

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-204553

CalWORKs/RCA Adults by WTW/REP Category Dashboard

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/28/2021	1.0	Initial Revision	Esequiel Herrera-Ortiz
08/10/2021	1.1	Added a 'Cash Aid Role Reason' column to every case list. Added a 'Volunteer' column for exempt work participants. Added an 'WTW/REP Program Status Expected End Date' column for adults in Good Cause.	Esequiel Herrera-Ortiz
08/17/2021	1.2	Added the following columns to all case lists: 'Cash Aid Role Status Reason', 'Work Registration Begin Date', 'WTW/REP Program Status Begin Date', 'Report Month'. Included a 'Homeless' column to several case lists. Added an 'Activity Type', 'Activity Number' and 'Activity Status Begin Date' to the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' case lists. Remapped the '1V – RCA' aid code to the new 'RCA Employed 32+ Hrs/Week' measure.	Esequiel Herrera-Ortiz
08/21/2021	1.3	Updated the 'Report Month' parameter to default to the latest month. Updated the 'Homeless' column logic. Added the following columns: 'Prior Month Cash Aid Role Reason', 'Work Registration Status Reason', 'CW/RCA Discontinuance Date', 'Activity Status Reason' and 'Activity Status Begin Date' column. Added column view requirement. Added an 'Excluded' column.	Esequiel Herrera-Ortiz

11/08/2021	1.4	<p>Updating design document per committee review.</p> <ul style="list-style-type: none"> Renamed one of two 'CalWORKs/RCA Adults' header to 'CalWORKs/RCA Adults by Type' Added last known worker column information to the Not Assigned to Worker subcategories. Update the case list column order. Fixed typos and screen shots. 	Esequiel Herrera-Ortiz
02/24/2022	1.5	<p>The following aid codes have been remapped to 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week':</p> <ul style="list-style-type: none"> 3G – CW – Zero Parent (State) 3H – CW-Zero Parent (Mixed) 3R – CW-Zero Parent-Exempt MAP (Fed) <p>The RCA Participant Employed 32+ Hrs/Week metric has been updated to dynamically include any new Fed, State or Mixed aid code.</p>	Esequiel Herrera-Ortiz
03/14/2023	2.0	<p>The Description of Change section and Recommendations section had aid codes 3G, 3H, 3R and 33 incorrectly mapped.</p> <p>The requirement to remove the roles of FRI and FSO from the base population was missing from Description of Change.</p>	Esequiel Herrera-Ortiz
03/29/2023	2.1	<p>Aligned the aid code list for Single Parents and Two Parent households in all sections.</p> <p>Fixed an incorrect reference of Begin Date to Expected Begin Date.</p> <p>Fixed inconsistent column name references.</p> <p>Updates Description of Change section to include missing requirements found in the</p>	Esequiel Herrera-Ortiz

		Recommendation of Change section.	
04/03/2023	2.2	Updated the No WTW/REP Program Block logic to remove the condition that the latest WTW/REP Work Registration record is Mandatory. A person with No WTW/REP program may not have a WTW/REP work registration record.	Esequiel Herrera-Ortiz
04/10/2023	2.3	Updated Description of Change item 19 to remove the column order. The column order was later changed to Appendix 7.7 and the section was not updated accordingly.	Esequiel Herrera-Ortiz
04/13/2023	2.4	Updated the case list to remove a Qlik ID column from the Mandatory case list and to add column to the Active case list. This is to match production.	Esequiel Herrera-Ortiz
04/18/2023	2.5	Description of Change 23 was updated to remove column visibility. The final column visibility is defined in Appendix 7.7 and Description of change.	Esequiel Herrera-Ortiz
04/20/2023	2.6	Fixed column definitions which had a copy and paste error for the following columns: Cal-Learn Program Status Reason, Cal-Learn Program Status Begin Month, Cal-Learn Program Status End Month. Updated Description of Change 17, 18, 20, 24, 26 to remove the column visibility. The column visibility is defined in Appendix 7.7. The definition for the Single Parents 20+ Hrs/Week metric in Appendix 7.2 has been correct. In the original design the metric did not have the requirement that the Single Parent	Esequiel Herrera-Ortiz

		must work less than 30 hours a week. The definition has been corrected.	
05/10/2023	2.7	The definition for the Single Parents 20+ Hrs/Week metric in Appendix 7.5 has been correct. In the original design the metric did not have the requirement that the Single Parent must work less than 30 hours a week.	Esequiel Herrera-Ortiz
06/13/2023	3.0	The Time Expiration Date column was not defined as requested by the user. The definition has been updated to reflect the user provided definition.	Esequiel Herrera-Ortiz

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1 OVERVIEW

The CalWORKs/RCA Adults by WTW/REP Category dashboard in Business Intelligence captures all adults in an active California Work Opportunities and Responsibilities to Kids (CalWORKs) program or Refugee Cash Assistance (RCA) program in each report month and reports them under a single category. The report runs for the prior month's data and the counts then remains static.

The dashboard was introduced into the system with SCR 49631 in the R17.10 release. The SCR sought to convert the legacy SMART's Global report into the legacy OBIEE reporting tool. The report has again been converted to the new Qlik reporting tool with CA-214600 in the 21.01 release.

This SCR updates the dashboard logic to report CalWORKs/RCA Adult participation more accurately.

1.1 Current Design

Currently the CalWORKs/RCA Adults by WTW/REP Category dashboard:

1. The 'CalWORKs/RCA Adults' (base population):
 - Does not restrict to only those adults with a household status of 'In the Home'.
 - Does not restrict the base population based on the adult's CW/RCA role.
 - The base population requires the adult to have an associated WTW/REP program block.

Note: To have an associated WTW/REP program block means the CalWORKs/RCA adult appears within a WTW/REP program block in the Case Summary page.

2. Does not provide the metric 'RCA Participants Employed 32+ Hrs/Week' in the following categories:
 - WTW/REP Mandatory / Assigned to Worker / Active
 - WTW/REP Mandatory / Not Assigned to Worker / Identified Reason
3. Does not include a 'Cal-Learn Adults' category or Cal-Learn Adults case level information.
4. Does not include a category to capture adults in an Active CalWORKs/RCA program who are not Members in the program or are not Active in the program. Such example of this population includes Active FRE Members, Ineligible Members, etc.
5. Does not include a category to capture adults who are in an Active CalWORKs/RCA program but are not in a WTW/REP program block on the same case.

Note: To not have an associated WTW/REP program block means the CalWORKs/RCA adult does not appear within a WTW/REP program block in the

- Case Summary page therefore does not have a WTW/REP role or WTW/REP program person status.
6. The '1V – RCA' aid code is mapped to the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures rather than the new 'RCA Participants Employed 32+ Hrs/Week' measure. The 'RCA Participants Employed 32+ Hrs/Week' measure will be updated to accept all Aid Codes marked as RCA Fed, State or Mixed.
 7. The '33 - CW – Zero Parent (Fed)' is mapped to 'Family Employed at Least 35 Hrs/Week' rather than 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week'.
 8. The following aid codes are not mapped to any metric. They will be mapped to 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week':
 - 3G – CW – Zero Parent (State)
 - 3H – CW-Zero Parent (Mixed)
 - 3R – CW-Zero Parent-Exempt MAP (Fed)
 9. Several measure headers have inconsistent capitalization and incorrect abbreviations.
 10. The 'Report Month' parameter is set to default to the latest 5 months. This is an excessive selection and is causing performance issues.
 11. The dashboard name, several sheet names, several category headers, and several measure headers spell out 'Welfare-to-Work' entirely rather than use the abbreviated form WTW and do not include the reference to the REP program.
 12. The columns in the case lists are not properly ordered. Also, some columns are not hidden/visible when they should be depending on the Tier Description parameter selected.
 13. The following case lists do not include a parameter that allows the user to filter to a distinct subcategory/measure within the category:
 - WTW/REP Mandatory
 - Assigned to Worker / Active
 - Assigned to Worker / Identified Reason
 - Assigned to Worker / Unknown Reason
 14. Does not provide the following columns in every case list:
 - Client Index Number (CIN)
 - Cash Aid Role Reason
 - Cash Aid Role Status Reason
 - Work Registration Begin Date
 - Report Month
 - WTW/REP Program Status Begin Date
 - WTW/REP Program Status Reason
 15. The 'CW/RCA Aided Case' list:
 - Contains a single parameter titled 'RCA Aided Reason' rather than 'Work Registration Status'.
 - Contains a column titled 'Expected End Date' rather than 'Work Registration Expected End Date'.
 - Has a 'Exempt Reason' rather than 'Work Registration Status Reason'.
 - Has the 'Prior Work Reg Status' columns, only visible for the WTW/REP Exempt population, that will be removed.

- Has the 'Prior Work Reg Begin Date' column, only visible for the WTW/REP Exempt population, that will be removed.
 - Does not include a 'Prior Month Cash Aid Role Reason' column.
 - The case list does not provide the following columns needed to evaluate the Exempt population:
 - Volunteer
 - Excluded
 - WTW/REP Program Status Expected End Date
16. The dashboard has two sections titled 'CalWORKs/RCA Adults'. The data set that is broken down by type will be renamed to 'CalWORKs/RCA Adults by Type'.
17. Does not include a 'Homeless' column in the following case lists:
- CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population divided by Type Description case list)
 - CalWORKs/RCA Adults by WTW/REP Category
 - CW/RCA Aided
18. The Assigned to Worker 'Identified Reason' case list:
- Does not include an 'WTW/REP Program Status Expected End Date' column for the Good Cause population.
 - Includes the unnecessary 'Program Status Reason' column.
 - Includes the unnecessary 'Program Status Reason Begin Date' column.
19. Does not provide prior assigned worker information for the Sanctioned, Not Assigned to Worker / Identified Reason, and Not Assigned to Worker / Should be Reregistered population who do not have an assigned program worker as of the end of the report month.
20. The 'Assigned to Worker / Active' case list and the 'Not Assigned to Worker / Identified Reason' case list do not include the following columns:
- Activity Type
 - Activity Number
 - Activity Status Begin Date
21. The 'Active' and 'Unknown Reason' case lists:
- Do not include a 'Activity Scheduled End Date' column.
 - Do not include a 'Activity Status Reason' column needed to verify Completed/Closed customer activities.
 - The 'Active' case list does not include an 'Activity Scheduled Start Date' column.
 - The 'Unknown Reason' case list has an existing column titled 'Expected Begin Date' rather than 'Activity Scheduled Begin Date'.
22. The Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)' case list does not have a 'CW/RCA Discontinuance Date' column. The column is needed to verify future current month terminations.
23. The 'CalWORKs/RCA Adults by WTW/REP Category Case List' and 'CalWORKs/RCA Adults by WTW/REP Category' case lists do not provide the following columns:
- TANF Months Used
 - Extender Reason
 - Extender Begin Date
 - Extender End Date

24. The 'CalWORKs/RCA Adults Category' and the 'CalWORKs/RCA Aided' case lists do not provide Activity information for the 'Timed-Out on Active CalWORKs Cases' population or the 'Exempt' population.
25. The 'CalWORKs/RCA Adults by WTW Category' (Base population divided by tier description) does not include any Cal-Learn related columns.
26. The 'Time Expiration **Date** **column**' within the CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list) and CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type Description case list) case list is displaying the Begin Date of when an adult's Role Status Reason Description is set to 'CW Time Limit'.
Technical Note: The logic will be taken from the Time Limits online page.
27. The 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Should Be Registered)' case list:
 - Includes a column titled 'Program Status Reason' that will be renamed to WTW/REP Program Status Reason.
 - Has a column titled Program Status Reason Begin Date that will be renamed to WTW/REP Program Status Reason Begin Date.

