CalSAWS

California Statewide Automated Welfare System

Design Document

CA-244962

Update Non-MAGI Medi-Cal EDBC to consider an 'Incarcerated' individual as in the home

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	William Baretsky, Geetha Ramalingam, Chad Quan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/1/2022	.01	Original Draft	Carmen Kolaskey
02/15/2023	.02	Updated Request, Rec 2.1 and 2.2	Renee Gustafson
03/31/2023	.03	Updated effective benefit month to January 2023	Renee Gustafson
05/25/2023	.04	Updated Design to be an EDBC Rules update only.	Cynthia Ridley
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06/21/2023	1.0	Updated Design based on Committee Review and sent out for Review	Cynthia Ridley
06/22/2023	2.0	Updated Design based on Committee Review and sent out for Review	Cynthia Ridley

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1 OVERVIEW

The purpose of this SCR is to update the System to align with All County Welfare Directory Letter (ACWDL) 21-22, and no longer discontinue Medi-Cal Programs for beneficiaries due to incarceration.

1.1 Current Design

The System collects incarceration information on the Living Arrangements Detail page. If a Non-MAGI Medi-Cal beneficiary has a Living Arrangement for "Incarcerated", and a "Permanently Out of the Home" household status, the System will discontinue/deny the Non-MAGI Medi-Cal Individual for reason of "Out of the Home -Incarcerated".

Per ACWDL 21-22, when a Medi-Cal beneficiary reports incarceration, their Medi-Cal is to be placed in a suspended status. With SCR CA-203793 in release 22.01, the System reports the suspension to Medi-Cal to MEDS via the automated EW32 transaction based on the "Incarcerated" Living Arrangement record.

CalSAWS eHIT logic includes Administrative Verification of Incarceration = Yes for an individual who is included in the EDR if they have a Living Arrangement record of "Incarcerated". With CalHEERS Change Request 189274 (CalHEERS release 22.9), CalHEERS began ignoring Electronic or Administrative verifications that confirm the individual is Incarcerated; CalHEERS will grant MAGI Medi-Cal if the individual is otherwise eligible, even when Incarceration is verified.

1.2 Requests

Per ACWDL 21-22 and 22-26, Incarcerated beneficiaries can remain on Medi-Cal and suspended in MEDS while they are incarcerated. When they are released from incarceration, the suspension is lifted and they are able to use their Medi-Cal again.

Update the Non-MAGI Medi-Cal EDBC Rules to allow an Incarcerated individual with a Living Arrangement record of 'Incarcerated' to be considered "In the Home" for Medi-Cal budgeting and remain Active MEM, if otherwise eligible. ~~This exception only applies to Medi-Cal and all other EDBC programs will treat the individual as "Permanently Out of the Home".~~

1.3 Overview of Recommendations

1. Update Non-MAGI Medi-Cal EDBC rules to treat an incarcerated individual with a Living Arrangement Record of "Incarcerated" as if they are in the home.

1.4 Assumptions

1. Changes to processing Medi-Cal Renewal for Adult and Juvenile inmates will be addressed in future SCR CA-217940.
2. There are no changes to eHIT logic for incarcerated individuals included in an EDR to CalHEERS. If an individual with Living Arrangement of "Incarcerated" is included in the EDR, the system will include Administrative Verification of Incarceration = Yes for the individual.
3. There are no changes to the EW32 transaction that suspends and un-suspends an incarcerated individual in MEDS with this change.
4. Negative Action will need to be applied to deny/discontinue an incarcerated individual.
5. This exception only applies to Medi-Cal and all other EDBC programs will treat the individual as "Permanently Out of the Home".

2 RECOMMENDATIONS

2.1 Update Non-MAGI Medi-Cal EDBC Rules

2.1.1 Overview

Update Non-MAGI Medi-Cal EDBC rules to treat an incarcerated individual, with a Living Arrangement Record of "Incarcerated" as if they are in the home.

2.1.2 Description of Changes

1. Update Non-MAGI Medi-Cal EDBC rules, effective benefit month January 2023 or later, to consider any person "In the Home" for any day the individual has a Living Arrangement record for 'Incarcerated' in the Benefit month.
   Note: This means Incarcerated individuals, including primary applicants will no longer be found ineligible/discontinued/denied to Medi-Cal for "Out of the Home – Incarcerated" (CT73_OI), or "Out of the Home – Primary Applicant" (CT73-73) and may be included in the Household budget.

2.1.3 Programs Impacted

Medi-Cal

2.1.4 Performance Impacts

N/A

2.2 Automated Regression Test

2.2.1 Overview

Create new automated regression test scripts to verify the availability of the new 'Living in the Home Status' and related Medi-Cal EDBC Rules.

2.2.2 Description of Change

1. Create new regression scripts to verify the person status determined by Medi-Cal EDBC for a person with the following Household Status and Living Arrangement combinations for all days in the benefit month, where the person is Pending on the Medi-Cal program:
    a. Household Status "Permanently Out of the Home"; Living Arrangement "Incarcerated": Active status
    b. Household Status "Permanently Out of the Home"; No Living Arrangement "Incarcerated": Denied status
2. Create new regression scripts to verify the Medi-Cal EDBC result for the impacted person with the following Household Status and Living Arrangement combinations for all days in the benefit month, where the person is Active on the Medi-Cal program in the prior month and no Medi-Cal EDBC result was previously saved for the benefit month:
    a. Household Status "Permanently Out of the Home"; Living Arrangement "Incarcerated": Active status
    b. Household Status "Permanently Out of the Home"; No Living Arrangement "Incarcerated": Discontinued status
3. Create new regression scripts to verify the person status determined by Medi-Cal EDBC for a person with the following Household Status and Living Arrangement combinations for some days in the benefit month, and Household Status "In the Home" for the remaining days in the same month, where the person is Pending on the Medi-Cal program:
    a. Household Status "Permanently Out of the Home"; Living Arrangement "Incarcerated": Active status
    b. Household Status "Permanently Out of the Home"; No Living Arrangement "Incarcerated": Denied status
4. Create new regression scripts to verify the person status determined by Medi-Cal EDBC for a person with the following Household Status and Living Arrangement combinations for some days in the benefit month, and Household Status "In the Home" for the remaining days in the same month, where the person is Active on the Medi-Cal program in the prior month and no Medi-Cal EDBC result was previously saved for the benefit month:
    a. Household Status "Permanently Out of the Home"; Living Arrangement "Incarcerated": Active status
    b. Household Status "Permanently Out of the Home"; No Living Arrangement "Incarcerated": Discontinued status

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Policy	ACWDL 21-22 Implementation of the "SUPPORT Act" - Suspension of Medi-Cal Benefits for "Eligible Juveniles", Under Age 21 or Former Foster Youth Under Age 26, and Other Suspension Requirements	ACWDL 21-22.pdf
2	Policy	ACWDL 22-26 Implementation of Senate Bill 184 – Extension of the Suspension of Medi-Cal Benefits for Adult Inmates, Redetermination Requirements, and Suspension Timeline Guidelines	ACWDL 22-26.pdf

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253708

Consolidate the Worklist Pages into the Task Pop-Up Pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala, Justin Dobbs
	Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena, Carlos Albances

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/04/2023	1.0	Initial Revision	Vallari Bathala, Justin Dobbs

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1 OVERVIEW

This design describes the details for consolidating features available within the Worklist pages into the Task Pop-Up pages.

1.1 Current Design

The CalSAWS System includes a series of Worklist pages that allow for management of Tasks. The CalSAWS System also includes a series of Task Pop-Up pages that allow for management of Tasks. The Worklist pages include several features that are not currently available on the Task Pop-Up pages.

1.2 Requests

1. Consolidate Worklist page specific functionalities into the Task Pop-Up pages.

1.3 Overview of Recommendations

1. Update the Task Pop-Up: Task Search page to include additional search fields, display result columns based on different view modes of the page and allow for multi-complete functionality.
2. Update the Task Pop-Up: My Tasks page to include additional search fields, display result columns based on different view modes of the page and allow for multi-complete functionality.
3. Modify Get Next processing to evaluate the additional selectable attributes to apply to Get Next.

1.4 Assumptions

Worklist pages will remain unchanged until the implementation of CA-257327 - Turn off Worklist Pages.

2 RECOMMENDATIONS

2.1 Task Pop-Up: My Tasks Page

2.1.1 Overview

This section outlines the modifications to the Task Pop-Up: My Tasks page to include additional attributes, allow for multi-complete and include additional Get Next parameters.

