

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250656

Add Available Threshold Languages for NA 832 to CalSAWS.

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Thanushree Veereshappa
	Reviewed By	Mamata Sasumana

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/25/2023	1.0	Initial Draft	Thanushree Veereshappa

## Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions.....	4
2	Recommendations	5
	2.1 Add Available Threshold Languages to NA 832 Form.....	5
	2.1.1 Overview.....	5
	2.1.2 Form Verbiage.....	5
	2.1.3 Form Variable Population.....	5
	2.1.4 Form Generation Conditions.....	6
3	Supporting Documents	7
4	Requirements	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

The purpose of this SCR is to add NA 832 NOTICE OF ACTION CHILD CARE SERVICES APPROVAL in available Threshold Languages to CalSAWS.

## 1.1 Current Design

Currently, NA 832 (3/20) is only available in English and Spanish Languages in CalSAWS.

## 1.2 Requests

Implement the available threshold languages of the NA 832 (3/20) in Child Care Services Approval in available threshold languages to CalSAWS Template Repository.

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

## 1.3 Overview of Recommendations

Add the NA 832 (3/20) Child Care Services Approval form in the following threshold languages.

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

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing English and Spanish forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add Available Threshold Languages to NA 835 Form

#### 2.1.1 Overview

This section will cover the requirements for adding the NA 832 forms in available threshold languages.

**State Form:** NA 832 (3/20)

**Current Programs:** Child Care

**Current Attached Forms:** N/A

**Current Forms Category:** NOA

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** Notice to Customers that they are approved for Stage 1 Child Care services.

**Imaging Form Name:** Child Care Approval (Stage 1)

**Imaging Document Type:** Notification/NOA

#### 2.1.2 Form Verbiage

##### Create NA 832 XDP's for Threshold Languages

XDP's will be added in threshold languages for NA 832 form with version (3/20).

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

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

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1 (Header\_1)

**Include NA BACK 9:** No

#### 2.1.3 Form Variable Population

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

## 2.1.4 Form Generation Conditions

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### Print Options:

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

#### Mailing Options:

Mailing Options	Option for NA 832 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

#### Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

#### Additional Options:

Requirement	Option for NA 832 Form
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Correspondence	NA 832 Threshold Languages	NA832_AR.pdf NA832_AE.pdf NA832_CH.pdf NA832_FA.pdf NA832_RU.pdf NA832_KO.pdf NA832_LA.pdf NA832_HM.pdf NA832_TG.pdf NA832_CA.pdf NA832_VI.pdf

## 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	<p>NA832 is being added In Arabic, Armenian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Cambodian, Vietnamese and Tagalog threshold Languages.</p>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250658

Add Available Threshold Languages for NA 835 to CalSAWS.

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Thanushree Veereshappa
	Reviewed By	Mamata Sasumana

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/25/2023	1.0	Initial Draft	Thanushree Veereshappa

## Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions.....	4
2	Recommendations	5
	2.1 Add Available Threshold Languages to NA 832 Form.....	5
	2.1.1 Overview.....	5
	2.1.2 Form Verbiage.....	5
	2.1.3 Form Variable Population.....	5
	2.1.4 Form Generation Conditions.....	6
3	Supporting Documents	7
4	Requirements	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

The purpose of this SCR is to add NA 835 form in available Threshold Languages to CalSAWS.

## 1.1 Current Design

Currently, NA 835 (3/20) is only available in English and Spanish Languages in CalSAWS.

## 1.2 Requests

Implement the available threshold languages of the NA 835 (3/20) in Child Care Services Discontinuance in available threshold languages to CalSAWS Template Repository.

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

## 1.3 Overview of Recommendations

Add the NA 835 (3/20) in Child Care Services Discontinuance in the following threshold languages to CalSAWS Template Repository.

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

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing English and Spanish forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add Available Threshold Languages to NA 835 Form

#### 2.1.1 Overview

This section will cover the requirements for adding the NA 835 forms in available threshold languages to CalSAWS Template Repository.

**State Form:** NA 835 (3/20)

**Current Programs:** Child Care

**Current Attached Forms:** N/A

**Current Forms Category:** NOA

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** Notice to Customers that payments for child care will stop. Customer hearing rights are also listed.

**Imaging Form Name:** Child Care Discontinuance NOA

**Imaging Document Type:** Notification/NOA

#### 2.1.2 Form Verbiage

##### Create NA 835 XDP's for Threshold Languages

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

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** No

#### 2.1.3 Form Variable Population

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

## 2.1.4 Form Generation Conditions

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### Print Options:

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

#### Mailing Options:

Mailing Options	Option for NA 835 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

#### Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

#### Additional Options:

Requirement	Option for NA 835 Form
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Correspondence	NA 835 Threshold Languages	NA835_AR.pdf NA835_AE.pdf NA835_FA.pdf NA835_RU.pdf NA835_KO.pdf NA835_LA.pdf NA835_HM.pdf NA835_TG.pdf NA835_CA.pdf NA835_VI.pdf

## 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	<p>NA835 is being added In Arabic, Armenian, Farsi, Hmong, Korean, Lao, Russian, Cambodian, Vietnamese and Tagalog threshold Languages.</p>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-260246

Add the MC RE Packet in Hindi and Japanese languages.

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Mamata Sasumana
	Reviewed By	Lianel Richwin

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
05/08/2023	1.0	Initial document	Mamata Sasumana

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Add MAGI RE packet in Hindi and Japanese Languages .....	5
	2.1.1 Overview .....	5
	2.1.2 Create Threshold Form XDPs.....	5
	2.2 Add Non-MAGI RE packet in Hindi and Japanese Languages .....	5
	2.2.1 Overview .....	5
	2.2.2 Create Threshold Form XDPs.....	6
	2.3 Add Mixed Household RE packet in Hindi and Japanese Languages.....	6
	2.3.1 Overview .....	6
	2.3.2 Create Threshold Form XDPs.....	6
3	Supporting Documents .....	7
4	Requirements.....	7
	4.1 Project Requirements.....	7

# 1 OVERVIEW

---

The purpose of this SCR is to add the MC RE Packets (MAGI, Non-MAGI, Mixed) in the Hindi and Japanese languages to CalSAWS.

## 1.1 Current Design

Currently MC RE Packets (MAGI, Non-MAGI, Mixed) is available in CalSAWS supported languages (English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

## 1.2 Requests

1. Add the MAGI RE Packets in Hindi and Japanese languages to CalSAWS.
2. Add the Non-MAGI RE Packets in Hindi and Japanese languages to CalSAWS.
3. Add the Mixed Household RE Packets in Hindi and Japanese languages to CalSAWS.

## 1.3 Overview of Recommendations

1. Add the MC RE Packets (MAGI, Non-MAGI, Mixed) in the Hindi and Japanese languages.
2. Update CalSAWS framework to support these additional languages.
3. Update bundling logic/code tables.
4. Conduct central print test with the print vendor.
5. Note: These new languages will be added in Arial Unicode

## 1.4 Assumptions

1. The generation condition and variable population will remain the same as existing English and Spanish packets.
2. If a particular form is not available in the threshold language that the MC RE packet is getting generated in, then add the English version of the form.
3. Los Angeles county is responsible for providing the threshold language forms which belong in the MAGI RE Packet to the print vendor, which will then be pre-stuffed into the Los Angeles County – MAGI Packet envelopes.
4. Los Angeles county is responsible for providing the threshold language forms which belong in the Non-MAGI RE Packet to the print vendor, which will then be pre-stuffed into the Los Angeles County –Non-MAGI Packet envelopes.
5. Los Angeles county is responsible for providing the threshold language forms which belong in the Mixed Household RE Packet to the print vendor, which will then be pre-stuffed into the Los Angeles County – Mixed Household RE Packet envelopes.
6. The GEN 1365 will be added to each MC RE Packet envelope at the central print facility.

## 2 RECOMMENDATIONS

---

### 2.1 Add MAGI RE packet in Hindi and Japanese Languages

#### 2.1.1 Overview

This effort is to add MAGI RE Packet in Hindi and Japanese languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Hindi and Japanese

**Form Mockups/Examples:** See Supporting Documents #1.

#### 2.1.2 Create Threshold Form XDPs

1. Add MAGI RE Packet in Hindi and Japanese languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Hindi and Japanese

**Form Mockup/Example:** See Supporting Document #1

2. MAGI RE Packet for LA County will have the following forms: MC Coversheet with REG\_MC\_SUBFORM, LTC\_MC\_SUBFORM, MSP\_MC\_SUBFORM and MC 216. See Supporting Document #1 for English mockup.
3. MAGI RE Packet for Migration Counties will have the following forms: Coversheet with Standard Header, BRM Header, MC 216, MC 019, MC 219, MC 372, PUB 13, PUB 183, MC 003, and NVRA VPF. See Supporting Document #1 for English mockup.

### 2.2 Add Non-MAGI RE packet in Hindi and Japanese Languages

#### 2.2.1 Overview

This effort is to add Non-MAGI RE Packet in Hindi and Japanese languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Hindi and Japanese

**Form Mockups/Examples:** See Supporting Documents #1.

## 2.2.2 Create Threshold Form XDPs

1. Add Non-MAGI RE Packet in Hindi and Japanese languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Hindi and Japanese

**Form Mockup/Example:** See Supporting Document #1

2. Non-MAGI RE Packet for Los Angeles will have the following forms: MC Coversheet with REG\_MC\_SUBFORM, LTC\_MC\_SUBFORM, MSP\_MC\_SUBFORM and MC 210 RV. See Supporting Document #1 for English mockup.
3. Non-MAGI RE Packet for Migration Counties will have the following forms: Coversheet, MC 210 RV, MC 019, MC 219, MC 372, MC 007, DHCS 7077, DHCS 7077-A, PUB 13, PUB 183, MC 003, and NVRA VPF. See Supporting Document #1 for English mockup.

## 2.3 Add Mixed Household RE packet in Hindi and Japanese Languages

### 2.3.1 Overview

This effort is to add Mixed Household RE Packet in Hindi and Japanese languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Hindi and Japanese

**Form Mockups/Examples:** See Supporting Documents #1.

### 2.3.2 Create Threshold Form XDPs

1. Add Mixed Household RE Packet in Hindi and Japanese languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Hindi and Japanese

**Form Mockup/Example:** See Supporting Document #1

2. Mixed Household RE Packet for Los Angeles will have the following forms: MC Coversheet with REG\_MC\_SUBFORM, LTC\_MC\_SUBFORM, MSP\_MC\_SUBFORM and MC 217. See Supporting Document #1 for English mockup.
3. Mixed Household RE Packet for Migration Counties will have the following forms: Coversheet with Standard Header, BRM Header, MC 217, MC 019, MC 219, MC 372, MC 007, DHCS 7077, DHCS 7077-A, PUB 13, PUB 183, MC 003, and NVRA VPF. See Supporting Document #1 for English mockup.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	MC RE Packets	NON_MAGI_RE_Packet_NON_LA.pdf NON_MAGI_RE_Packet_LA.pdf MAGI_RE_Packet_NON_LA.pdf MAGI_RE_Packet_LA.pdf MIXED_HH_RE_Packet_NON_LA.pdf MIXED_HH_RE_Packet_LA.pdf Hindi_Japanese_Languages.zip

### 4 REQUIREMENTS

#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 (CAR-1239)	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: <ol style="list-style-type: none"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> </ol>	MC RE Packet will be added in Hindi and Japanese languages to CalSAWS.

	<ul style="list-style-type: none"> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	
--	---	--

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-262011

Changes to Vehicle Limits for CalWORKs

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Yale Yee
	Reviewed By	Business Analysts, Build Team, Test Team

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
08/03/2020	1.0	Initial Draft	Yale Yee
05/26/2023	1.1	Updated CC Regression Test list	Maria Jensen

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 CW/RCA EDBC: Motor Vehicle Disregard .....	5
	2.1.1 Overview .....	5
	2.1.2 Description of Changes .....	5
	2.1.3 Programs Impacted .....	5
	2.2 Regression Test Impacted CalWORKs Forms Variable Population .....	5
	2.2.1 Overview .....	5
	2.2.2 Description of Change.....	5
	2.3 Automated Regression Test.....	6
	2.3.1 Overview .....	6
	2.3.2 Description of Changes .....	6
3	Outreach.....	7
	3.1 Lists.....	7

# 1 OVERVIEW

---

This document identifies required changes to CalSAWS related to the vehicle limits for the CalWORKs (CW) and Refugee Cash Assistance (RCA) programs for Federal Fiscal Year (FFY) 2023 effective July 1, 2023 as informed by the All County Letter (ACL) 23-47. Effective July 1, 2023, the maximum value allowed for non-exempt vehicles will increase by both the 2022 and the 2023 increases to the CPI-U since the CDSS did not release guidance in 2022 to increase the vehicle asset limit. Therefore, the vehicle asset limit will be increased by 25.75 percent, reflecting increases to the CPI-U of 21.09 percent in 2022 and an additional 3.85 percent in 2023 (the rates are compounded).

## 1.1 Current Design

Per ACL 21-38 effective July 1, 2021, the resource threshold increased by an amount equal to the increase in the California Necessities Index for the most recent fiscal year (2021) to the following value:

- The vehicle equity disregard value is \$25,483.

## 1.2 Requests

Per ACL 23-47 effective July 1, 2023, the resource threshold will increase by an amount equal to the increase in the California Necessities Index for the most recent fiscal year (2023) to the following value:

- The vehicle equity disregard will be increased from \$25,483 to \$32,045.

## 1.3 Overview of Recommendations

1. Update CW/RCA EDBC rules that apply vehicle property limit amounts for Motor Vehicle Disregard to perform calculations based on the new limit.
2. Regression test impacted NOAs and Forms that populate the CalWORKs Motor Vehicle Disregard.

## 1.4 Assumptions

1. Vehicle property limits will reflect the new values on impacted NOAs and Forms.

## 2 RECOMMENDATIONS

---

### 2.1 CW/RCA EDBC: Motor Vehicle Disregard

#### 2.1.1 Overview

Update CW/RCA EDBC rules that apply vehicle property limit amounts for Motor Vehicle Disregard to perform calculations based on the new limit effective July 1, 2023.

#### 2.1.2 Description of Changes

1. Effective July 1, 2023, the disregard will be increased from \$25,483 to \$32,045 (CT 335-AO CW Motor Vehicle Disregard). Any amount in excess of the disregard will be counted against the AU's property limit.

#### 2.1.3 Programs Impacted

CW, RCA

### 2.2 Regression Test Impacted CalWORKs Forms Variable Population

#### 2.2.1 Overview

CalSAWS has Forms and Packets that auto-populate the motor vehicle disregard for CalWORKs.

Impacted Forms and Packets:

- SAWS 2A SAR
- CW RE Packet (non-LA County version)
- CW/CF RE Packet (non-LA County version)

#### 2.2.2 Description of Change

Regression test the following Forms and Packets to verify that the correct motor vehicle disregard is populating for CalWORKs.

Note: The motor vehicle disregard variable is referenced below as LIMIT\_VD.

Form	Variable	Languages
SAWS 2A SAR (ID 5399)	<p>Located on Page 9:</p> <p>“There is a \$&lt;LIMIT&gt; limit on the value of the property (e.g. bank accounts, stocks, etc.) that your family can own and be eligible to receive CalWORKs benefits. If someone in your family is at least 60 years of age or disabled the limit is \$&lt;LIMIT2&gt;. Your residence and furniture are not part of the limit. You can own a vehicle (for example a car, truck, van, motorcycle, etc.) as long as what it's worth minus what you owe is less than \$&lt;LIMIT_VD&gt;. If it was given to you as a gift, a donation, or a family member transferred it to you, we do not count it. You will be asked to give the County proof from the Department of Motor Vehicles that it was a gift, donation or transfer from a family member. The vehicle will not count if used by your family for certain special reasons. Ask your worker what those reasons are. Your worker can explain to you how to figure the value of any vehicle.”</p>	AE, AR, CA, CH, EN, FA, HM, KO, LA, RU, SP, TG, VI
CW RE Packet (ID 6543)	Located on Page 14 within identical verbiage as above.	AE, AR, CA, CH, EN, FA, HM, KO, LA, RU, SP, TG, VI
CW/CF RE Packet (ID 6544)	Located on Page 14 within identical verbiage as above.	AE, AR, CA, CH, EN, FA, HM, KO, LA, RU, SP, TG, VI

## 2.3 Automated Regression Test

### 2.3.1 Overview

Update the impacted ART scripts with the new vehicle values.

### 2.3.2 Description of Changes

Update the following scripts with the new values.

CW – Property – Motor Vehicles

CW, DV – Property – Motor Vehicles

CW, HP – Property – Motor Vehicles

CW, HT – Property – Motor Vehicles  
CW, IN – Property – Motor Vehicles  
RCA – Property – Motor Vehicles

### 3 OUTREACH

---

#### 3.1 Lists

A list of CW cases will be provided where the vehicle property failed for the previous vehicle property limit amount but the vehicle property passes for the current vehicle property limit amount for Motor Vehicle Disregard for the benefit month of 07/2023 and 08/2023.

**List Name:** List\_of\_CW\_Cases\_Where\_Motor\_Vehicle\_Disregard\_Failed

**List Criteria:** Provide a list of CW cases where the vehicle property failed for the previous vehicle property limit amount but the vehicle property passes for the current vehicle property limit amount for Motor Vehicle Disregard for the benefit month of 07/2023 and 08/2023.

**Standard Columns:**

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

**Additional Column(s):** Benefit Month

**Frequency:** One-time

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-262011

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-217613

Translate/Update Worker Id on missing threshold  
language headers

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Nisarga N
	Reviewed By	Lianel Richwin

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
4/25/2023	1.0	Original Draft	Nisarga N

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	4
	2.1 Update the CalSAWS Header_1 to translate the Worker ID in threshold languages.....	4
	2.1.1 Overview .....	4
	2.1.2 Form Verbiage .....	4
	2.1.3 Form Variable Population .....	4
	2.1.4 Form Generation Conditions .....	5
3	Supporting Documents .....	5
4	Requirements.....	5
	4.1 Project Requirements.....	5

# 1 OVERVIEW

---

The purpose of this SCR is to translate the Worker Id in CalSAWS Header\_1 in system supported threshold languages.

## 1.1 Current Design

Worker Id is not translated in available threshold languages in CalSAWS\_Header\_1.

## 1.2 Requests

Translate the Worker ID in available threshold languages in CalSAWS\_Header\_1.

## 1.3 Overview of Recommendations

Translate the Worker ID in available threshold languages in CalSAWS\_Header\_1.

## 1.4 Assumptions

1. No updated to the existing population logic.
2. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Update the CalSAWS Header\_1 to translate the Worker ID in threshold languages.

### 2.1.1 Overview

Update the CalSAWS Header\_1 to translate the Worker ID in threshold languages.

### 2.1.2 Form Verbiage

#### Update CalSAWS Header\_1 XDP's.

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

**Form Mockups/Examples:** See Supporting Documents # 1

### 2.1.3 Form Variable Population

No Updates to the Worker ID existing population logic.

## 2.1.4 Form Generation Conditions

N/A

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	Worker ID Translations	Worker_Id_Translations.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"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li></ul>	Worker ID is translated in available threshold languages in CalSAWS_Header_1.

	<ul style="list-style-type: none"><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul>	
--	---	--

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-238761

Update WTW 2 in Threshold Languages

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	M Devi Priya
	Reviewed By	Meghana R Chander

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/28/2023	1.0	Initial Draft	M Devi Priya

## Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions.....	4
2	Recommendations	4
	2.1.1 Add WTW 2 in Threshold Languages.....	4
	2.1.2 Overview.....	4
	2.1.3 Form Verbiage.....	5
	2.1.4 Form Variable Population.....	5
	2.1.5 Form Generation Conditions.....	5
3	Supporting Documents	7
4	Requirements	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

This effort will add the WTW 2 (5/21)- "Welfare-To-Work Activity Assignment" in all available threshold languages.