1.2 Requests

The CalWORKs/RCA Adults by WTW/REP Category dashboard, also known as Global Report, as designed, contains requirements that excludes caseload data and includes some data that is not needed. The current report logic needs to be modified for users to have access to accurate data needed to review ongoing participation in activities and to take necessary actions to appropriately manage CalWORKs/RCA eligible participants in the WTW/REP program.

1.3 Overview of Recommendations

The following modifications are made to the CalWORKs/RCA Adults by WTW/REP Category dashboard to accurately capture caseload data:

1. Update the logic definition for the 'CalWORKs/RCA Adults' (base population) as follows:
 - Add the requirement that the adult must have a household status of 'In the Home'.
 - The adult's role is **NOT** Financially Responsible – Included (FRI) or Family Size Only (FSO).
 - Remove the condition that the CalWORKs/RCA Adults must have an associated WTW/REP program block.

Note: To not have an associated WTW/REP program block means the CalWORKs/RCA adult does not appear within a WTW/REP program block in the Case Summary page therefore does not have a WTW/REP role or WTW/REP program person status.

2. Create a new metric titled 'RCA Participants Employed 32+ Hrs/Week' for the categories listed below:
 - WTW/REP Mandatory / Assigned to Worker / Active
 - WTW/REP Mandatory / Not Assigned to Worker / Identified Reason
3. Add a new subcategory to 'CalWORKs/RCA Adults by Type' titled 'Cal-Learn Adults' which captures the Cal-Learn adult population.
4. Add a new category titled 'CalWORKs/RCA Other' which captures adults in an Active CalWORKs/RCA program who are not Members in the program or are not Active in the program.
5. Add a new category titled 'No WTW/REP Program Block' which captures adults that are CalWORKs/RCA aided but do not have an associated WTW/REP program block.
 Note: To not have an associated WTW/REP program block means the CalWORKs/RCA adult does not appear within a WTW/REP program block in the Case Summary page therefore does not have a WTW/REP role or WTW/REP program person status.
6. Update the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to exclude the '1V – RCA aid code. The '1V – RCA' aid code is re mapped to the new 'RCA Participant Employed 32+ Hrs/Week' measure. The 'RCA Participants Employed 32+ Hrs/Week' measure will be updated to accept all Aid Codes marked as RCA Fed, State or Mixed.
7. Update the 'Family Employed at Least 35 Hrs/Week' measure in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to exclude the '33 - CW – Zero Parent (Fed)' aid code. The aid code is re mapped to the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures.
8. Update the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measure in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to include the following aid codes:
 - 3G – CW – Zero Parent (State)
 - 3H – CW-Zero Parent (Mixed)
 - 3R – CW-Zero Parent-Exempt MAP (Fed)
9. Update several measure headers within categories to have consistent capitalization and appropriate abbreviations.
10. Update the 'Report Month' parameter to default to only the latest month rather than the latest 5 months.
11. Update all 'Welfare-to-Work' references in the dashboard name, sheet names, category headers and measure headers to 'WTW/REP'.
12. Update all case lists' column order and column's visibility to match Appendix 7.7.
13. Update the following case lists to include a parameter that allows the user to filter to a distinct subcategory/measure within the category:
 - WTW/REP Mandatory
 - Assigned to Worker / Active
 - Assigned to Worker / Identified Reason
 - Assigned to Worker / Unknown Reason
14. Update all case lists to Include the following columns:

- CIN
 - Cash Aid Role Reason
 - Cash Aid Role Status Reason
 - Work Registration Begin Date
 - Report Month
 - WTW/REP Program Status Begin Date
 - WTW/REP Program Status Reason
15. Update the 'CW/RCA Aided' case list with the following changes:
- Rename the 'RCA Aided Reason' parameter to 'Work Registration Status'.
 - Rename the 'Expected End Date' column to 'Work Registration Expected End Date'.
 - Rename the 'Exempt Reason' column to 'Work Registration Status Reason'.
 - Remove the 'Prior Work Reg Status' column.
 - Remove the 'Prior Work Reg Begin Date' column.
 - Add a 'Prior Month Cash Aid Role Reason' column.
 - Add the following columns to the case list:
 - Volunteer
 - Excluded
 - WTW/REP Program Status Expected End Date

These new columns are only visible when the 'WTW/REP Exempt' Work Registration Status parameter option is selected.
16. Update the section header for the 'CalWORKs/RCA Adults' that is broken down by Type to 'CalWORKs/RCA Adults by Type'. See the attached mockup for reference.
17. Update the following case lists to include a 'Homeless' column:
- CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list)
 - CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type).
 - CW/RCA Aided
18. Update the Assigned to Worker 'Identified Reason' case list with the following changes:
- Add a 'WTW/REP Program Status Expected End Date' column. The column is only visible when the 'Current Good Cause' Identified Reason Description parameter is selected.
 - Remove the existing 'Program Status Reason' column.
 - Remove the existing 'Program Status Reason Begin Date' column.
19. Update the 'CalWORKs/RCA Adults by WTW/REP Category' (CalWORKs/RCA Adults by Type) case list to include two new columns to evaluate the Sanctioned population. Include the columns in the 'Not Assigned to Worker / Identified Reason' and the 'Not Assigned to Worker / Should be Reregistered' case lists:
- Last WTW/REP Worker ID
 - Last WTW/REP Region

20. Add the following columns to the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' case lists:
 - Activity Type
 - Activity Number
 - Activity Status Begin Date
21. Update the 'Active' and 'Unknown Reason' case list with the following changes:
 - Add a 'Activity Scheduled End Date' column.
 - Add a 'Activity Status Reason' column.
 - Add a 'Activity Scheduled Start Date' column to the 'Active' case list.
 - Rename the existing 'Expected Begin Date' column in the 'Unknown Reason' case list to 'Activity Scheduled Begin Date'.
22. Update the Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason) to include a new column titled 'CW/RCA Discontinuance Date'.
23. Add the following columns to the 'CalWORKs/RCA Adults by WTW/REP Category Case List' and 'CalWORKs/RCA Adults by WTW/REP Category' (CalWORKs/RCA Adults by Type) case lists:
 - TANF Months Used
 - Extender Reason
 - Extender Begin Date
 - Extender End Date
24. Add the following columns to the 'CalWORKs/RCA Adults by WTW/REP Category' case list and the 'CalWORKs RCA Aided' case list. The columns are only visible for the 'Timed-Out population and the 'WTW/REP Exempt' population.
 - Activity Type
 - Activity Number
 - Activity Status
 - Activity Status Reason
 - Activity Status Begin Date
 - Activity Scheduled Start Date
 - Activity Scheduled End Date
25. Update the 'CalWORKs/RCA Adults by WTW Category' (CalWORKs/RCA Adults by Type) case list to include the following Cal-Learn related columns. The columns are only visible when the 'Cal-Learn Adults' Type Description is selected:
 - Age
 - Cal-Learn Office
 - Cal-Learn Office ID
 - Cal-Learn Worker ID
 - Cal-Learn Secondary Worker ID
 - Cal-Learn Program Status
 - Cal-Learn Program Status Reason
 - Cal-Learn Program Status Begin Month
 - Cal-Learn Program Status End Month
26. Update the 'Time Expiration Date' column logic within the CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults

population case list) and CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type) case lists to display the **month after** the Begin Month of the 60th tick of the CalWORKs time clock.

Technical Note: The logic will be taken from the Time Limits online page.

27. Update the 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Should Be Registered)' case list as follows:
- Rename the 'Program Status Reason' column to 'WTW/REP Program Status Reason'.
 - Rename the 'Program Status Reason Begin Date' column to 'WTW/REP Program Status Reason Begin Date'.

