.

2.9 Update ABP 4023-T Failed to Return SSP14 NOA Reason Fragment

2.9.1 Overview

This NOA is generated when there is a discontinuance status reason of "SSP14 Form Not Received."

Reason Fragment Name and ID: GR_TN_FAIL_RETURN_SSP_G648 & 7200

Known County NOA: ABP 4023-T

Current NOA Template: GR_TERMINATION_TEMPLATE

Current Program(s): General Assistance/General Relief

Current Action Type: None

Current Fragment Level: Case

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: None

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

2.9.2 NOA Verbiage

Update Fragment XDP

The verbiage of the fragment will be updated as follows:

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

NOA Mockups/Examples: See supporting document #9

Description	Existing Text	Updated Text	Formatting*
Static	You did not turn in a completed State Supplementary Payment on time.	You did not turn in a completed SSP14 form on time.	Arial Font Size 10

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

2.9.3 NOA Variable Population

There are no updates to this section.

2.9.4 NOA Generation Conditions

There are no updates to this section.

2.10 Updates to Existing SSP 14 Form

2.10.1 Overview

This recommendation is to update the SSP 14. Currently the GR RD SSP 14 Set is used to generate the SSP 14 as part of the GR AA Packet when the packet is generated. If there is any error in the generation process of the GR RD SSP 14 Set, then there is logic to generate the SSP 14 form itself as part of the packet.

State Form: SSP 14 (09/10)

Current Programs: General Assistance/General Relief

Current Attached Form(s): GR AA Packet

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

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

2.10.2 Form Verbiage

The SSP 14 currently has a standard CalSAWS cover page and a blank page prior to the start of the form on the third page. As part of this effort, these two pages will be replaced with the new SSP 14 cover page (please see section 2.9) for LA County.

Update Form XDP

Form Header: Use the new SSP 14 Cover page (see section 2.9) for LA County

For migration counties, use the existing coversheet.

Form Mockups/Examples: See supporting document #10

2.10.3 Form Variable Population

There are no updates to this section.

2.10.4 Form Generation Conditions

1. Updates to Form Generation

Update the SSP 14 generation logic to generate the form separately from the GR AA Packet.

Create a new batch job to generate the SSP 14 on the 3rd of the Report Month, if that day is a weekend or holiday, then the SSP 14 will generate on the next business day. This batch job will also have the same generation conditions as the batch that triggers the new General Relief Annual Renewal Packet; however, it will generate the SSP 14 on the 3rd of the Report Month while the General Relief Annual Renewal Packet is generated on the batch 10-day cutoff.

Example: For General Relief renewal (RE), the RE Due month is April 2023. The SSP 14 will be generated via batch on March 3rd while the GR RE Packet will be generated at the batch 10-day cutoff of March. Both the SSP 14 form and GR RE Packet will be due on April 10th, 2023.

2. Update Form Control

The form currently only has an imaging barcode. A tracking barcode will also be added to the SSP 14 form to track it.

Due Date: 10th Calendar Day of the Renewal Due Month

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

Note: The tracking barcode should display on the SSP 14 form itself, not the cover page.

3. Updates to Form Print/Mailing Options

The form will have the following updates to its Mailing Requirements. The print options are not changed for this form; therefore, not displayed here in the design.

Mailing Options:

Mail-To (Recipient): No change to existing logic

Mailed From (Return): No change to existing logic

Mail-back-to Address: **County BRM Address***

Outgoing Envelope Type: No change to existing logic

Return Envelope Type: Returned Prepaid Envelope

Post to Self Service Portal (SSP): Yes

Note: The BRM logic for this effort will be for all counties as agreed upon by the Client Correspondence Committee as of 05/25/2023. All other logic mentioned in this SCR is still specific to LA County.

2.11 Add New SSP 14 Cover Page Form

2.11.1 Overview

The SSP 14 will now use this new SSP 14 cover page that will inform the customers of how to complete the SSP 14 and its requirements for return.

State Form: N/A – Not a state form

Current Programs: General Assistance/General Relief

Current Attached Form(s): SSP 14

Current Forms Category: Forms

Current Template Repository Visibility: N/A – Form not in repository

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

2.11.2 Form Verbiage

Create Form XDP

A new XDP is created for this new cover page that will be used by the SSP 14 form.

Form Header: CalSAWS standard header (Header_1)

Form Title (Document List Page Displayed Name): N/A – the cover page by itself will never be displayed in the Document List Page.

Form Number: SSP 14 Cover Page

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Imaging Case/Person: N/A

Form Mockups/Examples: See supporting document #10

2.11.3 Form Variable Population

Form Header Variables: The header variables will populate with the existing logic for the SSP 14.

Form Body Variables:

There is 1 variable on the new SSP 14 Cover Page as shown in the table below:

Variable Name	Population	Formatting	Editable*/Field Type	Template Repository Population	Populates with Form Generation
DUE_DATE	Due Date will be the 10th Calendar Day of the RE due month, if the 10th calendar day falls on a weekend or on a holiday the due date will be the next calendar day which is not a weekend and not a holiday.	Arial Font Size 10 Example 1: For the month of May the due date will be 05/10/2023 Example 2: For the month of June the due date will be 06/12/2023 as 10th and 11th are not weekdays.	Yes / Date Field	No – The cover page will never be generated as a stand-alone form from the template repository.	Yes, this will always populate when the SSP 14 generates.

2.11.4 Form Generation Conditions

1. Add Form Generation

This cover page is attached to the front of the SSP 14 and replaces the current header for the SSP 14 for LA County.

There is no other generation logic for this cover page, and it is not available in the Template Repository as a stand-alone form.

2.12 Updates to Existing GR RD SSP 14 Set

2.12.1 Overview

This recommendation is to update the GR RD SSP 14 Set. Currently the GR RD SSP 14 Set is used to generate the SSP 14 as part of the GR AA Packet

when packet is generated. If there is any error in the generation process of the GR RD SSP 14 Set, then there is logic to generate the SSP 14 form itself as part of the packet. This set will be turned off as part of this effort.

State Form: GR RD SSP 14 Set [SSP 14 (09/10)]

Current Programs: General Assistance/General Relief

Current Attached Form(s): GR AA Packet

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

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

2.12.2 Form Verbiage

There are no updates to this section.

2.12.3 Form Variable Population

There are no updates to this section.

2.12.4 Form Generation Conditions

1. Updates to Form Generation

Turn off this GR RD SSP 14 Set as we will only be using the SSP 14 form from section 2.6.

2.13 Add New ABP 4023-T Failed to Return GR RE Packet NOA Reason Fragment

2.13.1 Overview

The current discontinuance NOA that generates when the Annual Agreement is not returned is generated for an EDBC status reason of "ABP898 Form Not Received." Since there is an overlap month where both the Annual Agreement packet and the new Annual Renewal packet are out in production, a new NOA will be created to generate with the new discontinuance status reason of "General Relief Annual Renewal Not Received."

Known County NOA: ABP 4023-T

NOA Template: GR_TERMINATION_TEMPLATE

Program(s): General Assistance/General Relief

Action Type: Same as existing GR_TN_NO_ANNUAL_AGREEMENT_G052 (Existing GR Discontinuance NOA for No Annual Agreement)

Fragment Level: Case

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: Same as existing GR_TN_NO_ANNUAL_AGREEMENT_G052 (Existing GR Discontinuance NOA for No Annual Agreement)

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

2.13.2 NOA Verbiage

Create Fragment XDP

The verbiage of the fragment will be as follows:

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

NOA Mockups/Examples: See supporting document #11

Description	Text	Formatting*
Static	You did not turn in a completed Annual Renewal.	Arial Font Size 10

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

2.13.3 NOA Variable Population

1. **Add Fragment Variable Population**

There is no variable population for the new fragment.

2. **Add Fragment Regulations**

Same as existing GR_TN_NO_ANNUAL_AGREEMENT_G052 (Existing GR Discontinuance NOA for No Annual Agreement)

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

The NOA title and description will be as follows:

NOA Reference on Document List Page: Add new record for NOA_SHORT_DESCR in NOA_SNIPPET_CONFIG as "No GR Annual Renewal Packet".

For example, "NOA – GA – DS – No GR Annual Renewal Packet".

NOA Title: Same as existing GR_TN_NO_ANNUAL_AGREEMENT_G052 (Existing GR Discontinuance NOA for No Annual Agreement)

NOA Footer: Same as existing GR_TN_NO_ANNUAL_AGREEMENT_G052 (Existing GR Discontinuance NOA for No Annual Agreement)

2.13.4 NOA Generation Conditions

The action and message fragments, as well as ordering on the NOA, will follow the existing GR_TN_NO_ANNUAL_AGREEMENT_G052 (Existing GR Discontinuance NOA for No Annual Agreement).

This reason fragment will generate only for the new eligibility status reason of “General Relief Annual Renewal Packet Not Received” as mentioned in section 2.3.

Add a new record and the following values for NOA Reason ID category (CT10548):

Column Name	New Value
CODE_NUM_IDENTIF	*New code
SHORT_DECODE_NAME	GR Annual Renewal Packet Not Received
LONG_DECODE_NAME	General Relief Annual Renewal Packet Not Received
REFER_TABLE_1_DESCR	*New CODE_NUM_IDENTIF from section 2.4 in CT73.
REFER_TABLE_2_DESCR	GA
REFER_TABLE_6_DESCR	New snippet ID

2.14 Regression Testing for GR Discontinuance Batch Sweep

2.14.1 Overview

This recommendation is to regression test the GR discontinuance batch job sweep at the batch 10-day cutoff to see if the NOA – GA – DS – No Annual Agreement/SSP14 generates when the GR AA Packet is marked as “Incomplete” in Customer Reporting.

2.14.2 Description of Changes

Perform regression testing for the following scenario:

- Mark a “Received” GR AA Packet to “Incomplete” in Customer Reporting Detail,
- Ensure the No Annual Agreement GR Discontinuance NOA has not yet been sent,
- Run the GR discontinuance batch job (PB00E173) to discontinue the case at the batch 10-day cutoff.

Expectation: The NOA – GA – DS – No Annual Agreement/SSP14 will generate.

2.15 RE Date Report

2.15.1 Overview

The RE Date Report is an On Request management report used by county workers to process redeterminations (REs). The report provides a listing of CalWORKs, CalFresh, Medi-Cal, Transitional Nutrition Benefit and now General Relief (LA only) where there is an RE that is due. The report is an on-request report, and the data is refreshed daily.

2.15.2 RE Date Report Screenshot

CalSAWS Summary

Data extracted daily as of: 03/08/2023 06:03:38 AM County: - User: User Name

Summary CW and CF Details MC Details TNB Details GA/GR and CF Details

RE Due Month Department Office Unit Worker Mismatching REs Reset

CalWORKs/CalFresh

Program	Total	Customer Reports	Mismatching RE Data Total
CalFresh Only	3,636,284	387,736	0
CalWORKs and CalFresh	588,712	57,676	182,750
CalWORKs Only	316,348	61,912	0

Medi-Cal

Program	Total	Customer Reports	Mismatching RE Data Total
Medi-Cal	9,276,974	1,695,189	41,899

Transitional Nutrition Benefit

Program	Total	Customer Reports
Transitional Nutrition Benefit	2,782	192

GA/GR Only

Program	Total	Customer Reports
GA/GR Only	2,782	192
GA/GR and CalFresh	2,782	192

*Currently only includes General Relief for LA county.

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

2.15.3 Description of Change

1. GA/GR and CF Base Population:

- The program is General Relief.

Code-18	Short Description
GA	General Assistance/General Relief

*Note: This SCR only includes LA county GA/GR information.

- The program has an RE due. An RE due is defined as having no completion date.
- One of the following two conditions is met:

- The current program status is:

Code-72	Short Description
AC	Active
IN	Ineligible

- The current program status is Discontinued, and the current day is less than or equal to the third Thursday after the Discontinuance Effective Date.

Note: A program that is Discontinued for longer than the third Thursday after the Discontinuance Effective Date is dropped from the report because it can no longer be rescinded.

Code-72	Short Description
DS	Discontinued

Note: The base population does not capture programs that have a currently program status of Pending or Denied status.