2.1.2 My Tasks Mockup

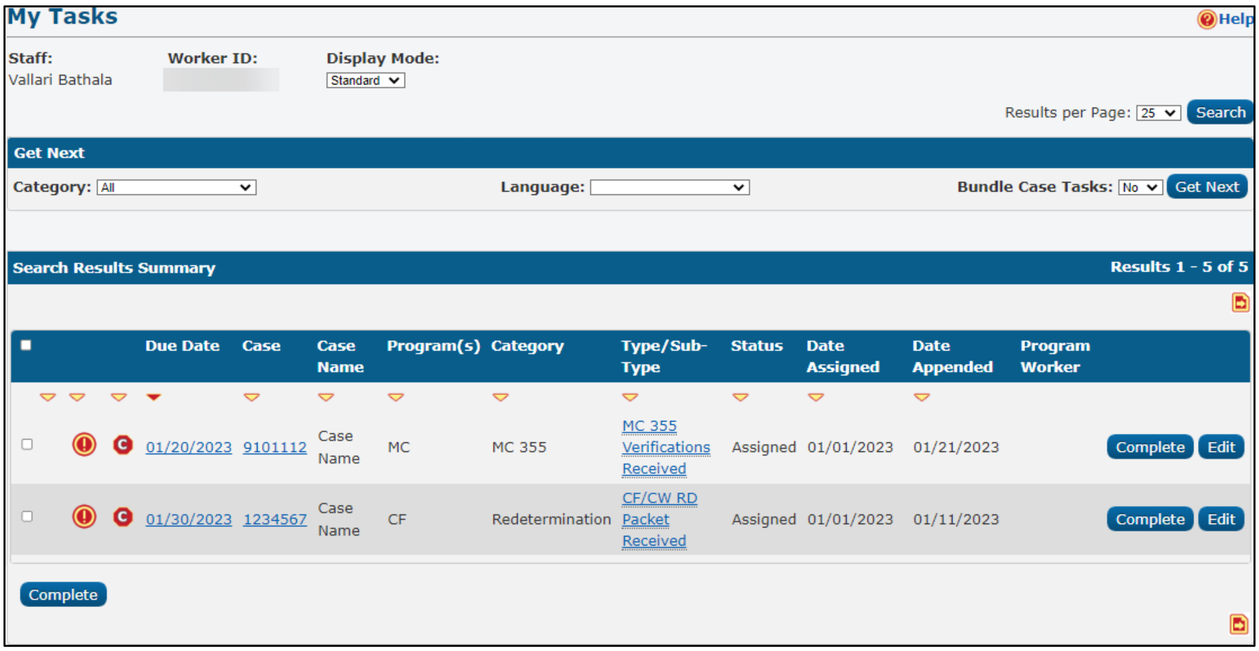

Figure 2.1.2-1 – My Tasks – Standard Display Mode

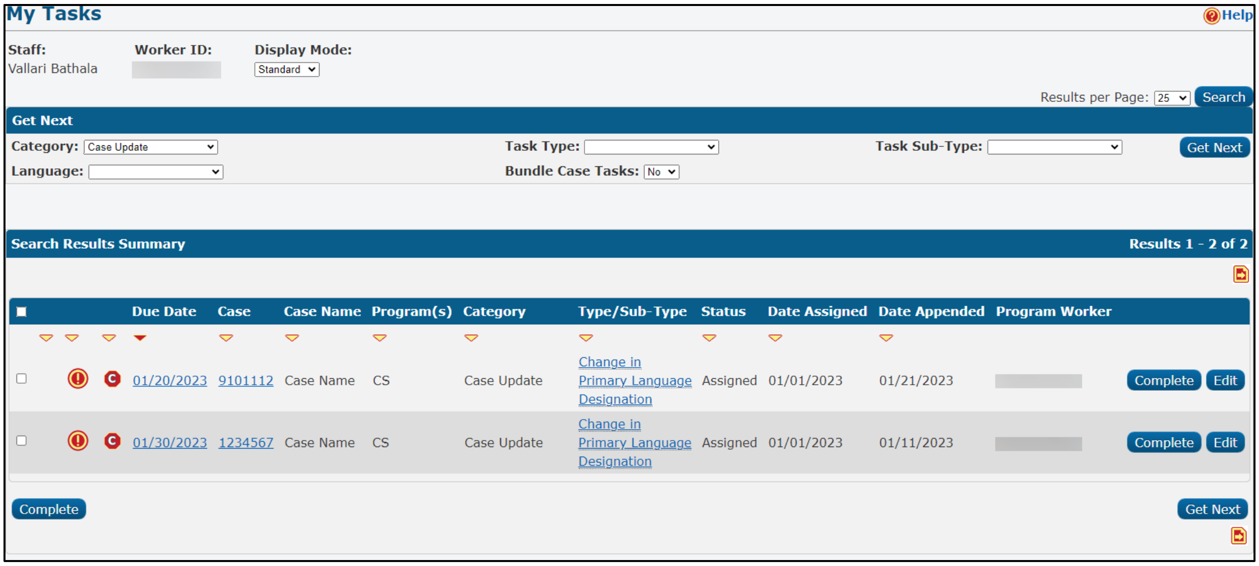

Figure 2.1.2-2 – My Tasks – Standard Display Mode with Type / Sub-Type

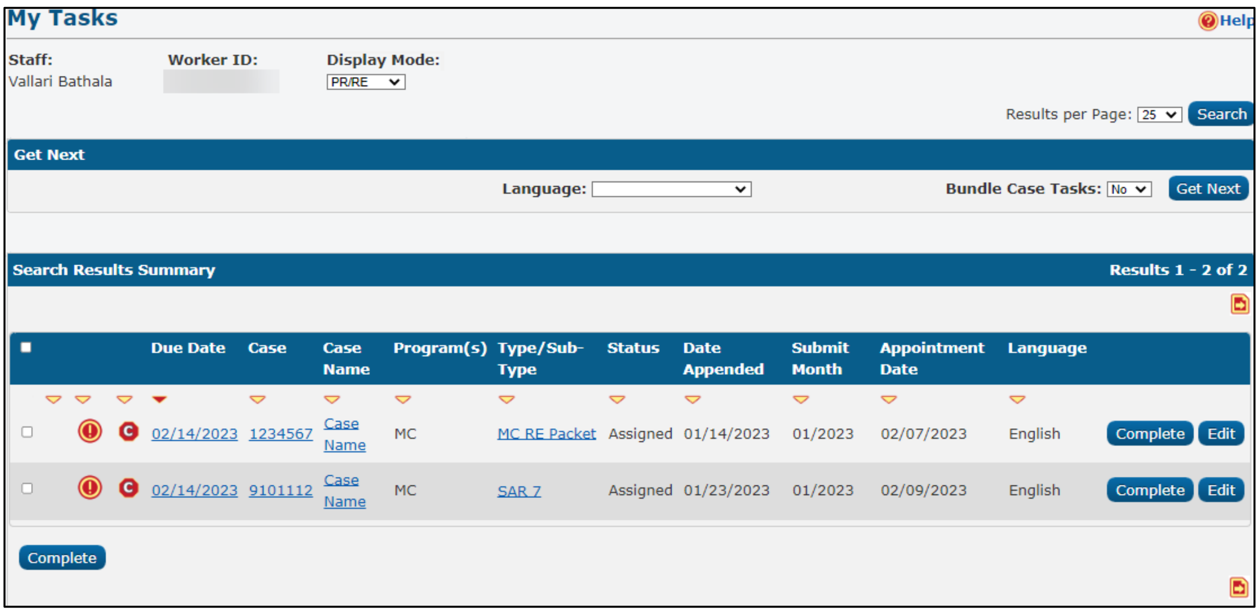

Figure 2.1.2-3 – My Tasks – PR/RE Display Mode

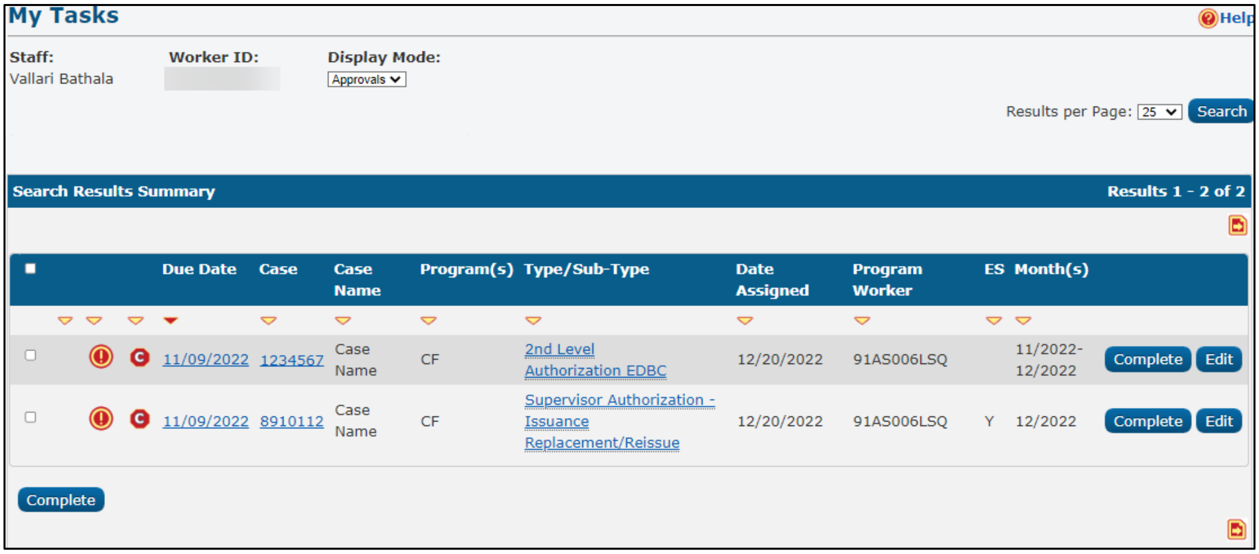

Figure 2.1.2-4 – My Tasks – Approvals Display Mode

2.1.3 Description of Changes

1. Update the Task Pop-Up: My Tasks page to add the following:
   a. Display Mode – A dropdown menu at the top of the page that will be invoked on click of the Search button and include the following options in the listed order:
      i. Standard **(default)**

         Displays all In Process/Assigned Tasks that are assigned to the logged in Worker.

      ii. PR/RE

         Displays all In Process/Assigned PR/RE Tasks that are assigned to the logged in Worker. A "PR/RE" Task is a Task that is associated directly to a Customer Report. These Tasks originate via Document Routing Rules where the document barcode can be linked to a specific Customer Report.

      iii. Approvals

         Displays all In Process/Assigned authorization Tasks that are assigned to the logged in Worker. An authorization Task is a Task with one of the following Task Category values:

         - Auxiliary Issuance
         - Computation Request
         - EDBC
         - External Recovery Account
         - Interest Allocation
         - Invoice

- Issuance Method
- Issuance Replacement/Reissue
- Payment Request
- Transaction Refund
- Valuable

Note: Authorization Tasks are "System Tasks" which are routed to the actioning worker's Supervisor. Worker's who are not supervisors that do not receive authorization Tasks can select this value, but the Search Results Summary will be blank.

Selections within this field will be applied via the "Search" button and modify the columns that are displayed in the Search Results Summary panel as described in Section 2.1.3.1.c.

b. Get Next

Add a new panel above the 'Search Results Summary' panel. This new panel will only display when the Display Mode value is "Standard" or "PR/RE".

The following search attributes will display in this panel:

i. Category – This field will display as a dropdown box that includes the Task Categories associated to the Worker's position as seen in the "Tasks" panel of the 'Position Detail page'. An "All" value will be included and will be the default value for this field. The options in this dropdown will display in alphabetical order. (Per alphabetical order, the "All" option will display at the top of the listing.) This field will only display when the Display Mode value is "Standard".

ii. Task Type – This field will display as a dropdown menu containing a list of Task Types. This field will display if the selected Category value includes Task Types, and the field will populate with the Task Types that are associated to the selected category in the "Category" dropdown.

iii. Task Sub-Type – This field will display as a dropdown menu containing a list of Task Sub-Types. This field will display if the selected Task Type value includes Task Sub-Types, and the field will populate with the Task Sub-Types that are associated to the selected Task Type.

iv. Language – A dropdown field that will display the listing of languages associated to the logged in worker as seen on the worker's Staff Detail page. This dropdown will default to BLANK on page load.

v. Bundle Case Tasks – This dropdown will display within the new panel when the 'Bundle Case Tasks Task Setting is enabled for the county.

vi. **BUTTON**: Get Next – This button will now display within the new panel.

c. Search Results Summary
   Modify the Search Results Summary panel as follows:
   i. Selectable checkbox – for each result displayed, a selectable checkbox will display at the beginning of the row.
      (See the "Complete" button section below for how the checkbox can be used.)
   ii. The Search Results Summary columns will display additional columns dynamically based on the Display Mode attribute value:
      1. Standard – This mode will display all the columns currently available in the My Tasks page. No modifications to the existing columns.
      2. PR/RE – This mode will not display the Program Worker, Category and Date Assigned columns, and will display the following columns:
         a. Submit Month – The Submit Month for the Customer Report that is associated to the Task as seen on the Customer Reporting Detail page. This value will be formatted as MM/YYYY.
         b. Appointment Date – An appointment date will display formatted as MM/DD/YYYY when the following criteria are met:
            i. The Customer Report that is associated to the Task has a Type of:
               1. CF RE Packet
               2. CW RE Packet
               3. CW/CF RE Packet

               The person associated to the generated document has an appointment during or after the Customer Report Submit Month with an appointment type of:

               1. Telephone CW/CF RE Interview
               2. Re-Evaluation CW/CF Interview
         c. Language – The language associated to the Task.
      3. Approvals – This mode will not display the Date Appended, Status and Category columns and will display the following columns:

a. ES – This column will display ‘Y’ if the below criteria are met, otherwise the column will display ‘N’:
   i. The Task Type Category is “EDBC”
   ii. The Authorization Task is associated to an EDBC that indicates Expedited Service OR the CalFresh program indicates Entitled to Expedited Service on the CalFresh Program Detail page where the File Date is within the authorization period.
b. Month(s) – This column will display the month(s) of EDBC that are pending authorization where:
   i. The Authorization Task Category is “EDBC”
   ii. The EDBC Run Status is “Pending Authorization”

   If a single EDBC month is pending authorization, the month will be formatted as MM/YYYY. If multiple months are pending authorization, this field will be formatted as “<Begin Month> - <End Month>” where each month is formatted as MM/YYYY to indicate the range of EDBC months. For example “04/2023 – 05/2023”

d. **BUTTON**: Complete – When clicked, Tasks that have been selected via the Selectable checkbox will be Completed.
e. Remove the Get Next **BUTTON** located at the bottom right side of the page below the Search Results Summary panel.

2.1.4 Page Validations

Add the following page validation if the User clicks the Complete button without checking the selectable checkbox for at least one Task in the Search Results Summary:

“Complete – Please select a Task to complete.”

2.1.5 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A
  Page is accessible through Utility bar’s Tasks Option.

2.1.6 Security Updates

Add the "WorkloadSummaryView" security right to the "My Tasks View" security group.

2.1.7 Page Mapping

Update page mapping with the new field and new columns in the My Tasks page.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Task Pop-Up: Task Search Page

2.2.1 Overview

This section outlines the modifications to the Task Pop-Up: Task Search page to include additional attributes and allow for multi-complete of Tasks.