1.4 Assumptions

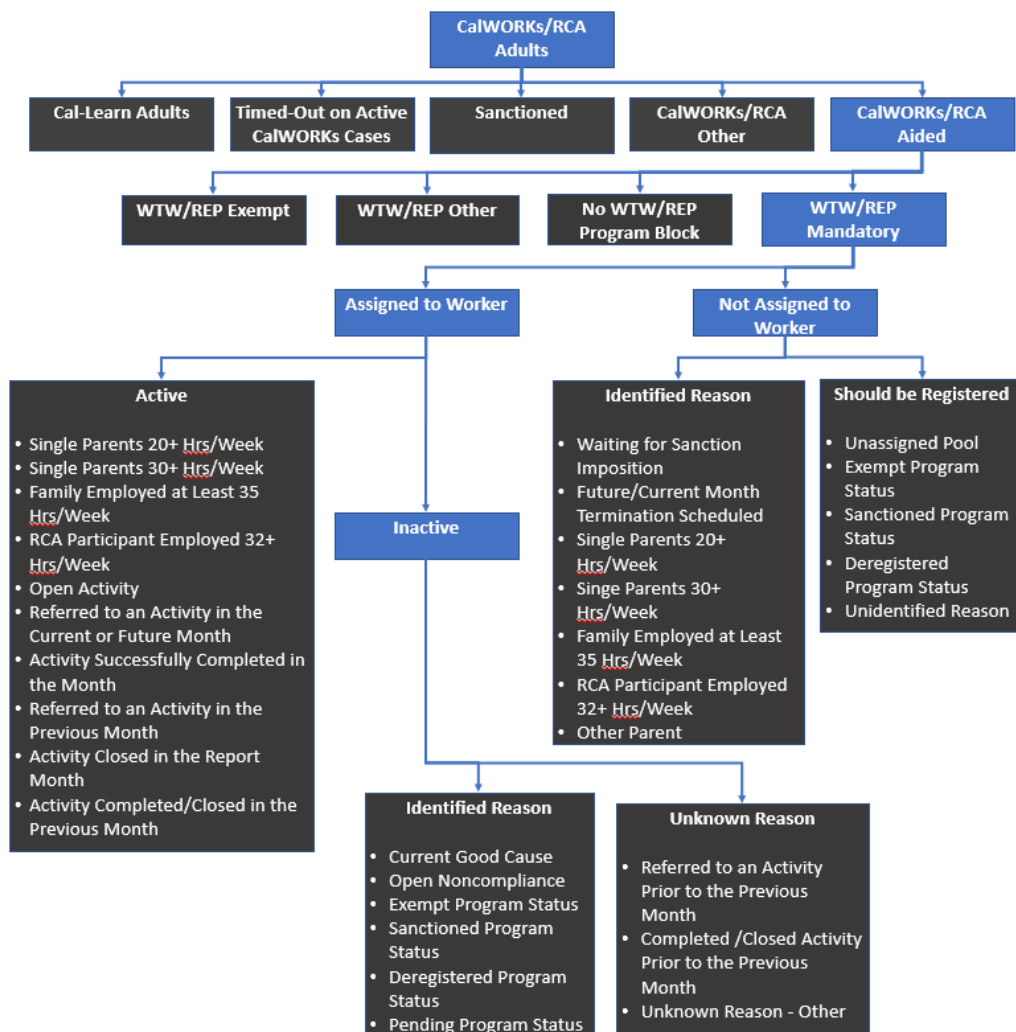
1. No update was made to the logic of the dashboard categories during the replatforming effort of the dashboard from the OBIEE reporting tool to the new Qlik version.
2. The 'Assigned to Worker Percentages' section and 'Not Assigned to Worker Percentages' section automatically adjust with the changes outlined in this SCR.
3. The data for historical months is not updated in this SCR.
4. **CA-217944 ACL 20-113 / 20-120 – CW 60 MTC and WTW 24 MTC** will be introduced before this SCR in the 22.03 release. As part of that SCR, the 'WTW Time Used' column will be removed from the dashboard. The column has been omitted from this design.
5. The Assigned to Worker 'Identified Reason' case list contains a 'WTW/REP Program Status Reason' column currently is not displaying any value. The issue is expected to be fixed on or before the implementation of this SCR.

2 RECOMMENDATIONS

2.1 CalWORKs/RCA Adults by WTW/REP Category

2.1.1 Overview

The CalWORKs/RCA Adults by WTW/REP Category dashboard takes the CalWORKs/RCA Adults base population and categorizes each adult into a single Welfare-to-Work (WTW)/ Refugee Employment Program (REP) category as displayed below in gray boxes. An adult can meet the criteria for multiple categories; therefore, a hierarchy is used to make the count distinct. The hierarchy chart below presents how the flow the CalWORKs/RCA Adults by WTW/REP population is categorized within the dashboard. The hierarchy starts from top to bottom and left to right. The adult is reported in the first category they meet the requirements for. The blue boxes represent an aggregation count of two or more subcategories.



2.1.2 CalWORKs/RCA Adults by WTW/REP Category Screenshot

CalSAWS

CalWORKs/RCA Adults by WTW Category

Data extracted daily as of: 2/3/2021 11:57:55 AM

User UserName

Month

Cash Aid Program

WTW/REP Region Group

WTW/REP Region

WTW/REP Office

WTW/REP Unit

WTW/REP Worker ID

Reset

CalWORKs/RCA Adults by Welfare-to-Work Category

Tier Description

Month Filter

Nov-20

Dec-20

Grand Total

1

1

Single Parents 20+ hr/week

1

1

Single Parents 30+ hr/week

1

1

Family Employed at least 35 hr/week

1

1

RCA Participant Employed 32+ hr/week

1

1

Open Activity

1

1

Referred to an Activity in the Current or Future Month

1

1

Activity Successfully Completed in the month

1

1

Referred to an Activity in the Previous Month

1

1

Activity Closed in the Report Month

1

1

Go to case list

Inactive

Month Filter

Nov-20

Dec-20

Inactive

1

1

Go to case list

Identified Reason

Tier Description

Month

Nov-20

Dec-20

Grand Total

1

1

Current Good Cause

1

1

Deregistered Program Status

1

1

Exempt Program Status

1

1

Open Noncompliance

1

1

Pending Program Status

1

1

Sanctioned Program Status

1

1

Go to case list

Unknown Reason

Tier Description

Month

Nov-20

Dec-20

Grand Total

1

1

Referred to an Activity prior to the Previous Month

1

1

Unknown Reason - Other

1

1

Completed/Closed Activity prior to the Previous Month

1

1

Assigned to Worker Percentages

Values

Month

Nov-20

Dec-20

% Active

0.00%

0.00%

% Inactive

0.00%

0.00%

Identified Reason % of Inactive

0.00%

0.00%

Unknown Reason % of Inactive

0.00%

0.00%

Unknown Reason % of Referred to Work

0.00%

0.00%

Note: This mockup has been cropped to fit the page. See the Supporting Documents section for the full view.

2.1.3 Description of Changes

- Make the following updates to dashboard categories. See the table below for more detail:
 - Update the logic for the 'CalWORKs/RCA Adults' (base population) as follows:

- Include the requirement that the adult must have a Household Status of 'In the Home'.
 - The adult's role is **NOT** Financially Responsible – Included (FRI) or Family Size Only (FSO).
 - **Remove** the condition that a CalWORKs/RCA adult must have an associated WTW/REP program block.
- b. Create a new metric titled 'RCA Participants Employed 32+ Hrs/Week' for the categories listed below:
- Assigned to Worker / Active
 - Not Assigned to Worker / Identified Reason
- c. Add a new category titled 'Cal-Learn Adults' which captures adults in the Cal-Learn program. See the table below for the category logic.
- d. Add a new category titled 'CalWORKs/RCA Other'. See table below for the category logic.
- e. Add a new category titled 'No WTW/REP Program Block'. See the table below for the category logic.
- f. Update the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to exclude the '1V – RCA' aid code. The '1V – RCA' aid code is re mapped to the new 'RCA Participant Employed 32+ Hrs/Week' measure. The 'RCA Participants Employed 32+ Hrs/Week' measure now captures all Aid Codes marked as RCA Fed, State or Mixed. See Appendix 7.2 and 7.5 for the new measure logic.
- g. Update the 'Family Employed at Least 35 Hrs/Week' measure in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to exclude the '33 - CW – Zero Parent (Fed)' aid code. The aid code is re mapped to the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures.
- h. Update the 'Single Parents 20+ Hrs/Week' and 'Single Parents 30+ Hrs/Week' measures in the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' categories to include the following aid codes:
- 3G – CW – Zero Parent (State)
 - 3H – CW-Zero Parent (Mixed)
 - 3R – CW-Zero Parent-Exempt MAP (Fed)

Note: All conditions are as of the end of the reporting month.

Category	Logic Definition
CalWORKs/RCA Adults (Base Population)	<ul style="list-style-type: none"> • The adult is in one of the following Programs (CT-18): <ul style="list-style-type: none"> ○ CW – CalWORKs ○ RC - RCA • Program Status (CT-72): <ul style="list-style-type: none"> ○ AC - Active

	<ul style="list-style-type: none"> The program person Adult/Child indicator (CT-345): <ul style="list-style-type: none"> AD - Adult Household Status (CT-209): <ul style="list-style-type: none"> IH - In the Home The adult does NOT have a CW/RC Role of <ul style="list-style-type: none"> FI - FRI FM - FSO <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> Cal-Learn Adults Timed-Out on Active CalWORKs Cases Sanctioned CalWORKs/RCA Other CalWORKs/RCA Aided <p>Technical Note: The base population does not include a condition that the adult must have an associated WTW/REP program block.</p>
CalWORKs/RCA Adults: Cal-Learn Adults	<p>From the base population, count the adult in this category if the adult is in a Cal-Learn Program which is in one of the following program statuses (CT-72):</p> <ul style="list-style-type: none"> Pending Active Good Cause Exempt Deferred <p>Note The Discontinued status is not included.</p>
CalWORKs/RCA Adults: Timed-Out on Active CalWORKs Cases	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> Not in the Cal-Learn Adults population Role Reason Description (CT-73): <ul style="list-style-type: none"> AA - CW Time Limit <p>Technical Note: The 'AA – CW Time Limit' role reason is only applied to CalWORKs program persons.</p>
CalWORKs/RCA Adults: Sanctioned	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> Not in the Cal-Learn Adults population Role Reason Description (CT-73) <ul style="list-style-type: none"> BC - CW Non Part
CalWORKs/RCA Adults: CalWORKs/RCA Other	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> Not In the Cal-Learn Adults population Role Reason Not Equal to (CT-73):

	<ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type Not Equal to (CT-201): <ul style="list-style-type: none"> • ME - Member <p>OR</p> <p>Program Person Status Not Equal to (CT-72):</p> <ul style="list-style-type: none"> • AC – Active <p>Note: This category captures the adults who are in an active CalWORKs/RCA program but have a program person status and role type combination such as one of the following:</p> <ul style="list-style-type: none"> • Active: FRE, MMO, UP • Discontinued: Mem, FSO, FRE, UP, MMO • Denied: UP, FRE, MEM, MMO • Ineligible: FRI, MEM, UP
CalWORKs/RCA Adults: CalWORKs/RCA Aided	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC - Active <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • WTW/REP Exempt • WTW/REP Other • No WTW/REP Program Block • WTW/REP Mandatory <p>For adults who are receiving aid in both CalWORKs and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Exempt	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72):

	<ul style="list-style-type: none"> • AC - Active • Latest WTW/REP Work Registration Status (CT-248): <ul style="list-style-type: none"> • EX - Exempt <p>For adults who are receiving aid in both CalWORKs and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Other	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC - Active • Latest WTW/REP Work Registration Status is Not (CT-248): <ul style="list-style-type: none"> • EX - Exempt • MA - Mandatory <p>OR Latest WTW/REP Work Registration Status is blank.</p> <p>OR Does Not have any existing WTW/REP Work Registration record.</p> <p>Note: For people who are receiving aid in both CW and RCA, capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: No WTW/REP Program Block	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC - Active • Does Not have an associated WTW/REP program block.