For a given case, the CalFresh information will be displayed along with the GA/GR information as a single row if it meets the criteria listed below. However, if a person meets the CalFresh criteria but does not meet the GA/GR criteria then the case will not appear on the sheet.

- The program is CalFresh.

Code-18	Short Description
FS	CalFresh

- The sub program is blank or equal to Transitional CalFresh.

Code-368	Short Description
TC	Transitional

- The program has an RE due. An RE due is defined as having no completion date.
- One of the following two conditions is met.
 - The current program status is:

Code-72	Short Description
AC	Active

IN	Ineligible
----	------------

- o The current program status is Discontinued, and the current day is less than or equal to 30 days after the Discontinuance Effective Date.

Note: A program that is Discontinued for longer than 30 days after the Discontinuance Effective Date is dropped from the report because it can longer be rescinded.

Code-72	Short Description
DS	Discontinued

Note: The base population does not capture programs that have a currently program status of Pending or Denied status.

2. Header – Every sheet on the report has the same header. The new GA/GR Details sheet includes the same header. See the attached mockups in the supporting documents section for reference.

Item	Field Name	Field Description
1	System Logo and Sheet Name	The system logo followed by the selected sheet's name.
2	Data extracted daily as of:	The day the report data was last refreshed. Format: Data extracted daily as of: MM/DD/YYYY HH:MM:SS AM/PM
3	County:	The county name the logged in user is associated to. Format: [County Name]
4	User:	The user's username. Format: User [Username]

- 3. Navigation** – Every sheet on the report has the same navigation bar. All sheets will be updated to include a new 'GA/GR and CF Details' link which navigates the user to the new 'GA/GR and CF Details' sheet. See the attached mockups in the Supporting Documents section for reference.

Navigation Button	Description
Summary	The link navigates the user to the Summary sheet.
CW and CF Details	The link navigates the user to the CW and CF details sheet.
MC Details	The link navigates the user to the MC Details sheet.
TNB Details	The link navigates the user to the TNB Details sheet.
GA/GR and CF Details	The link navigates the user to the GA/GR and CF Details sheet.

- 4. Summary Sheet Filters** – All existing filters on the Summary sheet apply to the new GA/GR totals including the Mismatching REs filter. See the GA/GR and CF Details Filter section for reference.
- 5. Summary Sheet Totals-** Update the 'Summary' sheet totals to include the following GA/GR totals. See the attached mockup in the Supporting Documents section for placement of the totals.

Field Name	Field Description
GA/GR Only – Total	A dynamic total of the number of cases in the GA/GR base population which have a GA/GR RE and do not have a CalFresh RE due.
GA/GR Only – Customer Reports	A dynamic total of the number of cases in the GA/GR base population which have a GA/GR RE due and do not have a CalFresh RE due and a customer report was generated for the GA/GR RE.
GA/GR and CalFresh – Total	A dynamic total of the number of cases in the GA/GR base population which have a GA/GR RE due and have a CalFresh RE due.
GA/Grand CalFresh – Customer Reports	A dynamic total of the number of cases in the GA/GR base population which have a GA/GR RE due and

have a CalFresh RE Due and a customer report was generated for the GA/GR RE.

Note: These totals changes as filters are applied to the base population.

6. GA/GR and CF Details - Case List Tab Mockup

CalSAWS GA/GR and CF Details

Data extracted daily as of: 03/08/2023 06:38:38 AM County: - User: User Name

Summary CW and CF Details MC Details TNB Details GA/GR and CF Details

RE Due Month Department Office Unit Worker Reset

*Currently only includes General Relief for LA county. Total: 1,283

Case Number	Case Name	RE Due Month	GA/GR Worker	GA/GR Worker Begin Date	GA/GR Applic... Date	GA/GR Disco... Date	GA/GR RE Due Month	GA/GR Previo... RE Compl... Date	GA/GR Customer Report	GA/GR Custo... Report Gener... Date	GA/GR Customer Report Current Status	GA/GR Custo... Report Current Status	CalFre... Worker Begin Date	CalFre... Applic... Date	CalFre... Disco... Date
1B0H936	Case Name	-	57L8992385	12/30/2022	09/01/2019	01/01/2023	08/2024	09/30/2021	-	-	-	-	-	-	-
1B02W98	Case Name	-	57L8992386	12/30/2022	10/01/2019	10/01/2019	03/2024	09/08/2021	-	-	-	-	-	-	-
1B07T54	Case Name	-	31L882M29	10/03/2022	09/01/2019	09/01/2019	02/2024	10/15/2021	-	-	-	-	-	-	-
1B08M43	Case Name	-	57L8992386	12/30/2022	12/01/2019	12/01/2019	11/2023	05/07/2021	-	-	-	-	-	-	-
1B15K98	Case Name	-	31L882M1Q	07/02/2020	07/01/2019	07/01/2019	12/2023	06/22/2021	-	-	-	-	-	-	-
1B19P93	Case Name	-	57L8810T1G	11/01/2022	09/21/2022	11/01/2022	03/2023	-	-	-	-	-	-	-	-
A218442	Case Name	-	33LS710P93	05/24/2022	12/11/2018	06/01/2020	01/2022	07/02/2021	-	-	-	-	-	-	-
A241962	Case Name	-	33LS22676D	08/31/2022	08/01/2019	08/01/2020	01/2023	07/21/2022	-	-	-	-	-	-	-
A258878	Case Name	-	33LS35A88	12/05/2022	08/04/2009	02/01/2021	01/2022	07/07/2021	-	-	-	-	-	-	-

7. GA/GR and CF Details – Summary Tab Mockup

CalSAWS GA/GR and CF Details

Data extracted daily as of: 03/08/2023 06:38:38 AM County: - User: User Name

Summary CW and CF Details MC Details TNB Details GA/GR and CF Details

RE Due Month Department Office Unit Worker Reset

*Currently only includes General Relief for LA county. Total: 1,283

Program	Total	Customer Reports	Mismatching RE Date Total
GA/GR and CalFresh	0	0	0
GA/GR Only	0	0	0

8. GA/GR and CF Details – Filters

Filter Name	Description
RE Due Month	<p>Restrict the base population based on the GA/GR RE Due Month. By default, the last 6 months are selected from the current month.</p> <p>Values:</p> <ul style="list-style-type: none"> • Blank (Default) – Will not place any restriction on the data. • All GA/GR RE Due Months within the county that are captured by the base population logic. The values are displayed in descending order. Format: MM/YYYY
Department	<p>Restrict the base population based on the GA/GR program assigned Worker's Department.</p> <p>Values:</p> <ul style="list-style-type: none"> • Blank (Default) – Will not place any restriction on the data. • All Department within the county that are captured by the base population logic. The values are displayed in ascending order.
Office	<p>Restrict the base population based on the GA/GR program assigned Worker's Office.</p> <p>Values:</p> <ul style="list-style-type: none"> • Blank (Default) – Will not place any restriction on the data. • All Offices within the county that are captured by the base population logic. The values are displayed in ascending order. Format:

Filter Name	Description
Unit	<p>Restrict the base population based on the GA/GR program assigned Worker's Unit.</p> <p>Values:</p> <ul style="list-style-type: none"> Blank (Default) – Will not place any restriction on the data. All Units within the county that are captured by the base population logic. The values are displayed in ascending order.
Worker	<p>Restrict the base population based on the GA/GR program assigned Worker's selected.</p> <p>Values:</p> <ul style="list-style-type: none"> Blank (Default) – Will not place any restriction on the data. All Worker Numbers within the county that are captured by the base population logic. The values are displayed in ascending order.

9. **GA/GR and CF Details – Summary Tab** - Add a 'Summary' tab to the 'GA/GR and CF Details' sheet. The tab will contain the same GA/GR totals found on the 'Summary' sheet.

Field Name	Field Description
GA/GR Only – Total	A dynamic total of the number of cases in the GA/GR base population which have a GA/GR RE and do not have a CalFresh RE due.
GA/GR Only – Customer Reports	A dynamic total of the number of cases in the GA/GR base population which have a GA/GR RE due and do not have a CalFresh RE due and a customer report was generated for the GA/GR RE.
GA/GR and CalFresh – Total	A dynamic total of the number of cases in the GA/GR base population which have a GA/GR RE due and have a CalFresh RE due.
GA/Grand CalFresh – Customer Reports	A dynamic total of the number of cases in the GA/GR base population which have a GA/GR RE due and have a CalFresh RE Due and a

	customer report was generated for the GA/GR RE.
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10. GA/GR Details – Case List Tab – Add a 'Case List' tab to the 'GA/GR and CF Details' sheet. The columns will be ordered from left to right as listed in the table.

Column Name	Column Description
Case Number	Displays the case number on the case.
Case Name	Displays the case name on the case.
RE Due Month Mismatch	Indicates whether there is a mismatch between a given cases' GA/GR program and CF program. Possible Values: <ul style="list-style-type: none"> • Y – The GA/GR RE and CF RE are not in the same month • N – The GA/GR RE and CF RE are in the same month • *Blank – There is no CF program information.
GA/GR Worker	Displays the worker number of the worker associated to the GA/GR program using the following logic: If the current program status is Active, then displays the current program assigned worker. The column will display 'NO WORKER' if the program does not have an assigned worker. If the current program status is Discontinued or Ineligible, then displays the last known worker of the program.
GA/GR Worker Begin Date	Displays the begin date of the worker associated to the program. The column will be blank if the data is not available. Format: MM/DD/YYYY
GA/GR Application Date	Displays the application date of the latest program application associated to the GA/GR program. Format: MM/DD/YYYY

Column Name	Column Description
GA/GR Discontinuance Date	<p>Displays the effective date of discontinuance for the GA/GR program effective after the RE due month. The column will be blank if the program was not discontinued.</p> <p>Format: MM/DD/YYYY</p>
GA/GR RE Due Month	<p>The column displays the redetermination due month for the GA/GR program.</p> <p>Format: MM/YYYY</p>
GA/GR Previous RE Completed Date	<p>Displays the completion date of the latest completed RE by Due Month of the GA/GR program that does not have a completion reason of (CT-1892):</p> <ul style="list-style-type: none"> • NV - No Longer Valid • CO - Conversion <p>The column will be blank if the data does not exist.</p> <p>Format: MM/DD/YYYY</p>
GA/GR Customer Report Type	<p>329 - Displays the latest customer report type generated for the GA/GR RE.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • General Relief Annual Agreement • *Blank – The column will be blank if no customer reports were generated for the case. <p>*Technical Note: A Customer Report's due date is in the same month as the RE Due Month. The RE due date will be on the 10th of the month.</p>
GA/GR Customer Report Generated Date	<p>Displays the latest date the GA/GR RE Packet was Generated or Sent (Code 258).</p> <p>Format: MM/DD/YYYY</p> <p>The column will be blank if a customer report was not Generated or Sent.</p>

Column Name	Column Description
GA/GR Customer Report Current Status	<p>258 - Displays the current status of the GA/GR RE Packet.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Generated • Sent • Received • Reviewed- Ready to Run EDBC • Complete- EDBC Accepted • Incomplete • Error • Not Applicable <p>Note this list is not restrictive. If a new status is introduced the report will automatically display the value.</p>
GA/GR Customer Report Current Status Date	<p>Displays the status date of the current status of the GA/GR RE Packet.</p> <p>Format:</p> <p>MM/DD/YYYY</p>
CalFresh Worker	<p>Displays the worker number of the worker associated to the CalFresh program using the following logic:</p> <p>If the current program status is Active, then displays the current program assign worker. The column will display 'NO WORKER' if the program does not have an assigned worker.</p> <p>If the current program status is Discontinued or Ineligible, then displays the last known worker of the program.</p>
CalFresh Worker Begin Date	<p>Displays the begin date of the worker associated to the program. The column will be blank if the data is not available.</p> <p>Format:</p> <p>MM/DD/YYYY</p>
CalFresh Application Date	<p>Displays the application date of the latest program application associated to the CalFresh program.</p> <p>Format:</p> <p>MM/DD/YYYY</p>

Column Name	Column Description
CalFresh Discontinuance Date	<p>Displays the effective date of discontinuance for the CalFresh program effective during or after the RE due month. The column will be blank if the program was not discontinued.</p> <p>Format: MM/DD/YYYY</p>
CalFresh RE Due Month	<p>The column displays the redetermination due month for the CalFresh program.</p> <p>Format: MM/YYYY</p>
CalFresh Previous RE Completed Date	<p>Displays the completion date of the latest completed RE by Due Month of the CalFresh program that does not have a completion reason of (CT-1892):</p> <ul style="list-style-type: none"> • NV - No Longer Valid • CO - Conversion <p>The column will be blank if the data does not exist.</p> <p>Format: MM/DD/YYYY</p>
CalFresh Transitional CalFresh	<p>This column populates with a 'Y' if the RE information is associated to a TCF program, otherwise this column will be blank.</p> <p>Technical Note – TCF is identified by looking at the sub program of the CalFresh program.</p>
CalFresh ESAP	<p>Displays the Elderly Simplified Application Project (ESAP) indicator tied to the program status which is effective during the RE Due Month.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Y- The household is considered a CalFresh ESAP household During the RE Due Month. • *Blank- The field will be blank if the household is not considered a CalFresh ESAP household during the RE Due Month.