2.2.2 Task Search Mockup

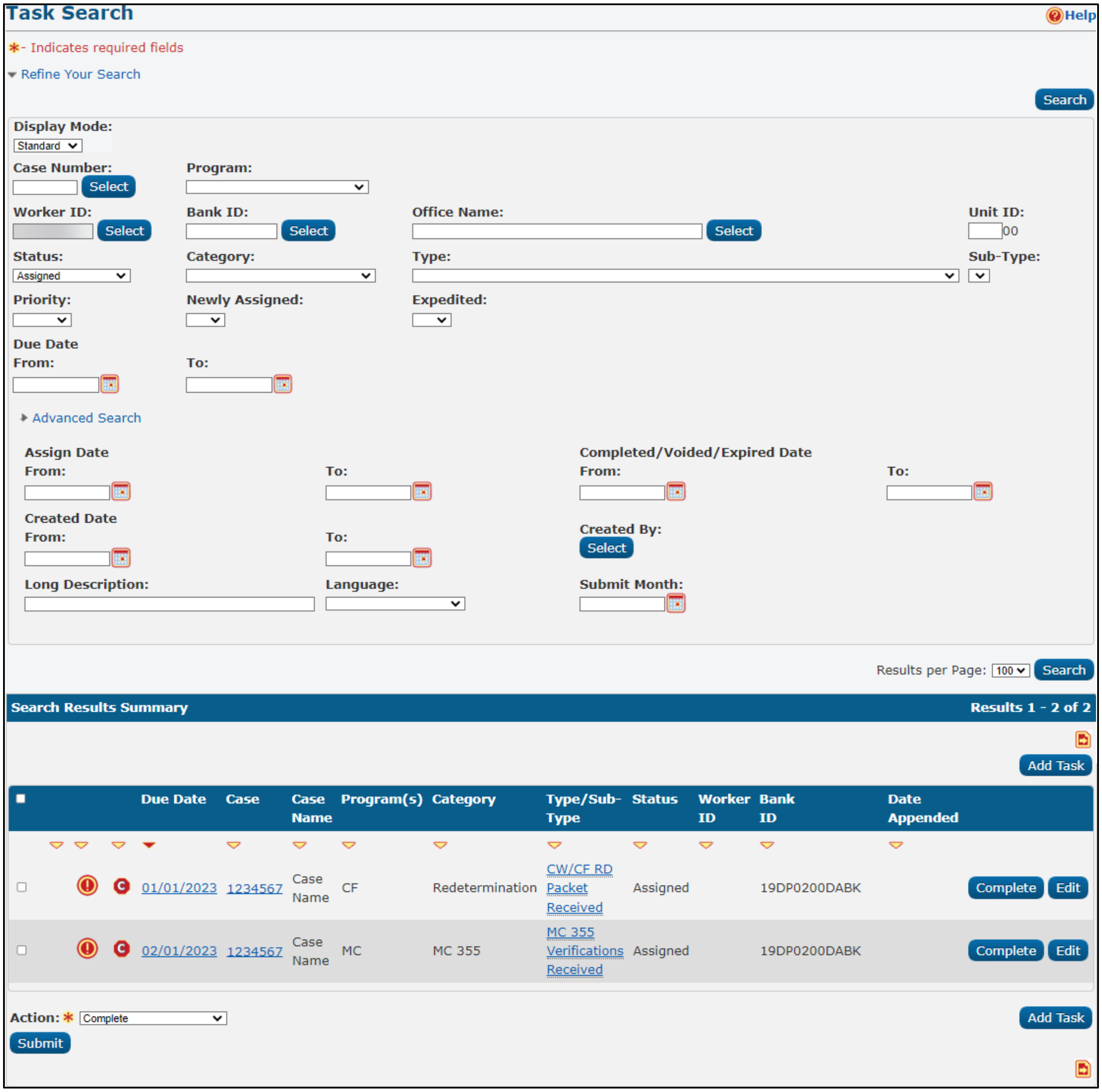

Figure 2.2.2-1 – Task Search – Standard

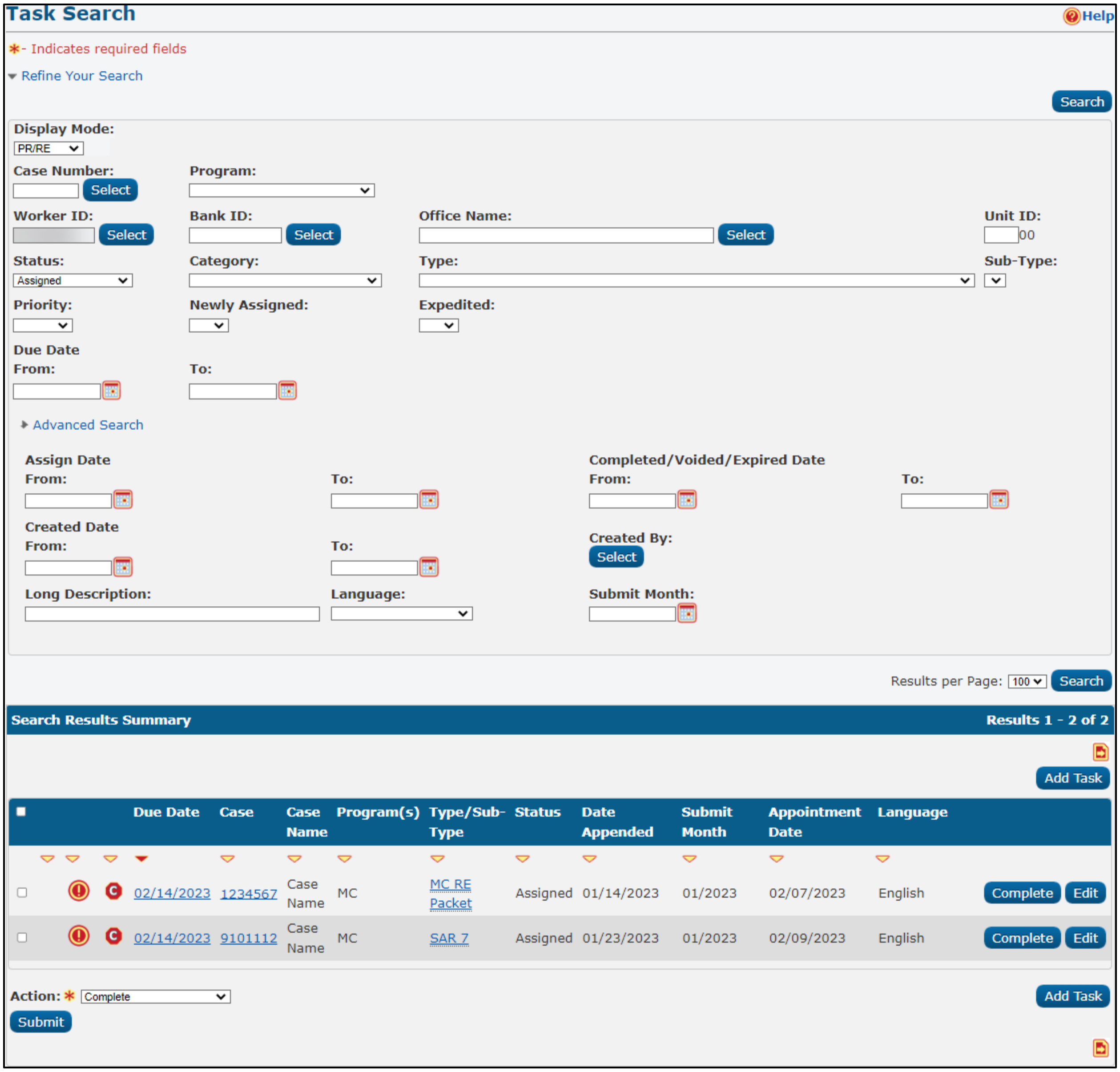

Figure 2.2.2-2 – Task Search – PR/RE

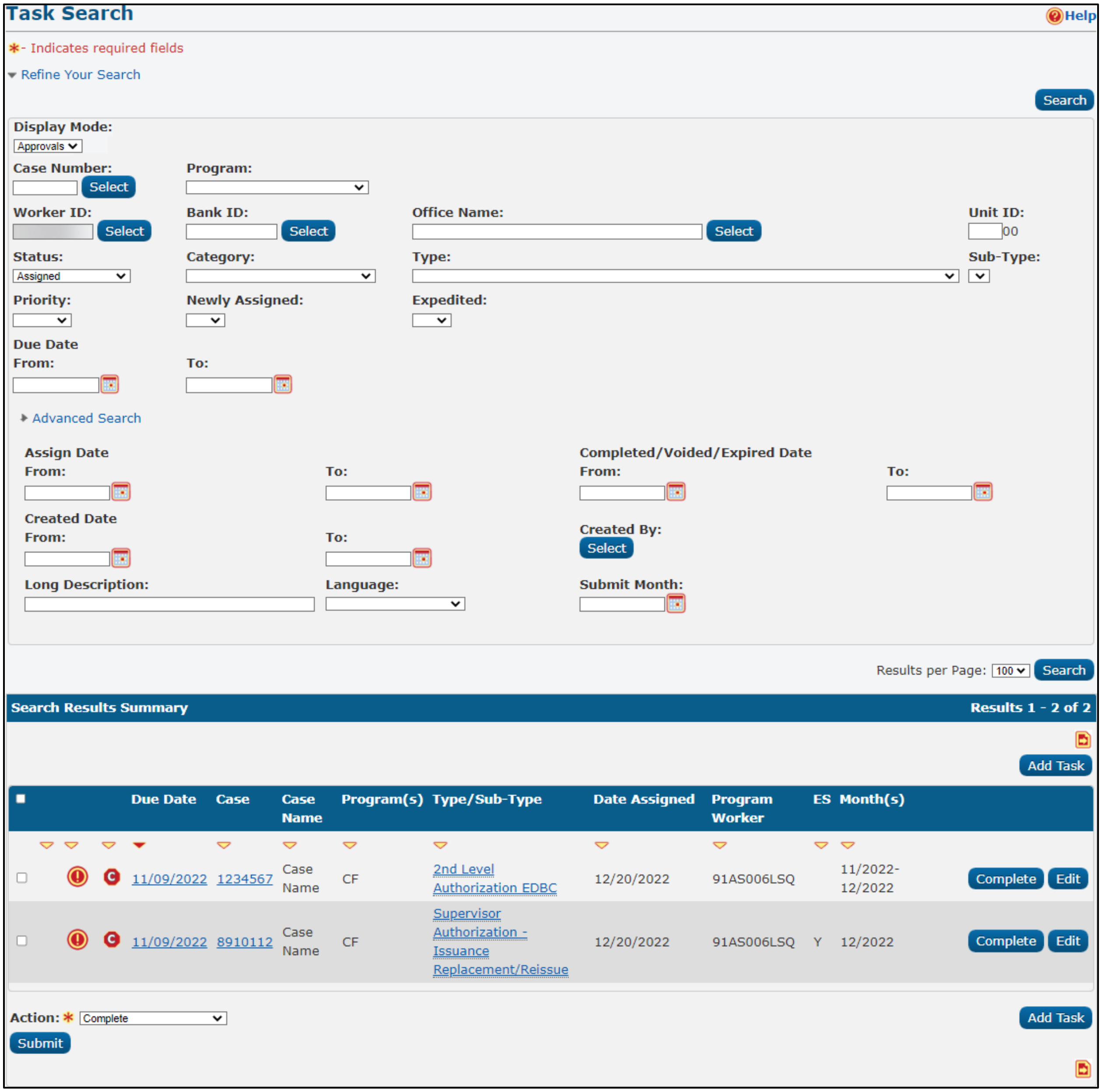

Figure 2.2.2-3 – Task Search – Approvals

2.2.3 Description of Changes

1. Update the Task Pop-Up: Task Search page to add the following:
    a. Display Mode – A dropdown menu at the top of the page that will be invoked on click of the Search button and include the following options in the listed order:
        i. Standard **(default)**

           Displays all In Process/Assigned Tasks based on the search criteria.

        ii. PR/RE

Displays all In Process/Assigned PR/RE Tasks based on the search criteria. A "PR/RE" Task is a Task that is associated directly to a Customer Report. These Tasks originate via Document Routing Rules where the document barcode can be linked to a specific Customer Report.

iii. Approvals

Displays all In Process/Assigned authorization Tasks based on the search criteria. An authorization Task is a Task with one of the following Task Category values:

- Auxiliary Issuance
- Computation Request
- EDBC
- External Recovery Account
- Interest Allocation
- Invoice
- Issuance Method
- Issuance Replacement/Reissue
- Payment Request
- Transaction Refund
- Valuable

Selections within this field will be applied via the "Search" button and modify the columns that are displayed in the Search Results Summary panel as described in Section 2.2.3.1.d.

b. Language – A dropdown field that will display the listing of languages known to the CalSAWS System.
c. Submit Month – This calendar field will allow Users to search for PR/RE Tasks based on the Submit Month of the Customer Report that is associated to the Task.

d. Search Results Summary
    iv. The Search Results Summary columns will display additional columns dynamically based on the Display Mode attribute value:
        1. Standard – This mode will display all the columns currently available in the Task Search page. No modifications to the existing columns.
        2. PR/RE – This mode will not display the Category, Worker ID, and Bank ID columns, and will display the following columns:
            a. Submit Month – The Submit Month for the Customer Report that is associated to the

Task as seen on the Customer Reporting Detail page. This value will be formatted as MM/DD/YYYY.

   b. Appointment Date – An appointment date will display formatted as MM/DD/YYYY when the following criteria are met:
      i. The Customer Report that is associated to the Task has a Type of:
         1. CF RE Packet
         2. CW RE Packet
         3. CW/CF RE Packet

         The person associated to the generated document has an appointment during or after the Customer Report Submit Month with an appointment type of:

         1. Telephone CW/CF RE Interview
         2. Re-Evaluation CW/CF Interview
   c. Language – The language associated to the Task.
3. Approvals – This mode will not display the Category, Worker ID, Bank ID and Date Appended columns and will display the following columns:
   a. ES – This column will display 'Y' if the below criteria are met, otherwise the column will display 'N':
      i. The Task Type Category is "EDBC"
      ii. The Authorization Task is associated to an EDBC that indicates Expedited Service OR the CalFresh program indicates Entitled to Expedited Service on the CalFresh Program Detail page where the File Date is within the authorization period.
   b. Month(s) – This column will display the month(s) of EDBC that are pending authorization where:
      i. The Authorization Task Category is "EDBC"
      ii. The EDBC Run Status is "Pending Authorization"

      If a single EDBC month is pending authorization, the month will be formatted as MM/YYYY. If multiple months are pending authorization, this field will be formatted as "<Begin Month> - <End Month>" where each month is formatted as MM/YYYY to indicate the range of EDBC months. For example “04/2023 – 05/2023”

e. Action: Update this dropdown field to include a ‘Complete’ option

    i. Complete – On click of the Submit button with an Action value of “Complete”, all Tasks selected via the Selectable checkbox will be completed.

2.2.4 Page Validations

N/A

2.2.5 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A
  Page is accessible through Utility bar’s Tasks Option.

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

Add page mapping for the new field and new columns in the Task Search page.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Export: Templates

2.3.1 Overview

This section outlines the modifications to the Export Template in My Tasks and Task Search pages to include new columns previously found in Worklist pages.

2.3.2 Export Template Mockup

Case Numb	Case Name	Prograr	Language	Start Dat	Due D[illegible]	[illegible]oide	Date Completed	Submit Month	Appointment Date	ES	Month(s)	Long Description
1234567	Case Name	CF	English		12/0[illegible]			12/2022	12/21/2022	Y	12/2022	
9101112	Case Name	CF	English		12/[illegible]			12/2022	12/21/2022	Y	12/2022	

Figure 2.3.2.1 – Export Template

2.3.3 Description of Changes

1. Language – This column will display the language associated to the Task.
2. Submit Month – The Submit Month for the Customer Report that is associated to the Task as seen on the Customer Reporting Detail page. This value will be formatted as MM/YYYY.
3. Appointment Date – An appointment date will display formatted as MM/DD/YYYY when the following criteria are met:
    a. The Customer Report that is associated to the Task has a Type of:
        i. CF RE Packet
        ii. CW RE Packet
        iii. CW/CF RE Packet

        The person associated to the generated document has an appointment during or after the Customer Report Submit Month with an appointment type of:

        i. Telephone CW/CF RE Interview
        ii. Re-Evaluation CW/CF Interview
4. ES – This column will display 'Y' if the below criteria are met, otherwise the column will display 'N':
    a. The Task Type Category is "EDBC"
    b. The Authorization Task is associated to an EDBC that indicates Expedited Service OR the CalFresh program indicates Entitled to Expedited Service on the CalFresh Program Detail page where the File Date is within the authorization period.
5. Month(s) – This column will display the month(s) of EDBC that are pending authorization where:
    a. The Authorization Task Category is "EDBC"
    b. The EDBC Run Status is "Pending Authorization"

    If a single EDBC month is pending authorization, the month will be formatted as MM/YYYY. If multiple months are pending authorization, this field will be formatted as "<Begin Month> - <End Month>" where each month is formatted as MM/YYYY to indicate the range of EDBC months. For example "04/2023 – 05/2023"

    Note: The Export Template will not dynamically update the columns based on the Display Mode selected. All columns will be available in the template regardless of the Display Mode on the My Tasks or Task Search page.

2.4 Get Next Processing

2.4.1 Overview

This section describes updates to Get Next processing based on the additional Get Next parameters introduced in Section 2.1.

2.4.2 Description of Changes

Update Get Next processing as follows:

1. If a specific “Category” is selected in the Get Next panel of the Task Pop-Up: My Tasks page, Get Next processing will restrict Tasks evaluated/ordered by the selected Category only.

2. If a specific “Language” is selected in the Get Next panel of the Task Pop-Up: My Tasks page, Get Next processing will restrict Tasks evaluated/ordered by the selected Language. If no Tasks are available for the selected Language, processing will consider English Tasks by default.