<p>CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA – Mandatory <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • Assigned to Worker • Not Assigned to Worker
<p>CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Assigned to Worker</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program has a program assigned worker. <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • Active • Inactive <p>Note: For people who are receiving aid in both CW and RCA, capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>

<p>CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Assigned to Worker: Active</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program has a program assigned worker. • Meets one of the following metric requirements. See Appendix 7.2 for the logic definition. See Appendix 7.1 for hour calculation logic. <ul style="list-style-type: none"> • Single Parent 20+ Hrs/Week • Single Parents 30+ Hrs/Week • Family Employed at Least 35 Hrs/Week • RCA Participant Employed 32+ Hrs/Week • Open Activity • Referred to an Activity in the Current or Future Month • Activity Successfully Completed in the Month • Referred to an Activity in the Previous Month • Activity Closed in the Report Month • Activities Completed/Closed in the Previous Month <p>Note: For people who are receiving aid in both CW and RCA, capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p> <p>Note: The summary is a distinct person count but the detailed drill-down displays at max the 3 latest activates for each metric: 'Referred to an Activity in the Current or Future Month', 'Activity Successfully Completed in the Month', 'Referred to an Activity in the Previous Month', 'Activity Closed in the Report</p>
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	Month', 'Activities Completed/Closed in the Previous Month'.
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Assigned to Worker: Inactive	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program has a program assigned worker. • Does Not meet any of the 'Active' category metric requirements. <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • Identified Reason • Unknown Reason <p>Note: For people who are receiving aid in both CW and RCA, capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Assigned to Worker: Inactive: Identified Reason	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory

	<ul style="list-style-type: none"> • The WTW/REP program has a program assigned worker. • Does Not meet any of 'Active' category metric requirements. • Meets the criteria for one of the measures below. See Appendix 7.3 for the logic definition. <ul style="list-style-type: none"> • Current Good Cause • Open Noncompliance • Exempt Program Status • Sanctioned Program Status • Deregistered Program Status • Pending Program Status <p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Assigned to Worker: Inactive: Unknown Reason	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program has a program assigned worker. • Does Not meet any of the 'Active' category metric requirements. • Does Not meet any of the 'Inactive Identified Reason' category metric requirements. • Meets one of the following metric requirements. See Appendix 7.4 for the logic definition. <ul style="list-style-type: none"> • Referred to an Activity Prior to the Previous Month • Completed/Closed Activity Prior to the Previous Month • Unknown Reason - Other

	<p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
<p>CalWORKs/RCA Adults:</p> <p>CalWORKs/RCA Aided:</p> <p>WTW/REP Mandatory:</p> <p>Not Assigned to Worker</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program does Not have a program assigned worker. <p>The sum of this category must equal the sum of its sub-categories:</p> <ul style="list-style-type: none"> • Identified Reason • Should be Registered <p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
<p>CalWORKs/RCA Adults:</p> <p>CalWORKs/RCA Aided:</p> <p>WTW/REP Mandatory:</p> <p>Not Assigned to Worker:</p> <p>Identified Reason</p>	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> • Not In the Cal-Learn Adults population • Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> • BC - CW Non Part • AA - CW Time Limit • Role Type (CT-201): <ul style="list-style-type: none"> • ME - Member • Program Person Status (CT-72): <ul style="list-style-type: none"> • AC – Active • Has an associated WTW/REP program block. • Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> • MA - Mandatory • The WTW/REP program does Not have a program assigned worker.

	<ul style="list-style-type: none"> Meets one of the following metric requirements. See Appendix 7.5 for the logic definition. See Appendix 7.1 for hour calculation logic. <ul style="list-style-type: none"> Waiting for Sanction Imposition Future/Current Month Termination Scheduled Single Parents 20+ Hrs/Week Single Parents 30+ Hrs/Week Family Employed at Least 35 Hrs/Week RCA Participant Employed 32+ Hrs/Week Other Parent <p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.</p>
CalWORKs/RCA Adults: CalWORKs/RCA Aided: WTW/REP Mandatory: Not Assigned to Worker: Should be Registered	<p>From the base population, count the adult in this category if they meet the following conditions:</p> <ul style="list-style-type: none"> Not In the Cal-Learn Adults population Role Reason Not Equal to (CT-73): <ul style="list-style-type: none"> BC - CW Non Part AA - CW Time Limit Role Type (CT-201): <ul style="list-style-type: none"> ME - Member Program Person Status (CT-72): <ul style="list-style-type: none"> AC - Active Has an associated WTW/REP program block. Latest WTW/REP Work Registration Status is (CT-248): <ul style="list-style-type: none"> MA - Mandatory The WTW/REP program does Not have a program assigned worker. Does Not meet any of the 'Not Assigned to Worker Identified Reason' category metric requirements. Meets one of the following metric requirements. See Appendix 7.6 for the logic definition. <ul style="list-style-type: none"> Unassigned Pool Exempt Program Status Sanctioned Program Status Deregistered Program Status Unidentified Reason <p>Note: For people who are receiving aid in both CW and RCA capture the program with the latest Work</p>

	Registration begin date. This ensures we are capturing the participant based on the most recent action/update of their Work Registration.
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2. Make the following updates to the Worker / Active category measure headers:

Header Before	Header Now
Single Parents 20+ hr/week	Single Parents 20+ Hrs/Week
Single Parents 30+ hr/week	Single Parents 30+ Hrs/Week
Family Employed at Least 35 hr/week	Family Employed at Least 35 Hrs/Week
Activities completed/Closed in the previous Month	Activities Completed/Closed in the Previous Month

3. Make the following updates to the Assigned to Worker / Unknown Reason category measure headers:

Header Before	Header Now
Referred to an Activity prior to the Previous Month	Referred to an Activity Prior to the Previous Month

4. Make the following updates to the Not Assigned to Worker / Identified Reason measure headers:

Header Before	Header Now
Single Parents 20+ hr/week	Single Parents 20+ Hrs/Week
Single Parents 30+ hr/week	Single Parents 30+ Hrs/Week
Family Employed at least 35 hr/week	Family Employed at Least 35 Hrs/Week

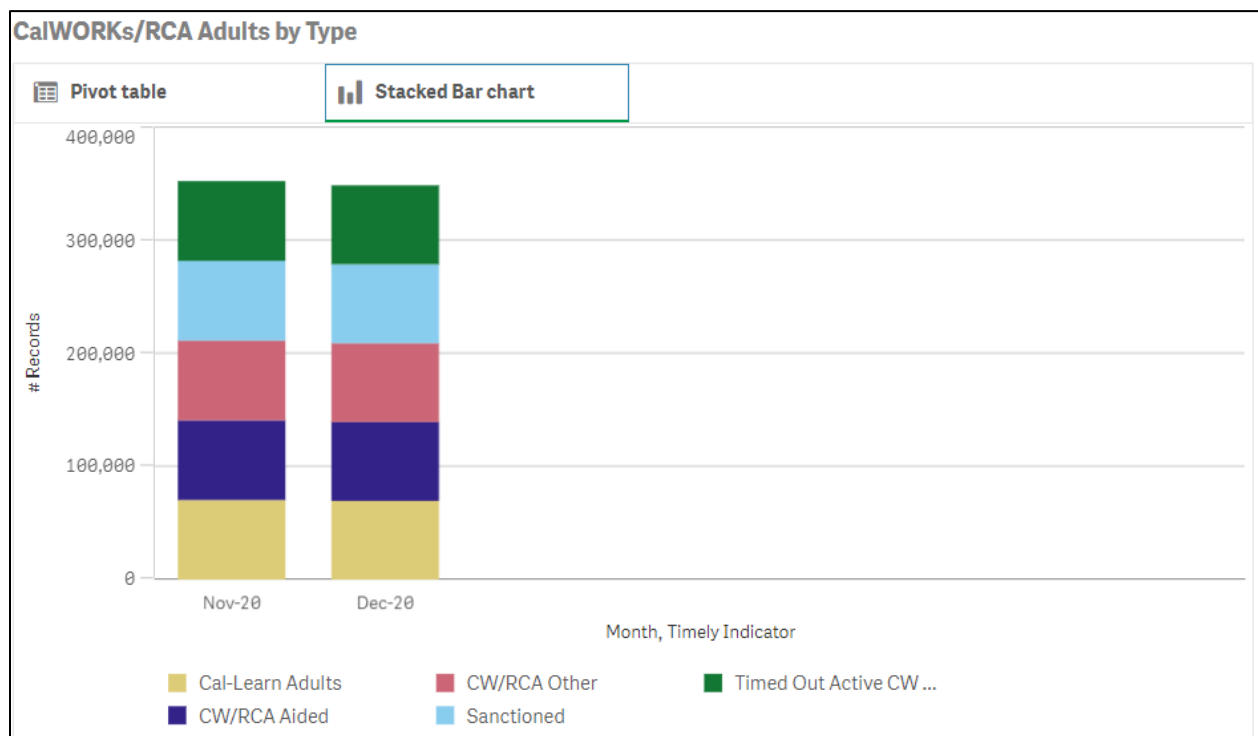
5. Update the 'Report Month' parameter found on all sheets to default to the latest available reporting month rather than the latest 5 reporting months.
6. Update all 'Welfare-to-Work' references in the dashboard name, sheet names, category headers and measure headers to 'WTW/REP'.
7. Update the column order and their visibility logic on all case lists to match Appendix 7.7.

- Rename the 'CalWORKs/RCA Adults' section title, which displays a Pivot Table and Stacked Bar Chart for the base population broken down by Type Description, to 'CalWORKs/RCA Adults by Type'. Update the Stacked Bar Chart and Pivot Table to display the new 'Cal-Learn Adults' and 'CalWORKs/RCA Other' Type Descriptions. The summation of the Type Descriptions is equal to the CalWORKs/RCA Adults total.