Column Name	Column Description
CalFresh Customer Report Type	<p>329 - Displays the latest customer report type generated for the CalFresh RE.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • CF RE Packet • CW/CF RE Packet • SAR 7 • *Blank – The column will be blank if no customer report was generated for the case. <p>*Technical Note: A Customer Report's due date will be in the same month as the RE Due Month.</p>
CalFresh Customer Report Generated Date	<p>Displays the latest date the CalFresh customer report was Generated or Sent (Code 258).</p> <p>Format: MM/DD/YYYY</p> <p>The column will be blank if a customer report was not Generated or Sent.</p>
CalFresh Customer Report Current Status	<p>258 - Displays the current status of the CalFresh customer report.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Generated • Sent • Received • Reviewed- Ready to Run EDBC • Complete- EDBC Accepted • Incomplete • Error • Not Applicable <p>Note this list is not restrictive. If a new status is introduced the report will automatically display the value.</p>
CalFresh Customer Report Current Status Date	<p>Displays the event date of the CalFresh customer report's current status.</p> <p>Format: MM/DD/YYYY</p>

11. GA/GR and CF Details – Total

Add a dynamic total above the Case List / Summary container. The total represents the number of records selected from the base

population. The total should equal the number of records displayed in the Case List tab view.

Format:

Total: [Row Count]

12. Report Description – Update the report description to read:

Provides a listing of cases with a CalWORKs, CalFresh, Transitional Nutrition Benefit, General Assistance / General Relief (LA only) or Medi-Cal program where there is an RE that is due or coming due. The report will also identify cases with differing RE dates between CalWORKs and CalFresh, Medi-Cal, and GA/GR and CalFresh.

2.15.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Case Activity**

2.15.5 Counties Impacted

The new sheet will only capture data for LA county.

2.15.6 Security Updates

1. No updates will be made to the report's existing security.

2.15.7 Report Usage/Performance

The report's curation and transformation job are expected to increase at maximum of 25 percent.

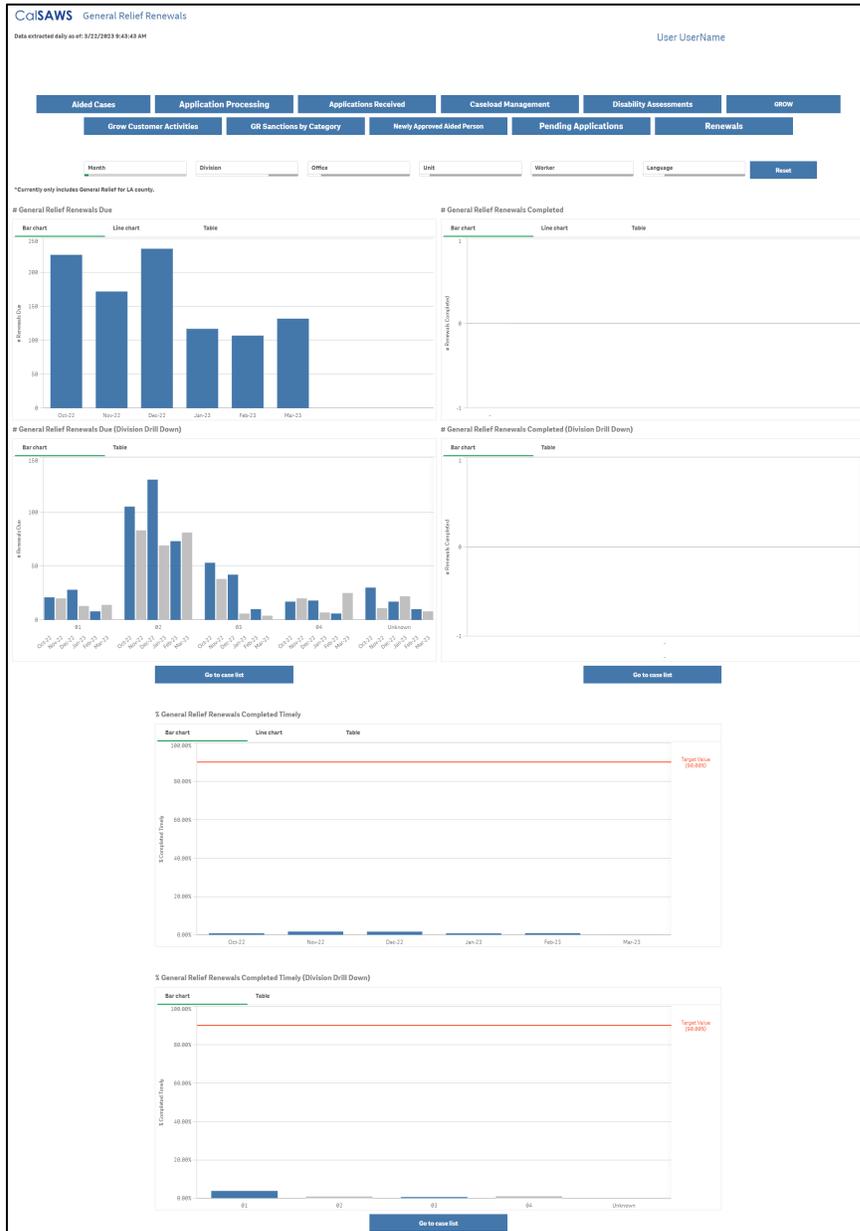
2.16 General Relief Dashboard

2.16.1 Overview

The General Relief Dashboard provides the following information: Aided Cases, Application Processing, Applications Received, Caseload Management, Disability Assessments, GROW, GROW Customer Activities, GR Sanctions by Category, Newly Approved Aided Persons, Pending Applications.

The Dashboard will be updated to include a new sheet to capture General Relief Renewal information.

2.16.2 General Relief Renewals Sheet Screenshot



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

2.16.3 Description of Change

1. **General Relief Renewals** - Add a new sheet to the General Relief Dashboard titled 'General Relief Renewals'. The sheet captures all General Relief renewals that meet the base population logic. See the attached mockup for the placement of the new sheet.

Base Population:

Note the code and logic which captures REs for the CalFresh, CalWORKs, Medi-Cal and CAPI dashboards is the same for all the dashboards. The code will be updated to include the General Relief program for LA county only. No other updates are made to the existing base population logic.

- The program is General Relief.

Code-18	Short Description
GA	General Assistance/General Relief

- The program status as of the first day of the RE Due Month is:

Code-72	Short Description
AC	Active

- The program has an RE with a Due Date \geq 10/01/2015
- The completion reason is blank or is not equal to:

Code-1892	Short Description
NV	No Longer Valid
CO	Conversion

2. **Header** – Add the following headers to the new 'General Relief Renewals' sheet. See the attached mockups in the supporting documents section for reference.

Item	Field Name	Field Description
1	System Logo and Sheet Name	The system logo followed by the selected sheet's name.
2	Data extracted daily as of:	The day the report data was last refreshed. Format: Data extracted daily as of: MM/DD/YYYY HH:MM:SS AM/PM
4	User:	The user's username. Format: User [Username]

3. **Navigation Bar** – Every sheet on the Dashboard has the same navigation bar. Update all sheets to include a new 'Renewals' link which navigates the user to the new 'General Relief Renewals' sheet. See the attached mockups in the Supporting Documents section for reference.

Navigation Button	Description
Aided Cases	The link navigates the user to the General Relief Aided Cases sheet.
Application Processing	The link navigates the user to the General Relief Application Processing sheet.
Application Received	The link navigates the user to the General Relief Application Received sheet.
Caseload Management	The link navigates the user to the General Relief Caseload Management sheet.
Disability Assessments	The link navigates the user to the General Relief Disability Assessments sheet.
GROW	The link navigates the user to the General Relief GROW sheet.
GROW Customer Activities	The link navigates the user to the General Relief GROW Customer Activities sheet.
GR Sanctions by Category	The link navigates the user to the General Relief Sanctions sheet.
Newly Approved Aided Person	The link navigates the user to the General Relief Newly Approved Aided Person sheet.
Pending Application	The link navigates the user to the General Relief Pending Applications sheet.
Renewals	The link navigates the user to the General Relief Renewals sheet.

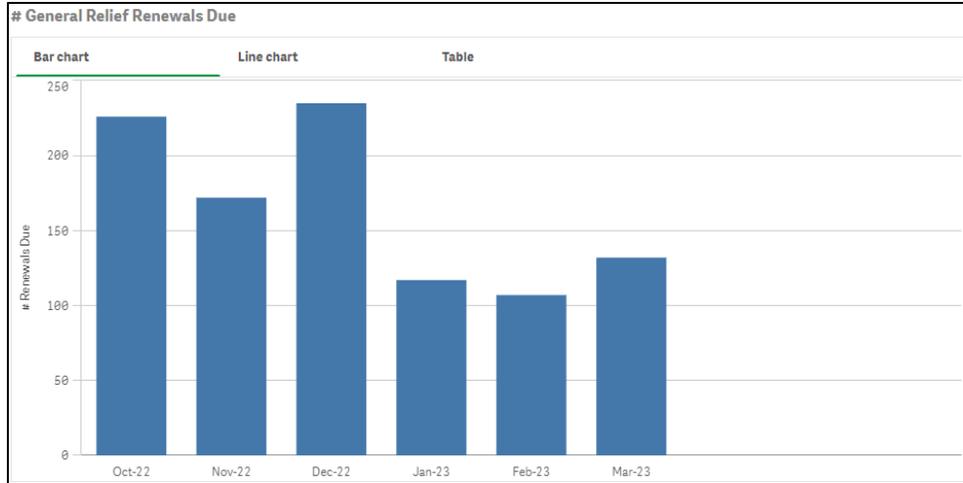
4. **Sheet Filters** – Add the following filters to the General Relief Renewals sheet:

Filter	Description
Month	<p>A multi select parameter which filters the base population to those records where the RE Due Month is equal to the selected value(s).</p> <p>By default, the current month and the last 5 months are selected.</p> <p>Format: Mon-YY</p>
Division	<p>A multi select parameter which filters the base population to those records where the Division is equal to the selected value(s).</p> <p>By default, no value is selected.</p>
Office	<p>A multi select parameter which filters the base population to those records where the Office is equal to the selected value(s).</p> <p>By default, no value is selected.</p>
Unit	<p>A multi select parameter which filters the base population to those records where the Unit is equal to the selected value(s).</p> <p>By default, no value is selected.</p>
Worker	<p>A multi select parameter which filters the base population to those records where the Worker is equal to the selected value(s).</p> <p>By default, no value is selected.</p>
Language	<p>A multi select parameter which filters the base population to those program person that have their language set to the selected value(s).</p> <p>By default, no value is selected.</p>

13. Add a '# General Relief Renewals Due' widget to the General Relief Renewals sheet. The widget captures all renewals in the sheet's base population. See the attached mockups in the Supporting Documents section for reference on the widget's placement.