Note: Get Next processing will give priority to processing Get Next Priority rules (if configured) as described in SCR CA-253349. If Get Next Priority rules do not return a Task, or if there do not exist Get Next Priority rules to be processed, a selected Category/Language will be applied to the Get Next processing.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	Security Matrix	CA-253708 Consolidate the Wo

4 REQUIREMENTS

N/A

5 APPENDIX

N/A

Style Definition: TOC 1

Style Definition: TOC 2

California Statewide Automated Welfare System

Design Document

CA-257402

Allow Users to Drag the Virtual Assistant Icon

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gerald Limbrick
	Reviewed By	Naga Chinduluru, William Baretsky, Chitra Barsagade

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/15/2023	1.0	Initial	G. Limbrick

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1 OVERVIEW

1.1 Current Design

The Virtual Assistant (VA) BOT was added to CalSAWS pages with CA-250886. The VA BOT Icon that displays on each page cannot be moved. When the user scrolls to the bottom of the page, the icon covers buttons, depending on the specific CalSAWS page. This is interfering with the use of the Add, Save, Close, etc... buttons.

The Icon is also appearing on screen prints.

1.2 Requests

Provide the user with the ability to drag the icon to any visible location on the page to prevent the current interference of page function.

Add logic to prevent the VA BOT Icon from showing on screen prints.

1.3 Overview of Recommendations

1. Update the VA BOT Icon to the new image (see Description of Changes below)
2. Make the icon draggable.
3. When the icon is in focus, allow the icon to be moved with the arrow keys.
4. Update The System so that the VA BOT Icon does not appear on screen prints. **Note**: This is related to the browser's print functionality (and not screen shots).

1.4 Assumptions

1. Any fields and functionality not mentioned in this document will not be changed.
2. When changing to a new page, the VA BOT Icon will revert to its default position.

2 RECOMMENDATIONS

2.1 Virtual Assistant Chat Bot Icon

2.1.1 Overview

1. Update the VA BOT Icon to the new image (see Description of Changes below)
2. Make the icon draggable.
3. When the icon is in focus, allow the icon to be moved with the arrow keys.
4. Update The System so that the VA BOT Icon does not appear on screen prints.

2.1.2 New Icon Mockup

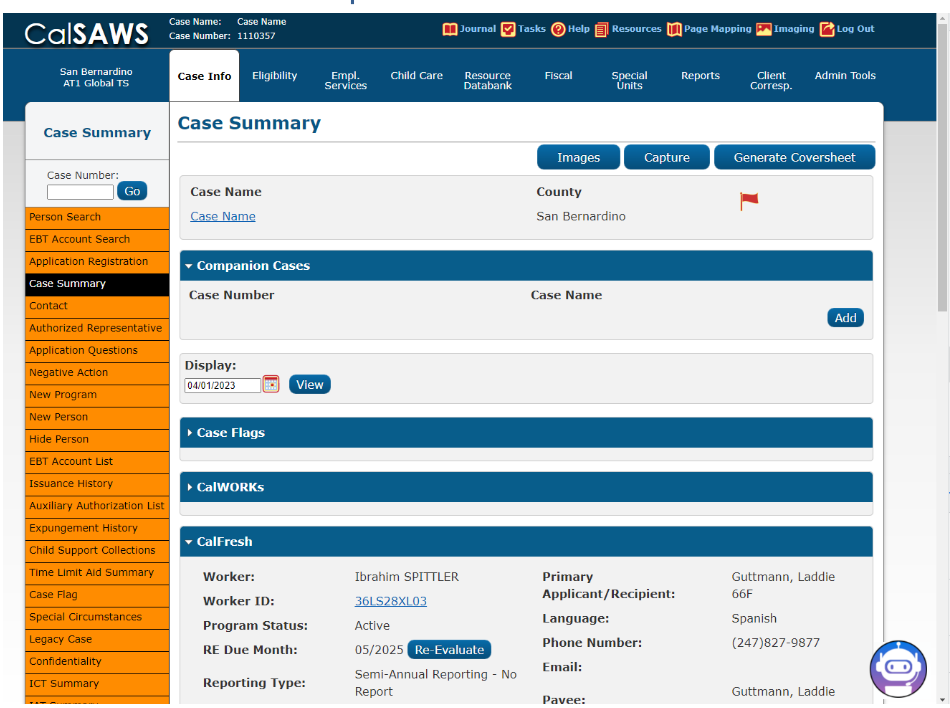


Figure 2.1.2.1 - New Icon Not In-Focus

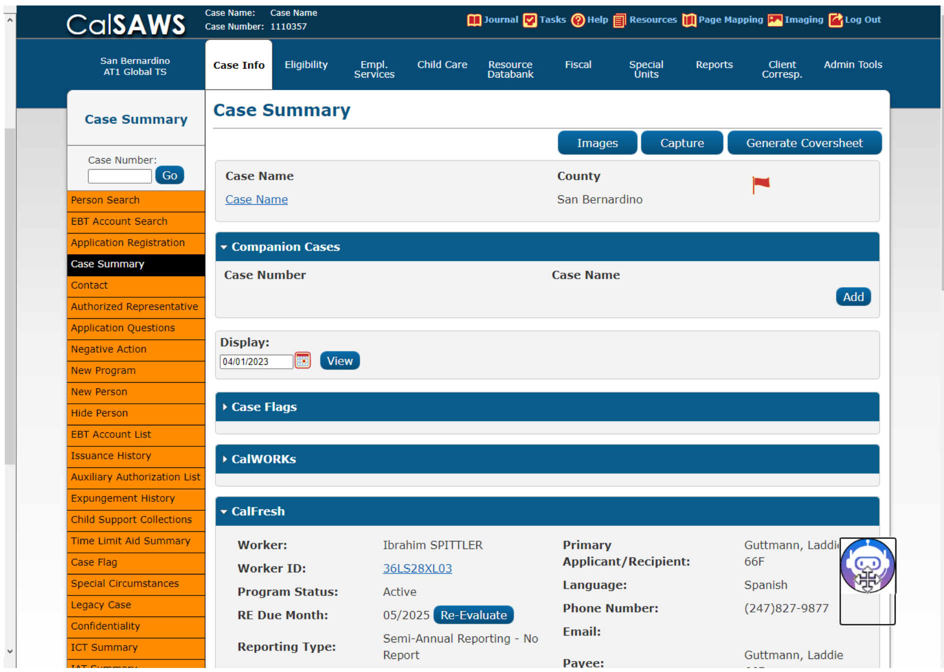
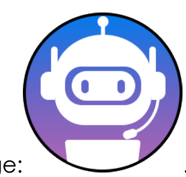


Figure 2.1.2.2 - New Icon In-Focus

2.1.3 Description of Changes

1. Update the icon to use this new image:  .
   a. Remove the existing text: "Chat", and the existing orange border from the VA BOT Icon / from surrounding the image
   b. On mouse-over, brighten/lighten the link; add a mouse-over description as: "Virtual Assistant (Draggable Icon)" **Note**: The mouse-over description is used by screen readers, to assist the visually impaired
2. Make the icon draggable:
   a. When dragging starts
      i. Change the cursor to the "move" cursor, for example: 

        ii. Brighten/lighten the link
    b. When dragging stops, revert to the system cursor and the original brightness level
3. When the icon is in focus (i.e., is the active screen element):
    a. Add/show a “move” indicator on/over the icon, for example: ; add mouse-over description to this indicator as: “Virtual Assistant graphic link grabbed! Use the tab key to drop this object or use the Enter key or Space key to activate it. Use the arrow keys to move this object around on the screen.”
    Note: When mousing over portions of the icon image other than the “move” indicator, separate mouse-over text, for the icon image will apply (see requirement #1 of this section)
    b. Add an announcement to be read by screen readers as: "Draggable Virtual Assistant image link grabbed. Use the tab key to drop this object or use the Enter key or Space key to activate. Use the arrow keys to move this object around on the screen".
    c. Allow the icon to be moved with the arrow keys, only when the icon is in focus (i.e., when the icon is the active element):
        i. Each press of an arrow key should move the icon 100 pixels (screen pixels) in that specific direction or to the edge of the screen when it was less than 100 pixels from the screen edge
        ii. When the icon is moved with an arrow key, add one of the following announcements to be read by screen readers as appropriate:
            1. "Virtual Assistant link moved to the left."
            2. "The Virtual Assistant link is at the left edge of the screen."
            3. “Virtual Assistant link moved to the right."
            4. “The Virtual Assistant link is at the right edge of the screen.”
            5. "Virtual Assistant link moved up."
            6. “The Virtual Assistant link is at the top edge of the screen.”
            7. "Virtual Assistant link moved down."
            8. "The Virtual Assistant link is at the bottom edge of the screen."

        Note: When the icon is already at one edge of the screen, the “… edge of the screen” announcement will be appropriate.
    d. When the icon loses focus (i.e., is no longer active):
        i. Remove/hide the “move” indicator
        ii. Add an announcement to be read by screen readers as: “Virtual Assistant link dropped”

4. Update The System so that the VA BOT Icon does not appear on screen prints. **Note**: This is related to the browser's print functionality (and not screen shots).

2.1.4 Page Location

Multiple pages

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 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 Virtual Assistant is an included coach and expert system.

3.2 Migration Requirements

N/A

4 MIGRATION IMPACTS

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-258639

Intake Task Enhancements

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Sarah Cox, Dymas Pena, Carlos Albances, Justin Dobbs

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/04/2023	1.0	Initial Revision	Vallari Bathala

Table of Contents

1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to allow the Users to modify certain aspects of the Intake Task Type.

1.1 Current Design

With the introduction of county configurable Task Types, the Intake Task Type was initially implemented as a "System" type which is viewable on the Task Type Detail page, but it cannot be edited.

1.2 Requests

Update the CalSAWS System to allow additional configurability for Intake Tasks.

1.3 Overview of Recommendations

1. Update the Intake Task Type to be editable and to allow configuration of additional attributes.
2. Add a new Complete Task Automated Action for Intake Task automatic closure.
3. Update Intake Automated Action logic to not trigger if the Case and Program already have an existing Task in Assigned or In-Process status.

1.4 Assumptions

1. The Available for Automation and Available Online Intake Task Type attributes will remain read-only.

2 RECOMMENDATIONS

2.1 Task Type List

2.1.1 Overview

This section describes the modification to the display of the Intake Task Type on the Task Type List page.

2.1.2 Task Type List Mockup

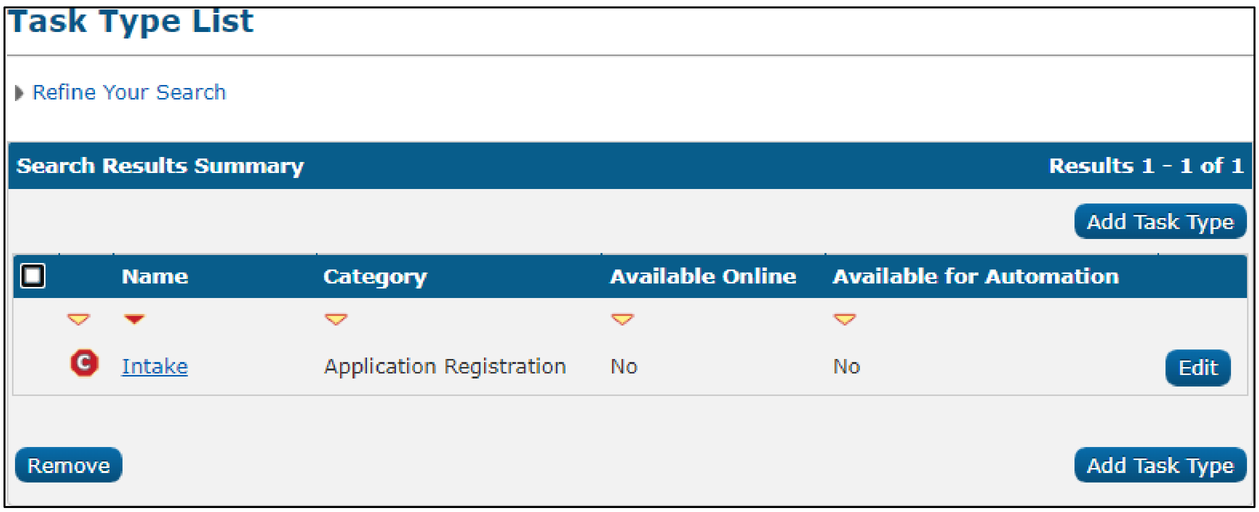


Figure 2.1.2-1 – Task Type List Mockup

2.1.3 Description of Changes

1. **BUTTON**: Edit – This button will now display for the Intake Task Type in the Task Type List page allowing the Intake Task Type to be editable.

2.1.4 Page Validations

N/A

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Task Types

  Intake Task Type is available in the Task Type List page.