CalWORKs/RCA Adults by Type

Pivot table **Stacked Bar chart**

Type Description <input type="text"/>	Month Filter <input type="text"/>	
	Nov-20	Dec-20
Cal-Learn Adults	1	1
CW/RCA Aided	1	1
CW/RCA Other	1	1
Sanctioned	1	1
Timed Out Active CW Cases	1	1



- Update the 'CalWORKs/RCA Aided' Pivot Table and Stacked Bar Chart, which displays the CalWORKs/RCA Aided population broken down by RCA Aided Reason, to display the new 'No WTW/REP Program Block' RCA Aided Reason. The summation of the RCA Aided Reasons is equal to the

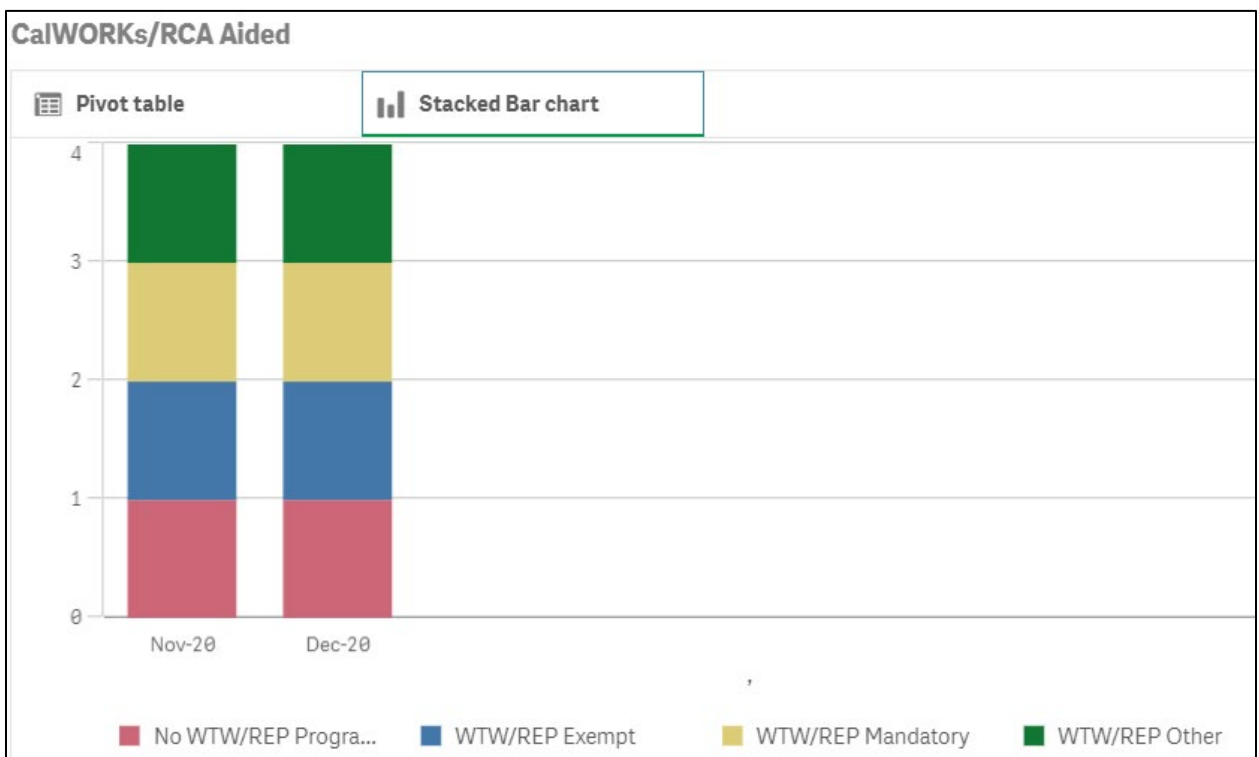
CalWORKs/RCA Aided total. Also rename the 'RCA Aided Reason' dimension on the Pivot Table to 'Work Registration Status'.

CalWORKs/RCA Aided

Pivot table **Stacked Bar chart**

Work Registratio... Month

	Nov-20	Dec-20
No WTW/REP Program Block	1	1
WTW/REP Exempt	1	1
WTW/REP Mandatory	1	1
WTW/REP Other	1	1



- Update the Assigned to Worker 'Active' table, which displays the CalWORKs/RCA Assigned to Worker population broken down by Tier Description, to display the new 'RCA Participant Employed 32+ Hrs/Week' metric. The summation of the metrics is equal to the WTW/REP Mandatory / Active population.

Active		
Tier Description <input type="text"/>	Month Filter <input type="text"/>	
	Nov-20	Dec-20
Grand Total	1	1
Single Parents 20+ Hrs/Week	1	1
Single Parents 30+ Hrs/Week	1	1
Family Employed at Least 35 Hrs/Week	1	1
RCA Participant Employed 32+ Hrs/Week	1	1
Open Activity	1	1
Referred to an Activity in the Current or Future Month	1	1
Activity Successfully Completed in the Month	1	1
Referred to an Activity in the Previous Month	1	1
Activity Closed in the Report Month	1	1

Note: Some measures are not visible in the scrollable table.

- Update the Not Assigned to Worker Identified Reason table, which displays the CalWORKs/RCA Not Assigned to Worker population broken down by Identified Reason Description, to display the new 'RCA Participant Employed 32+ Hrs/Week' metric. The summation of the metrics is equal to the WTW/REP Mandatory / Identified Reason population.

Identified Reason		
Identified Reason... <input type="text"/>	Month <input type="text"/>	
	Nov-20	Dec-20
Waiting for Sanction Imposition	1	1
Future/Current Month Termination Scheduled	1	1
Single Parents 20+ Hrs/Week	1	1
Single Parents 30+ Hrs/Week	1	1
Family Employed at Least 35 Hrs/Week	1	1
RCA Participant Employed 32+ Hrs/Week	1	1
Other Parent	1	1

- Add a parameter to the 'WTW/REP Mandatory' case list which filters the result set by Mandatory Reason.

Parameter	Description
Mandatory Reason	Filters the WTW/REP Mandatory population by the Mandatory Reason. Possible Values: <ul style="list-style-type: none"> Assigned to Worker Not Assigned to Worker

CalSAWS CalWORKs/RCA Adults by Welfare-to-Work Category CL

Mandatory Reason

WTW/REP Region	WTW/REP Unit	WTW/REP Worker ID	District Office
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown
Unknown	Unknown	Unknown	Unknown

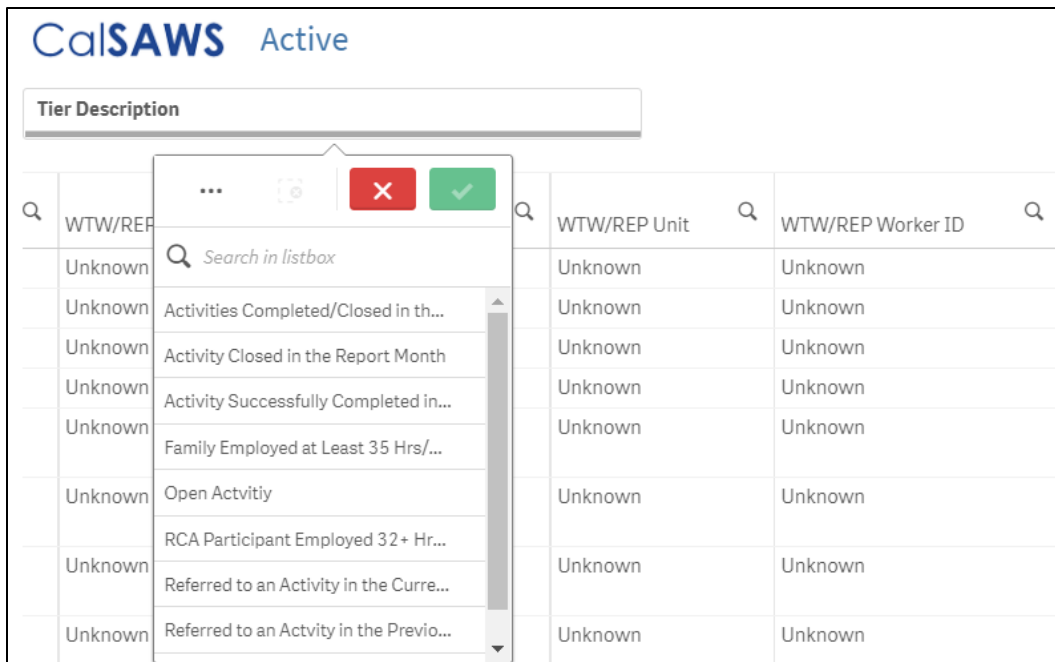
Search in listbox

Assigned to Worker

Not Assigned to Worker

13. Add a parameter to the 'Assigned to Worker / Active' case list which filters the result set by Tier Description.

Parameter	Description
Tier Description	<p>Filters the WTW/REP Assigned to Worker / Active population by the Tier Description.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Single Parents 20+ Hrs/Week • Single Parents 30+ Hrs/Week • Family Employed at Least 35 Hrs/Week • RCA Participant Employed 32+ Hrs/Week • Open Activity • Referred to an Activity in the Current or Future Month • Activity Successfully Completed in the Month • Referred to an Activity in the Previous Month • Activity Closed in the Report Month • Activities Completed/Closed in the Previous Month



14. Add a parameter to the 'Assigned to Worker / Identified Reason' case list which filters the result set by Tier Description.

Parameter	Description
Tier Description	<p>Filters the WTW/REP Assigned to Worker Identified Reason population by the Tier Description.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Current Good Cause • Deregistered Program Status • Exempt Program Status • Open Noncompliance • Sanctioned Program Status • Pending Program Status

CalSAWS

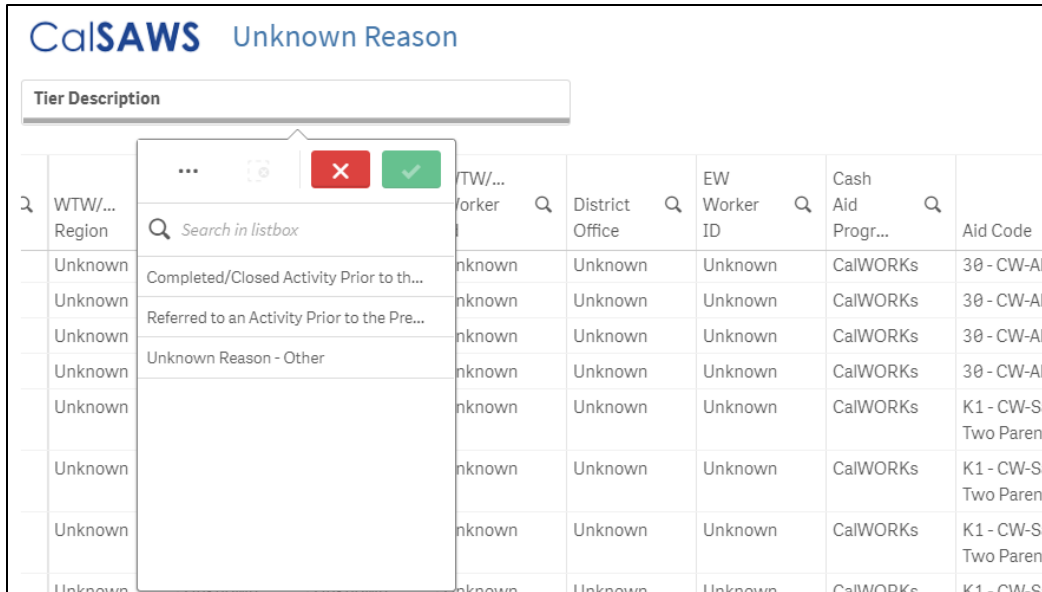
Identified Reason

Tier Description

WTW/REP Reason	<div> <div>...</div> <div> <div></div> <div></div> </div> </div> <div> <div>Search in listbox</div> <div>Current Good Cause</div> <div>Deregistered Program Status</div> <div>Exempt Program Status</div> <div>Open Noncompliance</div> <div>Pending Program Status</div> <div>Sanctioned Program Status</div> </div>	WTW/REP Unit	WTW/REP Worker ID	District Office
Unknown		Unknown	Unknown	Unknown
Unknown		Unknown	Unknown	Unknown
Unknown		Unknown	Unknown	Unknown
Unknown		Unknown	Unknown	Unknown
Unknown		Unknown	Unknown	Unknown
Unknown		Unknown	Unknown	Unknown
Unknown		Unknown	Unknown	Unknown
Unknown		Unknown	Unknown	Unknown

15. Add a parameter to the 'Assigned to Worker / Inactive / Unknown Reason' case list which filters the result set by Tier Description.