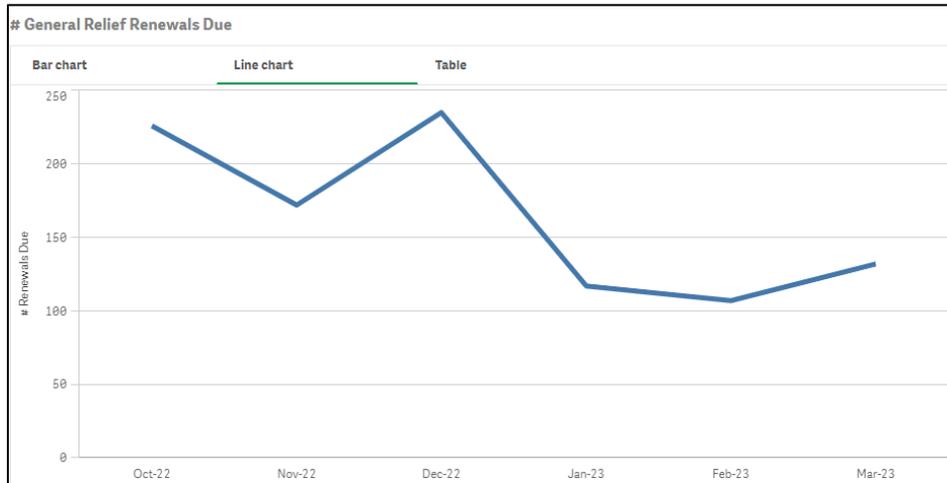
General Relief Renewals Due

View 1: Bar chart



Row = Renewal Due Month
 Format: Mon-YY
 Order: Ascending
 Length of bars = # Renewals Due

View 2: Line chart



Line: Renewal Due Month
 Format: Mon-YY
 Order: Ascending
 Height of line: # Renewals Due

View 3: Table

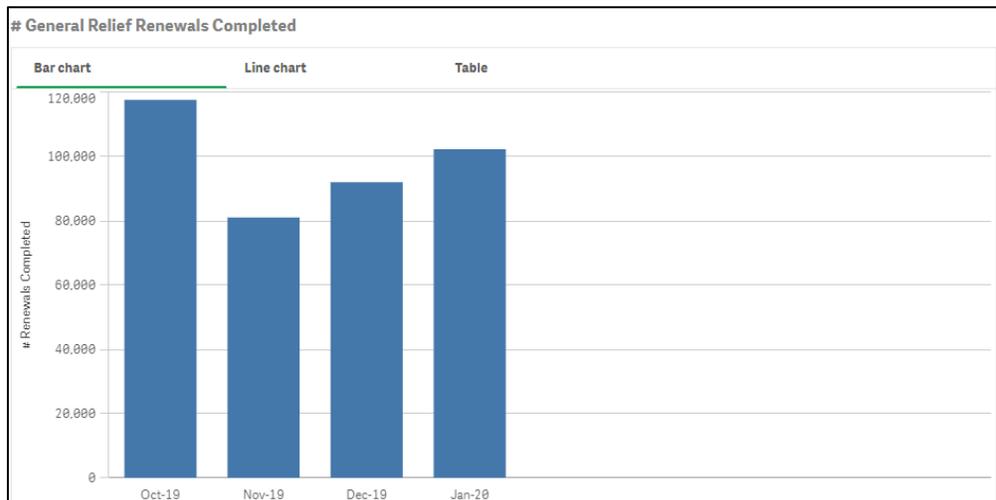
# General Relief Renewals Due		
Bar chart	Line chart	Table
Due Date Month ▲	Q	# Renewals Due
Oct-22		226
Nov-22		172
Dec-22		235
Jan-23		117
Feb-23		107
Mar-23		132

Column 1: Due Date Month
 Format: Mon-YY
 Order: Ascending
 Column 2: # Renewals Due

14. Add a '# General Relief Renewals Completed' widget to the General Relief Renewals sheet. The widget captures all renewals in the sheet's base population that have been completed. See the attached mockups in the Supporting Documents section for reference on the widget's placement.

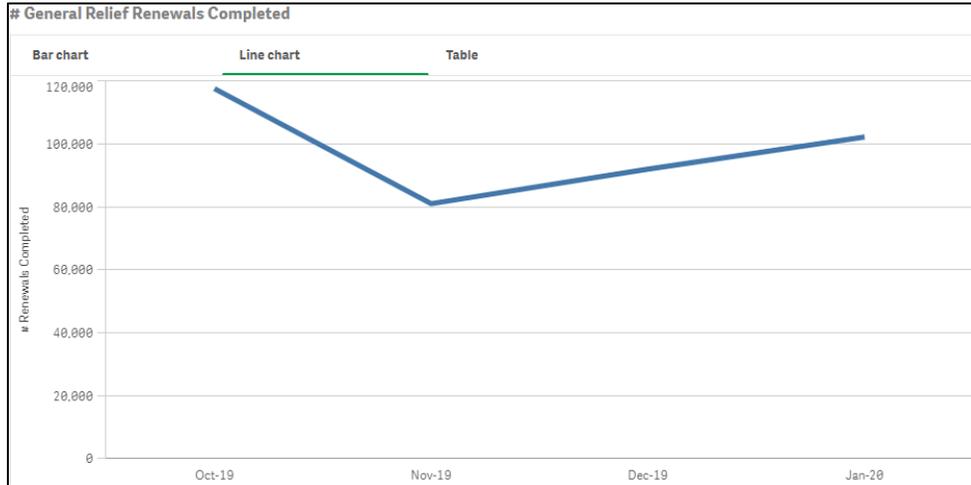
General Relief Renewals Completed

View 1: Bar chart



Bars = Completion Date
 Format: Mon-YY
 Order: Ascending
 Length of bars = # Renewals Completed

View 2: Line chart



Line: Completion Date
 Format: Mon-YY
 Order: Ascending
 Height of line: # Renewals Completed

View 3: Table

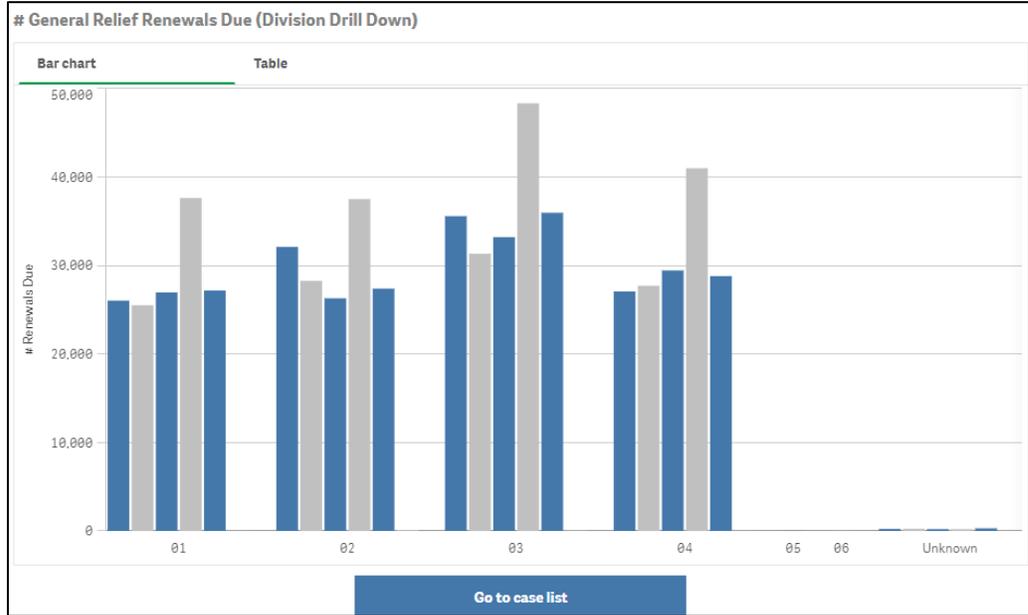
# General Relief Renewals Completed		
Bar chart	Line chart	Table
Completion Month	Q	# Renewals Completed
Sep-19		98,486
Oct-19		117,656
Nov-19		81,061
Dec-19		92,044
Jan-20		102,299
Feb-20		101,227

Column 1: Completion Month
 Format: Mon-YY
 Order: Ascending
 Column 2: # Renewals Completed

15. Add a '# General Relief Renewals Due (Division Drill Down)' widget to widget to the General Relief Renewals sheet. The widget captures all renewals in the sheet's base population. The widget includes a link titled 'Go to case list' which navigates to a new '# General Relief Renewals Due' case list. See the attached mockups in the Supporting Documents section for reference on the widget's placement.

General Relief Renewals Due (Division Drill Down)

View 1: Bar chart



Group = Division Drill Down
 Order: Ascending
 Bars = Due Date Month
 Order: Ascending
 Length of bars = # Renewals Due

View 2: Table

The table displays the number of renewals due for each division. The Y-axis is labeled '# Renewals Due' and ranges from 0 to 50,000. The X-axis shows Division (01, 02, 03, 04, 05, 06, Unknown). The table is titled '# General Relief Renewals Due (Division Drill Down)'.

Division	# Renewals Due
01	143,387
02	151,731
03	184,534
04	154,091
05	1
06	1
Unknown	1,237

Go to case list

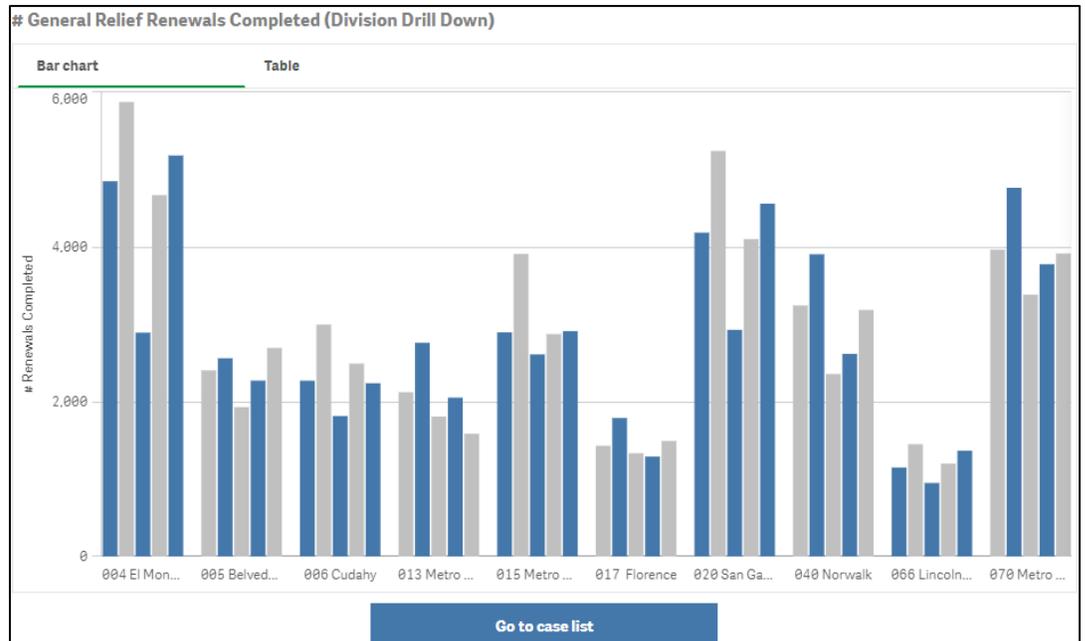
Column 1: Division Drill Down
 Order: Ascending

Columns 2: # Renewals Due

16. Add a '# General Relief Renewals Completed (Division Drill Down)' widget to widget to the General Relief Renewals sheet. The widget captures all renewals in the sheet's base population that are completed. The widget includes a link titled 'Go to case list' which navigates to a new '# General Relief Renewals Completed' case list. See the attached mockups in the Supporting Documents section for reference on the widget's placement.