2.1.6 Security Updates

N/A

2.1.7 Page Mapping

N/A

2.1.8 Page Usage/Data Volume Impacts

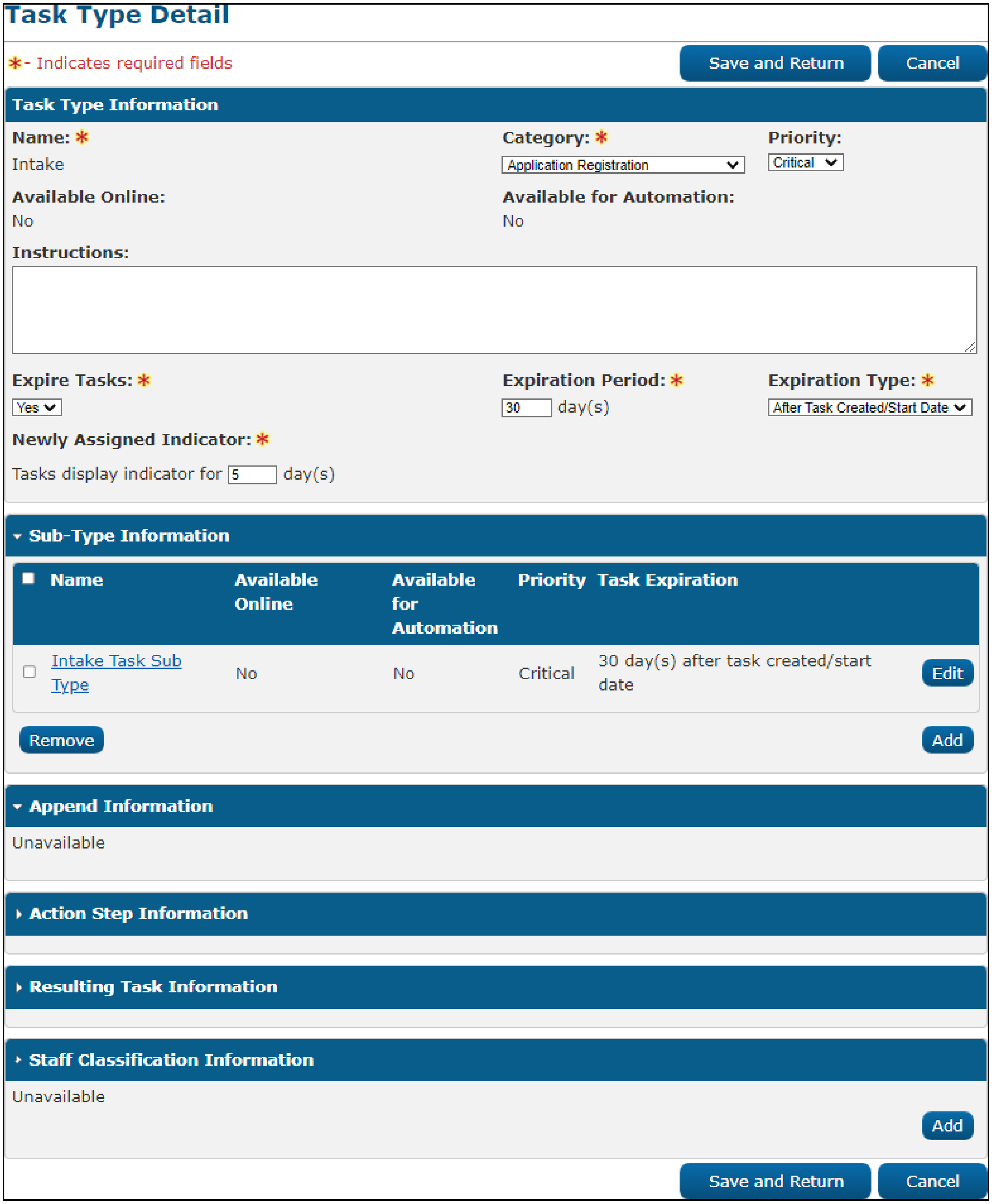
N/A

2.2 Task Type Detail

2.2.1 Overview

This section outlines the modifications to the Task Type Detail page for the Intake Task Type.

2.2.2 Task Type Detail Mockup



Task Type Detail

*- Indicates required fields

Save and Return | Cancel

Task Type Information

Name: *
Intake

Category: *
Application Registration

Priority:
Critical

Available Online:
No

Available for Automation:
No

Instructions:

Expire Tasks: *
Yes

Expiration Period: *
30 day(s)

Expiration Type: *
After Task Created/Start Date

Newly Assigned Indicator: *
Tasks display indicator for 5 day(s)

Sub-Type Information

Name	Available Online	Available for Automation	Priority	Task Expiration	
Intake Task Sub Type	No	No	Critical	30 day(s) after task created/start date	Edit

Remove | Add

Append Information

Unavailable

Action Step Information

Resulting Task Information

Staff Classification Information

Unavailable

Add

Save and Return | Cancel

Figure 2.2.2-1 – Task Type Detail Mockup

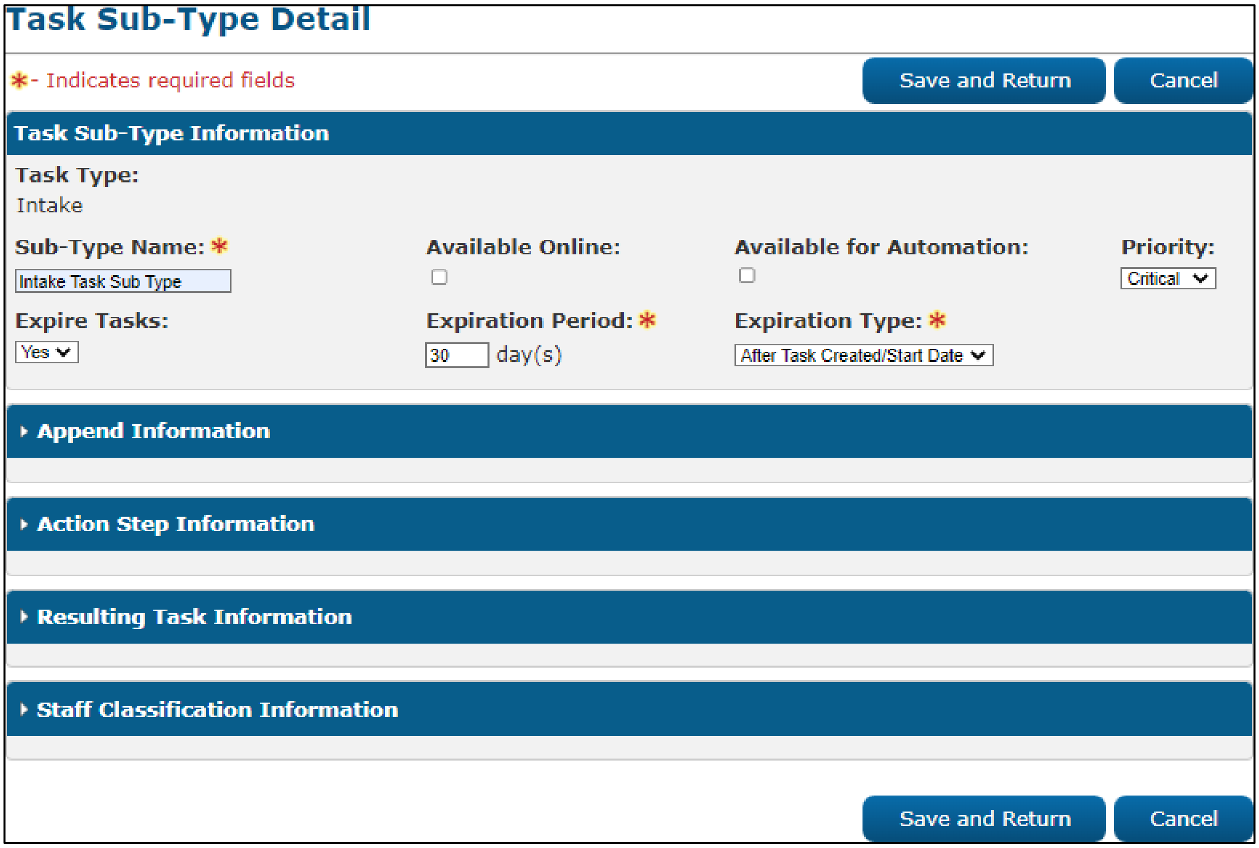


Figure 2.2.2-2 – Task Sub-Type Detail Mockup

2.2.3 Description of Changes

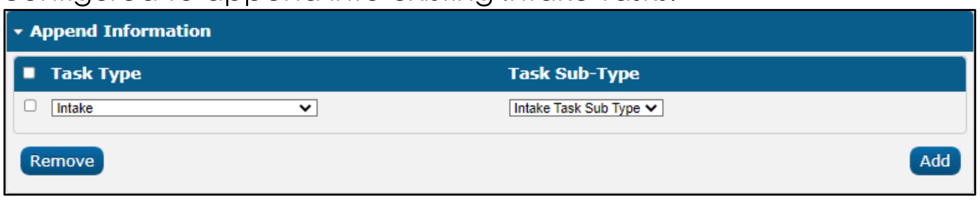
1. Update Task Type Information for Intake Task Type to allow Users to edit the following fields when the page is in Edit mode:
    a. Category
    b. Priority
    c. Instructions
    d. Expire Tasks
    e. Expiration Period
    f. Expiration Type
    g. Newly Assigned Indicator

    Note: Available Online and Available for Automation checkboxes will not be editable and will remain as 'No' as this Task Type is still only invoked via the "Intake" Automated Action.
2. The following panels within the Task Type Detail page will also be editable:
    a. Sub-Type Information
    b. Action Step Information
    c. Resulting Task Information

The Append Information panel will indicate “Unavailable” so that intake Tasks are always created when the “Intake” Automated Action is active and invoked.

The Staff Classification Information panel will indicate “Unavailable” as Tasks from the Intake Automated Action are routed directly to the Program Worker and do not perform additional routing evaluations such as Staff Classification information.

3. The Intake Task Type will be available for selection within the Append Information panel of other Task Types so that other Task Types may be configured to append into existing Intake Tasks.



2.2.4 Page Validations

N/A

2.2.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Task Types

Intake Task Type is available in the Task Type List page.

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

N/A

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Intake Complete Task Automated Action

2.3.1 Overview

This section describes a new Complete Task Automated Action allowing counties to opt in/out of Intake Task auto closure.

2.3.2 Automated Action Detail Mockup

Action Information		
Name: Intake: Pending Program Dispositioned	**Type:** Complete Task	**Status:** * Active
Program(s): All Programs	**Run Date:** Daily(Mon-Sat)	**Source:** Batch
Scenario: An Assigned/In-Process Intake Task is associated to a program that is no longer Pending.		

Figure 2.3.2-1 – Automated Action Detail Mockup

2.3.3 Description of Changes

Implement the following Intake Auto Closure in the CalSAWS System:

1. Intake: Pending Program Dispositioned
    a. Action Information
        i. Name: Intake: Pending Program Dispositioned
        ii. Type: Complete Task
        iii. Status: Active
        iv. Program(s): All Programs
        v. Run Date: Daily (Mon-Sat)
        vi. Source: Batch
        vii. Scenario: An Assigned/In-Process Intake Task is associated to a program that is no longer Pending.

2. Modify the Intake auto closure batch processing to evaluate the 'Status' of the new Intake: Pending Program Dispositioned automated action before automatically closing Intake Tasks. Intake Tasks will only be closed automatically if the Automated Action status is Active.

2.3.4 Page Validation

N/A

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Intake Automated Action

2.4.1 Overview

This section describes updates to the Intake Automated Action trigger conditions.

2.4.2 Description of Changes

1. Modify the logic of the Intake Automated Action to not trigger if the Case and Program already have an existing Task that originated from the Intake Automated Action with a status of Assigned or In-Process.

2.4.3 Page Validation

N/A

2.4.4 Security Updates

N/A

2.4.5 Page Mapping

N/A

2.4.6 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.2	The LRS shall generate alert, reminder, and control descriptions that are easily understandable.	Update the CalSAWS System to allow additional configurability for Intake Tasks.

4 REQUIREMENTS

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

California Statewide Automated Welfare System

Design Document

CA-262970

CalSAWS VA Expansion – Release 10

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/29/23	1.0	Original Draft	Uzochi Oparaji, Alexa Kideys

Table of Contents

1 OVERVIEW

1.1 Current Design

The Virtual Assistant (VA) allows CalSAWS workers to access a series of pre-defined questions (use cases) for the CalWORKs, CalFresh, Medi-Cal, 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 10 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 10	Total (All Releases)
Number of UCs	221	13	234
Number of Keywords	822	192	1014
Main Menu Branch	8	0	8
Sub-Menu Branches	29	4	33

Summary of Enhancements to Existing Content:

Category	Release 10
Number of Edited UCs	22
New UX/UI Features	0

1.4 Assumptions

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

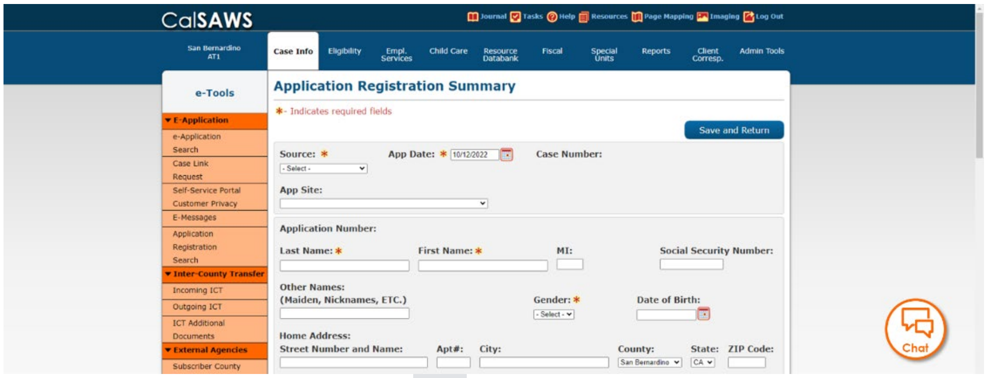


Figure 1.4.1 - VA Chat Icon

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

2 RECOMMENDATIONS

2.1 Internal VA Items

2.1.1 Overview

In this release, we will be adding more content to the VA and making enhancements to existing content. This content will include 13 more UCs, 22 edits to existing UCs, 192 new keywords, and 4 new sub-menu branches.