Parameter	Description
Tier Description	Filters the WTW/REP Assigned to Worker / Inactive / Unknown Reason population by the Tier Description. Possible Values: <ul style="list-style-type: none"> Referred to an Activity Prior to the Previous Month Unknown Reason – Other Completed/Closed Activity Prior to the Previous Month



16. Update all case lists within the dashboard to include the following columns. The column's position and visibility logic are found in Appendix 7.7:

Column Name	Column Description
CIN	Displays the Client Index Number (CIN) of the adult. The column is blank if the adult does not have a CIN number.
Cash Aid Role Reason	73 - Displays the reason for a person's CalWORKs/RCA role. The column is blank when there is no Role Reason.
Cash Aid Role Status Reason	73 - Displays the CW/RCA person's Role Status Reason. The column is blank when there is no Role Status Reason.
Work Registration Begin Date	Displays the Work Registration Begin Date. Format: MM/DD/YYYY
Report Month	Displays the Report Month the record was captured for. Format: MM/YYYY

WTW/REP Program Status Begin Date	Displays the WTW/REP Program Status Begin Date. Format: MM/DD/YYYY
WTW/REP Program Status Reason	Displays the WTW/REP Program Status Reason. This column is blank when there is no Program Status Reason.

Note:

- The 'WTW/REP Program Status Begin Date' is existing in the Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)'. The column is relocated in this case lists. The column is now visible regardless of the parameter selected.
- The 'Program Status Reason' and 'Program Status Reason Begin Date' is existing in the Not Assigned to Worker 'Should Be Registered' case list.
- The 'WTW/REP Program Status Reason' is existing in the following case lists: 'CW/RCA Aided', 'CalWORKs/RCA Adults by WTW/REP Category CL' (Mandatory), Assigned to Worker 'Identified Reason' and Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)'. This requirement will add the column to the rest of the case lists.

See Appendix 7.7 for all case lists and their column order and their visibility logic.

List of all case lists to update:

- CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list)
- CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type)
- CW/RCA Aided
- CalWORKs/RCA Adults by WTW/REP Category CL (Mandatory)
- Active
- Inactive
- Identified Reason
- Unknown Reason
- Not Assigned to Worker / CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)
- CalWORKs/RCA Adults by WTW/REP Category CL (Should Be Registered)

17. Updates to the 'CalWORKs/RCA Adults by WTW/REP Category' (CalWORKs/RCA Adults by Type), 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Identified Reason)' and 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Should Be Registered)' case list to include two new columns. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Last WTW/REP Worker ID	Displays the last known Worker ID when there is no assigned worker to the WTW/REP program as of the last day of the report month. Blank – The column is blank when the WTW/REP program has an assigned worker as of the last day of the report month.
Last WTW/REP Region	Displays the Region of the last known Worker when there is no assigned worker to the WTW/REP program as of the last day of the report month. Blank – The column is blank when the WTW/REP program an assigned worker as of the last day of the report month.

18. Make the following updates to the 'CW/RCA Aided' case list:
- Rename the existing 'Expected End Date' column to 'Work Registration Expected End Date'.
 - Rename the 'Exempt Reason' column to 'Work Registration Status Reason'.
 - Remove the 'Prior Work Reg Status' column.
 - Remove the 'Prior Work Reg Begin Date' column.
 - Add the columns listed below to the case list. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Volunteer	Indicates whether the adult volunteers to participate. Possible Values: <ul style="list-style-type: none"> • 'Y' – The work registration record indicates the adult is a volunteered participant. • 'N' - The work registration record indicates the adult is not a volunteered participant.
Excluded	Indicates whether the adult volunteer participant is excluded.

	<p>Possible Values:</p> <ul style="list-style-type: none"> • Y' – The work registration record indicates the adult is an excluded volunteered participant. • 'N' - The work registration record indicates the adult is not an excluded volunteered participant. • [Blank] – The field will be blank if the information is not available.
Work Registration Status Reason	<p>Displays the Work Registration Status Reason for the Exempt Adult.</p> <p>Possible Values (CT 249):</p> <ul style="list-style-type: none"> • 60 years of age or older (EDBC determined) • Disabled (EDBC determined) ... <p>Note: This list is not restrictive or complete. If more Work Registration Status values are added to the system, the report will automatically pick up the value.</p>
WTW/REP Program Status Expected End Date	<p>Displays the Expected End Date tied to the adult's program person status.</p> <p>Format: MM/DD/YYYY</p> <p>This field will be blank if the program status does not have an expected end date.</p> <p>Technical Note: No Expected End Date is when the field is NULL or set to 12/01/9999.</p>

19. Update the following case lists to include a new column titled 'Homeless'. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Homeless	<p>Indicates whether the adult is homeless.</p> <p>Possible Values</p> <ul style="list-style-type: none"> • Y – If the "Use Office Address" check box is selected on the Address Detail page for the adult's Physical address. <p>OR</p> <p>The adult's physical address matches any Office of Type 'DT - District' (CT-253).</p> <p>N – The adult does not meet the Homeless requirements.</p> <p>Technical Note: "Use Office Address" is stored PERS_ADDR.USE_DISTR_OFFICE_ADDR_IND</p>

List of all case lists to update:

- CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list)
- CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type)
- CW/RCA Aided

20. Update the 'Assigned to Worker / Inactive / Identified Reason' case list as follows:

- Remove the 'Program Status Reason' column.
- Remove the 'Program Status Reason Begin Date' column.
- Add the 'WTW/REP Program Status Expected End Date'. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
WTW/REP Program Status Expected End Date	Indicates when the adult's Good Cause status is expected to end. Format: MM/DD/YYYY The value is blank if there is no Expected End Date. Technical Note: This field comes from PGM_PERS_DETL.EXPECT_END_DATE.

21. Update the 'Assigned to Worker / Active' and 'Not Assigned to Worker / Identified Reason' case lists to include the columns listed below. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Activity Type	The type of activity for which the adult participated in (CT 26,56). Example of possible values: <ul style="list-style-type: none"> • SIP • Work Study • Employment • Adult Services • Appraisal • Assessment ... Note: This list is not restrictive. If new customer activity types are created, the logic automatically picks up the value.
Activity Number	The alphanumeric identifier that the staff assigned the customer activity. Technical Note: This field is stored in SERV_ACTIV.ACTIV_NUM_IDENTIF

Activity Status Begin Date	The Begin Date of the latest status of the corresponding activity. Format: MM/DD/YYYY
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22. Update the 'CW/RCA Aided' case list to include a new column titled 'Prior Month Cash Aid Role Reason'. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Prior Month Cash Aid Role Reason	73 – For adults who have a different effective program person role record in the prior month from the current reporting month, this column displays the role reason for the prior month's CalWORKs/RCA role. The column is blank when there is no Role Reason, or the adult has the same effective role in the current month as the prior month.

23. Make the following updates to the 'Active' and 'Unknown Reason' case lists:
- Add a 'Activity Scheduled End Date' column. The column is only visible for **referred activities**.
 - Add a 'Activity Status Reason' column.
 - Add a 'Activity Scheduled Start Date' column to the 'Active' case list.
 - Rename the existing '**Expected** Begin Date' column in the 'Unknown Reason' case list to 'Activity Scheduled Begin Date'.
- See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Activity Scheduled Begin Date	Displays the Scheduled Start Date of the adult's referred activity. Format: MM/DD/YYYY
Activity Scheduled End Date	Displays the Scheduled End Date of the adult's referred activity. Format: MM/DD/YYYY

Activity Status Reason	<p>Displays the Customer Activity Status Reason (CT - 124).</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Completed Satisfactory • Drop Out • Activity Cancelled • Employed <p>The column will be blank if there is no status reason.</p> <p>Note the list above is not complete or restrictive. If new customer activity status reasons are added the report will automatically display the value.</p>
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24. Add a 'CW/RCA Discontinuance Date' column to the Not Assigned to Worker 'CalWORKs/RCA Adults by WTW/REP Category CL (Identified Reason)' case list. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
CW/RCA Discontinuance Date	<p>Displays the effective date of future discontinuance of the adult's CW/RCA program.</p> <p>Format:</p> <p>MM/DD/YYYY</p>

25. Add the following columns to the 'CalWORKs/RCA Adults by WTW/REP Category Case List' (Entire CalWORKs/RCA Adults population case list) and the 'CalWORKs/RCA Adults by WTW/REP Category' case list (CalWORKs/RCA Adults by Type). See Appendix 7.7 for all case lists and their column order and their visibility logic.:

Column Name	Column Description
TANF Months Used	<p>Total number of TANF months used by the adult.</p> <p>Technical Note: This is existing logic and should be taken from the Time Limit Summary page for the TANF Months Used field.</p>
Extender Reason	<p>Displays the latest Approved (CT-10528) extender reason applied to the adult.</p> <p>Possible Values (CT-863):</p> <ul style="list-style-type: none"> • No Services Provided • Individual needs an additional time to complete a welfare-to-work activity specified in

	<p>his or her welfare-to-work case plan due to a diagnosed learning or other disability</p> <ul style="list-style-type: none"> Individual is likely to obtain employment within six months. <p>...</p> <p>Note latest Extender Reason will be based on Begin Date.</p> <p>Note: This list is not complete or restrictive. If more Extender Reasons are added the report will automatically display the information.</p> <p>Technical Note: Extender Information can be found on the Time Limit Extension Request Detail page.</p>
Extender Begin Date	<p>Displays the begin date of the approved time limit extender request.</p> <p>Format:</p> <p>MM/DD/YYYY</p> <p>This field will be blank if there is no Extender Begin Date information available.</p>
Extender End Date	<p>Displays the end date of the approved time limit extension request.</p> <p>Format:</p> <p>MM/DD/YYYY</p> <p>This field will be blank if there is no Extender Begin Date information available.</p>

26. Add the following columns to the 'CalWORKs/RCA Adults by WTW/REP Category' (CalWORKs/RCA Adults by Type) case list and the 'CalWORKs/RCA Aided' case list. See Appendix 7.7 for all case lists and their column order and their visibility logic. See Appendix 7.8 for the hierarchy for activity selection logic.