General Relief Renewals Completed (Division Drill Down)

View 1: Bar chart



Group = Division Drill Down
Order: Ascending
Bars = Completion Month
Order: Ascending
Length of bars = # Renewals Completed

View 2: Table

General Relief Renewals Completed (Division Drill Down)

Bar chart Table

Office	# Renewals Completed
004 El Monte (San Gab. V. Serv. Center)	23,469
005 Belvedere	11,867
006 Cudahy	11,816
013 Metro Family	10,332
015 Metro East	15,206
017 Florence	7,339
020 San Gabriel Valley	21,017
040 Norwalk	15,314
066 Lincoln Heights	6,118
070 Metro Special Office	19,808

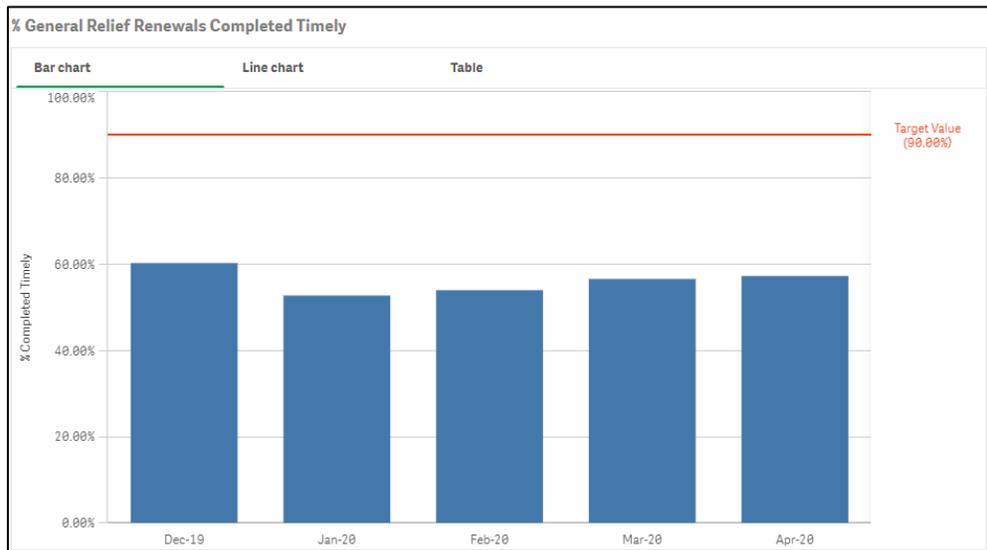
Go to case list

Column 1: Division Drill Down
 Order: Ascending
 Columns 2: # Renewals Completed

17. Add a '% General Relief Renewals Completed Timely' widget to the General Relief Renewals sheet. The widget captures all renewals in the sheet's base population that are completed. See the attached mockups in the Supporting Documents section for reference on the widget's placement.

% General Relief Renewals Completed Timely

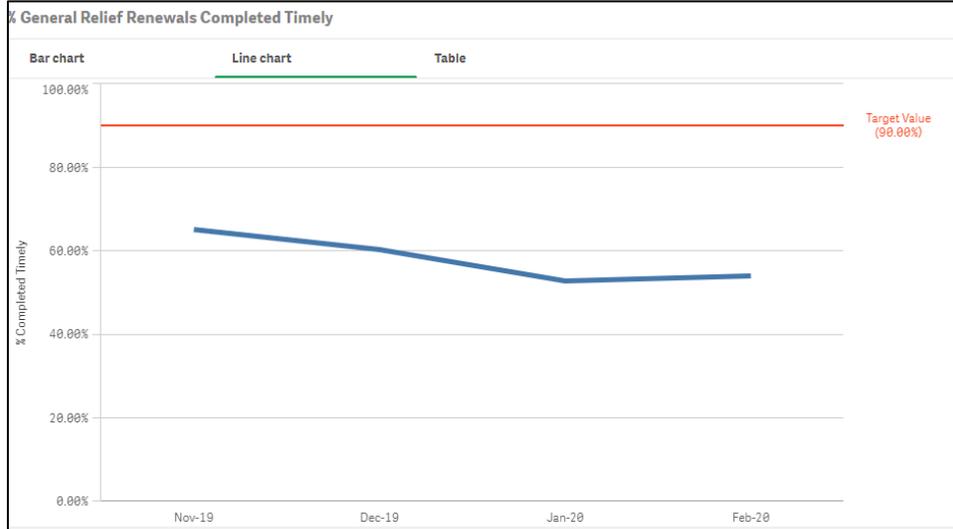
View 1: Bar chart



Group = Renewal Due Month

Order: Ascending
 Length of bars = % Completed Timely
 Target Value = 90.00%

View 2: Line Chart



Line: Renewal Due Month
 Order: Ascending
 Height of Line: % Completed Timely
 Target Value = 90.00%

View 3: Table

% General Relief Renewals Completed Timely	
Due Date Month	% Renewals Completed Timely
Nov-19	65.10%
Dec-19	60.30%
Jan-20	52.77%
Feb-20	54.01%

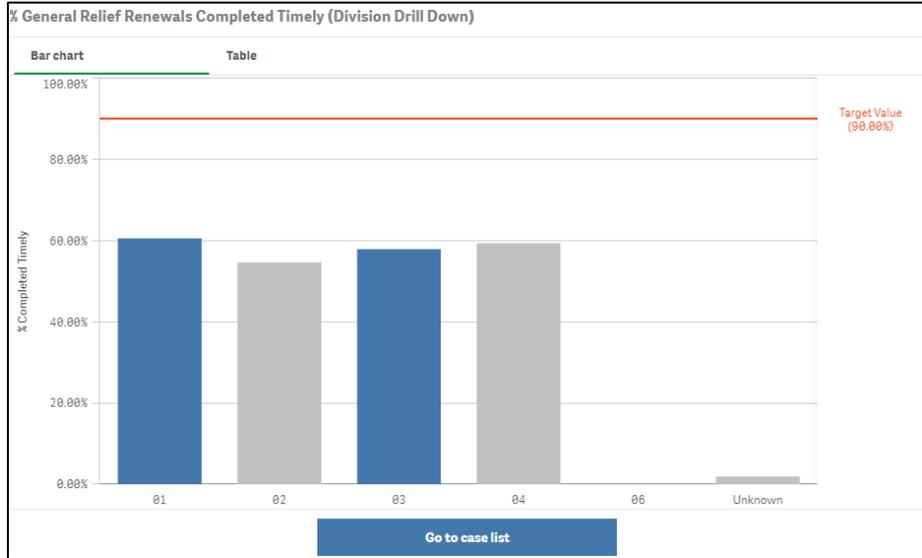
Column 1: RE Due Month
 Order: Ascending
 Columns 2: % Renewals Completed Timely

18. Add a '% General Relief Renewals Completed Timely (Division Drill Down)' widget to the General Relief Renewals sheet. The widget

captures all renewals in the sheet's base population where the RE was completed. The widget includes a 'Go to case list' link which navigates the user to the new '% General Relief Renewals Completed Timely' case list. See the attached mockups in the Supporting Documents section for reference on the widget's placement.

% General Relief Renewals Completed Timely (Division Drill Down)

View 1: Bar chart



Bars = Division Drill Down
 Order: Ascending
 Length of bars = % Completed Timely
 Target Value = 90.00%

View 2: Table

% General Relief Renewals Completed Timely (Division Drill Down)

Division	% Renewals Completed Timely
Totals	58.06%
01	60.60%
02	54.66%
03	57.93%
04	59.40%
06	0.00%
Unknown	1.92%

[Go to case list](#)

Column 1: Division Drill Down
 Order: Ascending
 Column 2: % Renewals Completed Timely

19. Add a case list titled 'General Relief Renewals Due' to the General Relief Renewals sheet. The sheet includes a 'Return' button which returns the user to the 'General Relief Renewals' sheet.

CalSAWS General Relief Renewals Due

Data extracted daily as of: 3/22/2023 9:43:43 AM User UserName

Case Number	Case Name	Program	Primary Language	Division	Office	Unit	Worker	Renewal Due Month
889W19	Case Name	General Assistance/General Relief	Spanish	04	831 South Family	40	19DP1406N	03/2023
88CD073	Case Name	General Assistance/General Relief	English	03	848 Norwalk	4C- MEDS RECON	19DP404C40	12/2022
88C1469	Case Name	General Assistance/General Relief	Spanish	02	868 Long Term Care	5L- 3V3	19DP805L3I	10/2022
88G0687	Case Name	General Assistance/General Relief	Spanish	02	838 Metro North Office	2N- 333	19DP837NBU	11/2022
88G0637	Case Name	General Assistance/General Relief	English	03	848 Norwalk	4C- MEDS RECON	19DP404C4P	10/2022
88J0876	Case Name	General Assistance/General Relief	Arabic	02	836 Pomona	4V- 3UF	19DP364V61	12/2022
88J0M19	Case Name	General Assistance/General Relief	Spanish	03	806 Cudahy	PE- MSR	19DP86PE84	12/2022
88JZ198	Case Name	General Assistance/General Relief	English	01	834 Lancaster	17- 282	19DP341787	12/2022
88K0879	Case Name	General Assistance/General Relief	Mandarin/Chinese	02	814 Civic Center	1K- CalFresh/Medi-Cal Approved	19DP141K22	12/2022
88K5F83	Case Name	General Assistance/General Relief	English	03	804 Cudahy	PE- MSR	19DP86PE81	10/2022
88K1L17	Case Name	General Assistance/General Relief	Spanish	03	804 Cudahy	PE- MSR	19DP86PE88	10/2022
88M1K92	Case Name	General Assistance/General Relief	English	02	868 Long Term Care	15- 2804	19DP801367	11/2022
88M7583	Case Name	General Assistance/General Relief	Spanish	02	818 Whittier Special Office	KJ- GRCC	19DP18KJ88	11/2022
88MCC32	Case Name	General Assistance/General Relief	Spanish	02	868 Long Term Care	1K- CalFresh/Medi-Cal Approved	19DP801K16	12/2022
88MCT74	Case Name	General Assistance/General Relief	English	02	892 Hawthorne Medi-Cal Regional	1J- CalFresh/Medi-Cal Approved	19DP821J8K	12/2022
88MPP56	Case Name	General Assistance/General Relief	Mandarin/Chinese	02	814 Civic Center	1K- CalFresh/Medi-Cal Approved	19DP141K2X	10/2022
88N2M88	Case Name	General Assistance/General Relief	Spanish	02	868 San Gabriel	A3- Anarado - AE	19DP86A229	10/2022
88P7D25	Case Name	General Assistance/General Relief	English	02	868 Long Term Care	1K- CalFresh/Medi-Cal Approved	19DP801K18	12/2022
88QW118	Case Name	General Assistance/General Relief	Russian	04	868 Rancho Park	6E- Pineda - 6E	19DP86E6D0	03/2023
88R9732	Case Name	General Assistance/General Relief	Mandarin/Chinese	03	828 San Gabriel Valley	3D- 3CB	19DP203D6E	11/2022
88Z6W84	Case Name	General Assistance/General Relief	Russian	04	868 Rancho Park	6E- Pineda - 6E	19DP86E6D0	03/2023
88T9882	Case Name	General Assistance/General Relief	Spanish	03	828 San Gabriel Valley	47- 3M1	19DP204783	12/2022

[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. The data is restricted by the filters that were selected in the previous page.

Columns:

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

1. Case Number
2. Case Name
3. Program
4. Primary Language
5. Division
6. Office
7. Unit
8. Worker
9. Renewal Due Month

20. Add a case list titled 'General Relief Renewals Completed' to the General Relief Renewals sheet. The sheet includes a 'Return' button which returns the user to the 'General Relief Renewals' sheet.