## 1.1 Current Design

Currently, WTW 2 (5/21) is available only in English and Spanish languages in CalSAWS.

## 1.2 Requests

Add WTW 2 (5/21) in available threshold languages to CalSAWS.

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

## 1.3 Overview of Recommendations

Add WTW 2 (5/21) to CalSAWS in following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Tagalog, Lao, Hmong, Korean, Russian and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1.1 Add WTW 2 in Threshold Languages

### 2.1.2 Overview

This section will cover the requirements for adding the WTW 2 (5/21) forms in available system supported threshold languages.

**State Form:** WTW 2 (5/21)

**Current Programs:** Welfare-To-Work, Refugee Employment Program (REP)

**Current Forms Category:** Form

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** This form notifies the customer of activities that must be completed to participate in the Welfare to Work Program.

**Imaging Form Name:** WTW Activity Assignment

**Imaging Document Type:** Welfare to Work

### 2.1.3 Form Verbiage

#### **Create WTW 2 (5/21) XDP's for Threshold Languages**

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

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

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Form Number:** WTW 2

**Include NA BACK 9:** No

### 2.1.4 Form Variable Population

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

### 2.1.5 Form Generation Conditions

The WTW 2 form is generated online from the Activity Agreement Detail page when the Form type is "WTW 2" and the generate form button is selected.

NOTE: The Generate form button will not display if the agreement is signed.

The WTW 2 is also available from the template repository page.

#### **Form Print/Mailing Options**

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

**Print Options:**

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

**Mailing Options:**

Mailing Options	Option for WTW 2 (5/21)
Mail-To (Recipient)	N/A
Mailed From (Return)	N/A
Mail-back-to Address	N/A
Outgoing Envelope Type	N/A
Return Envelope Type	N/A
Special Paper Stock	N/A

**Form Control:**

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

**Additional Options:**

Requirement	Option for WTW 2 (5/21)
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Correspondence	WTW 2 Threshold Languages	WTW2_Arabic.pdf WTW2_Armenian.pdf WTW2_Cambodian.pdf WTW2_Chinese.pdf WTW2_Farsi.pdf WTW2_Hmong.pdf WTW2_Korean.pdf WTW2_Lao.pdf WTW2_Russian.pdf WTW2_Tagalog.pdf WTW2_Vietnamese.pdf

## 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	WTW 2 are being added in all available threshold languages.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-239420

Add MC RE Packets in Punjabi and Thai  
languages

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Lianel Richwin
	Reviewed By	Madhan Kumar

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
05/07/2023	1.0	Initial document	Lianel Richwin

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Add MAGI RE packet in Punjabi and Thai Languages .....	5
	2.1.1 Overview .....	5
	2.1.2 Create Threshold Form XDPs.....	5
	2.2 Add Non-MAGI RE packet in Punjabi and Thai Languages .....	6
	2.2.1 Overview .....	6
	2.2.2 Create Threshold Form XDPs.....	6
	2.3 Add Mixed Household RE packet in Punjabi and Thai Languages.....	7
	2.3.1 Overview .....	7
	2.3.2 Create Threshold Form XDPs.....	7
3	Supporting Documents .....	8
4	Requirements.....	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

The purpose of this change is to add the MC RE Packet (MAGI, Non-MAGI, Mixed) in Punjabi and Thai languages to CalSAWS.

## 1.1 Current Design

Currently MC RE Packet is available in English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese) in CalSAWS.

## 1.2 Requests

1. Add the MAGI RE Packets in Punjabi and Thai languages to CalSAWS.
2. Add the Non-MAGI RE Packets in Punjabi and Thai languages to CalSAWS.
3. Add the Mixed Household RE Packets in Punjabi and Thai languages to CalSAWS.

## 1.3 Overview of Recommendations

1. Add the MC RE Packets (MAGI, Non-MAGI, Mixed) in Punjabi and Thai languages to CalSAWS.
2. Update CalSAWS framework to support these additional languages.
3. Update bundling logic/code tables.
4. Conduct central print test with the print vendor.
5. These new languages will be added in Arial Unicode.

## 1.4 Assumptions

1. The generation condition and variable population will remain the same as existing English and Spanish packets.
2. If a particular form is not available in the threshold language that the MC RE packet is getting generated in, then add the English version of the form.
3. Los Angeles county is responsible for providing the threshold language forms which belong in the MAGI RE Packet to the print vendor, which will then be pre-stuffed into the Los Angeles County – MAGI Packet envelopes.
4. Los Angeles county is responsible for providing the threshold language forms which belong in the Non-MAGI RE Packet to the print vendor, which will then be pre-stuffed into the Los Angeles County –Non-MAGI Packet envelopes.
5. Los Angeles county is responsible for providing the threshold language forms which belong in the Mixed Household RE Packet to the print vendor, which will then be pre-stuffed into the Los Angeles County – Mixed Household RE Packet envelopes.
6. The GEN 1365 will be added to each MC RE Packet envelope at the central print facility.

## 2 RECOMMENDATIONS

---

### 2.1 Add MAGI RE packet in Punjabi and Thai Languages

#### 2.1.1 Overview

This effort is to add MAGI RE Packet in Punjabi and Thai languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Punjabi and Thai

**Form Mockups/Examples:** See Supporting Documents #1.

#### 2.1.2 Create Threshold Form XDPs

1. Add MAGI RE Packet in Punjabi and Thai languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Punjabi and Thai

**Form Mockup/Example:** See Supporting Document #1

2. MAGI RE Packet for LA County will have the following forms: MC Coversheet with REG\_MC\_SUBFORM, LTC\_MC\_SUBFORM, MSP\_MC\_SUBFORM and MC 216. See Supporting Document #1 for English mockup.
3. MAGI RE Packet for Migration Counties will have the following forms: Coversheet with Standard Header, BRM Header, MC 216, MC 019, MC 219, MC 372, PUB 13, PUB 183, MC 003, and NVRA VPF. See Supporting Document #1 for English mockup.

## 2.2 Add Non-MAGI RE packet in Punjabi and Thai Languages

### 2.2.1 Overview

This effort is to add Non-MAGI RE Packet in Punjabi and Thai languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Punjabi and Thai

**Form Mockups/Examples:** See Supporting Documents #1.

### 2.2.2 Create Threshold Form XDPs

1. Add Non-MAGI RE Packet in Punjabi and Thai languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Punjabi and Thai

**Form Mockup/Example:** See Supporting Document #1

2. Non-MAGI RE Packet for Los Angeles will have the following forms: MC Coversheet with REG\_MC\_SUBFORM, LTC\_MC\_SUBFORM, MSP\_MC\_SUBFORM and MC 210 RV. See Supporting Document #1 for English mockup.

3. Non-MAGI RE Packet for Migration Counties will have the following forms: Coversheet, MC 210 RV, MC 019, MC 219, MC 372, MC 007, DHCS 7077, DHCS 7077-A, PUB 13, PUB 183, MC 003, and NVRA VPF. See Supporting Document #1 for English mockup.

## 2.3 Add Mixed Household RE packet in Punjabi and Thai Languages

### 2.3.1 Overview

This effort is to add Mixed Household RE Packet in Punjabi and Thai languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Punjabi and Thai

**Form Mockups/Examples:** See Supporting Documents #1.

### 2.3.2 Create Threshold Form XDPs

1. Add Mixed Household RE Packet in Punjabi and Thai languages for Los Angeles and Migration counties.

**Existing Languages:** English and system supported threshold languages (Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese)

**Newly Added Languages:** Punjabi and Thai

**Form Mockup/Example:** See Supporting Document #1

2. Mixed Household RE Packet for Los Angeles will have the following forms: MC Coversheet with REG\_MC\_SUBFORM, LTC\_MC\_SUBFORM, MSP\_MC\_SUBFORM and MC 217. See Supporting Document #1 for English mockup.

3. Mixed Household RE Packet for Migration Counties will have the following forms: Coversheet with Standard Header, BRM Header, MC 217, MC 019, MC 219, MC 372, MC 007, DHCS 7077, DHCS 7077-A, PUB 13, PUB 183, MC 003, and NVRA VPF. See Supporting Document #1 for English mockup.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	MC RE Packet	NON_MAGI_RE_Packet_NON_LA.pdf NON_MAGI_RE_Packet_LA.pdf MAGI_RE_Packet_NON_LA.pdf MAGI_RE_Packet_LA.pdf MIXED_HH_RE_Packet_NON_LA.pdf MIXED_HH_RE_Packet_LA.pdf Punjabi_Thai_Languages.zip

### 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> </ul>	MC RE Packet will be added in Punjabi and Thai languages to CalSAWS.

<ul style="list-style-type: none"><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul>	
--	--

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-241919

Add Missing Threshold Languages to Template  
Repository - NA 833

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Reshma Chandy
	Reviewed By	Mamata Sasumana

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/27/2023	0.1	Initial Draft	Reshma Chandy

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Add NA 833 in threshold languages to CalSAWS.....	5
	2.1.1 Overview .....	5
	2.1.2 Form/NOA Verbiage .....	5
	2.1.3 Form/NOA Variable Population .....	5
	2.1.4 Form/NOA Generation Conditions.....	5
3	Supporting Documents .....	7
4	Requirements.....	7
	4.1 Project Requirements.....	7

# 1 OVERVIEW

---

The purpose of this SCR is to update and add NA 833 (4/20) NOTICE OF ACTION CHILD CARE SERVICES CHANGE form in English and available threshold languages to CalSAWS.

## 1.1 Current Design

Currently NA 833 (4/20) is available only in English and Spanish in CalSAWS.

## 1.2 Requests

1. Add NA 833 (4/20) in available threshold languages to the CalSAWS Template Repository.  
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
2. Update English and Spanish languages to match the state version NA 833(4/20).

## 1.3 Overview of Recommendations

1. Add NA 833 (4/20) to CalSAWS Template Repository in following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
2. Update English and Spanish languages to match the state version NA 833(4/20).

## 1.4 Assumptions

1. Print options for threshold languages will remain the same as the print options for NA 833 English and Spanish.
2. No updates to population logic for NA 833.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add NA 833 in threshold languages to CalSAWS.

#### 2.1.1 Overview

This section will cover the requirements for adding NA 833 (4/20) in available threshold languages.

**State Form:** NA 833 (4/20)

**Current Programs:** Child Care

**Current Forms Category:** NOA

**Current Template Repository Visibility:** All Counties

**Existing Languages:** English, Spanish

#### 2.1.2 Form/NOA Verbiage

##### **Create NA 833 (4/20) XDP for Threshold Languages**

Create NA 833 XDPs for the available threshold languages with version (4/20)

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

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

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Include NA BACK 9:** Yes

#### 2.1.3 Form/NOA Variable Population

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

#### 2.1.4 Form/NOA Generation Conditions

##### **Form Print/Mailing Options**

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

**Print Options:**

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

**Form Control:**

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

**Mailing Options:**

Mailing Options	Option for NA 833
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

**Additional Options:**

Requirement	Option for NA 833 Form
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Forms	NA 833 Mockup	NA833_AE.pdf NA833_AR.pdf NA833_CA.pdf NA833_CH.pdf NA833_FA.pdf NA833_HM.pdf NA833_KO.pdf NA833_LA.pdf NA833_RU.pdf NA833_TG.pdf NA833_VI.pdf NA833_EN.pdf NA833_SP.pdf

### 4 REQUIREMENTS

---

#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: <ul style="list-style-type: none"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> </ul>	NA 833 will be added in available languages to CalSAWS Template Repository.

	<ul style="list-style-type: none"><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul>	
--	---	--

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250034

Add Available Translations for SSP 18 to CalSAWS.

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Lianel Richwin
	Reviewed By	Madhan Kumar

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
06/05/2023	1.0	Initial Draft	Lianel Richwin

## Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Request .....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations	4
	2.1 Add SSP 18 in available Threshold Languages to CalSAWS .....	4
	2.1.1 Overview .....	4
	2.1.2 Form Verbiage .....	5
	2.1.3 Form Variable Population .....	5
	2.1.4 Form Generation Conditions .....	5
3	Supporting Documents	7
4	Requirements	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

This effort will add SSP 18 (4/15) in available threshold languages to CalSAWS.

## 1.1 Current Design

Currently, SSP 18 (4/15) is available only in English and Spanish languages in CalSAWS.

## 1.2 Request

Add SSP 18 (4/15) Notice Of Action And Right To Request A State Hearing On Interim Assistance in available threshold languages to CalSAWS Template Repository.

Languages Include: Armenian and Chinese

## 1.3 Overview of Recommendations

Add SSP 18 (4/15) Notice Of Action And Right To Request A State Hearing On Interim Assistance to CalSAWS Template Repository in following threshold languages: Armenian and Chinese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish.
2. There are no changes to the generation logic of these forms. The new threshold forms will be the same as the existing English and Spanish forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add SSP 18 in available Threshold Languages to CalSAWS

### 2.1.1 Overview

This section will cover the requirements for adding the SSP 18 forms in available threshold languages.

**State Form:** SSP 18 (4/15)

**Current Programs:** GA/GR, CAPI

**Current Template Repository Visibility:** All counties

**Template Description:** This is a notice is sent to inform a customer that the Social Security Administration is being billed to repay their Supplemental Security Income/State Supplementary Payment and give them the information they need to setup a hearing if they dispute this.

**Imaging Form Name:** NOA Right for Hearing on Interim Assist

**Imaging Document Type:** Notification/NOA

**Existing Languages:** English, Spanish

### 2.1.2 Form Verbiage

#### Create SSP 18 XDP's for Threshold Languages

New XDP's will be added for threshold languages.

**Threshold Languages:** Armenian, Chinese\*

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

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header (Header\_1)

**Include NA BACK 9:** Yes

### 2.1.3 Form Variable Population

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

### 2.1.4 Form Generation Conditions

The CalSAWS will generate the SSP 18 Form from Template Repository.

#### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

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

**Mailing Options:**

Mailing Options	Option for SSP 18 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

**Form Control:**

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

**Additional Options:**

Requirement	Option for SSP 18 Form
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Correspondence	SSP 18	SSP18_Armenian.pdf SSP18_Chinese.pdf

## 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	SSP 18 is being added in available threshold languages.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250347

Add Available Translations for CW 2224 to  
CalSAWS.

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Navyasri Yalamanchili
	Reviewed By	Lianel Richwin

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/26/2023	1.0	Initial Draft	Navyasri Yalamanchili
06/05/2023	1.1	Updated Design to update existing English and Spanish languages	Navyasri Yalamanchili

## Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Request .....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations	5
	2.1 Add Threshold Languages to CW 2224.....	5
	2.1.1 Overview .....	5
	2.1.2 Form Verbiage .....	5
	2.1.3 Form Variable Population .....	5
	2.1.4 Form Generation Conditions .....	5
3	Supporting Documents	7
4	Requirements	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

This effort will Update and add CW 2224 (2/20) in English and available threshold languages to CalSAWS.

## 1.1 Current Design

Currently, CW 2224 (2/20) is available only in English and Spanish languages to CalSAWS.

## 1.2 Request

1. Update English and Spanish languages to add coversheet with Standard CalSAWS header and BRM header for CW 2224 (2/20).
2. Add CW 2224 (2/20) CalWORKs Home Visiting Program (HVP) in available threshold languages to CalSAWS Template Repository.  
Languages Include: Russian

## 1.3 Overview of Recommendations

Update English, Spanish and add Russian language for CW 2224 (2/20) CalWORKs Home Visiting Program (HVP) to CalSAWS.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish.
2. There are no changes to the generation logic of these forms. The new threshold forms will be the same as the existing English and Spanish forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.
5. Written languages of households other than English, Spanish, and Russian will get the English version with a GEN 1365.

## 2 RECOMMENDATIONS

---

### 2.1 Add Threshold Languages to CW 2224

#### 2.1.1 Overview

This section will cover the requirements for adding the CW 2224 forms in available threshold languages.

**State Form:** CW 2224 (2/20)

**Updated Programs:** CalWORKs, WTW, REP, Cal-Learn

**Current Template Repository Visibility:** All counties

**Template Description CW 2224-** CalWORKs Home Visiting Program (HVP) form is used to volunteer for Home Visiting Program

**Imaging Form Name:** CW HOME VISITING PROGRAM (HVP)

**Imaging Document Type:** CalWORKs (CW)

**Existing Languages:** English, Spanish

#### 2.1.2 Form Verbiage

##### **Create CW 2224 XDP's for English and Threshold Languages**

The xdp will have 3 impressions. First impression will have coversheet with Standard CalSAWS Header\_1. Second impression will be BRM Header. Third impression will follow the state form.

**Languages to be Updated:** English and Spanish

**Threshold Languages to be Added:** Russian

**Form Mockups/Examples:** See Supporting Documents # 1

**Form Header:** Add coversheet with CalSAWS Standard Header (Header\_1). Add BRM header to the back of the coversheet. Add Agency Header (Header\_3-1) to the pages of the form.

**Include NA BACK 9:** No

#### 2.1.3 Form Variable Population

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

#### 2.1.4 Form Generation Conditions

The CalSAWS will generate the CW 2224 Form from Template Repository.

### **Form Print/Mailing Options**

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

<b>Blank Template</b>	<b>Print Local without Save</b>	<b>Print Local and Save</b>	<b>Print Central and Save</b>	<b>Reprint Local</b>	<b>Reprint Central</b>
Y	Y	Y	Y	Y	Y

#### **Mailing Options:**

<b>Mailing Options</b>	<b>Option for CW 2224 Form</b>
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	County BRM address which generated the form
Outgoing Envelope Type	Standard
Return Envelope Type	Returned Prepaid Envelope
Special Paper Stock	N/A

#### **Form Control:**

<b>Tracking Barcode</b>	<b>BRM Barcode</b>	<b>Imaging Barcode</b>
Y	Y	Y

#### **Additional Options:**

<b>Requirement</b>	<b>Option for CW 2224 Form</b>
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Correspondence	CW 2224	CW2224_EN.pdf CW2224_SP.pdf CW2224_RU.pdf

## 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	CW 2224 is being added in Russian language.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250351

Add Available Translations for CW 61 to CalSAWS

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	M Devi Priya
	Reviewed By	Meghana R Chander

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/28/2023	1.0	Initial Draft	M Devi Priya

## Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions.....	4
2	Recommendations	4
	2.1 Add Available Translations for CW 61 to CalSAWS.....	4
	2.1.1 Overview.....	4
	2.1.2 Form Verbiage.....	5
	2.1.3 Form Variable Population.....	5
	2.1.4 Form Generation Conditions.....	5
3	Supporting Documents	7
4	Requirements	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

This effort will add the CW 61 (7/01) in all available threshold languages.

## 1.1 Current Design

Currently, CW 61 (7/01) is available only in English and Spanish languages in CalSAWS.

## 1.2 Requests

Add CW 61 (7/01) Authorization to Release Medical Information in threshold languages to CalSAWS Template Repository.

Languages Include: Cambodian, Chinese, Russian and Vietnamese.

## 1.3 Overview of Recommendations

Add CW 61 (7/01) Authorization to Release Medical Information in threshold languages to CalSAWS in following threshold languages: Cambodian, Chinese, Russian and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add Available Translations for CW 61 to CalSAWS

### 2.1.1 Overview

This section will cover the requirements for adding the CW 61 (7/01) forms in available threshold languages.

**State Form:** CW 61 (7/01)

**Current Programs:** CalWORKs, Welfare to Work, Refugee Employment Program (REP), Child Care

**Current Forms Category:** Form

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** This form is used to request medical information on customers participating in the CalWORKs program.

**Imaging Form Name:** Auth to Release Medical Info

**Imaging Document Type:** Medical Reports/Records

## 2.1.2 Form Verbiage

### Create CW 61 (7/01) XDP's for Threshold Languages

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

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

**Form Mockups/Examples:** See Supporting Documents # 1

**Form Header:** CalSAWS Standard Header #1

**Form Number:** CW 61

**Include NA BACK 9:** No

## 2.1.3 Form Variable Population

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

## 2.1.4 Form Generation Conditions

The CW 61 (7/01) is generated only through Template Repository.

### Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### Print Options:

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

**Mailing Options:**

Mailing Options	Option for CW 61
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

**Form Control:**

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

**Additional Options:**

Requirement	Option for CW 61 (7/01)
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Correspondence	CW 61 Threshold Languages	CW61_Cambodian.pdf CW61_Chinese.pdf CW61_Russian.pdf CW61_Vietnamese.pdf

## 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	CW 61 are being added in all available threshold languages.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250369

Add Available Translations for CL 1 to CalSAWS

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	M R Kavitha
	Reviewed By	Richwin Lianel

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
12/04/2023	1.0	Initial Draft	M R Kavitha

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	4
	2.1 Add available threshold languages for CL 1 to the CalSAWS .....	4
	2.1.1 Overview .....	4
	2.1.2 Form Verbiage .....	5
	2.1.3 Form/NOA Variable Population .....	5
	2.1.4 Form Generation Conditions .....	5
3	Supporting Documents .....	6
4	Requirements.....	6
	4.1 Project Requirements.....	6

# 1 OVERVIEW

---

The purpose of this SCR is to add CL 1 (4/99) - "Cal-Learn Registration/Program Information/Orientation Appointment Notice" to CalSAWS in available Threshold languages.

## 1.1 Current Design

Currently, CL 1 (4/99) is available only in English and Spanish languages in the CalSAWS.

## 1.2 Requests

Add CL 1 (4/99) to the CalSAWS in available threshold languages.  
Languages Include: Cambodian, Russian, and Vietnamese

## 1.3 Overview of Recommendations

Add CL 1 (4/99) to the CalSAWS in available threshold languages.  
Languages Include: Cambodian, Russian, and Vietnamese

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing EN/SP forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add available threshold languages for CL 1 to the CalSAWS

### 2.1.1 Overview

**State Form:** CL 1(4/99)

**Current Programs:** Cal-Learn

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All Counties

**Existing Languages:** English, Spanish

### 2.1.2 Form Verbiage

Create new XDP's for threshold languages with Version (4/99)

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

**Form Header:** CalSAWS Standard Header (HEADER\_1\_EN)

**Include NA Back 9:** Yes

**Form Mockups/Examples:** See supporting document #1

### 2.1.3 Form/NOA Variable Population

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

### 2.1.4 Form Generation Conditions

The form is generated only through Template repository.

#### 1. Add Form Control

Add an imaging barcode for CL 1.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

#### 2. Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for the CL 1 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 Options:

Mailing Options	Option for CL 1
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

**Additional Options:**

Requirement	Option for CL 1 Form
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	State Form	CL 1 (4/99)	CL1_CH.pdf CL1_CA.pdf CL1_RU.pdf CL1_VI.pdf

### 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> </ul>	CL 1 is being added in available threshold languages to CalSAWS.

<ul style="list-style-type: none"><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul>	
--	--

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250631

Add Available Translations for CW 61A to  
CalSAWS.

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Navyasri Yalamanchili
	Reviewed By	Lianel Richwin

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/14/2023	1.0	Initial Draft	Navyasri Yalamanchili

## Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions.....	4
2	Recommendations	5
	2.1 Add Available Threshold Languages to CW 61A to CalSAWS. ....	5
	2.1.1 Overview.....	5
	2.1.2 Form Verbiage.....	5
	2.1.3 Form Variable Population.....	5
	2.1.4 Form Generation Conditions.....	6
3	Supporting Documents	7
4	Requirements	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

This effort will add available Threshold Languages to CW 61A (6/01) in CalSAWS.

## 1.1 Current Design

Currently CW 61A (6/01) is only available in English and Spanish Languages in CalSAWS.

## 1.2 Requests

Add CW 61A (6/01) Physical Capacities in available threshold languages to CalSAWS Template Repository.

Languages Include: Cambodian, Chinese, Russian and Vietnamese.

## 1.3 Overview of Recommendations

Add CW 61A (6/01) Physical Capacities to CalSAWS in following threshold languages: Cambodian, Chinese, Russian and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. The new threshold forms will be the same as the existing English and Spanish forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Add Available Threshold Languages to CW 61A to CalSAWS.

#### 2.1.1 Overview

This section will cover the requirements for adding the CW 61A in available threshold languages.

**State Form:** CW 61A

**Current Programs:** Refugee Employment Program, Welfare-To-Work, Child Care, CalWORKs

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Template Description:** This form is intended to determine the extent, if any, that this person's current physical condition would interfere with his/her ability to work or participate in a CalWORKs activity.

**Imaging Form Name:** Physical Capacities

**Imaging Document Type:** Medical Reports/Records

#### 2.1.2 Form Verbiage

##### **Create CW 61A XDP's for Threshold Languages**

XDP's will be added in threshold languages for CW 61A form with version (6/01).

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

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

**Form Mockups/Examples:** See Supporting Documents #1

**Form Header:** CalSAWS Standard Header #1

**Form Number:** CW 61A

**Include NA BACK9:** No

#### 2.1.3 Form Variable Population

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

## 2.1.4 Form Generation Conditions

The CW 61A form will be generated through only Template Repository.

### **Form Print/Mailing Options**

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

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

#### **Mailing Options:**

Mailing Options	Option for CW 61A Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

#### **Form Control:**

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

#### **Additional Options:**

Requirement	Option for CW 61A Form
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Correspondence	CW 61A Threshold Languages	CW61A_CA.pdf CW61A_CH.pdf CW61A_RU.pdf CW61A_VI.pdf

## 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	<p>CW 61A is being added in available threshold Languages to CalSAWS.</p>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250633

Add Available Translations for CW 61B to  
CalSAWS.

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Surendar Raja Gopal Murugesan
	Reviewed By	Lianel Richwin

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/28/2023	1.0	Initial Draft	Surendar Raja Gopal Murugesan

## Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions.....	4
2	Recommendations	4
	2.1 Add CW 61B in available Threshold Languages.....	4
	2.1.1 Overview.....	4
	2.1.2 Form Verbiage.....	5
	2.1.3 Form Generation Conditions.....	5
3	Supporting Documents	7
4	Requirements	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

This effort will add available Threshold Languages to CW 61B (6/01) in CalSAWS.

## 1.1 Current Design

Currently CW 61B (6/01) is only available in English and Spanish languages in CalSAWS.

## 1.2 Requests

Add CW 61B (6/01) Mental Capacities in available threshold languages to CalSAWS Template Repository.

Languages Include: Cambodian, Chinese, Russian, Vietnamese

## 1.3 Overview of Recommendations

Add CW 61B (6/01) Mental Capacities to CalSAWS in following threshold languages: Cambodian, Chinese, Russian, Vietnamese

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. The new threshold forms will be the same as the existing English and Spanish forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Add CW 61B in available Threshold Languages

### 2.1.1 Overview

This section will cover the requirements for adding the CW 61B in available threshold languages.

**State Form:** CW 61B (6/01)

**Programs:** CalWORKs, Welfare-To-Work, REP and Child Care.

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All counties

**Existing Languages:** English, Spanish

**Form Title (Document List Page Displayed Name):** Mental Capacities

## 2.1.2 Form Verbiage

### Create CW 61B XDP's for Threshold Languages

New XDPs will be created for threshold languages.

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

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

**Form Header:** CalSAWS Standard Header #1

**Include NA Back 9:** No

**Form Mockups/Examples:** See Supporting Documents #1

## 2.1.3 Form Generation Conditions

The CW 61B will be generated through Template Repository.

### Form Print/Mailing Options

Threshold languages will have the same Form Print/Mailing Options as their corresponding English/Spanish languages.

#### Print Options:

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

#### Mailing Options:

Mailing Options	Option for CW 61B
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

#### Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

**Additional Options:**

Requirement	Option for CW 61B Form
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Correspondence	CW 61B form in threshold languages	CW61B_CA.pdf CW61B_CH.pdf CW61B_RU.pdf CW61B_VI.pdf

## 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"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	CW 61B is added in available threshold languages.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250657

Add Available Translations for NA 834 to CalSAWS

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Sagar Karnawadi
	Reviewed By	Mamata Sasumana

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/26/2023	1.0	Initial Draft	Sagar Karnawadi

## Table of Contents

1	Overview .....	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions .....	4
2	Recommendations.....	4
2.1	Add new NA 834 to CalSAWS in available threshold languages.....	4
2.1.1	Overview .....	4
2.1.2	Form Verbiage .....	5
2.1.3	Form Generation Conditions .....	5
3	Supporting Documents .....	7
4	Requirements.....	8
4.1	Project Requirements.....	8

# 1 OVERVIEW

---

The purpose of this SCR is to add NA 834 NOTICE OF ACTION CHILD CARE SERVICES DENIAL in threshold languages to CalSAWS.

## 1.1 Current Design

During the missing translations review, only the English and Spanish version of the NA 834 Child Care Services Denial. Some translations are missing.

## 1.2 Requests

Implement the available translations of the NA 834 Child Care Services Denial. The following translations missing in CalSAWS are currently available on the CDSS website:

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

## 1.3 Overview of Recommendations

Add available threshold languages for NA 834 Child Care Services Denial to CalSAWS Template Repository.

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

## 1.4 Assumptions

1. All fields (blank or prepopulated) will be editable.
2. No variables will be populated on the new NA 834 Form (aside from the standard header and footer information).
3. Supporting Documents section references attachments found on JIRA.

# 2 RECOMMENDATIONS

---

## 2.1 Add new NA 834 to CalSAWS in available threshold languages.

### 2.1.1 Overview

Currently the translations of the NA 834 Child Care Services Denial are not in the CalSAWS.

**State Form:** NA 834 (3/20)

**Programs:** Child Care

**Forms Category:** NOA  
**Template Repository Visibility:** All Counties  
**Form Title (Document List Page Displayed Name):**  
Child Care Services Denial  
**Imaging Form Name:** Child Care Denial NOA  
**Imaging Document Type:** Notification/NOA  
**Imaging Case/Person:** Case  
**Existing Languages:** English, Spanish.

### 2.1.2 Form Verbiage

#### **Create NA 834 XDP.**

A new XDP will be created in threshold languages for NA 834 form with version (3/20).

**Languages:** Arabic, Armenian, Cambodian, Chinese \*, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.

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

**Form Header:** CalSAWS Standard Header (HEADER\_1\_EN)

**Form Number:** NA 834

**Include NA Back 9:** Yes

**Form Mockups/Examples:** See supporting documents #1

### 2.1.3 Form Generation Conditions

#### **Add NA 834 (3/20) to Template Repository in all available languages.**

The NA 834(3/20) Child Care Services Denial is added to the Template Repository.

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

#### **Add Form Print Options and Mailing Requirements**

The following are the print and mailing requirements for Child Care Services Denial.

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

**Mailing Options:**

Mailing Options	Option NA 834
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

**Add Form Control**

Add an imaging barcode for NA 834

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

**Additional Options:**

Requirement	Option for NA 834 Form
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Correspondence	NA 834 Available Languages	NA_834_Arabic.pdf NA_834_Armenian.pdf NA_834_Cambodian.pdf NA_834_Farsi.pdf NA_834_Hmong.pdf NA_834_Korean.pdf NA_834_Lao.pdf NA_834_Tagalog.pdf NA_834_Vietnamese.pdf NA_834_Chinese.pdf NA_834_Russian.pdf

## 4 REQUIREMENTS

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	NA 834 (3/20) is being added in all available threshold languages.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-254554

Ensure the Case County Matches When  
Creating a Special Investigation Detail

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Gerald Limbrick
	Reviewed By	Naga Chinduluru

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
3/22/2023	1.0	Initial	G. Limbrick
5/31/2023	1.1	Added DCR to correct old records	G. Limbrick
6/9/2023	1.2	Updated estimated records for DCR	G. Limbrick

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Special Investigation Detail .....	5
	2.1.1 Overview .....	5
	2.1.2 Special Investigation Detail page Mockup.....	5
	2.1.3 Description of Changes .....	5
	2.1.4 Page Location .....	6
	2.1.5 Security Updates.....	6
	2.1.6 Page Mapping.....	6
	2.1.7 Page Usage/Data Volume Impacts .....	6
	<b>2.2 Data Change .....</b>	<b>6</b>
	<b>2.2.1 Overview .....</b>	<b>6</b>
	<b>2.2.2 Description of Change.....</b>	<b>6</b>
	<b>2.2.3 Estimated Number of Records Impacted/Performance.....</b>	<b>6</b>
3	Requirements.....	8
	3.1 Project Requirements.....	8
	3.2 Migration Requirements.....	8
4	Migration Impacts .....	9

# 1 OVERVIEW

---

## 1.1 Current Design

A special investigation may be created in the CalSAWS system outside of the users logged in county i.e., the user can select/choose a case from another county when creating a Special Investigation Detail record thru the Special Investigation Detail & Select Case pages. A Special Investigation Detail created for a case in a different county causes the batch job PB19S910 to fail.

## 1.2 Requests

Prevent a case from another county, besides the user's home county (or currently selected county for RCC (Regional Contact Center)/county 90 & 92 type users), being saved when creating a Special Investigation Detail record.

## 1.3 Overview of Recommendations

1. Add a Validation to prevent a Special Investigation record being saved for a case outside of the user's county.

## 1.4 Assumptions

1. All other functionalities remain unchanged unless specifically called out by this document.

## 2 RECOMMENDATIONS

### 2.1 Special Investigation Detail

#### 2.1.1 Overview

Add a validation message when saving a Special Investigation Detail record with a Case from a different county than the users home/logged in county:

#### 2.1.2 Special Investigation Detail page Mockup

The screenshot displays the 'Special Investigation Detail' form. On the left is a navigation menu with 'Special Investigations' highlighted. The main form area has a title 'Special Investigation Detail' and three buttons: 'Images', 'Save', and 'Cancel'. A red asterisk legend indicates that fields marked with an asterisk are required. A validation message is displayed: '• Case Number - The selected Case Number is not valid for this county.' The form contains several fields: 'Investigation ID', 'Legacy Fraud Number', 'Investigation Status' (set to 'Referral'), 'DPA 266 Type' (set to 'Other Unreported Income'), 'Allegation', 'Origin' (set to 'Internal'), 'Restricted Access - Internal Investigation?' (set to 'No'), 'Case Type' (set to 'Internal'), 'Case Number' (set to '2046541' with a 'Remove' button), 'Case Name' (set to 'Case Name'), 'Language' (set to 'English'), 'Disposition Type', 'Disposition Date' (with a calendar icon), 'Fraud Type' (set to 'Historical'), and 'Child Care Agency' (with a 'Select' button).

Figure 2.1.2.1 – Special Investigation Detail Validation Message

#### 2.1.3 Description of Changes

1. Add a validation message when saving a Special Investigation Detail record with a case from a different county than the users home/logged in county:
  - a. Validate on pressing the 'Save' button

- b. Prevent the system from saving; show a validation as: "Case Number – The selected Case Number is not valid for this county."

#### **2.1.4 Page Location**

- **Global: Special Units**
- **Local: Special Investigations**
- **Task: Special Investigation Search**

#### **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 Data Change**

#### **2.2.1 Overview**

Remove the Case Number from any Special Investigation Summary records where the Case's county is not the same as the Special Investigation Summary record's county.

#### **2.2.2 Description of Change**

1. Remove the Case Number from any Special Investigation Summary records where the Case's county is not the same as the Special Investigation Summary record's county.
  - a. Remove/Null the Case (SPEC\_INVESTIG\_SUMM.Case\_ID) from the Special Investigation Summary table record
  - b. Remove/delete the linking table record associated with the Case Number (the SIU\_CASE table record)

#### **2.2.3 Estimated Number of Records Impacted/Performance**

192 records



### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.15.3.14	The LRS shall include a summary of fraud cases for the Welfare Fraud Investigator, including the status of investigations that may be accessed by COUNTY-specified Users.	This SCR facilitates the creation of a summary of a fraud Case.

#### 3.2 Migration Requirements

N/A

## 4 MIGRATION IMPACTS

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-255674

Update RCA Batch Sweep to Determine 12  
Months Based on Citizenship Date of Entry

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Eric Haymes
	Reviewed By	Howard Suksanti

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
02/15/2023	1.0	Initial	Eric Haymes
05/10/2023	1.1	Updated the 12 months logic to use Date of Entry	Howard Suksanti

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Update RCA Discontinuance Batch (PB00E128) .....	5
	2.1.1 Overview .....	5
	2.1.2 Description of Changes .....	5
	2.1.3 Execution Frequency.....	5
	2.1.4 Key Scheduling Dependencies.....	5
	2.1.5 Counties Impacted .....	5
	2.1.6 Category .....	5
	2.1.7 Data Volume/Performance.....	5
	2.1.8 Failure Procedure/Operational Instructions.....	6
3	Requirements.....	6
	3.1 Project Requirements.....	6

# 1 OVERVIEW

---

SCR CA-245084 implemented an ACWDL dated May 27, 2022, that extended RCA eligibility from 8 to 12 months. SCR CA-245084 updated the RCA Discontinuance batch sweep to the new 12-month benefit period. The SCR CA-255674 will update the sweep to use the Citizenship Date of Entry to calculate the 12-month period.

## 1.1 Current Design

The RCA discontinuance batch sweep (PB00E128) identifies individuals who have reached their 12-month period by using the Begin Date on the Citizenship Detail page.

## 1.2 Requests

1. Update the RCA discontinuance batch sweep to use the Citizenship Date of Entry to calculate if the 12-month period has been reached.

## 1.3 Overview of Recommendations

1. Update the RCA discontinuance batch sweep to use the Citizenship Date of Entry to calculate if the 12-month period has been reached.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

---

### 2.1 Update RCA Discontinuance Batch (PB00E128)

#### 2.1.1 Overview

Update the RCA Discontinuance batch sweep to use Citizenship Date of Entry to calculate the 12-month period.

#### 2.1.2 Description of Changes

1. Update the RCA Discontinuance batch sweep (PB00E128) to use Citizenship Date of Entry to calculate the 12-month period.

The following are the updated trigger conditions:

- a. Participant status is active on an RCA program as of batch run date.
  - b. The batch does not select case that there is only one person on the case that is under 18 years old.
  - c. The following month is over 12 months from the Citizenship – Date of Entry.
  - d. Do not trigger Batch EDBC when RCA State Discontinuance Sweep (PB00E125) or RCA Federal Discontinuance Sweep (PB00E126) triggers EDBC on the same case.
2. Add a dependency to run after PB00E125 and PB00E126.

#### 2.1.3 Execution Frequency

No Change. Monthly Batch 10 Day cutoff.

#### 2.1.4 Key Scheduling Dependencies

Add dependency to run after PB00E125 and PB00E126.

#### 2.1.5 Counties Impacted

All Counties

#### 2.1.6 Category

Core

#### 2.1.7 Data Volume/Performance

No Change.

### 2.1.8 Failure Procedure/Operational Instructions

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

## 3 REQUIREMENTS

---

### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.1	The LRS shall fully automate and perform all aspects of the eligibility determination process and benefit level calculations for all categories of public assistance in a single pass without manual intervention.	This SCR updates the RCA Discontinuance batch to trigger EDBC on a correct 12 months period.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-256730

Update Address Location for Migration Flat Mail  
Packets

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	M R Kavitha
	Reviewed By	Lianel Richwin

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
05/12/2023	0.1	Initial Draft	M R Kavitha

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Update the mailing address location for below Migration packets including threshold languages. ....	5
	2.1.1 Overview .....	5
	2.1.2 Form/NOA Verbiage .....	5
	2.1.3 Form/NOA Variable Population .....	7
	2.1.4 Form/NOA Generation Conditions.....	7
3	Supporting Documents .....	8
4	Requirements.....	8
	4.1 Project Requirements.....	8

# 1 OVERVIEW

---

This SCR will update the Mailing Address location for given Migration Packets. So that the mailing address will be visible using both tap methods.