2.1.2 CalSAWS VA Mockups

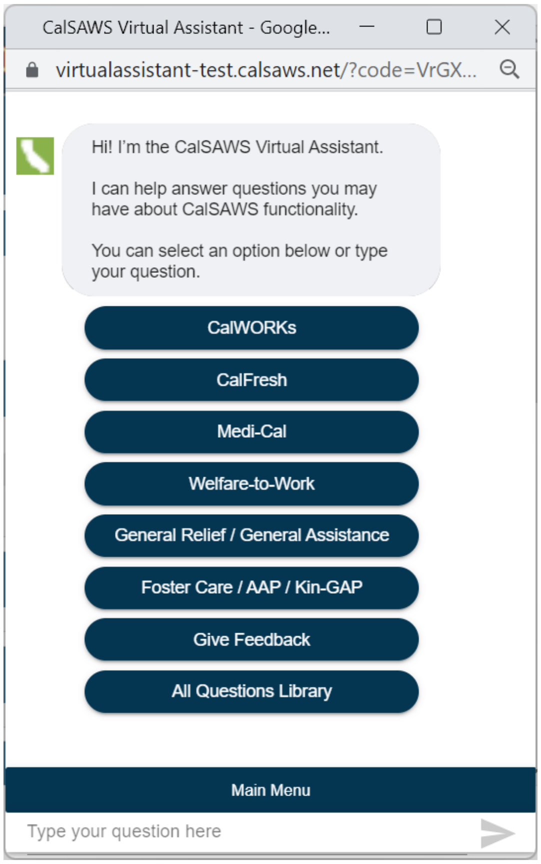


Figure 2.1.2.1 - VA Window

2.1.3 Description of Changes

1. New UCs

Below is a table containing all new Use Cases in Release 10:

Program	Question	Answer	Buttons
Flags Sub-Menu	How to end date a case flag associated to a case?	To enter an end date for a flag: 1. Click on **Case Info** a. Select the **Case Summary** page 2. From the **Case Summary** page: a. Click on **Case Flag** 3. On the **Case Flag List** page: a. Click **Edit** on the flag(s) you would like to end date 4. On the **Case Flag Detail** page a. Enter the **End Date** for the flag(s) b. Click **Save** Once a flag is associated to a case, you cannot enter an End Date for the flag that is prior to the current system date. If you attempt to enter an earlier date, you will see one of several validation messages, and the information you entered will not be saved.	**Button**: Flagging – Create and Assign to Cases (JA) **Button**: More Flags-related Topics
Flags Sub-Menu	How to flag a case for special circumstances / accommodations?	When a participant has indicated that they require special assistance through the BenefitsCal application/app, an ADA (Americans with Disabilities Act) icon (red wheelchair) will be displayed to the worker on certain pages during the case opening process. The areas in the System that display the ADA disability icon are: Message Center, Worklist page, E-Application Search page, Reception Log List and Detail To flag a case for special circumstances/accommodations:	**Button**: Flagging – Create and Assign to Cases (JA) **Button**: More Flags-related Topics

		1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigation bar 3. Click the **Special Circumstances** link on the **Task** navigation bar 4. On the **Special Circumstances List** page, select the **Name** of the person you would like to add the flag to and click **Add** 5. On the **Special Circumstances Detail** page, select the special circumstances and accommodation preferences **Note**: Adding a special circumstance flag only adds the icon to alert users that there are accommodations.	
Flags Sub-Menu	What do different flag icons mean?	When a flag is associated to a case, the flag information displays in the Case Flags section on the Case Summary page. A colored flag icon displays in the top right corner of the Case Summary page and can have different meanings: 1. The **Reporting Flag** icon (**white** in color) may indicate a county, state, or federal study is being conducted 2. The **Worker Action Flag** icon (**red** in color) indicates a worker action is needed to address the flag. Depending on the County business process, a due date may be assigned to the Work Action Flags only. When both **Reporting and Worker Action Flags** are associated to a case, the red **Worker Action Flag** icon displays in the top right corner **Note**: The **ADA (Americans with Disabilities Act) disability Worker Action** icon indicates that a participant on the case requires special assistance. When a participant has indicated that they require special assistance, an ADA	**Button**: Flagging – Create and Assign to Cases (JA) **Button**: More Flags-related Topics

		disability icon **(red wheelchair)** will be displayed to the worker on certain pages during the case opening process.	
Welfare to Work	How to view the Job Development Activity Detail Page?	The Job Development Activity Detail page allows you to search for existing job development activities and add a job development activity. To view the Job Development Activity Detail page: 1. Place the cursor over **Empl. Services** on the **Global** navigation bar 2. Select **Workload Inventory** from the **Local** navigation bar 3. Click the **Job Development Detail** link on the **Task** navigation bar to access the **Job Development Detail** page 4. Click the **Activity** hyperlink or the **Add** button to access the Job Development Activity Detail page in View or Add mode, respectively For more information on the Job Development Activity Detail page, click the button below.	**Button**: Job Development Detail (OLH) **Button**: More Welfare-to-Work-related Topics
EDBC Sub-Menu	How to troubleshoot EDBC when you get a denial for No Eligible Mem in a Medi-Cal case?	You may get a denial for **No Eligible Mem** when running EDBC before requesting MAGI for a Medi-Cal case. The steps to correct this are below. To request MAGI, at a minimum, the following must be entered for the Primary Applicant: 1. Tax household information 2. Identity Proof information 3. A customer option with an agreement to consent for Verification 4. Marital status information Once the pages are correct, you can Request MAGI. When the MAGI results are returned, you can run EDBC to get the right approval or denial.	**Button**: More EDBC-related Topics

Students Sub-Menu	How to enter a student grant?	To enter a student grant as income: 1. On the **Income List** page: a. Select **<Educational, Student>** from the Income **Category** drop list b. Click the **Add** button 2. On the **Income Detail** page: a. Select **<Name>** from the **Name** drop list b. Select **<Type of Financial Aid Received>** from the **Type** drop list c. Enter **<Source>** in the **Source** field, if applicable d. Select **<Frequency>** from the **Frequency** drop list e. Click the **Shared with RDP** page section expand caret and select **<Yes or No>** from the **Is this income shared with a Registered Domestic Partner?** drop list, if applicable f. Enter **<Description>** in the **Description** field, if applicable 3. In the **Income Amounts** page section: a. Select **<Program>** from the **Display Program** drop list b. Click the **Add** button **Note**: The **Add** button does not display until a program is selected from the Display Program drop list	**Button**: More Student-related Topics
Foster Care / AAP / Kin-GAP, Medi-Cal	How to manage sensitive customer information when a child is moved from a Medi-Cal program to Foster Care / AAP / Kin-GAP?	This CIT will provide information on management of sensitive customer information for an individual who has moved from a Medi-Cal program to the Foster Care / Kin-GAP / AAP (FC / KG / AAP) program. The contact information for a non-primary applicant on the FC / KG / AAP program is known as a 'sensitive' to CalHEERS. This job aid describes the interim solution in the System to not have a 'sensitive' address being sent to or displayed in the CalHEERS portal. To learn more about management of sensitive customer information for	**Button**: CIT 0018-23 Medi-Cal CalHEERS Management of Sensitive Population **Button**: More Medi-Cal-related Topics **Button**: More Foster Care-related Topics

		Foster Care / Kin-GAP / AAP programs, click the button below.	
Medi-Cal	How to add a Hunt v. Kizer expense?	To add a **Hunt v. Kizer Expense**, in the context of a case: 1. Click on **Eligibility** on the **Global** navigation bar 2. Select **Customer Information** from the **Local** navigation bar 3. Select **Financial** on the **Task** navigation bar to access the Hunt v. Kizer Expense List page 4. On the **Hunt v. Kizer Expense List** page, click on **Add** to be navigated to the **Hunt v. Kizer Expense Detail** page: a. Select **<Name>** b. Enter **<Bill Number>** c. Select **<Yes or No>** under **Accepted**, based on policy d. Enter **<Statement Date>** e. Enter **<Received Date>** f. Enter **<Initial Charge>** g. Enter **<Initial Amount Paid>**, if any h. Enter **<Requested Month>** 5. Click the **Save and Return** button 6. Run EDBC to adjust the share of cost using the Hunt v. Kizer expense	**Button**: More Medi-Cal-related Topics
Intake Sub-Menu, CalWORKS	How to create a case for a new applicant?	The case establishment process begins after the application is registered and assigned in the System. This process explains how to establish a case for an applicant who does not exist in the System: **Note**: Follow your county file clearance process in regard to creating a new case 1. On the **New Person Detail** page: a. Confirm the information populated on the page and click the **Search** button under the **Client Index Number:** field	**Button**: Create a Case – New Applicant **Button**: More Intake-related Topics **Button**: More CalWORKs-related Topics

		2. On the **Client Index Number (CIN) Search Results** page, review the **Search Results Summary** page section: a. If the CIN exists, confirm or select the radio button and click the Select button b. If the CIN does not exist, click the **Request New CIN** button **Note**: Please verify a CIN does not already exist within MEDS before creating a new CIN. If a CIN is known to MEDS but not to CalSAWS, clicking the Request New CIN button should pull the CIN from MEDS onto the **Client Index Number (CIN) Search Results** page 3. On the **New Person Detail** page with the CIN populated: a. To add an address, click the **Add Address** button 4. On the **Address Detail** page: a. Select **Mailing and Physical** from the **Address Type(s)** multi-select list b. Click the **Submit** button 5. On the **Select Address** page: a. Confirm or select the **<Address>** in the **Possible Matches** page section b. Click the **Select** button 6. On the **New Person Detail** page: a. Click the **Save and Continue** button For step-by-step instructions on how to initiate the Clearance process, create a new case from a registered application in the System, and add applicants, click the button below.	**Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics
Skimming / Scamming Sub-Menu	How to replace a benefit?	You may replace an issued cash benefit by utilizing the **Replace** functionality in the System. Once an issuance has been replaced, it	**Button**: Issuance – Replace Cash EBT Benefits (JA)

		cannot be replaced an additional time. This functionality covers the following programs: CalWORKs (CW), CalFresh (CF), Cal-Learn (CL), General Relief (GR), Homeless Permanent (HP), Homeless Temporary (HT), Immediate Need (IN), Refugee Cash (RC), CAPI (CP) and Welfare to Work (WTW). This process can only be completed by workers who have the appropriate security rights. To replace the benefit, you must first search for the cash issuance with a current status of **Issued**. This can be done while in the context of a case by accessing **Issuance History** and skipping to Step 4 below. Alternatively, you can complete an issuance search with the following steps: 1. Place the cursor over **Fiscal** on in the **Global** navigation bar 2. Select **Issuances** from the **Local** navigation bar 3. On the **Issuance Search** page, a. Select **<Category>** from the **Search By** drop list, enter relevant search criteria, and click the **Search** button b. Click the **<Control Number>** hyperlink of the issued cash benefit to be replaced 4. On the **Issuance Detail** page: a. Click the **Replace** button b. Select **<Rush** or **Routine>** from the **Immediacy** drop list c. Enter **<Amount>** in the Payment Amount text box **Note**: You may enter an amount up to the originally issued amount. If the amount entered exceeds the original issuance, a validation message will appear prompting you to enter the correct amount	**Button**: Issuance – Replace CalFresh Benefits (JA) **Button**: More Skimming / Scamming-related Topics

		d. Select an **<Option>** from the **Status Reason** and **Electronic Theft Type** drop lists e. Select a **<Pay Code>** from the **Pay Code** drop list, if applicable f. Click the **Save** button **Note**: If replacing a benefit due to skimming/scamming, you must first reissue the EBT card.	
Income Sub-Menu, Sponsorship Sub-Menu	How to apply sponsor deemed income?	When an adult sponsored noncitizen is not indigent and does not meet an exception to the deeming rules per program policy, sponsor deeming applies. To get CalSAWS to deem income, the following pages must be completed: 1. The sponsor will need to be on the case as a case member 2. Citizenship page must be completed for the sponsored noncitizen 3. Sponsorship page must be completed for the sponsored noncitizen 4. The sponsor's income and property must be added to the case **Note:** The JA provides step-by-step instructions on how to add or edit citizenship and sponsorship records.	**Button**: More Income-related Topics **Button**: More Sponsorship-related Topics
Replace / Reissue Benefits	How to reissue/replace benefits?	**Note**: This is a Fiscal function. Please check your county's policy on reissuing benefits. This process can only be completed by workers who have the appropriate security rights. To replace the benefit, you must first search for the cash/CalFresh issuance with a current status of Issued. This can be done while in the context of a case by accessing Issuance History and	**Button**: Reissue Benefits (JA) **Button**: More EBT-related Topics **Button**: More Skimming / Scamming-related Topics

		skipping to Step 4 below. Alternatively, you can complete an issuance search with the following steps: 1. Place the cursor over **Fiscal** on the **Global** navigation bar 2. Select **Issuances** from the **Local** navigation bar 3. On the **Issuance Search** page: a. Select a **<Search By Option>** from the **Search By** drop list b. Enter the search criteria c. Click the Search button d. Click the **Control number** hyperlink for the desired search result 4. On the **Issuance Detail** page: a. Click the **Replace** button b. Select the **<Issuance Method>** from the **Issuance Method** drop list c. Select the **<Immediacy>** from the **Immediacy** drop list d. Enter the **<Issue Date>** in the **Issue Date** field e. Click the **Person** or **Organization** radio button f. Click the **Select** button 5. On the **Select Person** or **Select Resource** page: a. Enter the search criteria of the person or resource b. Click the **Search** button c. Verify the radio button for the appropriate person is selected d. Click the **Select** button 6. On the **Issuance Detail** page, then click the **Save** and **Close** buttons	
Flags Sub-Menu	How to edit a flag?	Before a flag is associated to a case, all fields on the Flag Detail page are editable. Once a flag is associated to a case, the Title, Category and Type fields are not editable.	**Button**: Flagging – Create and Assign to Cases (JA)

		If you have to edit the Title, Category, or Type fields, you must first end date the incorrect case flag, and then create a new one with the correct information. Note: This is an administrative function that may not be available to all Users. Click the button below for instructions on how to create and end date case flags.	**Button**: End Date Case Flag **Button**: More Flags-related Topics

2. Edited UCs

Below is a table containing all edited Use Cases in Release 10. Text highlighted signals edits:

Program	Question/Title	Answer	Buttons
Client Correspondence Sub-Menu	Generate EDBC NOAs	In CalSAWS you have the ability to preview a NOA before saving EDBC 1. Accepting EDBC triggers the processing of the NOA for preview. The message **<Program> NOA run is processing** is displayed and the **Preview NOA** and **Save and Continue** buttons are grayed out a. When the **Preview NOAs** button displays blue, click it. You will be taken to the **Distributed Documents Search** page allowing you to review the NOA before sending it out to the customer b. Click on the **Document Name** link. The NOA opens in PDF form. **Review** the NOA c. Clicking **Cancel** will return you to the **Distributed Document**	**Button:** NOA Detail (OLH) **Button:** CIT 0189-23 CalSAWS Infographic – Notices of Actions (NOAs) **Button:** More Client Correspondence-related Topics

		Search page where you can click the **Back to EDBC List** page button d. Clicking **Reject** allows you to troubleshoot EDBC results and re-run EDBC to attain new results and generate a new NOA in preview mode 2. Review the NOA after saving EDBC: a. Click the **Save and Continue** button on the **EDBC List** page to save EDBC results b. Click the **Document Name** hyperlink (with the status of **Pending Review**) and a PDF document will generate with print options c. The PDF shows that you can **Append, Save and Print Locally, Save and Print Centrally** or **Reject** For more information about how to generate EDBC NOAs, click the button below. Note: NOAs are not generated for manual or overwritten EDBCs by the System.	
EDBC Sub-Menu, Client Correspondence Sub-Menu	Append EDBC NOAs	In CalSAWS you can append an NOA after you have reviewed and saved EDBC. To append an EDBC NOA: 1. Review the NOA after saving EDBC: a. Click the **Save and Continue** button on the	**Button:** NOA Detail (OLH) **Button:** CIT 0189-23 CalSAWS Infographic – Notices of Actions (NOAs)

		EDBC List page to save EDBC results b. Click the **Document Name** hyperlink (with the status of **Pending Review**) and a PDF document will generate with print options. The **Append** option will not be available if the NOA was printed **Locally** or **Centrally** c. The PDF shows that you can **Append, Save and Print Locally, Save and Print Centrally** or **Reject** Note: Appending adds information to the existing NOA prior to the NOA being printed. The user cannot Edit the information generated on the system NOA 2. Click the **Append** button to open the **Append Detail** page that contains a free form text field (2000 characters max) 3. Click the **Generate NOA** button. This displays the updated NOA, and the buttons have changed. 4. The **Distributed Documents Search** page now shows that the original NOA was overridden and the Appended NOA is in **Accept – Print Centrally** status For information on how to generate EDBC NOAs, click the button below.	**Button:** More EDBC-related Topics **Button:** More Client Correspondence-related Topics

Client Correspondence Sub-Menu	Form Types	The Forms Overview in Online Help (OLH) describes all the forms in the Template Repository. This is updated with every Major release and includes access rights, print options, county visibility, languages, the programs each form is available to, IVR/telephonic signature, if it is a State form, time sensitivity, outbound/inbound envelope, etc. Click the button below for the Forms Overview. There are multiple pages that can be accessed from the sidebar of OLH.	**Button:** Forms Overview (OLH) **Button:** CIT 0189-23 CalSAWS Infographic – Notices of Actions (NOAs) **Button:** More Client Correspondence-related Topics
CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance, Foster Care / AAP / Kin-GAP, Workload / Case Assignment Sub-Menu	Worker Assignment	To assign a worker to a new or pending program: 1. Place the cursor over **Case Info** on the **Global** navigation bar 2. Select **Worker Assignment** from the **Local** navigator 3. On the **Pending Assignment List** page: a. Click the program(s) check box(es) in the **Program Information** section to select the program(s) you want to assign b. Click the **Manual Assignment** radio button in the **Assignment Options** section to manually assign a worker c. Click the **Select** button	**Button**: Worker Assignment (JA) **Button**: CIT 0189-23 CalSAWS Infographic - Caseloads **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics

		4. On the **Select Worker** page: a. Enter the appropriate search criteria b. Click the **Search** button c. Click the radio button for the appropriate **Worker** d. Click the **Select** button 5. On the **Pending Assignment List** page: a. **Automatically Reassign When Activated** will default to **<No>**. Based on your County business process, you can select **<Yes>** b. Click the **Assign** button Note: Worker assignment assumes you are within the context of a case. Users with the correct security rights can also reassign programs using the Worker Assignment page in Admin Tools.	**Button**: More Welfare-to-Work-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics **Button**: More Workload / Case Assignment-related Topics
CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance, Foster Care / AAP / Kin-GAP, Workload / Case Assignment Sub-Menu	Worker Reassignment	To reassign a worker: 1. Place the cursor over **Admin Tools** on the **Global** navigation bar 2. Select **Workload Assignment** from the **Local** navigator **Note**: The Workload Assignment page is only accessible if you have the appropriate security clearance 3. On the **Workload Reassignment Detail** page:	**Button**: CIT 0189-23 CalSAWS Infographic - Caseloads **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics

		a. In the **From** section, select the radio button next to Case Number and enter the Case Number in the field b. In the **Reassign Quantity** section, select the radio button next to Number of Cases (enter 1) c. Select **[Program]** in the **Program** list d. Select the language from the **Language** drop list e. In the **To** section, click the **Select** button under **Worker ID** 4. On the **Select Worker** page: a. Enter search criteria b. Click the **Search** button c. Confirm or click the radio button for the desired worker d. Click the **Select** button 5. On the **Workload Reassignment Detail** page: a. In the **Effective Date** section, select the radio button next to Immediate Assignment b. In the **Reassignment Option** section, select **No** in the **Automatically Reassign When Activated field** and **Yes** in the **Send Worker Alert** field c. Click the **Reassign** button	**Button**: More Medi-Cal-related Topics **Button**: More Welfare-to-Work-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics **Button**: More Workload / Case Assignment-related Topics
Welfare-to-Work	Add Worker to WTW Program	To add a worker to WTW Program:	**Button:** Welfare to Work Non-

		1. Place the cursor over **Admin Tools** on the **Global** navigation bar 2. Select **Workload Assignment** from the **Local** navigator Note: the Workload Assignment page is only accessible if you have the appropriate security clearance 3. On the **Workload Reassignment Detail** page: a. In the **From** section, select the radio button next to Case Number and enter the Case Number in the field b. In the **Reassign Quantity** section, select the radio button next to Number of Cases (enter 1) c. Select **Welfare-to-Work** program in the Program list d. Select the language from the **Language** drop list e. In the **To** section, click the **Select** button under **Worker ID** 4. On the **Select Worker** page: a. Enter search criteria b. Click the **Search** button c. Confirm or click the radio button for the desired worker d. Click the **Select** button 5. On the **Workload Reassignment Detail** page:	Compliance / Conciliation / Sanction (JA) **Button:** CIT 0189-23 CalSAWS Infographic – Caseloads **Button:** More Welfare-to-Work-related Topics **Button:** Other Cure Sanction Steps

		a. In the **Effective Date** section, select the radio button next to Immediate Assignment b. In the **Reassignment Option** section, select **No** in the **Automatically Reassign When Activated** field and **Yes** in the **Send Worker Alert** field c. Click the **Reassign** button **Note:** To confirm the worker reassignment review WTW Case Summary	
General Relief / General Assistance, CalWORKs, Vendor Pay Sub-Menu, Intake Sub-Menu	Request Lodging Invoice	A Lodging Invoice is offered to General Relief / General Assistance and CalWORKs applicants to assist in homeless situations. Applicants may use the Lodging Invoice at contracted facilities or vendor hotels. To request a Lodging Invoice within the context of a case: 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigator 3. Click **Invoice History** on the **Task** navigation bar 4. On the **Invoice History** page: a. Select **<Lodging>** in the **Invoice Type** drop list (bottom right) b. Click the **<Request>** button	**Button:** General Relief Meal and Lodging (JA) **Button:** Authorize Lodging Invoice **Button:** More CalWORKs-related Topics **Button:** More General Relief / General Assistance-related Topics **Button:** More Vendor Pay-related Topics **Button:** More Intake-related Topics

		5. On the **Invoice Detail (Request – Lodging)** page: a. Select **<Participant>** from the **Participant Name** field b. Click the **Select** button in the **Provider Name** field in the **Service Detail** section 6. On the **Select Money Management Resource** page: a. Enter search criteria in the appropriate fields b. Click the **Search** button c. Confirm that the correct record appears in the **Search Results Summary** section. If multiple records appear, select the radio button that corresponds to the appropriate record d. Click the **Select** button 7. On the **Invoice Detail (Request – Lodging)** page: a. Enter **<Date>** in the **Begin Date** and **End Date** fields b. Enter **<Invoice Amount>** in the **Invoice Amount** field c. Click the **Save and Continue** button Note: Some Lodging Invoices may require an authorization and be placed in a status of Pending Authorization. Click the “Lodging Invoice Authorization” button for	

		steps on how to authorize a Lodging Invoice.	
General Relief / General Assistance, CalWORKs, Vendor Pay Sub-Menu, Intake Sub-Menu	Authorize Lodging Invoice	Some Lodging Invoices may require an authorization and be placed in a status of Pending Authorization. To authorize a Lodging Invoice: 1. Place the cursor over **Fiscal** on the **Global** navigation bar 2. Select **Invoice** from the **Local** navigator 3. On the **Invoice Search** page: a. Select **<Invoice Status>** from the **Search By** drop list b. Select **<Pending Authorization>** from the **Invoice Status** drop list c. Click the **Search** button d. Click the **<Invoice Number>** hyperlink in the **Search Results Summary** section 4. On **Invoice Detail (Payment-Lodging)** page: a. Click the **Authorize** button **Note:** Follow your County's policy on authorizing a Lodging Invoice. Appropriate security rights are required to authorize a Lodging Invoice.	**Button:** General Relief Meal and Lodging (JA) **Button:** Request Lodging Invoice **Button:** More CalWORKs-related Topics **Button:** More General Relief / General Assistance-related Topics **Button:** More Vendor Pay-related Topics **Button:** More Intake-related Topics

Foster Care / AAP / Kin-GAP, Vendor Pay Sub-Menu	Add Infant Supplemental Payment to Case	To add an Infant Supplement Payment (ISP) child to a Kin-GAP (KG) or Foster Care (FC) case: 1. Add the infant to the case 2. Assign a program role of MMO (Medi-Cal Member Only) to the ISP Child 3. Enter the child's data collection information 4. To issue an ISP: a. **Foster Care** – Complete the **Infant Supplement** page section on the **Child Placement Detail** page b. **Kin-GAP** – Complete the **Infant Supplement** section on the **Kin-GAP Rate Summary** page 5. Run EDBC **Note:** For counties that use the CWS/CMS interface, please continue to enter infant supplemental payment request in CWS/CMS & process the infants MEDS program per your County process Click the button below for detailed steps on how to add an infant supplemental payment.	**Button:** Foster Care and Kin-GAP – Infant Supplement Payment – Add or Edit (JA) **Button:** More Foster Care-related Topics **Button:** More Vendor Pay-related Topics
CalWORKs, Intake Sub-Menu	Create Non-Needy Case	When creating a non-needy CalWORKs case or reapplying on an existing case, do not select the CalWORKs program for the caretaker.	**Button:** More CalWORKs-related Topics

		Note: A non-needy caretaker is someone who is on the case but will not be a program person.	**Button:** More Intake-related Topics
Medi-Cal, Continuous Coverage Unwinding Sub-Menu, Intake Sub-Menu	Long Term Care (LTC)	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: • **Single Person in LTC**: A single case with only one case member with the LTC person as the primary applicant recipient •Person in LTC with a Spouse at Home not Applying for Aid: A single case with the LTC person as the primary applicant recipient • **Married Couple in LTC**: 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 The steps for updating the Medi-Cal program type for the person in LTC assume you are in the context of a pended case: 1. Place the cursor over **Eligibility** on the **Global** navigation bar	**Button:** Medi-Cal – Long Term Care (JA) **Button:** More Medi-Cal-related Topics **Button:** More Continuous Coverage Unwinding-related Topics **Button:** More Intake-related Topics

		2. Select **Case Summary** from the **Local** navigation bar 3. Click the **View Details** button in the **Medi-Cal** page section for the LTC person 4. On the **Medi-Cal Detail** page: a. Click the **Edit** button b. Click the **Edit** button in the **Program Persons** page section 5. On the **Medi-Cal Person Detail** page, click the **Edit** button in the **Requested Medi-Cal Type** page section 6. On the **Requested Medi-Cal Type Detail** page: a. Select **LTC** from the **Requested Medi-Cal Type** drop list b. Click the **Save and Return** button For more instructions to set up a LTC case, click the button below.	
Medi-Cal, Intake Sub-Menu	Add Retroactive Medi-Cal Month	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:	**Button**: Retroactive Medi-Cal (JA) **Button**: More Medi-Cal-related Topics **Button:** More Intake-related Topics

		• The County determines that the applicant would have been eligible • The applicant received health services which have not been paid • The applicant was not previously denied Medi-Cal for the month in question, unless the application was denied due to County error or failure to cooperate beyond the applicant's control To add a Retro Medi-Cal month for one person: 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigation bar 3. Click the **View Details** button in the **Medi-Cal** program box 4. On the **Medi-Cal Detail** page: a. Click the **Edit** button b. In the **Program Persons** page section, click the **Edit** button for the applicant requesting Retro Medi-Cal 5. On the **Medi-Cal Person Detail** page: a. Enter the **<Month Retro Medi-Cal Was Requested>** in the **Month** field in the **Retro Months** page section b. Select the **<Requested Medi-Cal Type>** from the	