Case Number	Case Name	Program	Primary Language	Division	Office	Unit	Worker	Renewal Due Month	Renewal Completion Date
8080801	Case Name	General Relief/General Assistance	Spanish	04	807 South Special	L4 - Koozeva - 14	190P81245V	11/2018	11/21/2019
8080801	Case Name	General Relief/General Assistance	Spanish	04	807 South Special	LW	190P810X18	11/2018	10/28/2017
8080801	Case Name	General Relief/General Assistance	Spanish	04	807 South Special	LW	190P810X18	11/2017	09/28/2018
8080801	Case Name	General Relief/General Assistance	Spanish	04	807 South Special	OE - MCE	190P810E8J	10/2015	10/06/2016
8080801	Case Name	General Relief/General Assistance	Spanish	04	808 Southwest Special	A1	190P84A11S	11/2019	02/12/2021
8080801	Case Name	General Relief/General Assistance	Spanish	04	808 Southwest Special	B5 - CW Approved Bilingual	190P88551U	11/2020	12/31/9999
8080802	Case Name	General Relief/General Assistance	English	04	811 South Family	SR - 320	190P11580K	10/2015	10/13/2016
8080802	Case Name	General Relief/General Assistance	English	04	811 South Family	SR - 320	190P11580K	11/2016	10/20/2017
8080802	Case Name	General Relief/General Assistance	English	04	811 South Family	SR - 320	190P11580K	11/2019	12/31/9999
8080802	Case Name	General Relief/General Assistance	English	04	811 South Family	F2	190P11F207	11/2017	01/28/2019
8080802	Case Name	General Relief/General Assistance	English	04	811 South Family	F2	190P11F208	11/2018	01/15/2020
8080818	Case Name	General Relief/General Assistance	Spanish	03	804 El Monte (San Gab. V. Serv. Center)	7B - 44X	190P84790B	09/2016	10/02/2017
8080818	Case Name	General Relief/General Assistance	Spanish	03	804 El Monte (San Gab. V. Serv. Center)	7B - 44X	190P84790H	09/2017	12/14/2018
8080818	Case Name	General Relief/General Assistance	Spanish	03	804 El Monte (San Gab. V. Serv. Center)	7B - 44X	190P84790H	09/2018	10/09/2019
8080818	Case Name	General Relief/General Assistance	Spanish	03	804 El Monte (San Gab. V. Serv. Center)	P6 - HRT2	190P84P601	09/2019	12/31/9999
8080814	Case Name	General Relief/General Assistance	Spanish	03	813 Metro Family	1K - CalFresh/Med-Cal Approved	190P131K3L	05/2018	05/01/2019
8080814	Case Name	General Relief/General Assistance	Spanish	03	813 Metro Family	1U - CalFresh/Med-Cal Approved	190P131U4F	05/2020	12/31/9999
8080814	Case Name	General Relief/General Assistance	Spanish	03	813 Metro Family	1W - SAR7/OR7 Change Center	190P131W33	05/2019	05/05/2020
8080814	Case Name	General Relief/General Assistance	Spanish	03	813 Metro Family	15 - Medical	190P13154C	05/2017	06/28/2018

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. The data is restricted by the filters that were selected in the previous page.

Columns:

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

1. Case Number

2. Case Name
3. Program
4. Primary Language
5. Division
6. Office
7. Unit
8. Worker
9. Renewal Due Month
10. Renewal Completion Date

21. Add a case list titled '% General Relief Renewals Completed Timely' to the General Relief Renewals sheet. The sheet includes a 'Return' button which returns the user to the 'General Relief Renewals' sheet.

CalSAWS % General Relief Renewals Completed Timely

Data extracted daily as of: 3/22/2023 9:43:43 AM

User UserName

Case Number	Case Name	Program	Primary Language	Division	Office	Unit	Worker	Renewal Due Month	Renewal Completion Date	Timeliness Indicator
B88WX19	Case Name	Medi-Cal	Spanish	04	031 South Family	40	18DP31403N	03/2023		Not Timely
B8CD873	Case Name	Medi-Cal	English	03	049 Norwalk	40-MEDS RECON	18DP488C40	12/2022		Not Timely
B8C1499	Case Name	Medi-Cal	Spanish	02	088 Long Term Care	5L-3V3	18DP889L33	10/2022		Not Timely
B9C2557	Case Name	Medi-Cal	Spanish	02	039 Metro North Office	2N-333	18DP828N9U	11/2022		Not Timely
B9C2937	Case Name	Medi-Cal	English	03	049 Norwalk	40-MEDS RECON	18DP488C4P	10/2022		Not Timely
B9J8R76	Case Name	Medi-Cal	Arabic	02	036 Pomona	4V-3UF	18DP584W1	12/2022		Not Timely
B9JXK19	Case Name	Medi-Cal	Spanish	03	086 Custody	PE-MSR	18DP86P84	12/2022		Not Timely
B9JZ198	Case Name	Medi-Cal	English	01	034 Lancaster	17-202	18DP914197	12/2022		Not Timely
B9KD879	Case Name	Medi-Cal	Mandarin (Chinese)	02	014 Civic Center	1K-Ca/Fresh/Medi-Cal Approved	18DP141K2Z	12/2022		Not Timely
B9KDF83	Case Name	Medi-Cal	English	03	086 Custody	PE-MSR	18DP86P81	10/2022		Not Timely
B9KT117	Case Name	Medi-Cal	Spanish	03	086 Custody	PE-MSR	18DP86P88	10/2022		Not Timely
B9M1K02	Case Name	Medi-Cal	English	02	088 Long Term Care	1S-2884	18DP881S87	11/2022		Not Timely
B9M7569	Case Name	Medi-Cal	Spanish	02	018 Welfare Special Office	KJ-GRCC	18DP18K48B	11/2022		Not Timely
B9MCC33	Case Name	Medi-Cal	Spanish	02	088 Long Term Care	1K-Ca/Fresh/Medi-Cal Approved	18DP881K16	12/2022		Not Timely
B9MC774	Case Name	Medi-Cal	English	02	092 Hawthorne Medi-Cal Regional	1J-Ca/Fresh/Medi-Cal Approved	18DP921J8K	12/2022		Not Timely
B9MPP56	Case Name	Medi-Cal	Mandarin (Chinese)	02	014 Civic Center	1K-Ca/Fresh/Medi-Cal Approved	18DP141K2X	10/2022		Not Timely
B9K1M68	Case Name	Medi-Cal	Spanish	03	085 Behavioral	AJ-Abused-AJ	18DP85A215	10/2022		Not Timely
B9P7839	Case Name	Medi-Cal	English	02	088 Long Term Care	1K-Ca/Fresh/Medi-Cal Approved	18DP881K16	12/2022		Not Timely

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. The data is restricted by the filters that were selected in the previous page.

Columns:

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

1. Case Number
2. Case Name
3. Program
4. Primary Language
5. Division
6. Office

- 7. Unit
- 8. Worker
- 9. Renewal Due Month
- 10. Renewal Completion Date
- 11. Timeliness Indicator

22. **Column Definitions:** Define the new columns listed above as follows:

Column Name	Column Description
Case Number	Displays the Case Number on the case.
Case Name	Displays the Case Name on the case.
Program	Displays the program name of the program.
Primary Language	Displays the current Primary Language of the primary applicant.
Division	Displays the Division of the program assigned worker.
Office	Displays the Office of the program assigned worker.
Unit	Displays the Unit of the program assigned worker.
Worker	Displays the current program assigned worker of the program.
Renewal Due Month	Displays the RE Due Month of the renewal. Format: MM/YYYY
Renewal Completion Date	Displays the completion date of the Renewal. Format: MM/DD/YYYY The column will be blank if the RE was not completed.

Column Name	Column Description
Timeliness Indicator	<p>Indicates whether the RE was completed timely.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Timely – If the completion date is less than or equal to the RE Due month. • Not Timely - If the completion date is greater than the RE Due month.

2.16.4 Report Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: DPSSSTATS**
- **Title: Renewals**
- **Category: General Relief**

2.16.5 Counties Impacted

The new sheet will only have data available for LA county.

2.16.6 Security Updates

1. No updates will be made to the report's existing security.

2.16.7 Report Usage/Performance

The report's curation and transformation job are expected to increase at max by 25 percent.

2.17 Update Discontinue GR for Non-Receipt of Forms Batch Sweep

2.17.1 Overview

Update PB00E173 to also sweep for the new General Relief Annual Renewal Packet.

2.17.2 Description of Change

1. Update PB00E173 so that it also sweeps for cases that have not returned the new General Relief Annual Renewal Packet (GR RE Packet).

2.17.3 Execution Frequency

No Change

2.17.4 Key Scheduling Dependencies

No Change

2.17.5 Counties Impacted

LA

2.17.6 Data Volume/Performance

N/A

2.17.7 Failure Procedure/Operational Instructions

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	RE Date Report – Summary Sheet Mockup	 RE Date Report Summary Sheet.png
2	Reports	RE Date Report – GA/GR Details Sheet Mockup	 RE Date Report GAGR Details Mockup

3	Reports	General Relief Renewals Sheet Mockup	 General Relief Renewals Sheet Mock
4	Reports	General Relief Renewals Due Case List Mockup	 General Relief Renewals Due Case Li
5	Reports	General Relief Renewals Completed Case List Mockup	 General Relief Renewals Completed
6	Reports	% General Relief Renewals Completed Timely Case List	 % General Relief Renewals Completed
7	Forms	General Relief Annual Renewal Packet Mockup	General Relief Annual Renewal Packet Mockup.pdf
8	Forms	GR 22 Form Mockup	GR22_Form_Mockup.pdf
9	NOAs	GR Discontinuance NOA - Failed to Return SSP 14 NOA Mockup	Failed to Return SSP 14_EN.pdf
10	Forms	SSP 14 and Cover Page Mockup	SSP14_EN.pdf
11	NOAs	GR Discontinuance NOA - Failed to Return GR RE Packet NOA Mockup	Failed to Return GR RE Packet_EN.pdf
12	Form	GR 21 Form Mockup	GR21_Form_Mockup.pdf

4 APPENDIX

4.1 Discontinuance GR For Non-Receipt of Forms Batch Job PB00E173

The following are the existing conditions that triggers the batch sweep to discontinue the GR Program for not returning the QR7 or General Relief Annual Agreement Packet:

1. Customer Report Type Code is QR7 or General Relief Annual Agreement, and
2. Current date is between program begin date and end date, and
3. Customer Report Effective Month is current month, and

4. EDBC begin date is less than or equal to beginning of current month, and
5. EDBC end date is greater than or equal to beginning of current month, and
6. EDBC status is Accepted – Saved, and
7. Customer Report Type Detail Status code is Sent, Incomplete, or Error

5 REQUIREMENTS

5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; 	<p>Replacing the Annual Agreement packet with the new Annual Renewal Packet. Updating the NOAs tied to the annual renewal for General Relief.</p>

	u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	
2.12.1.1 CAR-1037	The LRS shall identify and display cases subject to periodic reporting requirements, by program or combination of programs.	The Customer Reporting pages will be updated to capture the new Packet for LA county in order for the renewal packet to be track.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253349

Task Mgmt: Get Next Prioritization Configurability

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/04/2023	1.0	Initial Revision	Vallari Bathala
05/10/2023	1.1	<p>Update Section 2.1.3 Description of Changes:</p> <p>2.b Clarified that the Name hyperlink will not display unless the Bank is saved in the Bank Detail page.</p> <p>2.e Clarified that the Edit button will not display unless the Bank is saved in the Bank Detail page.</p> <p>3.a Clarified that the Name hyperlink will not display unless the Bank is saved in the Bank Detail page.</p> <p>3.d Clarified that the Edit button will not display unless the Bank is saved in the Bank Detail page.</p> <p>Update Section 2.2.3 Description of Changes:</p> <p>3. Update 'Save' button to 'Save and Return' for create and edit modes.</p> <p>Update Section 2.2.2 Get Next Priority Detail Mockups</p> <p>Update Figure 2.2.2-1 – Get Next Priority – Create/Edit Mode to show 'Save and Return' button.</p>	Vallari Bathala

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	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Bank Detail.....	5
	2.1.1 Overview	5
	2.1.2 Bank Detail Mockups.....	5
	2.1.3 Description of Changes	6
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1 OVERVIEW

This design describes the details for adding an additional configuration to Task Banks which will allow for more targeted prioritization of Tasks during Get Next processing.

1.1 Current Design

Get Next processing determines which Task Banks a worker is associated to, filters the Tasks within these Task Banks to the Tasks that the worker's Position is configured to receive, and applies an order criterion (highest priority, oldest due date, oldest created date) to retrieve a single Task to be assigned to the Worker.

A simplified configuration that allows a temporary prioritization of Tasks by Get Next does not exist in the CalSAWS System.

1.2 Requests

1. Provide functionality that allows a simplified configuration by Task Type which will be prioritized by Get Next processing for a specified period.

1.3 Overview of Recommendations

1. Update the Bank Detail page to include an additional configurable panel that allows users to configure one or more Get Next Priority rules for a Task Bank.
2. Modify Get Next processing to evaluate Get Next Priority rules.

1.4 Assumptions

1. Get Next Priority rules is an optional feature that may be used by counties, if necessary, it is not a requirement for Get Next processing. Similarly, there are no adverse impacts to Get Next processing currently in place.

2 RECOMMENDATIONS

2.1 Bank Detail

2.1.1 Overview

This section describes modifications to the Bank Detail page to include a Get Next Priority panel.