Column Name	Column Description
Activity Type	<p>The type of activity for which the adult participated in (CT 26,56).</p> <p>Example of possible values:</p> <ul style="list-style-type: none"> SIP Work Study Employment Adult Services Appraisal Assessment

	<p>...</p> <p>This column will be blank if the Adult does not have an associated Activity.</p> <p>Note: This list is not restrictive. If new customer activity types are created, the logic automatically picks up the value.</p>
Activity Number	<p>The alphanumerical identifier that the staff assigned the customer activity.</p> <p>This column will be blank if the Adult does not have an associated Activity.</p> <p>Technical Note: This field is stored in SERV_ACTIV.ACTIV_NUM_IDENTIF</p>
Activity Status	<p>Displays the Status of the Customer Activity (CT-151).</p> <p>This column will be blank if the Adult does not have an Activity.</p>
Activity Status Reason	<p>Displays the Customer Activity Status Reason (CT - 124).</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Completed Satisfactory • Drop Out • Activity Cancelled • Employed <p>....</p> <p>The column will be blank if there is no status reason.</p> <p>Note the list above is not complete or restrictive. If new customer activity status reasons are added the report will automatically display the value.</p>
Activity Status Begin Date	<p>The Begin Date of the latest status of the corresponding activity.</p> <p>Format:</p> <p>MM/DD/YYYY</p> <p>This column will be blank if the Adult does not have an associated Activity.</p>
Activity Scheduled Start Date	<p>The expected or schedule begin date of the customer activity.</p> <p>Format:</p> <p>MM/DD/YYYY</p> <p>This column will be blank if the Adult does not have an associated Activity.</p>

Activity Scheduled End Date	<p>The expected or schedule end date of the customer activity.</p> <p>Format: MM/DD/YYYY</p> <p>This column will be blank if the Adult does not have an associated Activity.</p>
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27. Add the following columns to the 'CalWORKs/RCA Adults by WTW Category' (CalWORKs/RCA Adults by Type) case list. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Age	Displays the age of the Cal-Learn adult.
Cal-Learn Office	<p>Displays the Office Name of the office associated to the primary Cal-Learn program assigned Worker.</p> <p>This field will be blank if there is no primary program assigned worker.</p>
Cal-Learn Office ID	<p>Displays the Office ID of the office associated to the primary Cal-Learn program assigned worker.</p> <p>This field will be blank if there is no primary program assigned worker.</p>
Cal-Learn Worker ID	<p>Displays the Worker ID of the primary Cal-Learn program assigned Worker.</p> <p>This field will be blank if there is no primary program assigned worker.</p>
Cal-Learn Secondary Worker ID	<p>Displays the Worker ID of the secondary Cal-Learn program assigned Worker.</p> <p>This field will be blank if there is no secondary program assigned worker.</p>
Cal-Learn Program Status	<p>Displays the Program Status of the Cal-Learn program (CT-72).</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Pending • Active • Good Cause • Exempt • Deferred

Cal-Learn Program Status Reason	Displays the Program Status Reason of the Cal-Learn program. Format: MM/DD/YYYY
Cal-Learn Program Status Begin Month	Displays the Program Status Begin Month of the Cal-Learn program. Format: MM/DD/YYYY
Cal-Learn Program Status End Month	Displays the Program Status End Month of the Cal-Learn program. Format: MM/DD/YYYY This field will be blank if there is no End Date.

28. Update the 'Time Expiration **Date**' column logic within the CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list) and CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type) case lists. See Appendix 7.7 for all case lists and their column order and their visibility logic.

Column Name	Column Description
Time Expiration Date	Displays the month after the Begin Month of the 60 th tick of the CalWORKs time clock. This column will be blank if the case has not reached 60 ticks. Note: If a person has ticks split between two cases and EDBC marks them as Timed Out this column will be blank.

29. Update the 'CalWORKs/RCA Adults by Welfare-to-Work Category CL (Should Be Registered)' case list as follows:
- Rename the 'Program Status Reason' column to 'WTW/REP Program Status Reason'.
 - Rename the 'Program Status Reason Begin Date' column to 'WTW/REP Program Status Reason Begin Date'.

2.1.4 Counties Impacted

The changes outlined in this section impact all counties.

2.1.5 Report Location

- **Global: On Request**
- **Local: Business Intelligence**
- **Task: Operations Reports**


2.1.6 Security Updates

No updates are made to the dashboard's existing security.

2.1.7 Report Usage/Performance Impacts

The changes outlined in this SCR do not cause any notable affect to the system's performance.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	CalWORKs/RCA Adults by WTW/REP Category Mockup	 CalWORKs RCA by WTW REP Category M

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.8	The LRS shall include the ability to generate the following parameter-driven reports: a. Fraud reports; b. Hearing reports; c. Financial reports; d. Federal and State claiming reports; e. Caseload Activity Report (CAR); f. Personnel management reports; h. Benefit authorization reports; i. Issuance reports; j. Collection reports; k. QC reports; l. Mass update reports; m. Interface reports; n. Error reports; o. Caseload management reports; p. Performance-based criteria reports; q. Case LRS Data reports; and r. Control and processing reports.	The CalWORKs RCA Adults by WTW/REP Category Report is a parameter-driven caseload management report.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
N/A			

5 MIGRATION IMPACTS

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

6 OUTREACH

N/A

7 APPENDIX

7.1 Calculating Employment Hours

Single Parent

- 1) If the single parent has active employment record(s), as of the last day of the report month, then sum all scheduled employment hours in the active employment record(s), as displayed on the Employment Detail page.
- 2) If the active employment record(s) has/have no employment hours, then sum the hours of all existing active employment activities (customer activity category code = EM, category id 54) the single parent is participating in, as of the last day of the report month.
- 3) If the single parent does not have any active employment record(s), and thus no employment activities. Then, use the single parent's earned income information used by EDBC found in the system: **Eligibility>Customer Information>Financial>Income>Income List>Income Detail** (income category id 277, code = 01, category field= Earnings), to calculate the number of employed hours in a week. This calculation is incorporated in the report, since this calculation does not exist in the database.

Double Parent:

- 1) If the parent(s) has active employment record(s), as of the last day of the report month, then sum all scheduled employment hours in the active employment record(s), as displayed on the Employment Detail page.
- 2) If the active employment record(s) (of neither parent) has/have no employment hours, then sum the hours of all existing active employment activities (customer activity category code = EM, category id 54) both parents are participating in, as of the last day of the report month.
- 3) If the parents in the household do not have any active employment record(s), and thus no employment activities. Then, use both parents' earned income information used by EDBC found in the system: **Eligibility>Customer Information>Financial>Income>Income List>Income Detail** (income category id 277, code = 01, category field= Earnings), to calculate the number of employed hours in a week. This calculation is incorporated in the report, since this calculation does not exist in the database.

7.2 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Assigned to Worker / Active

An adult captured in the 'Assigned to Worker' population is considered **Active** if they meet all the requirements for any of the given measures listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measure hierarchy is listed below in numerical order:

1. Single Parents 20+ Hrs/Week

- There is at least one child in the CW household under the age of 6 (exclusive).
- The adult/parent works at least 20 hours/week (inclusive). See appendix 7.1 for instructions on calculating hours.
- Has one of the following Aid Codes (CT-184):
 - 30 - CW – All Other Families (Fed)
 - 33 - CW – Zero Parent (Fed)
 - 3G – CW – Zero Parent (State)
 - 3H – CW- Zero Parent (Mixed)
 - 3R – CW – Zero Parent – Exempt MAP (Fed)
 - 3E - CW - All Other Families (Mixed)
 - 3L - CW – All Other Families (State)
 - 3P - CW – All Other Families-Exempt MAP (Fed)
 - 32 - CW – TANF – Timed Out -All Families (State)
 - 3W - CW – TANF – Timed Out (State)
 - K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
 - R1 - CW - TCVAP (State)

2. Single Parents 30+ Hrs/Week

- All children in the household are 6 years old or over.
- The parent works 30 or more hours per week (inclusive). See appendix 7.1 for instructions on calculating hours.
- Has one of the following Aid Codes (CT-184):
 - 30 - CW – All Other Families (Fed)
 - 33 - CW – Zero Parent (Fed)
 - 3G – CW – Zero Parent (State)
 - 3H – CW- Zero Parent (Mixed)
 - 3R – CW – Zero Parent – Exempt MAP (Fed)
 - 3E - CW - All Other Families (Mixed)
 - 3L - CW – All Other Families (State)
 - 3P - CW – All Other Families-Exempt MAP (Fed)
 - 32 - CW – TANF – Timed Out -All Families (State)
 - 3W - CW – TANF – Timed Out (State)
 - K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
 - R1 - CW - TCVAP (State)

3. Family Employed at Least 35 Hrs/Week

- The CW household has children irrespective of the child's age.
- The employment hours for one or both adults/parents in the CalWORKs household must be at least 35 hours per week (inclusive).
- Has one of the following Aid Codes (CT-184):
 - 35 - CW – Two Parent (Fed)
 - 3F - CW – Safety Net/Felon/WTW Sanct – Two Parent
 - 3M - CW-Two Parent (State)
 - 3U - CW – Two Parent (State)

4. RCA Participant Employed 32+ Hrs/Week

- Program (CT-18):
 - RC - RCA

- The employment hours for the adult are 32 or more per week (inclusive). See appendix 7.1 for instructions on calculating hours.
- Has a Federal, State, or Mixed RCA Aid Code (CT-184). This will be a dynamic list and if an aid code is later added, then the report will automatically pick up the information.

Current Possible Aid Codes:

- 01 – RCA – RCA (Fed)
- 1V - RCA - TCVAP (State)

Technical Note: RCA Aid Codes can be identified by looking at CODE_DETL.REFER_TABLE_4_DESCR in ('FE','NF', MX') and REFER_TABLE_5_DESCR = 'RC'.

5. Open Activity

- Has an existing customer activity with the following latest status (CT-21):
 - AC – Active
- The customer activity has the following Status Reason (CT-124):
 - AT – Attending

6. Referred to an Activity in the Current or Future Month

- The adult has a customer activity with a begin date in the report month or future month. The customer activity has the following latest status and status reason:
 - Customer Activity Status (CT-21):
 - AC - Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred
 - PR – Processing

OR

- The adult has a customer activity with an expected/scheduled start date in the report month or future month.