		Requested Medi-Cal Type drop list c. Click the **Add** button in the **Retro Months** page section to add additional Retro Month(s) or click the **Save and Return** button 6. On the **Medi-Cal Detail** page, click the **Save and Return** button. For detailed instructions on various Retro Medi-Cal functions, click the button below.	
CalFresh, Intake Sub-Menu	Restaurant Meals Program	The Restaurant Meals Program (RMP) allows homeless, disabled, and elderly (age 60 and over) individuals and included spouse (husband, wife, common-law husband, common-law wife) receiving CalFresh benefits to use their EBT cards to purchase prepared meals from participating restaurants that have been authorized to accept EBT. To determine eligibility for Restaurant Meals Program: 1. Create a Living Arrangement record of Homeless, Elderly, or Disabled for the household to qualify and be issued benefits 2. Run EDBC You should be able to confirm RMP eligibility after	**Button**: Restaurant Meals Program (JA) **Button**: More CalFresh-related Topics **Button:** More Intake-related Topics

		running EDBC on the EDBC Results Summary page. For more information on establishing the Restaurant Meal Program for an applicant/participant in the System, click the button below.	
Self-Service Portal Sub-Menu, Intake Sub-Menu	Identify Expedited Service (ES) / Immediate Need (IN) e-Applications	The e-Application Search page displays an Expedited Service (ES) / Immediate Need (IN) column. The code(s) displayed are as follows: • ES – Displays if applicant potentially qualifies for ES • IN – Displays if applicant potentially qualifies for IN • ES/IN – Displays if applicant is potentially eligible for ES and IN • No – Displays if applicant did not request or did not answer the ES or IN questions Note: Every application should be screened for Expedited Services even if it displays a "No" code.	**Button**: Self-Service Portal (SSP) e-Applications (JA) **Button**: More Self-Service Portal-related Topics **Button:** More Intake-related Topics
CalWORKs, CalFresh, Medi-Cal, General Relief / General Assistance, Foster Care / AAP / Kin-GAP, Intake Sub-Menu	Add Person to Program	When adding a new person to a case and program, follow County policy. Click the Job Aid below for step-by-step instructions on how to add a person to a program for two scenarios: (1) a person that is known to the System, and (2) a	**Button**: Add a Person to an Existing Case and Existing Program (JA) **Button:** More Intake-related Topics

		person that is not yet known to the system. Note: Confirm that the view month matches the beginning date of aid.	**Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / King-GAP-related Topics
CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, Intake Sub-Menu	Complete Telephonic / Electronic Signature	Electronic Signature is a method of capturing a participant's signature or intent through electronic options rather than signing a physical piece of paper. For step-by-step instructions on how to complete an electronic signature, click the Electronic Signature (e-Sign) (JA) button below. For more information on forms that require a telephonic/electronic signature, click the Forms Overview button below. Note: The Forms Overview Online Help guides are	**Button**: Electronic Signature (e-Sign)(JA) **Button**: Forms Overview (OLH) **Button**: More Intake-related Topics **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics

		updated with each major release; forms with priority release will not be in the Forms Overview.	**Button**: More Medi-Cal-related Topics **Button**: More Welfare-to-Work-related Topics
EDBC Sub-Menu, Intake Sub-Menu	Daily Batch Sweeps	Batch Sweeps are run automatically with a frequency dependent on the type of Batch it is. The following buttons will give you information about some of the Daily Batch Sweeps which are run every night (Monday – Saturday). Click the JA below for more general information about batch sweeps. Click the other buttons for information about each batch sweep.	**Button**: EDBC – Batch Sweep (JA) **Button**: Batch to Discontinue Active CalFresh with Past Due Postpone Verifications **Button**: Batch to Discontinue Child 16 or Older and Not Actively Going to School from the CalWORKs Program **Button**: Batch to Deny CalFresh Application for Missing Intake Interview **Button**: More EDBC-related Topics **Button**: More Intake-related Topics
CalWORKs, CalFresh, Medi-Cal, Welfare-to-	Identify Duplicate Person in CalSAWS	In CalSAWS, duplicate person records may exist due to system conversions,	**Button**: Duplicate Persons --

Work, General Relief / General Assistance, Foster Care / AAP / Kin-GAP, Intake Sub-Menu		worker mistakes, Inter County transfers, and many other reasons. Although several enhancements have been made to CalSAWS to prevent new duplicate persons from being created, there are still outstanding records which need to be resolved. Counties Identified a contact in each county and a contact list has been created to assist in the correction of duplicate person records and ensure accurate persons records are maintained in CalSAWS. Once you determine that more than one record exists for the same person, the incorrect person record needs to be indicated as a duplicate person record in the System. **Note**: Follow your chain of command to review the CalSAWS Duplicate Protocol 2022. Appropriate security rights are required to correct a duplicate person. Click the button below for steps on identifying duplicate persons.	Identifying and Correcting (JA) **Button**: CIT 0132-23 Person De-Duplication Business Process and Communication Protocol **Button**: More Intake-related Topics **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More Welfare-to-Work-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics

Free-Response, Intake Sub-Menu	Add/Remove Companion Case	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. The following steps assume you are in the context of a case: **To Add a Companion Case:** 1. Place the cursor over **Case Info**, **Eligibility**, **Empl. Services**, or **Child Care** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigator a. Click the **Add** button in the **Companion Cases** page section 3. On the **Select Person** page: a. Enter the search criteria, click the **Search** button b. Click the radio button next to the **Name** of the individual whose case you want to add, click the **Select** button **Note:** If the individual selected is associated to more than one case, you will be navigated to the **Select Case** page	**Button**: Companion Cases – Add and Remove (JA) **Button**: More Intake-related Topics

		4. On the **Select Case** page: a. Click the radio button next to the **Case Number** you want to add b. Click the **Select** button **To Remove a Companion Case:** 1. Place the cursor over **Case Info**, **Eligibility**, **Empl. Services**, or **Child Care** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigation bar 3. On the **Case Summary** page: a. Click the checkbox next to the **Case Number** in the **Companion Cases** page section b. Click **Remove** button	
~~CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance, Foster Care / AAP / Kin-GAP,~~ Intake Sub-Menu, Discontinuances Sub-Menu	Rescind Case	If you need to undo a denial or discontinuance of a person and/or program, without logging a new application, then you use the **Rescind** button on the **<Program> Detail** page to complete the process. The **Rescind** button can only rescind a group of people that share the same event effective date and event type (Denial or Discontinuance) and will not display when there is a pending application for ANY persons in the future.	**Button**: Reapplications and Rescissions (JA) **Button**: Rescind vs Reapply **Button**: More Discontinuances-related Topics **Button**: More Intake-related Topics

		The **Rescind** button is available based on the view date of denial/discontinuance for all EDBC programs except General Assistance/General Relief. When clicking the Rescind button, the BDA and application date are automatically populated based on the last valid application. If it is necessary to rescind two different groups of people, the process below will need to be repeated for each group. Start with the earliest effective date. To rescind a case, start by accessing the **<Program> Detail** page. To get to the **<Program> Detail** page: 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigator 3. On the **Case Summary** page: a. Change the **<Display Date>** to the month in which you want to rescind b. Click the **View** button to refresh the page with the new display date c. Click the **View Details** button in the **<Program>** block Click the button below for a complete set of	**Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More Welfare-to-Work-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP / Kin-GAP-related Topics

		instructions on how to rescind a case.	
~~CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance, Foster Care / AAP / Kin-GAP,~~ Intake Sub-Menu, Discontinuances Sub-Menu	Process Reapplication	When the Customer has been denied or discontinued from a program and they reapply, you will need to access the New/Reapplication Detail page. To access the New/Reapplication Detail page: 1. Place the cursor over **Eligibility** on the **Global** navigation bar 2. Select **Case Summary** from the **Local** navigation bar 3. On the **Case Summary** page: a. Change the **<Display Date>** to the month the reapplication takes affect (the BDA month) b. Click the **View** button to refresh the page with the new display date c. Click the **View Details** button in the **<Program>** section 4. On the **<Program> Detail** page: a. Click the **Edit** button b. Click the **Reapply** button **Note:** The Reapply button will not display for a denied or discontinued case if there is an approved application for ALL persons in the future, or if there is already a Pending application for all persons.	**Button**: Reapplications and Rescissions (JA) **Button**: Rescind vs Reapply **Button**: More Intake-related Topics **Button**: More Discontinuances-related Topics **Button**: More CalWORKs-related Topics **Button**: More CalFresh-related Topics **Button**: More Medi-Cal-related Topics **Button**: More Welfare-to-Work-related Topics **Button**: More General Relief / General Assistance-related Topics **Button**: More Foster Care / AAP

		Click the button below and scroll to the relevant table for instructions on how to process a reapplication.	/ Kin-GAP-related Topics
~~CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief / General Assistance, Foster Care / AAP / Kin-GAP,~~ Intake Sub-Menu, Discontinuances Sub-Menu	Rescind vs Reapply	**Rescind:** Rescind means to reverse a denial/discontinuance on an existing application date. Rescind should be used if a user needs to undo a denial or discontinuance of a program and/or person(s), without logging a new application. Rescind Scenarios: • Customer has a discontinued program that needs to be re-opened • Rescind an application if a household is 1st month ineligible • A client is late turning in their verification for a periodic report (SAR/RE) • Batch erroneously denies or discontinues a program • Restoration of aid **Reapply:** Reapply means to add a new application date on an existing program and can be used for either an entire household or individual. Reapply should be used if the prior application for a program and/or person(s) was denied or discontinued, and they submit a new application after a break in aid. Reapply Scenarios: • Customer has a denied	**Button:** Reapplications and Rescissions (JA) **Button:** More Intake-related Topics **Button:** More Discontinuances-related Topics **Button:** Go to Rescind Case **Button:** Go to Reapply Case

		program case and wants to apply again • Adult parents are applying for a program when their children are already active • Any new application where the program has been pending/active previously and is currently denied/discontinued **Note:** Please be mindful of the different program rules for the reapply and/or rescind processes. Follow your county policy when determining whether to rescind or reapply a program/person and applying good cause.	

3. **New Keywords**
   Below is a table containing all new Keywords in Release 10.

UC #	Title	Keywords
FR.33	Flags Sub-Menu	set flag, set flags, how to set a flag, types of flags, flag icons, ADA, special circumstances, special accommodations, end date case flag, reporting flag, worker action flag, ada flag, edit case flags, change flag, edit flags, change case flag, edit case flag, change flags, change case flags
FR.12	Imaging Sub-Menu	Upload in hyland
FR.22	Income Sub-Menu	add self employment income, self employment income, self employment expenses, self employment income entry, how to enter self employment
NT.00	Intake Sub-Menu	interview, interviews, missed interviews, deny case, deny cases, case intake, intakes, intake, denial, denials, deny missed interview case, how to deny a

		case for missed interview, deny case missed interview, missed interview deny case, failure to complete interview, how to deny case failure to complete interview, missed interview, NOMI, missed appointment, missed appointments, failed to show to appointment, create a case, creating a case, new case, new applicant, how to add a new case, clearance task, add applicant, applicant does not exist in the system, create a case, create case, create new case, reapply, reapplication, process a reapplication, registered reapplication
ST.00	Students Sub-Menu	students, student grants, enter student grant, student grant, student income, student exemptions, homeschool, homeschool record, student exemptions, student exemptions window, student window, student, in school, student truant, truant student, how to type in student exemption
KC.00	Skimming / Scamming Sub-Menu	skimming, scamming, replace benefits lost through skimming, replace benefits lost through scamming, scammed, skimmed, skim benefits, scammed benefits
CA. 00	WTW Customer Appointment Sub-Menu	cause determination appointment, schedule cause determination appointment, cause determination appy, cause determination appt, make a cause determination appointment, schedule wtw appointment, wtw appt, wtw customer appointment, wtw customer appt, compliance plan, no good cause, wtw compliance plan, wtw comp plan, comp plan, compliance plans, person misses cause determination appointment, no show, good cause, after compliance period end date, while in non-compliance, compliance plan

FR.40	Sponsorship Sub-Menu	how to put sponsor income, sponsor deemed income, sponsor income
FR.37	Discontinuances Sub-Menu	recsind case, rescind a case, rescind case, reactivate case, reactivate, rescind application, rescinf
FR.24	EDBC Sub-Menu	troubeshoot edbc, incorrect edbc results, edbc relationships
FR.35	Reset CalSAWS Password	tell me how to change my password, change my password, how to change my password, update calsaws password as is expiring
FR.23	Reports Sub-Menu	skipped issuance, skipped issuance report
FR.08	MAGI Sub-Menu	e-verified, MAGI error message resolution, magi error, magi verification
FR.05	EBT Sub-Menu	reissue benefits, replace benefits, replace cash benefits, replace CalFresh, replace cf benefits, replace cash aid, replace cash benefits, reissue benefits issued internally, reissue internally issued benefits, record benefits reissued externally, record external benefits, replacement benefits, replace issuance, replace issuances
FR.04	Help Response	operator, talk to a person, chat with representative
CF.54	Add Journal Entry	add case comments, add case comment, case comments, case comment, reminders, case reminder, case reminders, access case comments, access case comment, reminder, comment on case, comment on a case
CF.50	Update Individual Demographics	where can I find customer's address in CalSAWS
CF.47	Infographic for PR/RE Reports	PR, RE

CF.32	Add Person to Program	add baby, adding a baby, add babies, add a child, add child, add children
MC.09	Add Hunt v Kizer Expense	hunt v kizer, hunt v. kizer, Hunt Kizer, hunt v kizer expense, hunt v. kizer expense, add a hunt v kizer expense, hunt expense, kizer expense, hunt kizer expense, hvk, HvK, HvsK, hvsk, hVk, hv.k
MC.08	Long Term Care (LTC)	long term update, update a ltc
MC.07	Add Retroactive Medi-Cal Month	retro active benefits
WW.09	Job Development Activity Page	job development activity detail page, job development activity screen, job development activity, view job development activity, search for job development activity, add job development activity, job development page, job development detail page
GR.01	Request Lodging Invoice	vouchers

4. **New Main Menu/Sub-Menu Branches**
   Release 10 will include 4 new sub-menu branches that will bucket keywords into a sub-menu.

   The new sub-menu branches are:
   - Students
   - Skimming / Scamming
   - Intake
   - WTW Customer Appointments

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_Release10Tracker.xlsx
2	Design	Miro Board – VA flow and use cases are documents	R10 - 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