2.1.2 Bank Detail Mockups

Bank Detail

*- Indicates required fields

Edit Close

General Bank Information

Bank ID:	<input type="text"/>	Bank Name: *	<input type="text"/>
Office Name: *	CalSAWS Project Office	Unit ID: *	XX00
Associate All Positions In Unit and Office: *			
No			

▼ Task Categories

▶ Additional Associations

▶ Excluded Associations

▼ Get Next Priority

Active

Order Name	Task Type	Task Sub-Type
1	Purple Task Additional Help	Purple
2	Orange Task Additional Help	Orange

▼ Inactive

Name	Task Type	Task Sub-Type
Blue Task Additional Help	Blue	

Edit Close

Figure 2.1.1-1 – Bank Detail – View Mode

Bank Detail

*- Indicates required fields

Save
Cancel

General Bank Information

Bank ID:
[Input Field]

Office Name: *
CalSAWS Project Office

Associate All Positions In Unit and Office: *
[No v]

Bank Name: *
[Input Field]

Unit ID: *
XX00

Task Categories

Additional Associations

Excluded Associations

Get Next Priority

Add

Active

Order Name	Task Type	Task Sub-Type	
[1 v] Purple Task Additional Help	Purple		Edit
[2 v] Orange Task Additional Help	Orange		Edit

Inactive

Name	Task Type	Task Sub-Type	
Blue Task Additional Help	Blue		Edit

Save
Cancel

Figure 2.1.1-2 – Bank Detail – Edit Mode

2.1.3 Description of Changes

Add a Get Next Priority panel to the Bank Detail page in the CalSAWS System. This panel will be collapsed on load of the page.

1. **BUTTON:** Add - This button displays when the page is in create or edit mode and the worker's security profile contains the "BankDetailEdit" security right. Clicking this button will navigate to the Get Next Priority Detail page in create mode.
2. Active Panel

This panel will display Active Get Next Priority rules for the Task Bank.

- a. Order – In Create or Edit mode, this column is a dropdown menu containing the numbers 1 through X where X is the number of Active Get Next Priorities in the panel. This value controls the order in which the Active Get Next Priorities will be evaluated during Get Next. When a new Get Next Priority is added in this panel, the default value in the Order field will be the total number of Get Next Priorities in the panel. In view mode, Get Next Priorities in this panel will display ordered ascending by this field.

Example: If the panel includes three Get Next Priorities, the numbers 1, 2, and 3 will be available in this dropdown menu.

- b. Name – The Name of the Get Next Priority rule. This value will display as a hyperlink which will navigate to the Get Next Priority Detail page in View mode. **The hyperlinks will not display until the Bank has been created and saved in the Bank Detail page.**
- c. Task Type – The Task Type associated to the Get Next Priority rule.
- d. Task Sub-Type – The Task Sub-Type associated to the Get Next Priority rule. This column will be blank if the Get Next Priority rule does not have a Task Sub-Type associated.
- e. **BUTTON:** Edit – This button will display for each Get Next Priority rule if the worker's security profile contains the "BankDetailEdit" security right. The button will navigate to the Get Next Priority Detail page in Edit mode for the Get Next Priority rule. **The button will not display until the Bank has been created and saved in the Bank Detail page.**

3. Inactive Panel

This panel will display Inactive Get Next Priority rules for the Task Bank. The rows within this panel will be ordered alphabetically by Name.

- a. Name – The Name of the Get Next Priority rule. This value will display as a hyperlink which will navigate to the Get Next Priority Detail page in View mode. **The hyperlinks will not display until the Bank has been created and saved in the Bank Detail page.**
- b. Task Type – The Task Type associated to the Get Next Priority rule.
- c. Task Sub-Type – The Task Sub-Type associated to the Get Next Priority rule. This column will be blank if the Get Next Priority rule does not have a Task Sub-Type associated.
- d. **BUTTON:** Edit – This button will display for each Get Next Priority rule if the worker's security profile contains the "BankDetailEdit" security right. The button will navigate to the Get Next Priority Detail page in Edit mode for the Get Next Priority rule. **The**

button will not display until the Bank has been created and saved in the Bank Detail page.

2.1.4 Page Validation

1. "Order – Each Active Get Next Priority must have a unique order value."
 - a. A validation message displays when the User attempts to associate the same numeric value in the Order field for one or more Active Get Next Priorities.

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Bank – Add or Edit a Task Bank to access the Bank Detail page.

2.1.6 Security Updates

N/A – There are no modifications to security.

2.1.7 Page Mapping

Update page mapping for the Bank Detail page.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Get Next Priority Detail

2.2.1 Overview

This section describes the functionality for a new Get Next Priority Detail page. This page will allow counties to configure one or more Get Next Priority rules for a Task Bank.

2.2.2 Get Next Priority Detail Mockups

Get Next Priority Detail

* - Indicates required fields

Save and Return Cancel

General Information

Name: * **Status:**

Task Type: * **Begin Date: *** **End Date:**

Task Sub-Type:

Associations

<input type="checkbox"/>	Level	Number	Name
<input type="checkbox"/>	Worker	90WA005LML	Mickey Mouse
<input type="checkbox"/>	Worker	90WA03SGS	Donald Duck
<input type="checkbox"/>	Worker	90WA06BBW	Bruce Wayne

Remove Add

Status History

Save and Return Cancel

Last Updated On 02/03/2023 1:08:18 PM By: [1060982](#)

Figure 2.2.2-1 – Get Next Priority – Create/Edit Mode

Get Next Priority Detail

* - Indicates required fields

Edit
Close

General Information

Name: * Orange Task Additional Help	Status: Active	
Task Type: * Images Awaiting Review	Begin Date: * 01/20/2023	End Date:
Task Sub-Type:		

▼ Associations

Level	Number	Name
Worker	90WA005LML	Mickey Mouse
Worker	90WA03SGS	Donald Duck
Worker	90WA06BBW	Bruce Wayne

▼ Status History

Status	Begin Date	End Date
Active	01/20/2023	

Edit
Close

Figure 2.2.2-2 – Get Next Priority – View Mode

2.2.3 Description of Changes

Add a Get Next Priority Detail page to the CalSAWS System.

1. **BUTTON:** Edit - This button displays when the page is in view mode and will navigate to the Bank Detail page in edit mode. The button will display if the worker's security profile contains the "BankDetailEdit" security right.
2. **BUTTON:** Close - This button displays when the page is in view mode and will navigate to the Bank Detail page.
3. **BUTTON:** Save and Return - This button displays when the page is in create and edit mode. The button will save page changes and navigate to the Bank Detail page. The button will display if the worker's security profile contains the "BankDetailEdit" security right.
4. **BUTTON:** Cancel - This button displays when the page is in create or edit mode. The button will discard page changes and navigate to the Bank Detail page.
5. General Information Section
This is the upper section of the page that displays general Get Next Priority attributes.

- a. Name **(Required)** – A text field that allows a user to specify the name of the Get Next Priority rule. The maximum length for this field is 30 characters.
- b. Task Type **(Required)** - A dropdown menu that contains the Name of all Task Types available to the county displayed in alphabetical order.
- c. Task Sub-Type – A dropdown menu that contains Task Sub-Types in alphabetical order based on the selected Task Type. This field will only display if the selected Task Type contains one or more Task Sub-Types.
- d. Status – A dropdown menu containing two options, “Active” and “Inactive”. When the page is in create mode, this field will default to Active.
- e. Begin Date **(Required)** – A date field to indicate the beginning date of an Active Status.

When the page is in create mode OR the page is in edit mode with the Status field changing from Inactive to Active, this field will display as editable and will default to the current date. This date can be future dated to indicate a future start time of the Active status.

If the page is in edit mode and the Status of the Get Next Priority rule is currently Active, this field will not be editable and will display as plain text.

If the page is in edit mode and the Status of the Get Next Priority rule is Inactive OR the page is in edit mode with the Status field changing from Active to Inactive, the field will not be displayed.

General Information	
Name: *	Status:
<input type="text" value="Orange Task Additional Help"/>	<input type="button" value="Inactive"/>
Task Type: *	
<input type="text" value="Images Awaiting Review"/>	
Task Sub-Type:	
<input type="text"/>	

- f. End Date – A date field to indicate the ending date of an Active Status. This is an optional field. If a Get Next Priority rule is activated without an end date, the rule will remain active until it is manually deactivated. If an End Date is specified, the Active Status will only be Active through this date and be considered Inactive following the End Date.
- If the page is in edit mode and the Status of the Get Next Priority rule is Inactive OR the page is in edit mode with the Status field changing from Active to Inactive, the field will not be displayed.

6. Associations Section

This section contains a row for each Worker, Unit, or Office that has been explicitly associated to the Get Next Priority rule. This section also allows the user to add and/or remove Worker, Unit or Office associations to the Get Next Priority rule. If this section contains no rows, it appears collapsed upon page load.

- Selectable Checkbox –For each result displayed in this section, a selectable checkbox will display when the page is in Create or Edit mode.
- Level - This column indicates whether the row represents an individual Worker, a Unit, or an Office.
- Number - This column indicates the number of the Worker, Unit, or Office.
- Name - This column indicates the Name of the Worker, Unit, or Office.
- BUTTON:** Remove – Displays when the page is in create or edit mode and there exists at least one row in this section. Clicking this button removes any rows with a checkmark in the selectable checkbox.

BUTTON: Add – Displays when the page is in create or edit mode. Clicking this button adds an additional row to the table above this button. In the Level column of that row appears a select input containing the values “-Select-,” “Office,” “Unit,” and “Worker” in that order. When one of the three organizational values are selected, the Select button appears in the name column of the row. Clicking it will load the Select Office, Select Unit, or Select

Worker multi-select page depending on which value was chosen for level.

If a Worker attempts to add a row to this panel that already exists in this panel, the duplicate row is not displayed because it is consolidated to avoid duplicates.

7. Status History Section

This panel will display the history of Statuses for the Get Next Priority Rule. The panel will be collapsed on load of the page. Rows within this panel will be ordered descending with the latest (most current) Status at the top of the list.

- a. Status - This column indicates the Status for the time period represented by the Begin Date/End Date attributes.
- b. Begin Date - This column indicates the Begin Date of the Status formatted as MM/DD/YYYY.
- c. End Date - This column indicates the End Date of the Status formatted as MM/DD/YYYY. If a current Status is ongoing, this value will be blank.

2.2.4 Page Validation

1. "Begin Date – The Begin Date must not be in the past. Please enter a different date."
 - a. A validation message displays when the Begin Date entered is before the current date.
2. "End Date – The End Date must not be before the Begin Date. Please enter a different date."
 - a. A validation message displays when End Date entered is before Begin Date in the "Refine Your Search" section.
3. "Associations – A new row may not be added until the last row has been completed."
 - a. Add a validation to display if the User clicks the Add button in the Associations section without completing the previously added row.

2.2.5 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Bank – Add or Edit a Task Bank to access the Bank Detail page. Within the Bank Detail page, Add or Edit a Get Next Priority.

2.2.6 Security Updates

N/A – There are no modifications to security.

2.2.7 Page Mapping

Add page mapping for the Get Next Priority Detail page.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Get Next Processing

2.3.1 Overview

Currently, when a worker clicks the Get Next button, processing will determine all Task Banks that the worker is associated to, then consolidate all Tasks within these Task Banks that the worker's Position is configured to work (via Task Category) and order the results by highest priority, oldest due date, and oldest created date. The first Task in the results will be assigned to the worker.

This section describes modifications to Get Next processing to evaluate and process active Get Next Priority rules when necessary.

2.3.2 Description of Changes

When a Get Next Priority rule is associated to a Task Bank and it is currently Active, the rule will apply to all workers who are associated to the Task Bank via the Bank Detail page configuration. In addition, Get Next Priority rules allow additional Workers/Units/Offices to be associated only during the time that the rule is Active based on the configuration of the Get Next Priority Detail page. For example, a Task Bank which has Workers 1, 2 and 3 associated may have a Get Next Priority rule created that associates Workers 7, 8 and 9 to the Task Bank only while the Get Next Priority rule is Active. This allows a simplified way to temporarily associate additional Worker's to the Task Bank when additional assistance is needed to work specific Tasks in the Task Bank.