## 1.1 Current Design

Currently in CalSAWS, the mailing address location for the flat mail packets displays correctly when the contents are sitting on the bottom of the envelope (tap bottom). If the envelope is tapped on top, the mailing address is partially visible.

## 1.2 Requests

Update the mailing address location for all flat mail packets (Migration County) so that the mailing address will be visible using both tap methods. Moving the address lines, a little down will resolve this issue.

## 1.3 Overview of Recommendations

- Update the mailing address location for below Migration packets including threshold languages.
  1. CF 285 - Application for CalFresh Benefits
  2. CF 285A - Prepopulated Application for CalFresh Benefits
  3. CF 285A Application Packet - CalFresh CF 285A Application Packet
  4. CF RE Packet - CalFresh Recertification Packet
  5. CW RE Packet - CalWORKs Redetermination Packet
  6. CW/CF RE Packet - CalWORKs/CalFresh RE Packet
  7. ESAP CF RE Packet - ESAP CalFresh Recertification Packet
  8. MAGI RE Packet - MAGI RE Packet
  9. Mixed Household RE Packet - Mixed Household RE Packet
  10. Non-MAGI RE Packet - Non-MAGI RE Packet
  11. Non-MAGI Screening Packet - Non-MAGI Screening Packet
  12. Non-MAGI Turning 65 - Non-MAGI Turning 65 Packet
  13. TNB 4 Recert Packet - TNB 4 Recertification Packet

## 1.4 Assumptions

1. This effort will only update the location of Mailing Address occurrences in the Header section. There will be no updates to the location of the Customer Mailing Address occurring in sections other than Header section.
2. Central Print testing will be required for this effort.
3. There are no changes related to trigger or form generation conditions.

## 2 RECOMMENDATIONS

### 2.1 Update the mailing address location for below Migration packets including threshold languages.

#### 2.1.1 Overview

This SCR will update Mailing Address location for the given Packets in CalSAWS for Migration counties, so that the Customer Mailing Address location for the given packets will be visible using both tap methods Forms.

#### 2.1.2 Form/NOA Verbiage

**Form Header:** RD\_MIG\_Header

**Form Mockups/Examples:** See supporting document # 1



**Fig. 2.1.1.1 Tapping the Envelope Bottom vs. Top**

Compared to the customer mailing address location when tapping the form bottom, the mailing address is displayed completely. If the envelope is tapped on top, the mailing address is partially visible.

Update the 'Y' axis of all 3 address lines by moving the fields down in the header section for all available threshold languages for given packets.

Please find the below details related to available languages for given Packets.

<b>Sl.No</b>	<b>Packet Name</b>	<b>Available Languages</b>
1.	CF 285 - Application for CalFresh Benefits	English, Spanish
2.	CF 285A - Prepopulated Application for CalFresh Benefits	English, Spanish
3.	CF 285A Application Packet - CalFresh CF 285A Application Packet	English, Spanish
4.	CF RE Packet - CalFresh Recertification Packet	English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese
5.	CW RE Packet - CalWORKs Redetermination Packet	English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese
6.	CW/CF RE Packet - CalWORKs/CalFresh RE Packet	English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese
7.	ESAP CF RE Packet - ESAP CalFresh Recertification Packet	English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese
8.	MAGI RE Packet - MAGI RE Packet	English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese
9.	Mixed Household RE Packet - Mixed Household RE Packet	English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese
10.	Non-MAGI RE Packet - Non-MAGI RE Packet	English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese
11.	Non-MAGI Screening Packet - Non-MAGI Screening Packet	English, Spanish
12.	Non-MAGI Turning 65 - Non-MAGI Turning 65 Packet	English, Spanish
13.	TNB 4 Recert Packet - TNB 4 Recertification Packet	English, Spanish

Note: Chinese\* includes Cantonese, Chinese, and Mandarin.

### **2.1.3 Form/NOA Variable Population**

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

### **2.1.4 Form/NOA Generation Conditions**

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

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Packets	Envelope reference pdfs are given for both bottom and Top	Test Packet - tap bottom .pdf Test Packet - tap top.pdf

### 4 REQUIREMENTS

#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.2.12 CAR-1234	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> </ul>	Customer Address location will be updated to make address lines visible.

- |  |  |  |
|--|--|--|
|  | <ul style="list-style-type: none"><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul> |  |
|--|--|--|

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-256903

FC, KG, AAP Manual EDBC Copy Budget and  
Aid Code Information

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Yale Yee
	Reviewed By	Business Analysts, Build Team, System Test Team, Foster Care Committee

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
3/30/2023	1.0	Initial document	Yale Yee

## Table of Contents

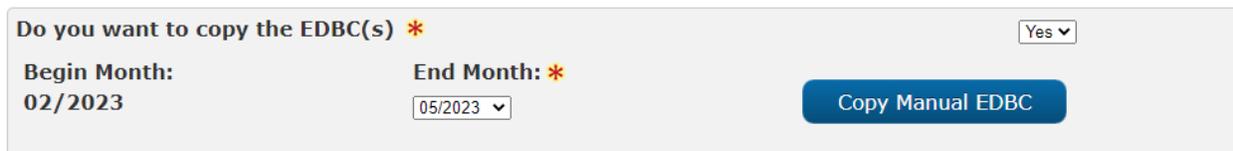
1	Overview .....	4
1.1	Current Design.....	4
1.2	Requests.....	7
1.3	Overview of Recommendations.....	7
1.4	Assumptions .....	7
2	Recommendations.....	8
2.1	AAP EDBC (Manual).....	8
2.1.1	Overview .....	8
2.1.2	AAP EDBC (Manual) Mockup .....	8
2.1.3	Page Location .....	9
2.1.4	Description of Changes .....	9
2.1.5	Security Updates.....	9
2.1.6	Page Mapping.....	9
2.1.7	Page Usage/Data Volume Impacts .....	9
2.2	Foster Care EDBC (Manual) .....	9
2.2.1	Overview .....	9
2.2.2	Foster Care EDBC (Manual) Mockup.....	10
2.2.3	Description of Changes .....	10
2.2.4	Page Location .....	11
2.2.5	Security Updates.....	11
2.2.6	Page Mapping.....	12
2.2.7	Page Usage/Data Volume Impacts .....	12
2.3	Kin-GAP EDBC (Manual) .....	12
2.3.1	Overview .....	12
2.3.2	Kin-GAP EDBC (Manual) Mockup .....	13
2.3.3	Description of Changes .....	13
2.3.4	Page Location .....	14
2.3.5	Security Updates.....	14
2.3.6	Page Mapping.....	14
2.3.7	Page Usage/Data Volume Impacts .....	14

# 1 OVERVIEW

---

## 1.1 Current Design

When a worker creates a Manual EDBC for Foster Care (FC), Kin-GAP (KG) or Adoption Assistance Program (AAP), and enters all the required data and clicks Accept, the EDBC List page displays the message "Do you want to copy the EDBC(s)" (unless the Manual EDBC was created for the come-up month, or the Manual EDBC Reason is COVID-19).



The screenshot shows a light gray dialog box with the following elements:

- Header: "Do you want to copy the EDBC(s) \*" in bold black text, with a red asterisk. To the right is a "Yes" dropdown menu.
- Form fields: "Begin Month:" with the value "02/2023" and "End Month: \*" with a dropdown menu showing "05/2023".
- Action: A blue button labeled "Copy Manual EDBC".

**Figure 1.1.1 – Copy the EDBC(s) Prompt**

Copying provides an option to replicate that one-month Manual EDBC forward for up to five additional months (but not beyond the come-up month). This saves some effort when creating multiple months of Manual EDBC's on a single case. The worker must still view, re-calculate, and accept each Manual EDBC copy before saving them all.

Some Manual EDBC information does not get copied to the EDBC copies created by this process and the worker must enter it before accepting and saving them all.

Aid Code Information				
Program Aid Code	Sub Type Code	Begin Date	End Date	Rate Structure *
<b>Organization: *</b> <span style="border: 1px solid black; border-radius: 5px; padding: 2px 10px;">Select</span>		<b>Placement Type:</b> AAP Placement		
Aid Payment				
<b>Rate Payment:</b>		\$	<input type="text" value="0.00"/>	
<b>Special Care Increment:</b>		+	<input type="text" value="0.00"/>	
<b>County Authorized Allowance:</b>		+	<input type="text" value="0.00"/>	
<b>Kidstep Supplement:</b>		+	<input type="text" value="0.00"/>	
<b>Potential Benefit:</b>		\$	0.00	
<b>Previous Potential Benefit:</b>		\$	<input type="text" value="0.00"/>	
Overpayment Adjustment Amount		\$	<u>0.00</u>	
Authorized Amount		\$	0.00	
Overpayment		\$	0.00	
				<span style="border: 1px solid black; border-radius: 5px; padding: 5px 15px;">Calculate</span>
<b>Pay Code:*</b>	<input type="text" value="Legal Guardian"/>			
<b>Delivery Method: *</b>	<b>Immediacy Indicator: *</b>	<b>Issuance Method:</b>		
<input type="text" value="Mail"/>	<input type="text" value="Routine"/>	Warrant		
Authorized Amount Per Rate Structure				
Aid Code	Auth Amount	Number of Days	Rate Structure	

Figure 1.2.1 – AAP EDBC (Manual) Copy EDBC

Aid Code Information						
Program Aid Code *	Sub Type Code	Begin Date	End Date	Rate Structure	Overridden Aid Code	<input type="button" value="Add"/>
Organization: * <input type="button" value="Select"/>			Placement Type:			
Foster Care Placement						
Aid Payment						
Rate Payment:					\$	<input type="text" value="0.00"/>
Special Care Increment:					+	<input type="text" value="0.00"/>
Infant Supplement Payment:					+	<input type="text" value="0.00"/>
Parenting Support Plan:					+	<input type="text" value="0.00"/>
Infant Supplemental Rate Supplement:					+	<input type="text" value="0.00"/>
County Authorized Allowance:					+	<input type="text" value="0.00"/>
Kidstep Supplement:					+	<input type="text" value="0.00"/>
Educational Travel Reimbursement:					+	<input type="text" value="0.00"/>
Unearned Income:					-	<input type="text" value="0.00"/>
Earned Income:					-	<input type="text" value="0.00"/>
Earned Income Disregard:					+	<input type="text" value="0.00"/>
Potential Benefit:					\$	0.00
Previous Potential Benefit:					\$	<input type="text" value="0.00"/>
Overpayment Adjustment Amount					\$	<u>0.00</u>
Authorized Amount					\$	0.00
Overpayment					\$	0.00
						<input type="button" value="Calculate"/>
Delivery Method: *	Immediacy Indicator: *	Issuance Method:				
<input type="text" value="Mail"/>	<input type="text" value="Routine"/>	Warrant				
Authorized Amount Per Aid Code						
Aid Code	Auth Amount	Number of Days	Rate Structure	Placement Type	Pay Code	

Figure 1.3.1 – Foster Care EDBC (Manual) Copy EDBC

Aid Code Information			
Program Aid Code	Begin Date	End Date	Rate Structure *

Aid Payment	
Rate Payment:	\$ 0.00
Special Care Increment:	+ 0.00
Infant Supplement Payment:	+ 0.00
Infant Supplemental Rate Supplement:	+ 0.00
County Authorized Allowance:	+ 0.00
Kidstep Supplement:	+ 0.00
Total Net Nonexempt Income:	- 0.00
Potential Benefit:	\$ 0.00
Previous Potential Benefit:	\$ 0.00
Overpayment Adjustment Amount	\$ 0.00
Authorized Amount	\$ 0.00
Overpayment	\$ 0.00
<b>Calculate</b>	
<b>Pay Code:*</b>	
Legal Guardian	

<b>Delivery Method: *</b>	<b>Immediacy Indicator: *</b>	<b>Issuance Method:</b>
Mail	Routine	Warrant

Authorized Amount Per Rate Structure			
Aid Code	Auth Amount	Number of Days	Rate Structure

Figure 1.4.1 – Kin-GAP EDBC (Manual) Copy EDBC

## 1.2 Requests

Update the Manual EDBC copy process to include additional information on Manual EDBC's for FC, KG, and AAP.

## 1.3 Overview of Recommendations

1. Update the Manual EDBC copy process to copy forward additional information on Manual EDBC's for FC, KG, and AAP.

## 1.4 Assumptions

1. The current validations for AAP, FC, and KG Manual EDBC's will not be changed.

## 2 RECOMMENDATIONS

### 2.1 AAP EDBC (Manual)

#### 2.1.1 Overview

Update the Manual EDBC copy process to copy forward additional information on Manual EDBC's for AAP.

#### 2.1.2 AAP EDBC (Manual) Mockup

Aid Code Information				
Program Aid Code	Sub Type Code	Begin Date	End Date	Rate Structure *
03 - AAP-Fed		01/01/2023		CCR
				<a href="#">Edit</a>

Organization: *	<a href="#">Select</a>	Placement Type:
Test Test		Adoptive Homes

Aid Payment	
Rate Payment:	\$ <input type="text" value="500"/>
Special Care Increment:	+ <input type="text" value="400"/>
County Authorized Allowance:	+ <input type="text" value="100"/>
Kidstep Supplement:	+ <input type="text" value="50"/>
Potential Benefit:	\$ 0.00
Previous Potential Benefit:	\$ <input type="text" value="0.00"/>
Overpayment Adjustment Amount	\$ <u>0.00</u>
Authorized Amount	\$ 0.00
Overpayment	\$ 0.00
<a href="#">Calculate</a>	
Pay Code: *	<input type="text" value="Not Applicable"/>

Delivery Method: *	Immediacy Indicator: *	Issuance Method:
<input type="text" value="Mail"/>	<input type="text" value="Routine"/>	Warrant

Authorized Amount Per Rate Structure			
Aid Code	Auth Amount	Number of Days	Rate Structure
03	\$0.00	31	CCR

Figure 2.1.1 – AAP EDBC (Manual) Copy EDBC

### 2.1.3 Page Location

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

### 2.1.4 Description of Changes

1. Copy the following fields:
  - a. Program Aid Code
  - b. Begin Date
    - i. Populate the field with the begin date of the EDBC.
  - c. End Date
    - i. Populate the field with the end date of the EDBC.
  - d. Rate Structure
  - e. Rate Payment
  - f. Placement Type
  - g. Special Care Increment
  - h. County Authorized Allowance
  - i. Kidstep Supplement

**Note:** The Authorized Amount Per Rate Structure section will be populated when the Aid Code Information is copied.

### 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 Foster Care EDBC (Manual)

### 2.2.1 Overview

Update the Manual EDBC copy process to copy forward additional information on Manual EDBC's for FC.

## 2.2.2 Foster Care EDBC (Manual) Mockup

**Aid Code Information**

Program Aid Code *	Sub Type Code	Begin Date	End Date	Rate Structure	Overridden Aid Code
2P - ARC only		01/01/2023		Non-CCR	<input type="button" value="Edit"/> <input type="button" value="Add"/>

**Organization: \***   
 Test Test

**Placement Type:**  
 Relative Home

**Aid Payment**

Potential CalWorks Benefit:	\$	<input type="text" value="500.00"/>
Potential ARC Amount:	\$	<input type="text" value="400.00"/>
Rate Payment:	\$	900.00
Special Care Increment:	+	<input type="text" value="300.00"/>
Infant Supplement Payment:	+	<input type="text" value="200.00"/>
Parenting Support Plan:	+	<input type="text" value="100.00"/>
Infant Supplemental Rate Supplement:	+	<input type="text" value="80.00"/>
County Authorized Allowance:	+	<input type="text" value="60.00"/>
Kidstep Supplement:	+	<input type="text" value="50.00"/>
Educational Travel Reimbursement:	+	<input type="text" value="40.00"/>
Unearned Income:	-	<input type="text" value="30.00"/>
Earned Income:	-	<input type="text" value="20.00"/>
Earned Income Disregard:	+	<input type="text" value="0.00"/>
Potential Benefit:	\$	1,680.00
Previous Potential Benefit:	\$	<input type="text" value="0.00"/>
Overpayment Adjustment Amount	\$	0.00
Authorized Amount	\$	1,680.00
Overpayment	\$	0.00

**Authorized Amount Per Aid Code**

Aid Code	Auth Amount	Number of Days	Rate Structure	Placement Type	Pay Code
2P	\$ 1,680.00	31	Non-CCR		<input type="text" value="Approved Relative Caregiver"/>

Figure 2.2.1 – Foster Care EDBC (Manual) Copy EDBC

## 2.2.3 Description of Changes

1. Copy the following fields:
  - a. Program Aid Code
  - b. Sub type Code

- c. Begin Date
  - i. Populate the field with the begin date of the EDBC.
- d. End Date
  - i. Populate the field with the end date of the EDBC.
- e. Rate Structure
- f. Potential CalWORKs Benefit
  - i. If applicable for ARC.
- g. Potential ARC Amount
  - i. If applicable for ARC.
- h. Rate Payment
- i. Placement Type
- j. Special Care Increment
- k. Infant Supplement Payment
- l. Parenting Support Plan
- m. Infant Supplemental Rate Supplement
- n. County Authorized Allowance
- o. Kidstep Supplement
- p. Educational Travel Reimbursement
- q. Unearned Income
- r. Earned Income
- s. Earned Income Disregard
- t. Pay Code

**Note:** The Authorized Amount Per Rate Structure section will be populated when the Aid Code Information is copied.

- 2. If there are multiple aid codes, the Aid Code Information field will not be copied. The fields include:
  - a. Program Aid Code
  - b. Sub Type Code
  - c. Begin Date
  - d. Rate Structure

#### 2.2.4 Page Location

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

#### 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 Kin-GAP EDBC (Manual)**

### **2.3.1 Overview**

Update the Manual EDBC copy process to copy forward additional information on Manual EDBC's for KG.

### 2.3.2 Kin-GAP EDBC (Manual) Mockup

Aid Code Information			
<b>Program Aid Code</b>	<b>Begin Date</b>	<b>End Date</b>	<b>Rate Structure *</b>
4T - Kin-GAP (Fed)	01/01/2023		Non-CCR
			<a href="#">Edit</a>

Aid Payment	
<b>Rate Payment:</b>	\$ <input type="text" value="500"/>
<b>Special Care Increment:</b>	+ <input type="text" value="400"/>
<b>Infant Supplement Payment:</b>	+ <input type="text" value="300"/>
<b>Infant Supplemental Rate Supplement:</b>	+ <input type="text" value="200"/>
<b>County Authorized Allowance:</b>	+ <input type="text" value="100"/>
<b>Kidstep Supplement:</b>	+ <input type="text" value="50"/>
<b>Total Net Nonexempt Income:</b>	- <input type="text" value="25"/>
<b>Potential Benefit:</b>	\$ 0.00
<b>Previous Potential Benefit:</b>	\$ <input type="text" value="0.00"/>
Overpayment Adjustment Amount	\$ <a href="#">0.00</a>
Authorized Amount	\$ 0.00
Overpayment	\$ 0.00
<a href="#">Calculate</a>	
<b>Pay Code:*</b>	<input type="text" value="Legal Guardian"/>

<b>Delivery Method: *</b>	<b>Immediacy Indicator: *</b>	<b>Issuance Method:</b>
<input type="text" value="Mail"/>	<input type="text" value="Routine"/>	Warrant

Authorized Amount Per Rate Structure			
Aid Code	Auth Amount	Number of Days	Rate Structure
4T	\$0.00	31	Non-CCR

Figure 2.3.1 – Kin-GAP EDBC (Manual) Copy EDBC

### 2.3.3 Description of Changes

3. Copy the following fields:
  - a. Program Aid Code
  - b. Begin Date
    - i. Populate the field with the begin date of the EDBC.
  - c. End Date
    - i. Populate the field with the end date of the EDBC.
  - d. Rate Structure
  - e. Rate Payment
  - f. Special Care Increment
  - g. Infant Supplement Payment
  - h. Infant Supplemental Rate Supplement
  - i. County Authorized Allowance

- j. Kidstep Supplement
- k. Total Net Nonexempt Income

**Note:** The Authorized Amount Per Rate Structure section will be populated when the Aid Code Information is copied.

#### **2.3.4 Page Location**

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

#### **2.3.5 Security Updates**

N/A

#### **2.3.6 Page Mapping**

N/A

#### **2.3.7 Page Usage/Data Volume Impacts**

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-258922

CCPU dues deductions from childcare  
payments

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Michael Wu, Naga Chinduluru, Chitra Barsagade, Himanshu Jain, William Baretsky

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/28/2023	1.0	Initial	Kusnadi.E
05/12/2023	2.0	<ul style="list-style-type: none"> <li>Updated Section 2.1.2 with 2 additional screen shots to include validation messages.</li> <li>Updated Section 2.1.3 information on how the 3 new rows being added should look for historical records (records that are already created prior to the implementation of the SCR)and added 2 more validations for the page for when users enter a negative number.</li> <li>Reorganize on how the 3 new rows are listed on Section 2.1.3 to match how it is going to be listed on the page.</li> </ul>	Kusnadi.E

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Child Care Payment Calculation Detail.....	5
	2.1.1 Overview .....	5
	2.1.2 Child Care Payment Calculation Detail Mockup.....	6
	2.1.3 Description of Changes .....	9
	2.1.4 Page Location .....	11
	2.1.5 Security Updates.....	12
	2.1.6 Page Mapping.....	12
	2.1.7 Page Usage/Data Volume Impacts .....	12
	2.2 Levy Detail .....	13
	2.2.1 Overview .....	13
	2.2.2 Levy Detail Mockup.....	13
	2.2.3 Description of Changes .....	13
	2.2.4 Page Location .....	14
	2.2.5 Security Updates.....	14
	2.2.6 Page Mapping.....	14
	2.2.7 Page Usage/Data Volume Impacts .....	14
	2.3 Code Table Change Request.....	14
	2.3.1 Overview .....	14
	2.3.2 Description of Change.....	14
	2.3.3 Estimated Number of Records Impacted/Performance.....	14
	2.4 Automated Regression Test.....	15
	2.4.1 Overview .....	15
	2.4.2 Description of Change.....	15
3	Requirements.....	15
	3.1 Project Requirements.....	15

# 1 OVERVIEW

---

As part of the Child Care Bulletin 23-01 (CCB 23-01) and Child Care Bulletin 23-07 (CCB 23-07) Union Dues or/and Political Contributions should be deducted from the childcare payment for providers. This SCR will update CalSAWS to allow workers to deduct Union Dues or/and Political Contributions so that it does not get issued along with keeping track on how much Union Dues or Political Contributions has been deducted for each benefit month from the providers.

## 1.1 Current Design

Currently in CalSAWS on the Child Care Payment Calculation Detail page workers are not able to deduct Union Dues or Political Contributions from the overall amount that is to be issued to the provider for a specific benefit month.

## 1.2 Requests

Update the Child Care Payment Calculation Detail page with additional fields to allow workers to deduct Union Dues and/or Political Contributions from the overall amount to be issued to the provider. Secondly, create a new Reason For Levy on the Levy Detail page to allow workers to track the amount of Union Dues/Political Contribution deductions that has been made for a specific provider.

## 1.3 Overview of Recommendations

1. Add additional fields to the Child Care Payment Calculation page to allow deduction of Union Dues and Political Contributions
2. Add an additional field to the Child Care Payment Calculation page to display the total amount prior to the deduction of Union Dues and Political Contributions.
3. Create a new Reason For Levy on the Levy Detail page

## 1.4 Assumptions

1. All existing functionalities will remain unchanged unless it's part of the design document.
2. Counties will need to retrieve the list of Providers from CalHR keep track manually on the total amount of Union Dues/Political Contributions that has been deducted overall.
3. A Levy recovery account will need to be created manually every month to keep track of issuance for providers where Union Dues and/or Political Contributions has been deducted from the amount to be issued.
4. Changes to the 1099 report will be updated as part of CA-260566.

## 2 RECOMMENDATIONS

---

As part of the Child Care Bulletin 23-01 (CCB 23-01) and Child Care Bulletin 23-07 (CCB 23-07) Union Dues or/and Political Contributions should be deducted from the childcare payment for providers. This SCR will update CalSAWS to allow workers to deduct Union Dues or/and Political Contributions so that it does not get issued along with keeping track on how much Union Dues or Political Contributions has been deducted for each benefit month from the providers.

### 2.1 Child Care Payment Calculation Detail

#### 2.1.1 Overview

Child Care Payment Calculation Detail page allows workers to add, edit or view the detail of the Child Care payment calculations used for payment authorization for a specific month. This SCR will add additional fields that would allow workers to deduct Union Dues and/or Political Contribution for the total amount to be authorized along with tracking the overall total amount prior to any deductions.

## 2.1.2 Child Care Payment Calculation Detail Mockup

### Child Care Payment Calculation Detail

\*- Indicates required fields

Images
Go
Cancel

<b>Funding Source:</b> Stage 1	<b>Benefit Month: *</b> 04/2023	<b>Creation Date:</b> 04/28/2023
<b>Child Name:</b> Minnie Mouse	<b>Provider:</b> Leora	<b>Calculate using: *</b> <input type="text" value="Least Rate"/>
		<b>Employed: *</b> <input type="text" value="Yes"/>

**Certified Care**

Care Type	Rate Type	Provider Rate	RMR	Month Units	Total
Full Time	Weekly	\$100.00	\$293.97	<input type="text" value="2.0"/>	\$200.00
Full Time	Weekly	\$200.00	\$293.97	<input type="text" value="0.0"/>	\$0.00

**Additional Care**

Care Type	Rate Type	Provider Rate	RMR	Month Units	Total
					<span style="border: 1px solid #0056b3; padding: 2px 5px; border-radius: 3px;">Add Rate</span>

**Monthly Amount**

Rate Sub-Total:	\$	200.00
Actual Amount Charged by the Provider:	\$	<input type="text" value="80.00"/>
Materials/Registration Fee:	+	<input type="text" value="50.00"/>
Disallowed Provider Vacation/Holiday Amount:	-	<input type="text" value="35.00"/>
Sub-Total for 1099:	=	95.00
Deduction for Union Dues:	-	<input type="text" value="10.00"/>
Deduction for Contributions:	-	<input type="text" value="5.00"/>
Sub-Total:	=	80.00
Total Amount Previously Authorized:	-	<input type="text" value="0.00"/>
Overpayment Adjustment:	-	0.00
Authorized Amount:	=	0.00
Overpayment:	\$	0.00

Images
Go
Cancel

This [Type 1](#) page took 0.40 seconds to load.

Figure 2.1.1 – Child Care Detail page in Create and Edit Mode

## Child Care Payment Calculation Detail

\* - Indicates required fields

Images

Accept

Edit

Close

**Funding Source:**

Stage 1

**Benefit Month: \***

04/2023

**Creation Date:**

04/28/2023

**Child Name:**

Minnie Mouse

**Provider:**

Leora

**Calculate using: \***

Least Rate

**Employed: \***

Yes

### Certified Care

Care Type	Rate Type	Provider Rate	RMR	Month Units	Total
Full Time	Weekly	\$100.00	\$293.97	2.0	\$200.00
Full Time	Weekly	\$200.00	\$293.97	0.0	\$0.00

### Monthly Amount

Rate Sub-Total:		\$	200.00
Actual Amount Charged by the Provider:		\$	80.00
Materials/Registration Fee:		+	50.00
Disallowed Provider Vacation/Holiday Amount:		-	35.00
Sub-Total for 1099:		=	95.00
Deduction for Union Dues:		-	10.00
Deduction for Contributions:		-	5.00
Sub-Total:		=	80.00
Total Amount Previously Authorized:		-	<u>0.00</u>
Overpayment Adjustment:		-	<u>0.00</u>
Authorized Amount:		=	80.00
Overpayment:		\$	0.00

Images

Accept

Edit

Close

This Type\_1 page took 0.58 seconds to load.

Figure 2.1.2 – Child Care Detail page in View Mode

## Child Care Payment Calculation Detail

\*- Indicates required fields

Images

Go

Cancel

- [Deduction for Union Dues](#) - Please enter an amount in xx,xxx,xxx.xx format.
- [Deduction for Contributions](#) - Please enter an amount in xx,xxx,xxx.xx format.

<b>Funding Source:</b> Stage 1	<b>Benefit Month: *</b> 04/2023	<b>Creation Date:</b> 04/28/2023	
<b>Child Name:</b> Minnie Mouse	<b>Provider:</b> Leora	<b>Calculate using: *</b> Least Rate	<b>Employed: *</b> Yes

### Certified Care

Care Type	Rate Type	Provider Rate	RMR	Month Units	Total
Full Time	Weekly	\$100.00	\$293.97	2.0	\$ 200.00
Full Time	Weekly	\$200.00	\$293.97	0.0	\$ 0.00

### Additional Care

Care Type	Rate Type	Provider Rate	RMR	Month Units	Total
					Add Rate

### Monthly Amount

Figure 2.1.3 – Child Care Detail page with validations for incorrect format

## Child Care Payment Calculation Detail

\*- Indicates required fields

Images

Go

Cancel

- [Deduction for Union Dues](#) - Please enter a positive amount.
- [Deduction for Contributions](#) - Please enter a positive amount.

<b>Funding Source:</b> Stage 1	<b>Benefit Month: *</b> 04/2023	<b>Creation Date:</b> 04/28/2023	
<b>Child Name:</b> Minnie Mouse	<b>Provider:</b> Leora	<b>Calculate using: *</b> Least Rate	<b>Employed: *</b> Yes

### Certified Care

Care Type	Rate Type	Provider Rate	RMR	Month Units	Total
Full Time	Weekly	\$100.00	\$293.97	2.0	\$ 200.00
Full Time	Weekly	\$200.00	\$293.97	0.0	\$ 0.00

Figure 2.1.4 – Child Care Detail page with validation for negative number

### 2.1.3 Description of Changes

1. Add 3 new row to the Monthly Amount section on the Child Care Payment Calculation Detail page.
  - a. The 1<sup>st</sup> row will be for 'Sub-Total for 1099:'
    - i. This row will also have an 'equal' sign and an un-editable text field.
      1. Text field will automatically populate with '0.00' when the page first load in Create mode.
      2. The page will automatically calculate the sub-total amount based on the following calculation: value entered on the 'Actual Amount Charged by the Provider' + value entered on the 'Materials/Registration Fee' – value entered on the 'Disallowed Provider Vacation/Holiday Amount'.
        - a. Value being displayed will be in the format of 'xx.xx'.
        - b. Example: Actual Amount Charged by the Provider is '80.00', Materials/Registration Fee is '50.00' and Disallowed Provider Vacation/Holiday Amount is '35.00'. The 'Sub-Total for 1099 will be '95.00' (80.00+50.00-35.00 = 95.00).
    - ii. For historical records, the row will display but will default to blank and will display as '0.00'.
      1. Workers will need to Edit the record and tab out of the 'Actual Amount Charged by the Provider' or the 'Materials/Registration Fee' text field for the page to calculate and display the appropriate amount.

Note: The Child Care Payment Calculation page will not be editable when payment is already issued. For these scenarios, the 'Sub-Total for 1099' will remain as '0.00' (blank).

- b. The 2<sup>nd</sup> row will be for 'Deduction for Union Dues:'
    - i. This row will also have a 'minus' sign along with an editable text field.
      1. Text field will be blank when the page first load in create mode.
      2. The amount entered on this field will have a format of xx.xx when the page is in view mode.
- Note:** This will work the same way as the 'Disallowed Provider Vacation/Holiday Amount' row.
- ii. For historical records, the row will display but will default to blank and will display as '0.00'.
    1. Workers will need to Edit the record in order to add any Deduction for Union Dues.

**Note:** The Child Care Payment Calculation page will not be editable when payment is already issued. For these scenarios, the 'Deduction for Union Dues will remain as '0.00' (blank).

- c. The 3<sup>rd</sup> row will be for 'Deduction for Contributions:'
  - i. This row will also have a 'minus' sign along with an editable text field.
    - 1. Text field will be blank when the page first load in create mode.
    - 2. The amount entered on this field will have a format of xx.xx when the page is in view mode.

**Note:** This will work the same way as the 'Disallowed Provider Vacation/Holiday Amount' row.

- ii. For historical records, the row will display but will default to blank and will display as '0.00'.
  - 1. Workers will need to Edit the record in order to add any Deduction for Contributions.

**Note:** The Child Care Payment Calculation page will not be editable when payment is already issued. For these scenarios, the 'Deduction for Union Dues will remain as '0.00' (blank).

- 2. Update the logic use to determine the value to be displayed for the 'Sub-Total' row on the Monthly Amount section on the Child Care Payment Detail page.
  - a. Update the 'Sub-Total' row to also deduct the amount entered on the newly 'Deduction for Union Dues' and 'Deduction for Contributions' row as part of its calculation to determine the amount for the 'Sub-Total'.
    - i. Example 1: Amount entered on the 'Actual Amount Charged by the Provider' is '80.00', amount entered on the 'Materials/Registration Fee' is '50.00' and the amount entered on 'Deduction for Union Dues' is '10.00' the 'Sub-Total' will be '120.00' ( $80.00 + 50.00 - 10.00 = 120.00$ ).
    - ii. Example 2: Amount entered on the 'Actual Amount Charged by the Provider' is '80.00', amount entered on the 'Disallowed Provider Vacation/Holiday Amount' is '35.00' and the amount entered on 'Deduction for Contributions' is '5.00' the 'Sub-Total will be '40.00' ( $80.00 - 35.00 - 5.00 = 40.00$ ).
    - iii. Example: Amount entered on the 'Actual Amount Charged by the Provider' is '80.00', amount entered on the 'Materials/Registration Fee' is '50.00', amount entered on the 'Disallowed Provider Vacation/Holiday Amount' is '35.00', amount entered on 'Deduction for Union Dues' is '10.00' and the amount entered on the 'Deduction for Contribution' is '5.00' the 'Sub-Total will be '80.00' ( $80.00 + 50.00 - 35.00 - 10.00 - 5.00 = 80.00$ ).

**Note:** The Sub-Total will continue to account for the amount entered on both the 'Materials/Registration Fee' and 'Disallowed Provider Vacation/Holiday Amount' as it currently does now.

3. Create the following new validations:
  - a. "Deduction for Union Dues – Please enter an amount in xx,xxx,xxx.xx format"
    - i. This validation will be triggered when the user clicks on the 'Go' button and the value entered on the 'Deduction for Union Dues' row is an alpha character, or if the numeric character entered is not in the format of xxxxxxxx.xx

**Note:** This validation should be the same as the validation that gets triggered when the value entered on the 'Disallowed Provider Vacation/Holiday amount' row is not in the proper format.
  - b. "Deduction for Contributions – Please enter an amount in xx,xxx,xxx.xx format"
    - i. This validation will be triggered when the user clicks on the 'Go' button and the value entered on the 'Deduction for Contributions' row is an alpha character, or if the numeric character entered is not in the format of xxxxxxxx.xx

**Note:** This validation should be the same as the validation that gets triggered when the value entered on the 'Disallowed Provider Vacation/Holiday amount' row is not in the proper format.
  - c. "Deduction for Union Dues – Please enter a positive amount."
    - i. This validation will be triggered when the user clicks on the 'Go' button and the value entered on the 'Deduction for Union Dues' row is not a positive amount (Example: -50).
  - d. "Deduction for Contributions – Please enter a positive amount."
    - i. This validation will be triggered when the user clicks on the 'Go' button and the value entered on the 'Deduction for Contributions' row is not a positive amount (Example: -50).

#### 2.1.4 Page Location

- **Global: Child Care**
- **Local: Case Summary**
- **Task: Child Care Certificate**

### **2.1.5 Security Updates**

N/A

### **2.1.6 Page Mapping**

Update Page Mapping to include the 3 new rows that are being added.

### **2.1.7 Page Usage/Data Volume Impacts**

N/A

## 2.2 Levy Detail

### 2.2.1 Overview

The Levy Detail page allows workers to add, edit or view a Levy Recovery Account type. This SCR will add a new Reason for Levy option to allow tracking specific for Union Dues/Contributions.

### 2.2.2 Levy Detail Mockup

The screenshot shows a web form titled "Levy Detail". At the top right are "Save" and "Cancel" buttons. A legend indicates that an asterisk (\*) denotes required fields. The form is organized into several sections:

- Recovery Account Number:** A text input field.
- Recovery Account Type:** A dropdown menu with "Levy" selected.
- Original Balance:** A text input field containing "0.00".
- Total Recovered:** A text input field containing "0.00".
- Current Balance:** A text input field containing "0.00".
- Cause:** A dropdown menu with "Levy" selected.
- Created On:** A date input field.
- Status:** A dropdown menu with "- Select -" selected.
- Status Reason:** A dropdown menu with "- Select -" selected.
- Status Date:** A date input field.
- Levy Requestor:** A "Select" button.
- Reason For Levy:** A dropdown menu with "- Select -" selected. A mouse cursor is hovering over the dropdown, which has opened to show a list of options: "- Select -", "- Select -", "Child Support Collections", "Contributions", "DMV Fees", "Levy", "Personal Income Tax", "Third Party Loss - Court Order", and "Union Dues".
- Responsible Party:** Radio buttons for "Person" (selected) and "Resource", followed by a "Select" button.
- Comments:** A large text area for entering notes.

At the bottom right are "Save" and "Cancel" buttons. A dark blue footer bar contains the text: "This Type\_1 page took 12.35 seconds to load."

Figure 2.2.1 – Levy Detail page with new option for the Reason For Levy field

### 2.2.3 Description of Changes

1. Add two new options of 'Union Dues' and 'Contributions' to the 'Reason For Levy' drop down field on the Levy Detail page.

**Note:** The change to the Levy Detail page is just to add a new option to the Reason For Levy drop down field. There is no change to how the page should function.

#### **2.2.4 Page Location**

- **Global: Fiscal**
- **Local: Collections**
- **Task: Create Levy Account**

#### **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 Code Table Change Request**

#### **2.3.1 Overview**

This change will be to add a reason for Levy to Code Detail Table Category 119.

#### **2.3.2 Description of Change**

1. Update Code Detail Table Category 119 to include the following mapping:
  - a. Short Decode Name: Union Dues
    - i. Refer Table 1 Descr: Yes ('Y')
  - b. Short Decode Name: Contributions
    - i. Refer Table 1 Descr: Yes ('Y')

#### **2.3.3 Estimated Number of Records Impacted/Performance**

2 records impacted.

## 2.4 Automated Regression Test

### 2.4.1 Overview

Create new automated regression test scripts to verify the display and calculation of the new fields on the Child Care Payment Calculation Detail page, and the 'Reason for Levy' values on the Levy Detail page.

### 2.4.2 Description of Change

1. Create regression scripts to verify that the following fields display on the Child Care Payment Calculation Detail page in view mode, and can be edited and saved on this page in edit mode:
  - a. Sub-Total for 1099  
**Technical Note:** Edit verification of this field is indirect, by changing the value of one or more dependent fields to trigger recalculation.
  - b. Deduction for Union Dues
  - c. Deduction for Contributions  
**Technical Note:** The scope of these scenarios is limited to newly created data. The default display for historical Detail records is out of scope.
2. Create regression scripts to verify that the 'Union Dues' and 'Contributions' values are available for selection in the 'Reason for Levy' dropdown on the Levy Detail page.