Modify Get Next processing to evaluate and process Get Next Priority rules as follows:

The first step in processing when a Worker clicks the Get Next button is to determine which Task Banks the Worker is associated to. In addition to the current determination of Worker/Bank associations, update the processing to also evaluate Active Get Next Priority rules to see if the Worker is associated to an Active Get Next Priority rule.

An Active Get Next Priority rule is a rule with:

- An Active Status
- A Begin Date that is on or before the current day
- An End Date that is on or after the current day or the End Date is blank.

Once this step is complete, all Task Banks currently associated to the Worker have been determined.

No Get Next Priority Rule(s):

If the Worker is NOT associated to any Active Get Next Priority rules AND none of the Task Banks the Worker is associated to have Active Get Next Priority rules, processing proceeds as normal. There is no Get Next Priority rule to be processed.

Associated to Task Bank(s) that Include Get Next Priority Rule(s):

If the Worker is associated to one or more Task Banks and one or more of these Task Banks includes an Active Get Next Priority rule(s), processing will evaluate the Get Next Priority rules in the order that is configured on the Bank Detail page. (See example scenarios below)

Associated Directly to Get Next Priority Rule(s):

If the Worker is associated directly to one or more Active Get Next priority rule(s), processing will evaluate the Get Next Priority rules in the order that is configured on the Bank Detail page. (See example scenarios below)

Get Next Priority rule processing

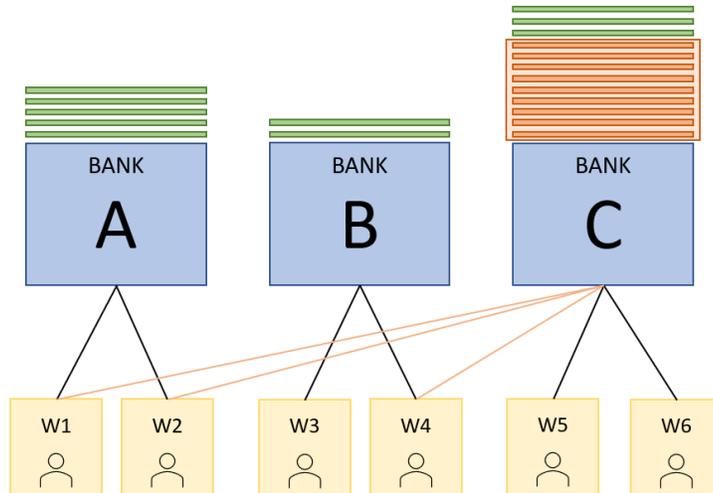
When a Get Next Priority rule is to be processed for a Task Bank, the Tasks within the Task Bank will be filtered by the Task Type/Task Sub-Type that is associated to the Get Next Priority rule. These Tasks will then be ordered by highest priority, oldest due date and oldest created date. The first Task from the ordered list will be provided by Get Next. If the Task Bank does not include any Tasks that per the Task Type/Task Sub-Type of the rule, processing will proceed to evaluate additional Get Next Priority rules (if necessary) or will proceed as normal if no additional Get Next Priority rules are to be evaluated.

Scenario 1: 1 Task Bank - 1 Active Get Next Priority Rule

If there is only one Active Get Next Priority rule for the Task Bank, process this rule as described above.

In the following example, the colored bars above each Task Bank represent Tasks.

Example:



Bank C has Workers 5 and 6 associated to it. This Bank has an influx of “Orange” Tasks assigned that require additional assistance, so the County configures an Active Get Next Priority rule for the “Orange” Tasks in Bank C that includes associations to Workers 1, 2 and 4.

In this example, if Workers 1, 2, 4, 5 or 6 click the Get Next button, the processing will notice the “Orange” Get Next priority rule for Bank C and focus specifically on the Orange Tasks. These Orange Tasks will be ordered by highest priority, oldest due date and oldest created date. The first Task in this ordered list will be assigned to the Worker. If there are no Orange Tasks in the Bank, processing proceeds as normal.

Scenario 2: 1 Task Bank - 2 or More Active Get Next Priority Rules

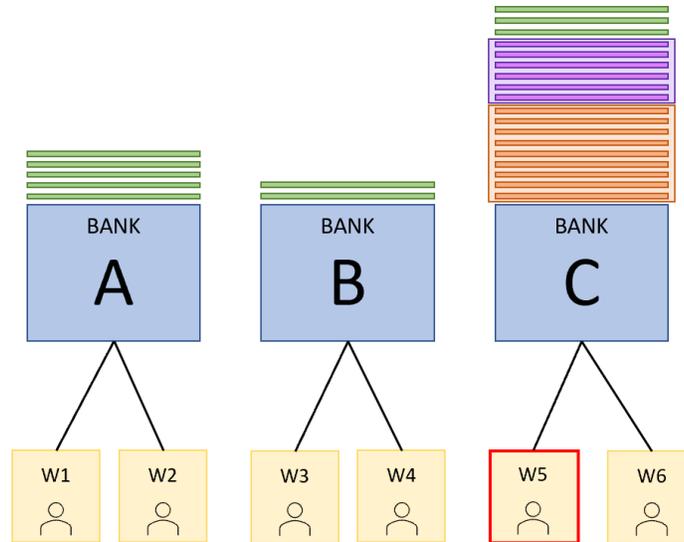
If there are two or more Active Get Next Priority rules for the Task Bank, logic will process the Get Next Priority rule based on the Order defined in the Get Next Priority/Active panel of the Bank Detail page.

In the following example, the colored bars above each Task Bank represent Tasks.

Example:



Bank C has two Active Get Next Priority rules:
“Purple Task Additional Help” with Order of 1
“Orange Task Additional Help” with Order of 2



Bank C has Workers 5 and 6 associated to it. This Bank has an influx of “Orange” and “Purple” Tasks assigned that require prioritization, so the County configures two Active Get Next Priority rules for Bank C: one for the “Orange” Tasks and one for the “Purple” Tasks. The “Purple Task Additional Help” rule is configured with Order of 1, and the “Orange Task Additional Help” is configured with Order of 2. In this instance, the “Purple Task Additional Help” rule will be processed first.

In this example, Worker 5 clicks the Get Next button, the processing will notice the “Purple Task Additional Help” and “Orange Task Additional Help” Get Next Priority rules to be processed. Because the “Purple Task Additional Help” rule is configured with Order of 1, this is the rule that will be processed which will focus specifically on the Purple Tasks. These Purple Tasks will be ordered by highest priority, oldest due date and oldest created date. The first Task in this ordered list will be assigned to the Worker.

If there are no Purple Tasks in the Bank, processing will proceed to evaluate the Orange Tasks per the “Orange Task Additional Help” rule which has an Order of 2. If there are no Orange Tasks in the Bank, processing will proceed as normal.

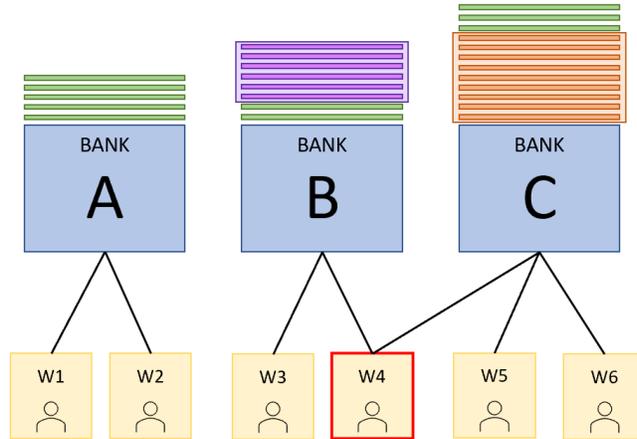
Scenario 3: 2 Task Banks – Each with an Active Get Next Priority Rule

If a Worker is associated to multiple Task Banks, and each Task Bank has an Active Get Next Priority rule, processing will combine the Tasks from each Task Bank per the Get Next Priority rule and apply the standard ordering of highest priority, oldest due date and oldest created date to

these Tasks. The first Task in the ordered list will be assigned to the Worker.

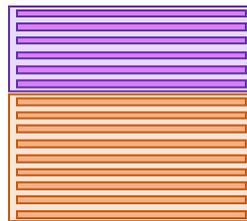
In the following example, the colored bars above each Task Bank represent Tasks.

Example:



This example will focus on Worker 4. This Worker is associated to Bank B and Bank C. Bank B has a "Purple" Get Next Priority rule to prioritize the Purple Tasks and Bank C has a "Orange" Get Next Priority rule to prioritize the Orange Tasks.

When Worker 4 clicks Get Next, the processing will identify the worker's association to Banks B and C. Processing will then notice the Get Next Priority rules for each bank and process each of those rules to restrict the Tasks in Bank B to the Purple Tasks and restrict the Tasks in Bank C to the Orange Tasks.



The combined Purple and Orange Tasks will be ordered by highest priority, oldest due date and oldest created date. The Task at the top of this ordered list will be assigned to the Worker. If there are no Purple or Orange Tasks available, processing proceeds as normal.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

N/A

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA – 256655

Add Programs to Document Routing Rule
Functionality

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/13/2023	1.0	Initial Revision	Vallari Bathala
05/16/2023	1.1	Update section 2.1.3 Description of Changes to remove the following requirement: In Edit Mode, the Program Status dropdown will display the above statuses for the Kin-GAP and AAP programs.	Vallari Bathala

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1 OVERVIEW

This design outlines enhancements to the Document Routing Rule functionality in the CalSAWS System.

1.1 Current Design

Counties which use the Hyland imaging solution can configure Document Routing Rules which allow configuration of Tasks to be created based on imaged documents. Document Routing Rule functionality was introduced with CA-214917 per DDIDs 2254, 2504 and 2245.

Document Routing Rules can be configured for CalFresh, CalWORKs, Child Care, Foster Care, Medi-Cal, Welfare to Work programs, Cal-Learn, CAPI, CFET, RCA and the General Assistance/General Relief programs.

1.2 Requests

Modify the CalSAWS System Document Routing Rule functionality to include additional programs in the program configuration options.

1.3 Overview of Recommendations

1. Update the Document Routing Rule Program Detail page to include Kin-GAP and Adoption Assistance Program as options.

1.4 Assumptions

1. The Document Routing Rule processing logic does not require modifications.
2. There are no impacts to Document Routing Rules.

2 RECOMMENDATIONS

This section will outline recommendations to update the Document Routing Rule Program Detail page to include Kin-GAP and Adoption Assistance Program.

2.1 Document Routing Rule Program Detail

2.1.1 Overview

This section describes updates to the Document Routing Rule Program Detail page accessible from the Document Routing Rule Detail page.

2.1.2 Document Routing Rule Program Detail Page Mockup

Document Routing Rule Program Detail

*- Indicates required fields

Save And Return Cancel

Program Information

Program: *

- CFET
- Child Care
- Foster Care
- General Assistance/General F
- GROW
- Kin-GAP**
- Medi-Cal
- RCA
- REP
- Nutrition Benefit
- Welfare to Work

Program Status:

- Select-
- Active
- Denied
- Deferred
- Deregistered
- Discontinued
- Exempt
- Good Cause
- Ineligible
- Non-Comp
- Pending

Distribution Type: *

Office Distribution

Sibling Assignment:

No

Save And Return Cancel

Figure 2.1.2.1 – Document Routing Rule Program Detail Page

2.1.3 Description of Changes

1. Add the following Program options to the Program dropdown on the Document Routing Rule Program Detail page for all the counties.
 - a. Kin-GAP
 - b. AAP
2. The following statuses apply to the Kin-GAP and AAP programs:
 - i. Active
 - ii. Discontinued
 - iii. Denied

- iv. Pending
- v. Ineligible

In Create Mode, per SCR CA-247248 a validation will display when a User attempts to save the Document Routing Rule Program Detail page when one or more selected Program Status(es) do not apply to one or more of the selected Program(s).

2.1.4 Page Validations

N/A – No new validations

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Automated Actions > Document Routing. Click the “Add Document Routing Rule” button, or the Name hyperlink/Edit button for an existing Document Routing Rule. From the Document Routing Rule Detail page, click the “Add” button within the “Program(s)” panel which is inside the “Task Information” panel.

2.1.6 Security Updates

N/A – No updates to security

2.1.7 Page Mapping

N/A – No updates to page mapping

2.1.8 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A