## 3 REQUIREMENTS

---

### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.1	<p>The LRS shall include the ability to issue benefits, including:</p> <ol style="list-style-type: none"><li>a. Monthly benefits issued on a recurring basis, on either a calendar month or fiscal (cyclical) period;</li><li>b. Emergency issuances (e.g., Immediate Need and Expedited Services);</li><li>c. Diversion payments;</li><li>d. Supplemental benefits;</li><li>e. Recovery refunds;</li><li>f. Special needs payments;</li><li>g. Retroactive payments;</li></ol>	<ol style="list-style-type: none"><li>1. The Child Care Payment Calculation List page will be updated to include new fields in order to track/calculate any deductions that needs to be made for childcare reimbursement due to union dues/contributions.</li><li>2. The Levy page is also updated to include 2 new options that can be used by users to manually track these union dues/contributions that's</li></ol>

	<ul style="list-style-type: none"> <li>h. Vendor and/or Service Provider payments;</li> <li>i. Tokens and bus passes;</li> <li>j. Non-traditional/alternative transportation (e.g., car pool, taxi vouchers, and parking fees);</li> <li>k. Vouchers for special payments, ancillary payments and other services; and</li> <li>l. Interim assistance payments.</li> </ul>	<p>been deduction for a provider per month.</p>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-259660

Task Management – Update Sibling Task  
Assignment

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Justin Dobbs
	Reviewed By	Justin Dobbs; Sarah Cox, Dymas Pena, Carlos Albances

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
4/7/2023	1.0	Initial Revision	Justin Dobbs

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Update Sibling Task Assignment Processing.....	5
3	Supporting Documents .....	10
4	Requirements.....	11
	4.1 Project Requirements.....	11
5	Appendix.....	12

# 1 OVERVIEW

---

This design outlines modifications to Task Management Sibling assignment processing to evaluate Position Task Category configurations.

## 1.1 Current Design

CA-250230 introduced a Sibling Assignment configuration for automated Tasks that will attempt to identify a worker who may already be holding a Task for the Case/Program of the Task being created and route the new Task to this "sibling" worker.

Sibling Assignment processing does not evaluate Position Task Category configurations.

## 1.2 Requests

Modify "sibling" Task assignment processing to evaluate Position Task Category configurations while determining a sibling Task worker. This is needed so that specialized workers do not receive additional Tasks for the same case/program that are outside of the categories of Tasks configured for the specialized worker.

## 1.3 Overview of Recommendations

1. Update "sibling" Task assignment logic to evaluate Position Task Category and Program configurations while determine sibling Task worker candidates. This adjustment will apply to all Task processes which use sibling processing per CA-250230 which include:
  - a. Automated Actions
  - b. Document Routing Rules
  - c. MEDS Alerts (Task configuration)
  - d. Task Upload
  - e. Worker Suggestions

## 1.4 Assumptions

1. N/A

## 2 RECOMMENDATIONS

---

### 2.1 Update Sibling Task Assignment Processing

1. Currently, the first step in "sibling" assignment processing is to:

Look for an existing sibling Task in an "Assigned" or "In Process" Status that is assigned to a Worker and associated to the same Case and Program of the Task being created.

Modify this first step in "sibling" assignment processing to:

Look for an existing sibling Task in an "Assigned" or "In Process" Status that is assigned to a Worker and associated to the same Case and Program of the Task being created. The Worker's Position must be configured to receive the Category and Program of the Task being created.

2. Currently, if the first step in "sibling" assignment processing above does not identify a worker, processing will:

Look for an existing sibling Task in an "Assigned" or "In Process" Status that is assigned to a Worker and associated to the same Case of the Task being created.

Modify this step in "sibling" assignment processing to:

Look for an existing sibling Task in an "Assigned" or "In Process" Status that is assigned to a Worker and associated to the same Case of the Task being created. The Worker's Position must be configured to receive the Category of the Task being created.

The following diagram outlines the full processing flow of “sibling” Task assignment processing as defined in CA-250230 plus the addition adjustments described above.

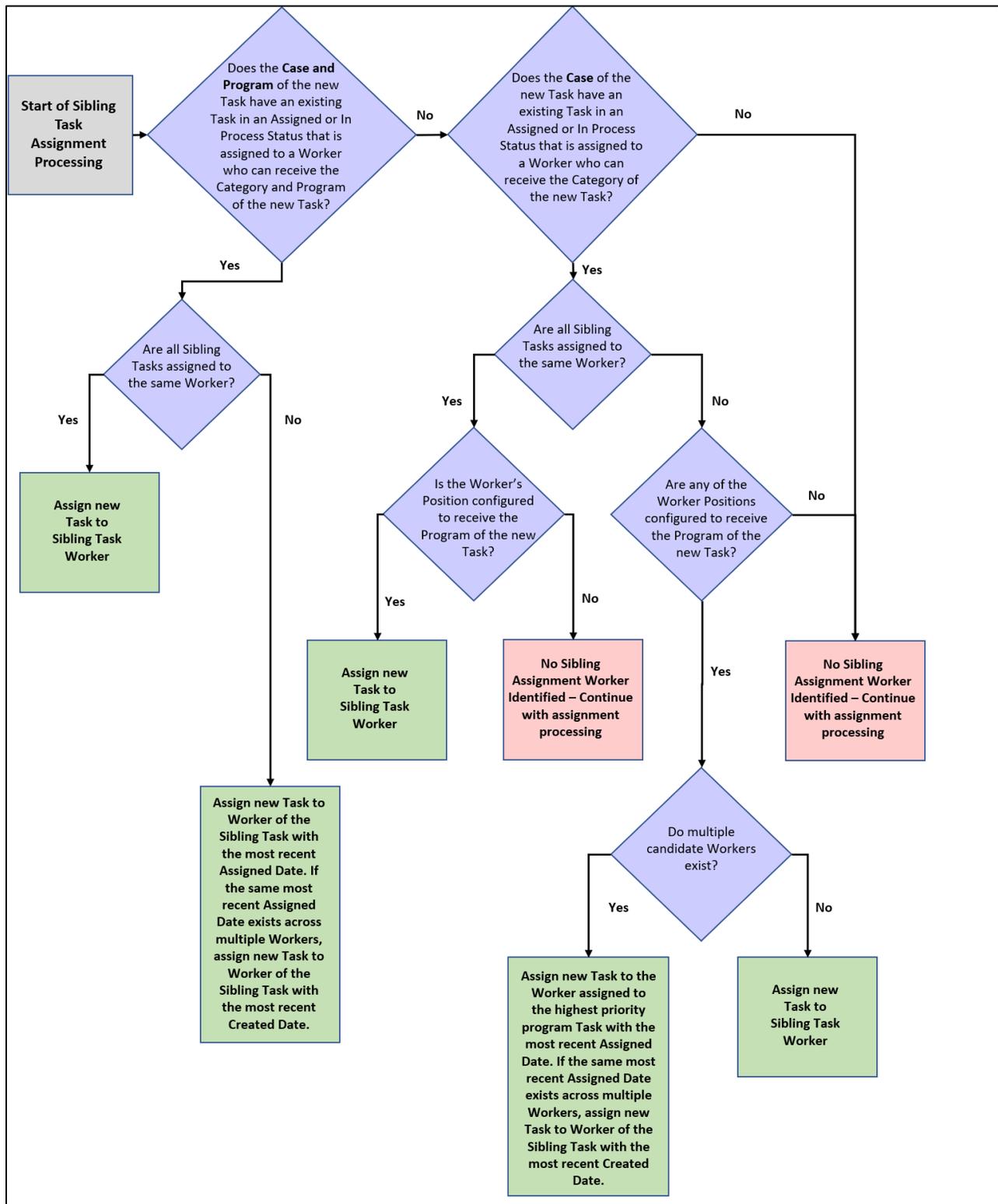


Figure 2.1-1 – Sibling Task Assignment Flow

Example Scenarios:

For each of the below examples, a new Task is being processed with Sibling Task Assignment that is associated to the CalWORKs program for Case 123 where the Category of the new Task is "Case Update".

Example 1:

Case 123 has a CalWORKs, CalFresh and Medi-Cal program. The CalWORKs program has an existing Task assigned to Worker A and the CalFresh program has an existing Task assigned to Worker B. These Tasks have a status of Assigned. Both Workers can accept "Case Update" category Tasks and are configured to work the CalWORKs program.

Program	Task	Task #	Task Assignment
CalWORKs	Yes	1	Worker A (Can accept "Case Update" Tasks)
CalFresh	Yes	2	Worker B (Can accept "Case Update" Tasks)
Medi-Cal	No		

**Result:** Step 1 of Sibling Task Assignment processing will evaluate Case 123 for a Task associated to the CalWORKs program because the new Task is also associated to the CalWORKs program. Processing will identify the single CalWORKs sibling Task that is assigned to Worker A where Worker A can accept "Case Update" category Tasks. Worker A is also configured for the CalWORKs program so the new Task will be assigned to Worker A.

Example 2:

Case 123 has a CalWORKs, CalFresh and Medi-Cal program. The CalWORKs program has an existing Task assigned to Worker A and the CalFresh program has an existing Task assigned to Worker B. These Tasks have a status of Assigned. Neither Worker can accept "Case Update" category Tasks.

Program	Task	Task #	Task Assignment
CalWORKs	Yes	1	Worker A (Can NOT accept "Case Update" Tasks)
CalFresh	Yes	2	Worker B (Can NOT accept "Case Update" Tasks)

Medi-Cal	No		
----------	----	--	--

**Result:** Step 1 of Sibling Task Assignment processing will evaluate Case 123 for a Task associated to the CalWORKs program because the new Task is also associated to the CalWORKs program. Processing does NOT identify a sibling Task worker with this step because the Worker assigned to the existing CalWORKs program Task cannot accept "Case Update" category Tasks. Processing will then continue and evaluate the other Tasks on the Case. In this example, Worker B who is assigned to the CalFresh program Task will not be identified as a Sibling candidate worker because Worker B cannot accept "Case Update" category Tasks. In this scenario, a sibling worker is not identified, and processing continues to evaluate the standard assignment configuration.

Example 3:

Case 123 has a CalWORKs, CalFresh and Medi-Cal program. The CalWORKs program has 3 existing Tasks with the status of Assigned. One Task assigned to Worker A, one Task assigned to Worker B and one Task assigned to Worker C. Worker A is configured for the CalWORKs program but cannot accept "Case Update" Tasks. Worker B can accept "Case Update" category Tasks but the position is NOT configured for the CalWORKs program. Worker C is configured for the CalWORKs program and can accept "Case Update" category Tasks-

Program	Task	Task #	Task Assignment	Task Assigned Date
CalWORKs	Yes	1	Worker A (Can NOT accept "Case Update" Tasks and is configured for the CalWORKs program)	10/15/2022
CalWORKs	Yes	2	Worker B (Can accept "Case Update" Tasks and is NOT configured for the CalWORKs program)	10/17/2022
CalWORKs	Yes	3	Worker C (Can accept "Case Update" Tasks and is configured for the CalWORKs program)	10/05/2022
CalFresh	No			

Medi-Cal	No			
----------	----	--	--	--

**Result:** Step 1 of Sibling Task Assignment processing will evaluate Case 123 for a Task associated to the CalWORKs program because the new Task is also associated to the CalWORKs program. Processing identifies the 3 sibling Tasks (Task #s 1, 2 and 3). Processing will then exclude Task #1 because Worker A cannot accept "Case Update" Category Tasks. This leaves Task #s 2 and 3. Processing will then exclude Task #2 because Worker B is not configured for the CalWORKs program. This leaves Task #3 where Worker C is configured to receive "Case Update" category Tasks and the position is configured for the CalWORKs program. Processing will assign the new Task to Worker C.

### 3 SUPPORTING DOCUMENTS

---

N/A

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.2.22.2	The LRS shall allow Users based on security profile to establish and save rules for alerts, reminders, and controls for future User sessions and/or as a default.	Introduce "sibling" Task assignment as a configuration option for automated Tasks in the CalSAWS System. This processing will evaluate Tasks which already exist for the Case and attempt to route new Tasks based on existing Task assignments.

## 5 APPENDIX

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-262252

CalSAWS VA Expansion – Release 9

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Uzochi Oparaji, Emily Best
	Reviewed By	Sarah Cordano

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
05/31/23	1.0	Original Draft	Uzochi Oparaji, Emily Best

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	6
	2.1 Internal VA Items .....	6
	2.1.1 Overview .....	6
	2.1.2 CalSAWS VA Mockups .....	6
	2.1.3 Description of Changes .....	7
	2.1.4 Page Location .....	36
	2.1.5 Security Updates.....	36
	2.1.6 Page Mapping.....	36
3	Supporting Documents .....	38
4	Requirements.....	39
	4.1 Project Requirements.....	39
5	Outreach.....	40
6	Appendix.....	40

# 1 OVERVIEW

---

## 1.1 Current Design

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

## 1.2 Requests

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

## 1.3 Overview of Recommendations

In Release 9 of the CalSAWS VA, we will release additional UCs within the VA and make enhancements to existing content. The scope of this SCR is as follows:

### Summary of New Content:

Category	Current Design	Release 9	Total (All Releases)
Number of UCs	203	18	221
Number of Keywords	549	273	822
Main Menu Branch	8	0	8
Sub-Menu Branches	25	4	29

### Summary of Enhancements to Existing Content:

Category	Release 9
Number of Edited UCs	14
New UX/UI Features	0

## 1.4 Assumptions

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

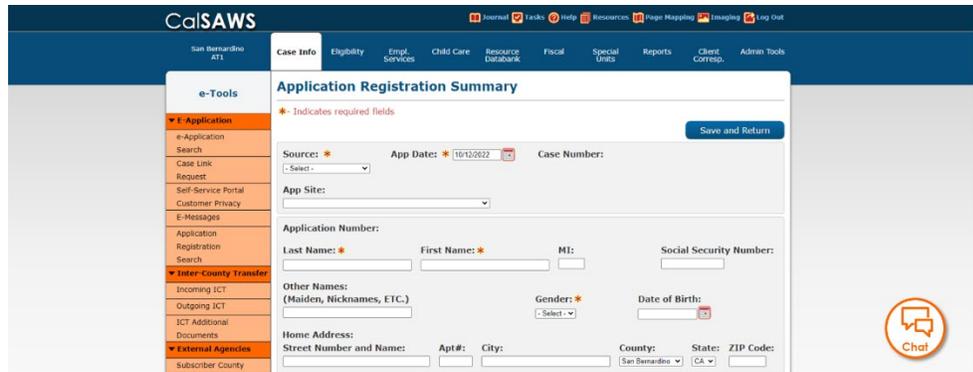


Figure 1.4.1 - VA Chat Icon

2. Once clicked, the VA will open as a pop-up window with the URL: [virtualassistant.calsaws.net](http://virtualassistant.calsaws.net).

## 2 RECOMMENDATIONS

---

### 2.1 Internal VA Items

#### 2.1.1 Overview

In this release, we will be adding more content to the VA and making enhancements to existing content. This content will include 18 more UCs, 14 edits to existing UCs, 273 new keywords, and 4 new sub-menu branches.

#### 2.1.2 CalSAWS VA Mockups

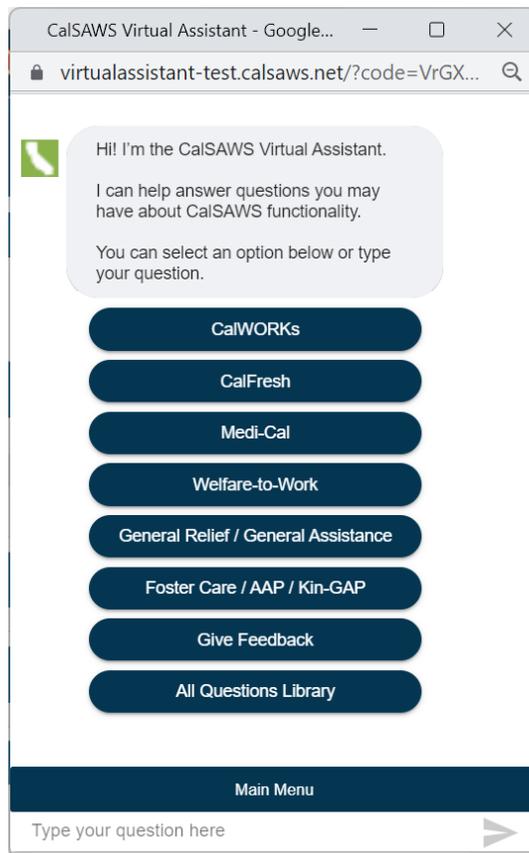


Figure 2.1.2.1 - VA Window

### 2.1.3 Description of Changes

#### 1. New UCs

Below is a table containing all new Use Cases in Release 9:

Program	Question	Answer	Buttons
Welfare-to-Work	What are the Non-Compliance Cause Determination appointment outcomes?	<p>There are different Cause Determination Appointment outcomes for a Welfare-to-Work (WTW) participant that is non-compliant:</p> <ol style="list-style-type: none"> <li>1. No Show to Non-Compliance Cause Determination Appointment</li> <li>2. Non-Compliance Cause Determination Appointment is Cancelled due to Good Cause</li> <li>3. Participant shows to Regional office after the Compliance Period End Date and the participant's case has a Sanction Start Date (but Sanction has not taken effect)</li> <li>4. Participant has Good Cause While in Non-Compliance</li> <li>5. Participant does not have good cause and is placed in a Compliance Plan</li> </ol> <p>Click the button below to learn more about next steps for each outcome. All outcomes assume you are in the context of a case.</p>	<p><b>Button:</b> Welfare to Work Non-Compliance / Conciliation / Sanction (JA)</p> <p><b>Button:</b> Non-Compliance</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p>
EDBC Sub-Menu	How to troubleshoot relationships for EDBC?	<p>The System will provide a hard validation error if one or more relationships are missing on the case. However, there is always the chance that the relationships are not correctly established or that the Parental Control was not designated for one or more of the children.</p>	<p><b>Button:</b> EDBC – Troubleshooting Incorrect Results (JA)</p> <p><b>Button:</b> EDBC – Online Definitions and</p>

		<p>To verify that customer relationships are correct:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Click the <b>Customer Information</b> link on the <b>Local</b> navigation bar</li> <li>3. Click the <b>Relationship</b> link on the <b>Task</b> navigation bar</li> <li>4. On the <b>Relationship List</b> page: <ol style="list-style-type: none"> <li>a. If there is an incorrect relationship, click the Edit button next to the person</li> <li>b. If there is a missing relationship, you can click the hyperlinked number next to “<b>Number of relationships remaining to be created</b>” (found above the Search Result Summary) or click the <b>Add</b> button</li> </ol> </li> <li>5. On the <b>Relationship Detail</b> page: <ol style="list-style-type: none"> <li>a. Confirm and correct information as appropriate</li> <li>b. Click the <b>Save and Return</b> button</li> </ol> </li> </ol> <p>Click one of the buttons below for additional information and instructions for troubleshooting EDBC.</p>	<p>Troubleshooting (JA)</p> <p><b>Button:</b> More EDBC-related Topics</p>
<p>MAGI Sub-Menu</p>	<p>How to navigate to the MAGI Verification List page?</p>	<p>Users can view, edit, add, or remove MAGI Verifications for a case person by accessing the <b>MAGI Verification List</b> page. To access the MAGI Verification List page within the context of a case:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigation bar</li> <li>3. Click the <b>MAGI Verifications</b> link on the <b>Task</b> navigation bar to access the <b>MAGI Verification List</b> page</li> </ol>	<p><b>Button:</b> MAGI Verification List and MAGI Verification Detail Pages (JA)</p> <p><b>Button:</b> Medi-Cal CalHEERS - MAGI Verifications (JA)</p> <p><b>Button:</b> More MAGI-related Topics</p>

		<p><b>Note:</b> This page is used to Admin Verify when there is no income record for a case person.</p> <p>For detailed instructions on managing MAGI Verifications, click the buttons below.</p>	
Medi-Cal, Discontinuances Sub-Menu, Continuous Coverage Unwinding Sub-Menu	What is the automated process for Medi-Cal renewal discontinuances?	<p>The CIT Fact Sheet below contains information regarding the process for Medi-Cal renewal discontinuances. The information includes the auto-discontinuance batch, MAGI and mixed households, MAGI only, Non-MAGI, Medi-Cal renewal packet submitted by beneficiary, reports, and common batch skip reasons.</p> <p>For access to the Fact Sheet, click the button below.</p>	<p><b>Button:</b> CIT 0183-23 Fact Sheet Medi-Cal Renewal Discontinuance</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Continuous Coverage Unwinding-related Topics</p> <p><b>Button:</b> More Discontinuances-related Topics</p>
Medi-Cal	How to add Retroactive (Retro) Medi-Cal month?	<p>An applicant for Medi-Cal, CalWORKs, SSI/SSP, SLMB (Medicare Premium Payment Program) or RCA may be eligible to receive Medi-Cal for any of the three months immediately preceding the month of application or reapplication if all of the following requirements are met in that month:</p> <ul style="list-style-type: none"> <li>• The County determines that the applicant would have been eligible</li> <li>• The applicant received health services which have not been paid</li> <li>• The applicant was not previously denied Medi-Cal for the month in question, unless the application was denied due to County error or failure</li> </ul>	<p><b>Button:</b> Retroactive Medi-Cal (JA)</p> <p><b>Button:</b> More Medi-Cal-related Topics</p>

		<p>to cooperate beyond the applicant's control</p> <p>To add a Retro Medi-Cal month for one person:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Case Summary</b> from the <b>Local</b> navigation bar</li> <li>3. Click the <b>View Details</b> button in the <b>Medi-Cal</b> program box</li> <li>4. On the <b>Medi-Cal Detail</b> page: <ol style="list-style-type: none"> <li>a. Click the <b>Edit</b> button</li> <li>b. In the <b>Program Persons</b> page section, click the <b>Edit</b> button for the applicant requesting Retro Medi-Cal</li> </ol> </li> <li>5. On the <b>Medi-Cal Person Detail</b> page: <ol style="list-style-type: none"> <li>a. Enter the <b>&lt;Month Retro Medi-Cal Was Requested&gt;</b> in the <b>Month</b> field in the <b>Retro Months</b> page section</li> <li>b. Select the <b>&lt;Requested Medi-Cal Type&gt;</b> from the <b>Requested Medi-Cal Type</b> drop list</li> <li>c. Click the <b>Add</b> button in the <b>Retro Months</b> page section to add additional Retro Month(s) or click the <b>Save and Return</b> button</li> </ol> </li> <li>6. On the <b>Medi-Cal Detail</b> page, click the <b>Save and Return</b> button.</li> </ol> <p>For detailed instructions on various Retro Medi-Cal functions, click the button below.</p>	
<p>Medi-Cal, Continuous Coverage Unwinding Sub-Menu</p>	<p>How to set up a Long Term Care (LTC) case?</p>	<p>Individuals in Long Term Care (LTC) must have a Requested Medi-Cal Type of LTC. All persons requesting LTC should be in their own program separate from anyone else applying for Medi-Cal (MC). For example:</p>	<p><b>Button:</b> Medi-Cal – Long Term Care (JA)</p>

	<ul style="list-style-type: none"> <li>• <b>Single Person in LTC:</b> A single case with only one case member with the LTC person as the primary applicant recipient</li> <li>• Person in LTC with a Spouse at Home not Applying for Aid: A single case with the LTC person as the primary applicant recipient</li> <li>• <b>Married Couple in LTC:</b> Cases containing a married couple who are both in LTC can be aided within the same case. However, they each need their own Medi-Cal program and each must be designated as the primary applicant/recipient in their MC program</li> </ul> <p>The steps for updating the Medi-Cal program type for the person in LTC assume you are in the context of a pending case:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over Eligibility on the Global navigation bar</li> <li>2. Select Case Summary from the Local navigation bar</li> <li>3. Click the View Details button in the Medi-Cal page section for the LTC person</li> <li>4. On the Medi-Cal Detail page:       <ol style="list-style-type: none"> <li>a. Click the Edit button</li> <li>b. Click the <b>Edit</b> button in the <b>Program Persons</b> page section</li> </ol> </li> <li>5. On the <b>Medi-Cal Person Detail</b> page, click the <b>Edit</b> button in the <b>Requested Medi-Cal Type</b> page section</li> <li>6. On the <b>Requested Medi-Cal Type Detail</b> page:       <ol style="list-style-type: none"> <li>a. Select <b>LTC</b> from the <b>Requested Medi-Cal Type</b> drop list</li> <li>b. Click the <b>Save and Return</b> button</li> </ol> </li> </ol> <p>For more instructions to set up a LTC case, click the button below.</p>	<p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Continuous Coverage Unwinding-related Topics</p>
--	--	--

Free-Response	What is the CalSAWS Configuration Guide?	<p>This Configuration Guide will outline various processes related to CalSAWS configuration as well as highlight specific “need to know” areas of system functionality. It can also help illustrate and define what configuration looks like and how it works in the production environment.</p> <p>The Guide will be comprised of three distinct sections:</p> <ol style="list-style-type: none"> <li>1. Core Configuration, including Task Management Configuration</li> <li>2. Additional Configuration</li> <li>3. Security Configuration</li> </ol> <p>The Core Configuration section includes areas of configuration that will migrate in the conversion process.</p> <p><b>Note:</b> Users will need to have the appropriate security rights to access the configuration menus. This guide will not be updated on a regular basis; however, additional training will be made available in the LMS to reflect ongoing enhancements to CalSAWS.</p> <p>To access the CalSAWS Configuration Guide, click the button below.</p>	<p><b>Button:</b> CIT CalSAWS Configuration Guide</p>
Welfare-to-Work	What is the Welfare to Work Assistance Unit Summary Page?	<p>From within the context of a case, the WTW Assistance Unit Summary page provides workers with an overview of the entire assistance unit as it pertains to the WTW program. To navigate to the WTW Assistance Unit Summary page, the worker must be in the context of a case, place the cursor over <b>Empl. Services</b> on the <b>Global</b> navigation bar and select <b>Activities</b>.</p>	<p><b>Button:</b> CIT CalSAWS Infographic - WTW Assistance Unit Summary Page</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p>

		For more information about the Welfare to Work Assistance Unit Summary Page, click the button below.	
Free-Response	How to add or remove a companion case?	<p>Cases with similar household members or primary applicants may be linked using the Companion Case add functionality. Case level information is not shared with the Companion Case functionality. The functionality is simply used for navigating with ease between cases.</p> <p>The following steps assume you are in the context of a case:</p> <p><b>To Add a Companion Case:</b></p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Case Info, Eligibility, Empl. Services, or Child Care</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Case Summary</b> from the Local navigator <ol style="list-style-type: none"> <li>a. Click the <b>Add</b> button in the Companion <b>Cases</b> page section</li> </ol> </li> <li>3. On the <b>Select Person</b> page: <ol style="list-style-type: none"> <li>a. Enter the search criteria, click the <b>Search</b> button</li> <li>b. Click the radio button next to the <b>Name</b> of the individual whose case you want to add, click the <b>Select</b> button</li> </ol> <p><b>Note:</b> If the individual selected is associated to more than one case, you will be navigated to the Select Case page</p> </li> <li>4. On the <b>Select Case</b> page: <ol style="list-style-type: none"> <li>a. Click the radio button next to the <b>Case Number</b> you want to add</li> <li>b. Click the <b>Select</b> button</li> </ol> </li> </ol> <p><b>To Remove a Companion Case:</b></p>	<b>Button:</b> Companion Cases – Add and Remove (JA)

		<ol style="list-style-type: none"> <li>1. Place the cursor over <b>Case Info, Eligibility, Empl. Services, or Child Care</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Case Summary</b> from the <b>Local</b> navigation bar</li> <li>3. On the <b>Case Summary</b> page: <ol style="list-style-type: none"> <li>a. Click the checkbox next to the <b>Case Number</b> in the <b>Companion Cases</b> page section</li> <li>b. Click <b>Remove</b> button</li> </ol> </li> </ol>	
EBT Sub-Menu	Where to find EBT card transactions?	<p>To find EBT Card Transactions, in the context of a case:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Case Info</b> or <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Case Summary</b> from the <b>Local</b> navigation bar</li> <li>3. Click the <b>EBT Account List</b> link on the <b>Task</b> navigation bar to access the <b>EBT Account List</b> page</li> <li>4. Click the <b>Account Number</b> hyperlink to access the <b>EBT Account Detail</b> page</li> <li>5. Click the <b>EBT Card Transaction Search</b> link on the <b>Task</b> navigation bar</li> <li>6. Enter the appropriate search criteria</li> <li>7. Click the <b>View</b> button</li> </ol> <p>For more detailed instruction, click the button below.</p>	<p><b>Button:</b> EBT Card Transaction Search (OLH)</p> <p><b>Button:</b> More EBT-related Topics</p>
CalFresh, CalWORKs, Medi-Cal, Welfare-to-Work, General Relief / General Assistance, Foster Care / AAP / Kin-GAP	How to change an address?	<p>To change an address, navigate to the <b>Address Detail</b> page:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigation bar</li> <li>3. On the <b>Contact Summary</b> page, to add a new address click the <b>Add</b> button</li> <li>4. To edit an address, click the <b>Person</b> hyperlink, or click the <b>Edit</b> button to access the <b>Address Detail</b> page</li> </ol> <p><b>Note:</b> Follow your county policy when adding or editing an address.</p>	<p><b>Button:</b> Address Detail (OLH)</p> <p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p>

			<p><b>Button:</b> More Welfare-to-Work-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p>
CalFresh	How to initiate Transitional CalFresh (TCF)?	<p>For Transitional CalFresh (TCF) to be auto-tested and be granted, it is necessary that the CalWORKs (CW) and CalFresh (CF) EDBC be run together. When the programs are run together and the CW program fails, TCF will open when certain conditions are met. For a list of these conditions, refer to the Job Aid below.</p> <p>Click the button below for more information on Transitional CalFresh.</p>	<p><b>Button:</b> Transitional CalFresh (TCF) Processing (JA)</p> <p><b>Button:</b> Recertification Process</p> <p><b>Button:</b> More CalFresh-related Topics</p>
CalFresh, CalWORKs, General Relief, Foster Care	How to transfer a cash type transaction recovered between recovery accounts?	<p>Users can transfer a cash type (i.e., check, money order, tax intercept, etc.) transaction recovered from one recovery account to another recovery account by accessing the <b>Transaction Transfer Detail</b> page.</p> <p>To access the Transaction Transfer Detail page:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Fiscal</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Collections</b> from the <b>Local</b> navigation bar</li> <li>3. On the <b>Recovery Account Search</b> page:</li> </ol>	<p><b>Button:</b> Recovery Accounts – Transaction Transfer/Refund (JA)</p> <p><b>Button:</b> Recovery Account</p> <p><b>Button:</b> More CalWORKs-related Topics</p>

		<ol style="list-style-type: none"> <li>a. Select a <b>&lt;Category&gt;</b> from the <b>Search By</b> drop list</li> <li>b. Enter the search criteria for the populated field based on the <b>Search By</b> option that you have selected</li> <li>c. Click the <b>Search</b> button</li> <li>d. The <b>Search Results Summary</b> page section displays. Click the <b>Recovery Account Number</b> hyperlink for the desired recovery account</li> </ol> <ol style="list-style-type: none"> <li>4. Click <b>Transaction Summary</b> on the <b>Task</b> navigation bar on the <b>Recovery Account Detail</b> page</li> <li>5. Click the hyperlink for the transaction that you want to transfer on the <b>Transaction Summary</b> page</li> <li>6. Click the <b>Transfer</b> button on the <b>Transaction Detail</b> page to access the <b>Transaction Transfer Detail</b> page</li> </ol> <p><b>Note:</b> Only workers with the appropriate security rights can access recovery account pages.</p> <p>Click the button below for complete steps on transferring a recovery account.</p>	<p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p>
<p>Workload / Case Assignment Sub Menu</p>	<p>What are the workload reassignment options?</p>	<p>Users can utilize the <b>Workload Reassignment Detail Page</b> to initiate case reassignment.</p> <p>Options for reassignment include:</p> <ul style="list-style-type: none"> <li>• Worker(s) to Worker(s)</li> <li>• Worker(s) to Office(s)</li> <li>• Worker(s) to Unit</li> <li>• Case to Worker(s)</li> </ul>	<p><b>Button:</b> Workload Assignment – Manage (JA)</p> <p><b>Button:</b> CIT 0189-23 CalSAWS Infographic – Caseloads</p>

		<ul style="list-style-type: none"> <li>• Case to Office</li> <li>• Case to Unit</li> <li>• Office to Office(s)</li> <li>• Office to Worker(s)</li> <li>• Office to Unit</li> </ul> <p><b>Note:</b> Follow your county policy when using the <b>Auto Assign</b> functionality. You need the appropriate security rights to access the <b>Workload Reassignment Detail Page</b>.</p> <p>For detailed instructions on the various workload reassignment options, click the button below.</p>	<p><b>Button:</b> More Workload / Case Assignment-related Topics</p>
Sponsorship Sub Menu	How to view the Sponsorship List page?	<p>In the context of a case, the Sponsorship List page allows you to view the information for sponsored non-citizen persons. You can narrow or expand the search by specifying a date range in the Display From and To fields and clicking the View button. The System will maintain historical and current sponsorship information.</p> <p>To view the Sponsorship List page:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigator</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigator</li> <li>3. If necessary, click the <b>Non-Financial</b> link on the <b>Task</b> navigation bar to expand the <b>Non-Financial</b> section.</li> <li>4. Click the <b>Sponsorship</b> link on the <b>Task</b> navigation bar</li> </ol> <p>For more information on the Sponsorship List page or how to add or edit a sponsorship record, click the button below.</p>	<p><b>Button:</b> Citizenship and Sponsorship – Add or Edit (JA)</p> <p><b>Button:</b> More Sponsorship-related Topics</p>

Sponsorship Sub Menu	How to add a sponsorship record?	<p>To add a sponsorship record:</p> <ol style="list-style-type: none"> <li>1. On the <b>Sponsorship List</b> page: <ol style="list-style-type: none"> <li>a. Select <b>&lt;Individual&gt;</b> from the <b>Sponsor Type</b> drop list</li> <li>b. Click the <b>Add</b> button</li> </ol> </li> <li>2. On the <b>Sponsorship Detail</b> page and in the <b>Establish Change Reason</b> section: <ol style="list-style-type: none"> <li>a. Select <b>&lt;Change Reason&gt;</b> from the <b>Change Reason</b> drop list and Enter <b>&lt;Date&gt;</b> in the Reported Date field</li> </ol> </li> <li>3. On the <b>Sponsorship Detail</b> page: <ol style="list-style-type: none"> <li>a. Select <b>&lt;Sponsored Non-Citizen's Name(s)&gt;</b> from the <b>Sponsored Non-Citizen's Name</b> multi-select list</li> <li>b. Select <b>&lt;Sponsor's Name&gt;</b> from the <b>Sponsor's Name</b> drop list</li> <li>c. Enter <b>&lt;Sponsor's Household Size&gt;</b> in the <b>Sponsor's Household Size</b> field</li> <li>d. Enter <b>&lt;Total Number of Sponsored Non-Citizens&gt;</b> in the <b>Total Number of Sponsored Non-Citizens</b> field</li> <li>e. Select <b>&lt;Yes or No&gt;</b> from the <b>Did the sponsor sign an I-864?</b> drop list</li> <li>f. Select <b>&lt;Yes or No&gt;</b> from the <b>Does the sponsor help with money?</b> drop list</li> <li>g. If appropriate, select the checkbox next to the</li> </ol> </li> </ol>	<p><b>Button:</b> Citizenship and Sponsorship – Add or Edit (JA)</p> <p><b>Button:</b> More Sponsorship-related Topics</p>
----------------------	----------------------------------	--	--

		<p>items under <b>Does the sponsor help with any of the following?</b></p> <ul style="list-style-type: none"> <li>h. Enter <b>&lt;Date&gt;</b> in the <b>Begin Date</b> field</li> <li>i. If applicable, enter <b>&lt;Date&gt;</b> in the <b>End Date</b> field</li> <li>j. Click the <b>Save and Add Another</b> button if you wish to save the newly created record and add another one <b>OR</b> Click the <b>Save and Return</b> button to save the record and access the <b>Sponsorship List</b> page</li> </ul> <p>For more information on how to add a sponsorship record, click the button below.</p>	
<p>Sponsorship Sub Menu</p>	<p>How to edit a sponsorship record?</p>	<p>To edit a sponsorship record:</p> <ul style="list-style-type: none"> <li>1. On the <b>Sponsorship List</b> page: <ul style="list-style-type: none"> <li>a. Click the <b>Edit</b> button next to the record you wish to edit</li> </ul> </li> </ul> <p>OR Click the <b>Name</b> hyperlink</p> <ul style="list-style-type: none"> <li>2. On the <b>Sponsorship Detail</b> page: <ul style="list-style-type: none"> <li>a. Click the <b>Edit</b> button</li> </ul> </li> <li>3. On the <b>Sponsorship Detail</b> page and in the <b>Establish Change Reason</b> section: <ul style="list-style-type: none"> <li>a. Select <b>&lt;Change Reason&gt;</b> from the <b>Change Reason</b> drop list</li> <li>b. Enter <b>&lt;Date&gt;</b> in the <b>Reported Date</b> field</li> </ul> </li> <li>4. On the <b>Sponsorship Detail</b> page:</li> </ul>	<p><b>Button:</b> Citizenship and Sponsorship – Add or Edit (JA)</p> <p><b>Button:</b> More Sponsorship-related Topics</p>

		<ul style="list-style-type: none"> <li>a. Make the appropriate changes</li> <li>b. Click the <b>Save and Return</b> button</li> </ul> <p>For more information on how to edit a sponsorship record, click the button below</p>	
<p>CalFresh, CalWORKs, Medi-Cal, General Relief, Welfare-to-Work, Foster Care</p>	<p>How to add a journal entry?</p>	<p><b>To add a journal entry within the context of a case:</b></p> <ul style="list-style-type: none"> <li>1. Click the Journal link on the Utilities navigation bar</li> <li>2. On the Journal Search page, <ul style="list-style-type: none"> <li>b. The <b>&lt;Template&gt;</b> will default to <b>Classic</b></li> <li>c. Click the <b>Add Entry</b> button</li> </ul> </li> </ul> <p><b>Note:</b> When adding a journal entry, the system will default to the classic template. Follow your county process on which template is needed.</p> <p><b>To add a journal entry from the CalSAWS home page:</b></p> <ul style="list-style-type: none"> <li>1. Click the Journal link on the Utilities navigation bar</li> <li>2. On the Journal Search page: <ul style="list-style-type: none"> <li>a. Enter <b>&lt;Case Number&gt;</b> in the <b>Case Number</b> field</li> </ul> </li> </ul> <p><b>OR</b></p> <p>Enter <b>&lt;Resource ID&gt;</b> in the <b>Resource ID</b> field</p> <ul style="list-style-type: none"> <li>a. The <b>&lt;Template&gt;</b> will default to <b>Classic</b></li> <li>b. Click the <b>Add Entry</b> button</li> </ul> <p><b>Note:</b> When adding a journal entry, the system will default to the classic template. Follow your county process on which template is needed.</p> <p>Click the button below for more information on adding journal entries.</p>	<p><b>Button:</b> Journal and Reminders (JA)</p> <p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p>

## 2. Edited UCs

Below is a table containing all edited Use Cases in Release 9. Text highlighted signals edits:

Program	Question/Title	Answer	Buttons
CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance	Non-Compliance	<p>The Eligibility Non-Compliance List page allows you to add, edit, view, or remove Eligibility Non-Compliance information for all applicants/participants associated to a case who have not complied with program rules, who are avoiding the law, or who have been convicted of a drug felony.</p> <p>Note: Most instances of non-compliance are added by the system. This page can still be used for corrective actions or limited instances not related to automated functions.</p> <p>For more information on non-compliance records, click the button below.</p>	<p><b>Button:</b> Eligibility Non-Compliance Process (JA)</p> <p><b>Button:</b> Cause Determination Appointment Outcomes</p> <p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p>
CalWORKs, CalFresh, Medi-Cal, Foster Care / AAP / Kin-GAP, Discontinuances Sub-Menu	Negative Action	Follow the steps below to run negative action on the Negative Action Detail page:	<b>Button:</b> Negative Action Detail – Withdrawal or Discontinuance (JA)

		<ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Click the <b>Case Summary</b> link on the <b>Local</b> navigator</li> <li>3. Click the <b>Negative Action</b> link on the <b>Task</b> navigation bar</li> <li>4. On the <b>Negative Action Detail</b> page: <ol style="list-style-type: none"> <li>a. Select <b>&lt;Month&gt;</b> from the <b>Benefit Month</b> drop list</li> <li>b. Select <b>Run EDBC for this program</b> by clicking the check box for the program on which the Negative Action is being taken</li> <li>c. Select the checkbox(es) next to the <b>Person(s)</b> name</li> <li>d. Select <b>&lt;Reason&gt;</b> from the <b>Negative Action</b> reason drop list</li> <li>e. Click the <b>Run EDBC</b> button</li> </ol> </li> </ol> <p>Note: Care should be taken when using this process as it can be used to close an entire program or selected individuals. For Negative Actions on MAGI Medi-Cal, workers should request a Negative Action on the MAGI eligibility page first.</p>	<p><b>Button:</b> Request MAGI Negative Action</p> <p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p> <p><b>Button:</b> More Discontinuances-related Topics</p>
Client Correspondence Sub-Menu	Create Manual NOA	<p><del>From the Template Repository, you can generate an NOA/Form and edit the field in the NOA/Form. You can insert information in any of the blue fields in the PDF. The Template</del></p>	<p><b>Button:</b> Forms and NOAs (JA)</p> <p><b>Button:</b> CIT 0189-23 CalSAWS Infographic-Notices of Action (NOAs)</p>

		<p>Repository allows workers to search for various form templates/notices and generate manual NOAs. Manual NOAs generated from the Template Repository are saved to the case history. Manual Variables need to be added to Manual NOAs. The Free Format NOA allows you to create an NOA, add the text and add the regulations in the Rules section.</p> <p><b>Note:</b> There are multiple free-format NOA templates, ensure you are using the correct one for the relevant program.</p>	<p><b>Button:</b> More Client Correspondence-related topics</p>
<p>Income Sub-Menu, IHSS Sub-Menu</p>	<p>IHSS Income WINS Eligibility</p>	<p>When an individual has IHSS income, the income is considered earnings for CalFresh but can be exempt under certain circumstances for Medi-Cal.</p> <p>When IHSS income is counted for both CalFresh and Medi-Cal:</p> <ol style="list-style-type: none"> <li>1. Enter the IHSS income on the <b>Income List</b> page and select <b>Earnings</b> from the <b>Income Category</b> drop list</li> <li>2. Enter the income amount for the CalFresh</li> </ol>	<p><b>Button:</b> WINS (JA)</p> <p><b>Button:</b> IHSS Income (JA)</p> <p><b>Button:</b> More Income-related Topics</p> <p><b>Button:</b> More IHSS-related Topics</p>

		<p>program and allow the System to inherit the income for Medi-Cal. Click the button below for instructions on how to use the Actual or Proxy WINS functionality</p> <p>When IHSS income is counted for CalFresh, but not Medi-Cal:</p> <ol style="list-style-type: none"><li>1. Enter the IHSS income on the <b>Income List</b> page and select <b>Earnings</b> from the <b>Income Category</b> drop list</li><li>2. Enter the income amount for the CalFresh program. Click the button below for instructions on how to use the Actual or Proxy WINS functionality</li><li>3. Enter the income amount of \$0.00 for the Medi-Cal program with the same Begin Date as the CalFresh income amount record to prevent income inheritance</li><li>4. Enter the IHSS income on the <b>Income List</b> page and select <b>IHSS</b> from the <b>Income Category</b> drop list</li><li>5. Select the appropriate <b>Type</b> and enter the income amount for the Medi-Cal program</li><li>6. Enter the income amount of \$0.00 for the CalFresh program with the same Begin Date as the Medi-Cal income amount record to prevent income inheritance</li></ol>	
--	--	--	--

<p>Income Sub-Menu, <b>IHSS Sub-Menu</b></p>	<p>Exempt IHSS Income</p>	<p>When the income type of Caregiver Wages – Other should not be counted in the MAGI eligibility determination because the caregiver is living with the person receiving the personal care services, select the MAGI Medi-Cal: Lives with IHSS Recipient check box which displays below the <b>Income Type</b> drop list on the <b>Income Detail</b> page. This ensures the System does not send the income to CalHEERS.</p> <p>The checkbox can only be selected in add or edit mode and will only be populated when the income Type of 'Caregiver Wages – Other' is selected.</p> <p><b>Note:</b> If the living situation changes and the income needs to be counted in the MAGI eligibility determination for any month, end date the income record with the check box selected and add a new income record for the appropriate months.</p>	<p><b>Button:</b> IHSS Income (JA)</p> <p><b>Button:</b> More Income-related Topics</p> <p><b>Button:</b> More IHSS-related Topics</p>
<p>Referrals Sub-Menu, <b>IHSS Sub-Menu</b></p>	<p>Access IHSS Referrals</p>	<p>The In Home Supportive Services (IHSS) Referral Search page displays all pending IHSS referrals assigned to a worker.</p> <p>To access the IHSS Referrals Search page:</p>	<p><b>Button:</b> IHSS Referrals (JA)</p> <p><b>Button:</b> IHSS Referrals Search (OLH)</p>

		<p>1. Place the cursor over <b>Case Info</b> on the <b>Global</b> navigation bar</p> <p>2. Select <b>Referral</b> from the <b>Local</b> navigator</p> <p>3. If no data is displayed, click the <b>Refine Your Search</b> link and enter new search parameters</p>	<p><b>Button:</b> More Referrals-related Topics</p> <p><b>Button:</b> More IHSS-related Topics</p>
Referrals Sub-Menu, <b>IHSS Sub-Menu</b>	Link IHSS Referrals	<p>The In Home Supportive Services (IHSS) Referral Detail page allows users to link a referral to a case in the System and view information sent through the Caseload Management Information and Payrolling System (CMIPS) II interface. Users may access the IHSS Referrals Detail Page from the IHSS Referrals Search page by clicking the IHSS Case hyperlink on the IHSS Referral Search page.</p> <p>Note: Only users with the appropriate security rights can link an IHSS referral to a case.</p> <p>To link an IHSS referral to a case in the System:</p> <p>1. Click the link to <b>System Case</b> button on the <b>IHSS Referral Detail</b> page</p> <p>2. Search for an existing person on the <b>New Person Search</b> page. Add a new person or select an existing person on the <b>New Person Search Results</b> page</p> <p>Note: When an IHSS applicant has a pseudo</p>	<p><b>Button:</b> IHSS Referrals (JA)</p> <p><b>Button:</b> More Referrals-related Topics</p> <p><b>Button:</b> More IHSS-related Topics</p>

		<p>Social Security Number (SSN) in MEDS, the CMIPS II system sends zeros for a person's SSN and populates the SSN text box with zeros during the linking process. Remove the zeros and leave the SSN text box blank or enter a valid SSN, if applicable.</p> <p>3. Click the <b>Select</b> or <b>Create New Case</b> button depending upon whether the person being added has an existing System case</p> <p>Note: If the person being added does not have sufficient information to assign a Client Index Number (CIN), they will be added to the case, but no System program is created.</p> <p>Note: For more information on adding a person or creating a case in the System, refer to the "System Establish a Case - Existing Customer" and "The System Establish a Case - New Customer" job aids.</p>	
<p>Referrals Sub-Menu, <b>IHSS Sub-Menu</b></p>	<p>Reject IHSS Referrals</p>	<p>Referrals can be rejected if a user determines that an In Home Supportive Services (IHSS) referral should not be linked to a case in the System. When in edit mode on the IHSS Referral Detail page, clicking the Reject button updates the referral status</p>	<p><b>Button:</b> IHSS Referrals (JA)</p> <p><b>Button:</b> More Referrals-related Topics</p> <p><b>Button:</b> <b>More IHSS-related Topics</b></p>

		<p>from Accepted to Rejected.</p> <p>Note: Only users with the appropriate security rights can reject an IHSS Referral.</p> <p>If necessary, a rejected referral can be linked to another case in the System by clicking the Link to System Case button. Doing this will change the referral status from Rejected to Accepted. When a referral is rejected and linked to another System case, the nightly interface sends a transaction to Caseload Management Information and Payrolling System (CMIPS) II notifying them of the new System case number and status of the Medi-Cal or cash-based program.</p> <p>In the event the IHSS referral is not linked to another System case, the System will reject all future CMIPS II interface transactions as the IHSS referral is no longer known to the System.</p>	
<p>Foster Care / AAP / Kin-GAP, <b>Discontinuances Sub-Menu</b></p>	<p>Discontinue Foster Care Program End Date Placement</p>	<p>Refer to your County's policy when determining if a Foster Care program should be discontinued using Negative Action. For LA County, please refer to your CWS/CMS process.</p>	<p><b>Button:</b> Foster Care Program Discontinuance - Continuing Eligibility for Children (CEC) (JA)</p>

		<p>To discontinue a Foster Care program:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigator</li> <li>3. Click the <b>Foster Care</b> expand caret on the <b>Task</b> navigation bar</li> <li>4. Click the <b>Child Placement</b> link on the <b>Task</b> navigation bar</li> <li>5. On the <b>Child Placement List</b> page: <ol style="list-style-type: none"> <li>a. Click the <b>Edit</b> button for the appropriate placement record</li> </ol> </li> <li>6. On the <b>Child Placement Detail</b> page: <ol style="list-style-type: none"> <li>a. Enter <b>&lt;Placement End Date&gt;</b> in the <b>End Date</b> field</li> <li>b. Select <b>&lt;Placement End Reason&gt;</b> from the <b>Placement End Reason</b> drop list</li> <li>c. Click the <b>Save and Return</b> button</li> </ol> </li> <li>7. Run EDBC through future month</li> </ol> <p>For a complete set of instructions on how to discontinue a Foster Care Case, click the button below.</p>	<p><b>Button:</b> More Foster Care-related Topics</p> <p><b>Button:</b> More Discontinuances-related Topics</p>
<p>MAGI Sub-Menu, Discontinuances Sub-Menu</p>	<p>Request MAGI Negative Action</p>	<p>To deny or discontinue a MAGI case, you must complete the negative action process by accessing the MAGI Determination List page.</p>	<p><b>Button:</b> Medi-Cal – MAGI Discontinuances (JA)</p>

		<p>To request the MAGI negative action:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigator</li> <li>3. Click the <b>MAGI Eligibility</b> link on the <b>Task</b> navigation bar to access the <b>MAGI Determination List</b> page</li> <li>4. Select the <b>Negative Action</b> checkbox</li> </ol> <p>Click the button below for detailed instructions on requesting a MAGI negative action.</p> <p>Note: When discontinuing for an ICT, you do NOT need to request MAGI negative action.</p>	<p><b>Button:</b> More MAGI-related Topics</p> <p><b>Button:</b> More Discontinuances-related Topics</p>
<p>Batch Sweeps, Discontinuances Sub-Menu</p>	<p>Batch to Discontinue Child 16 or Older and Not Actively Going to School from the CalWORKs Program</p>	<p>The Batch Job to Discontinue Active CalFresh with Past Due Postpone Verifications triggers EDBC on active CalFresh program cases for which the postponed verifications for Expedited CalFresh programs are past due.</p> <p>Program: CalFresh and Supplemental Nutrition Benefit (SNB)</p> <p>This sweep will exclude cases if verification types are Personal Property, Real</p>	<p><b>Button:</b> Go Back to Batch Sweeps</p> <p><b>Button:</b> More Discontinuances-related Topics</p>

		<p>Property, or Transferred Property when CalFresh program is Categorically Eligible (CE) or Modified Categorical Eligibility (MCE).</p> <p><b>Note:</b> Not all counties have enabled this batch job. Please follow your County's policy.</p>	
<p>Batch Sweeps, <b>Discontinuances Sub-Menu</b></p>	<p>Batch to Discontinue Active CalFresh with Past Due Postpone Verifications</p>	<p>The Batch Job to Discontinue Child 16 or Older and Not Actively Going to School from the CalWORKs Program triggers EDBC for all active programs when ALL of the following conditions are true:</p> <ol style="list-style-type: none"> <li>1. If the case has active CalWORKs/RCA program individuals</li> <li>2. Who are 16 years or older</li> <li>3. Has a WTW/REP Work Registration status of Exempt</li> <li>4. Has a school attendance and not attending school full time</li> </ol> <p>Program: All Programs</p> <p>The job excludes individuals who are on an active or pending CalLearn program, or whose Work Registration status is Mandatory or Exempt with a valid reason.</p>	<p><b>Button:</b> Go Back to Batch Sweeps</p> <p><b>Button:</b> More <b>Discontinuances-related Topics</b></p>

		<p><b>Note:</b> All counties have opted into this batch sweep. Please follow your County's policy.</p>	
<p>CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance, Foster Care / AAP / Kin-GAP, Workload / Case Assignment Sub-Menu</p>	<p>Worker Assignment</p>	<p>To assign a worker to a new or pending program:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Case Info</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Worker Assignment</b> from the <b>Local</b> navigator</li> <li>3. On the <b>Pending Assignment List</b> page: <ol style="list-style-type: none"> <li>a. Click the program(s) check box(es) in the <b>Program Information</b> section to select the program(s) you want to assign</li> <li>b. Click the <b>Manual Assignment</b> radio button in the <b>Assignment Options</b> section to manually assign a worker</li> <li>c. Click the <b>Select</b> button</li> </ol> </li> <li>4. On the <b>Select Worker</b> page: <ol style="list-style-type: none"> <li>a. Enter the appropriate search criteria</li> <li>b. Click the <b>Search</b> button</li> <li>c. Click the radio button for the appropriate <b>Worker</b></li> <li>d. Click the <b>Select</b> button</li> </ol> </li> <li>5. On the <b>Pending Assignment List</b> page: <ol style="list-style-type: none"> <li>a. <b>Automatically Reassign When Activated</b> will default to <b>&lt;No&gt;</b>. Based</li> </ol> </li> </ol>	<p><b>Button:</b> Worker Assignment (JA)</p> <p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p> <p><b>Button:</b> More Workload / Case Assignment-related Topics</p>

		<p>on your County business process, you can select <b>&lt;Yes&gt;</b></p> <p>b. Click the <b>Assign</b> button</p> <p>Note: Worker assignment assumes you are within the context of a case. Users with the correct security rights can also reassign programs using the Worker Assignment page in Admin Tools.</p>	
<p>CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance, Foster Care / AAP / Kin-GAP, <b>Workload / Case Assignment Sub-Menu</b></p>	<p>Worker Reassignment</p>	<p>To reassign a worker:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Admin Tools</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Workload Assignment</b> from the <b>Local</b> navigator</li> </ol> <p><b>Note:</b> The Workload Assignment page is only accessible if you have the appropriate security clearance</p> <ol style="list-style-type: none"> <li>3. On the <b>Workload Reassignment Detail</b> page: <ol style="list-style-type: none"> <li>a. In the <b>From</b> section, select the radio button next to Case Number and enter the Case Number in the field</li> <li>b. In the <b>Reassign Quantity</b> section, select the radio button next to Number of Cases (enter 1)</li> <li>c. Select <b>[Program]</b> in the <b>Program</b> list</li> <li>d. Select the language from the <b>Language</b> drop list</li> </ol> </li> </ol>	<p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p>

		<p>e. In the <b>To</b> section, click the <b>Select</b> button under <b>Worker ID</b></p> <p>4. On the <b>Select Worker</b> page:</p> <ul style="list-style-type: none"> <li>a. Enter search criteria</li> <li>b. Click the <b>Search</b> button</li> <li>c. Confirm or click the radio button for the desired worker</li> <li>d. Click the <b>Select</b> button</li> </ul> <p>5. On the <b>Workload Reassignment Detail</b> page:</p> <ul style="list-style-type: none"> <li>a. In the <b>Effective Date</b> section, select the radio button next to Immediate Assignment</li> <li>b. In the <b>Reassignment Option</b> section, select <b>No</b> in the <b>Automatically Reassign When Activated field</b> and <b>Yes</b> in the <b>Send Worker Alert</b> field</li> <li>c. Click the <b>Reassign</b> button</li> </ul>	<p><b>Button: More Workload / Case Assignment-related Topics</b></p>
--	--	--	--

**3. New Keywords**

Below is a table containing all new Keywords in Release 9.

UC #	Title	Keywords
FR.41	Add/ Remove Companion Case	add companion case, adding companion case, supplement companion case, remove companion case, companion case, companion, add companion, remove companion, add a companion case, remove a companion case, removing companion case, deleting companion case, delete companion case

FR.40	Sponsorship Sub-Menu	sponsorship record, sponsorship list, sponsor, sponsorship, sponsored, add a sponsorship record, how to edit a sponsorship record, adding sponsorship, editing sponsorship, sponsored person, how to add a sponsor
FR.39	Workload/Case Assignment Sub-Menu	Workload assignment options, workload reassignment, workload reassignment options, transfer case, caseload transfer, case reassignment
FR.37	Discontinuances Sub-Menu	Discontinuance, discontinue, discont, out-of-state, out of state, other state, negative action, MAGI negative action, batch to discontinue, discontinue Foster Care program, discontinue fc case, fc discontinuance, fc end date placement, cancel rescind, mc renewal discontinuances, renewal discontinuance, medi-cal discontinuances
FR.36	IHSS Sub-Menu	IHSS, IHHS, In-Home Supportive Services, IHSS Income, IHSS Referrals, IHSS Refferals, enter IHSS income, IHSS Income WINS, IHSS Income WINS Eligibility, Exempt IHSS Income, Reject IHSS Referrals, Link IHSS Referrals, Access IHSS Referrals, CMIPS, CMIPS II
FR.32	CalSAWS Configuration Guide	calsaws configuration guide, additional resource, new user resource, calsaws guide, configuration, configuration guide, configure calsaws
CF.54	Add Journal Entry	Add journal entry, new journal entry, create journal entry, adding journal entry, case comments, journal, journal entry, journal entries, journals
MC.07	Add Retroactive Medi-Cal Month	retro mc, retroactive medi-cal, retro medical, retro-active medi-cal, medi-cal retro, retro, retroactive care, retro care

MC.08	Long Term Care (LTC)	ltc, long term care, medi-cal ltc, LTC, long-term medi-cal care, medi-cal long term, longterm care
WW.07	Cause Determination Appointment Outcomes	no show, good cause, after compliance period end date, while in non-compliance, compliance plan
WW.08	WTW Assistance Unit Summary Page	wtw assistance unit summary page, wtw assistance unit, wtw assistance
CF.53	Transfer Cash Type Transaction Between Recovery Accounts	transfer recovery account, transfer ra, transfer cash transaction
CF.05	Initiate Transitional CalFresh	Transitional CalFresh, TCF, Transitional CF, transitonal CalFresh, transitional cal fresh
CF.52	Change Address	address change, change address, address, edit address, delete address, add address, view address

#### 4. New Main Menu/Sub-Menu Branches

Release 9 will include 4 new sub-menu branches that will bucket keywords into a sub-menu.

The new sub-menu branches are:

- IHSS
- Discontinuances
- Workload / Case Assignment
- Sponsorship

#### 5. UX/UI Updates

There are 0 UX/UI updates in this release.

##### 2.1.4 Page Location

N/A

##### 2.1.5 Security Updates

N/A

##### 2.1.6 Page Mapping

N/A



### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Design	Release Tracker	VirtualAssistant_Release9Tracker.xlsx
2	Design	Miro Board – VA flow and use cases are documents	R9 - CalSAWS Worker-Facing VA.pdf

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

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

## **5 OUTREACH**

---

N/A

## **6 APPENDIX**

---

N/A