7. Activity Successfully Completed in the Month

- The adult has a customer activity effective in the report month with the following latest status and status reason:
 - Customer Activity Status (CT-21):
 - CO - Completed
 - Customer Activity Status Reason (CT-124):
 - CS – Completed Satisfactory
 - CE - Employed

8. Referred to an Activity in the Previous Month

- The adult has a customer activity with a begin date that falls in the month immediately prior to the report month with the latest status and status reason of:
 - Customer Activity Status (CT-21):
 - AC - Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred

9. Activity Close in the Report Month

- The adult has a customer activity with a begin date that falls in the report month and the latest status is the following:
 - Customer Activity Status (CT-21):
 - CL - Closed

10. Activity Completed/Closed in the Previous Month

- The adult has a customer activity with a begin date that falls in the month immediately prior to the report month.
 - Customer Activity Status (CT-21)
 - CO - Completed
 - CL – Closed
 - Status Reason (CT-124):
 - [Any]

7.3 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Assigned to Worker / Inactive / Identified Reason

An adult captured in the 'Assigned to Worker' population is considered **Inactive for Identified Reason** if they do not meet the any of the Active measures but meet one of the measure requirements listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measure hierarchy is listed below in numerical order:

1. Current Good Cause

- Program (CT-18):
 - WT - WTW
 - RE - REP
- Program Status (CT-72):
 - GC - Good Cause

2. Open Noncompliance

- Program (CT-18):
 - WT - WTW
 - RE - REP
- Program Status:
 - NC- Non-Compliant

3. Exempt Program Status

- Program (CT-18):
 - WT - WTW
 - RE - REP
- Program Status (CT-72):
 - EX- Exempt

4. Sanctioned Program Status

- Program (CT-18):
 - WT - WTW
 - RE - REP
- Program Status (CT-72):
 - SA- Sanction

5. Deregistered Program Status

- Program (CT-18):
 - WT – WTW
 - RE - REP
- Program Status (CT-72):
 - DG - Deregistered

6. Pending Program Status

- Program (CT-18):
 - WT – WTW
 - RE - REP
- Program Status (CT-72):
 - PE- Pending

7.4 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Assigned to Worker / Inactive / Unknown Reason

An adult captured in the 'Assigned to Worker' population is considered **Inactive for Unknown Reason** if they do not meet any Active measures and do not meet one of the 'Inactive / Identified Reason' measures requirements but meet one of the measure requirements listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measures hierarchy are listed below in numerical order:

1. Referred to an Activity Prior to the Previous Month:

- The adult has a customer activity with a begin date two months prior to the report month with the latest status and status reason of:
 - Customer Activity Status (CT-21):
 - AC- Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred

2. Completed/Closed Activity Prior to the Previous Month:

- The adult has a customer activity with a begin date two months prior to the report month with the latest status and status reason of:
 - Customer Activity Status (CT-21):
 - CL- Closed
 - CO - Complete

3. Unknown Reason - Other:

- All other adults in the Inactive population who could not be categorized for Known Reasons or the two unknown reasons of 'Referred to an Activity Prior to the Previous Month' or 'Completed/Closed Activity Prior to the Previous Month'.

7.5 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Not Assigned to Worker / Identified Reason

An adult captured in the 'Not Assigned to Worker' population is considered having an **Identified Reason** if they meet the requirements for one of the measures listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measures hierarchy are listed below in numerical order:

1. Waiting for Sanction Imposition:

- Program (CT-18):
 - WT - WTW
 - REP - REP
- Program Status (CT-72):
 - SA- Sanction

2. Future/Current Month Termination Scheduled:

- Program (CT-18):
 - CW - CalWORKs
 - RC - RCA
- Program Status effective the month after the report month (CT-72):
 - DS – Discontinued

3. Single Parents 20+ Hrs/Week:

- There is at least one child in the CW household under the age of 6 (exclusive).
- The adult/parent works at least 20 hours/week (inclusive). See appendix 7.1 for instructions on calculating hours.
- Has one of the following Aid Codes (CT-184):
 - 30 - CW – All Other Families (Fed)
 - 33 - CW – Zero Parent (Fed)
 - 3G – CW – Zero Parent (State)
 - 3H – CW- Zero Parent (Mixed)
 - 3R – CW – Zero Parent – Exempt MAP (Fed)
 - 3E - CW - All Other Families (Mixed)
 - 3L - CW – All Other Families (State)
 - 3P - CW – All Other Families-Exempt MAP (Fed)
 - 32 - CW – TANF – Timed Out -All Families (State)
 - 3W - CW – TANF – Timed Out (State)
 - K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent

- R1 - CW - TCVAP (State)

4. Single Parents 30+ Hrs/Week:

- All children in the household are 6 years old or over.
- The parent works 30 or more hours per week (inclusive). See appendix 7.1 for instructions on calculating hours.
- Has one of the following Aid Codes (CT-184):
 - 30 - CW – All Other Families (Fed)
 - 33 - CW – Zero Parent (Fed)
 - 3G – CW – Zero Parent (State)
 - 3H – CW- Zero Parent (Mixed)
 - 3R – CW – Zero Parent – Exempt MAP (Fed)
 - 3E - CW - All Other Families (Mixed)
 - 3L - CW – All Other Families (State)
 - 3P - CW – All Other Families-Exempt MAP (Fed)
 - 32 - CW – TANF – Timed Out -All Families (State)
 - 3W - CW – TANF – Timed Out (State)
 - K1 - CW-Safety Net/Felon/WTW Sanct-Non-Two Parent
 - R1 - CW - TCVAP (State)

5. Family Employed at Least 35 Hrs/Week

- The CW household has children.
- The employment hours for one or both adults/parents in the CW household must be at least 35 hours per week (inclusive).
- Has one of the following Aid Codes (CT-184):
 - 35 - CW – Two Parent (Fed)
 - 3F - CW – Safety Net/Felon/WTW Sanct – Two Parent
 - 3M - CW-Two Parent (State)
 - 3U - CW – Two Parent (State)

6. RCA Participant Employed 32+ Hrs/Week

- **Program (CT-18)**
 - **RC - RCA**
- **The employment hours for the adult are at least 32 hours per week (inclusive).**
- **Has a Federal, State, or Mixed RCA Aid Code (CT-184). This will be a dynamic list and if an aid code is later added, then the report will automatically pick up the information.**
Current Possible Aid Codes:
 - **01 – RCA – RCA (Fed)**
 - **1V - RCA - TCVAP (State)**

Technical Note: RCA Aid Codes can be identified by looking at CODE_DETL.REFER_TABLE_4_DESCR in ('FE', 'NF', 'MX') and REFER_TABLE_5_DESCR = 'RC'.

7. Other Parent

- Program (CT-18):
 - WT – WTW
 - RE - REP
- Program Status (CT-72):
 - DG - Deregistered
- Program Person Status Reason (CT-73):
 - PP – Other parent participation 35 hours.

7.6 The Measure Logic for CalWORKs/RCA Adults / CalWORKs/RCA Aided / WTW/REP Mandatory / Not Assigned to Worker / Should be Registered

An adult captured in the 'Not Assigned to Worker' population is considered '**Should be Registered**' if they do not meet any of the 'Not assigned to Worker Identified Reason' measures requirements but meet one measures requirements listed below. The measures are not mutually exclusive; therefore, an adult should only be captured in the first measure it meets the requirements for. The measures hierarchy are listed below in numerical order:

1. Unassigned Pool

- Program (CT-18):
 - WT – WTW
 - RE - REP
- Program Status (CT-72):
 - PE- Pending (CT 72)

Note: This count may or may not match the result(s) on the Unassigned Pool Business Intelligence Dashboard as a 'Pending' program may have been captured in a prior category in the hierarchy.

2. Exempt Program Status

- Program (CT-18):
 - WT – WTW
 - RE - REP
- Program Status (CT-72):
 - EX- Exempt (CT 72)

3. Sanctioned Program Status

- Program (CT-18):
 - WT – WTW
 - RE - REP
- Program Status (CT-72):
 - SA- Sanction

4. Deregistered Program Status

- Program (CT-18):
 - WT – WTW
 - RE - REP
- Program Status (CT-72):
 - DE- Deregistered

5. Unidentified Reason

- All adults who were captured in the 'Not Assigned to Worker' category but could not be captured in any of the measures for 'Identified Reason' or 'Should be Registered' category is reported here.

7.7 Case Lists Column Order

CalWORKs/RCA Adults by WTW/REP Category Case List (Entire CalWORKs/RCA Adults population case list)

1. **Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name
11. **CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
17. **Cash Aid Role Reason**
18. Cash Aid Role Status
19. **Cash Aid Role Status Reason**
20. Sanction Effective Date
21. **Homeless**
22. Work Registration Status
23. **Work Registration Begin Date**
24. WTW/REP Program
25. WTW/REP Program Status
26. **WTW/REP Program Status Reason**
27. **WTW/REP Program Status Begin Date**

- 28. **TANF Months Used**
- 29. CW Months Used
- 30. **Extender Reason**
- 31. **Extender Begin Date**
- 32. **Extender End Date**
- 33. Time Expiration Date

Note: This case list does not have a parameter therefore does not have any columns which are only visible dependent on parameter selection.

CalWORKs/RCA Adults by WTW/REP Category (CalWORKs/RCA Adults by Type)

- 1. Report Month**
- 2. WTW/REP Region Group
- 3. WTW/REP Region
- 4. WTW/REP Office
- 5. WTW/REP Unit
- 6. WTW/REP Worker ID
- 7. Last WTW/REP Worker ID**
- 8. Last WTW/REP Region**
- 9. District Office
- 10. EW Worker ID
- 11. Case Number
- 12. Participant Name
- 13. CIN**
- 14. Person ID
- 15. DOB
- 16. Aid Code
- 17. Cash Aid Program
- 18. Cash Aid Role
- 19. Cash Aid Role Reason**
- 20. Cash Aid Role Status
- 21. Cash Aid Role Status Reason**
- 22. Sanction Effective Date
- 23. Homeless**
- 24. Work Registration Status
- 25. Work Registration Begin Date**
- 26. WTW/REP Program
- 27. WTW/REP Program Status
- 28. WTW/REP Program Status Reason**
- 29. WTW/REP Program Status Begin Date**
- 30. Activity Type**
- 31. Activity Number**
- 32. Activity Status**
- 33. Activity Status Reason**
- 34. Activity Status Begin Date**
- 35. Activity Scheduled Start Date**

- 36. Activity Scheduled End Date**
- 37. TANF Months Used**
- 38. CW Months Used
- 39. Time Expiration Date
- 40. Extender Reason**
- 41. Extender Begin Date**
- 42. Extender End Date**
- 43. Age**
- 44. Cal-Learn Office**
- 45. Cal-Learn Office ID**
- 46. Cal-Learn Worker ID**
- 47. Cal-Learn Secondary Worker ID**
- 48. Cal-Learn Program Status**
- 49. Cal-Learn Program Status Reason**
- 50. Cal-Learn Program Status Begin Month**
- 51. Cal-Learn Program Status End Month**
- 52. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

CW/RCA Aided:

- TANF Months Used
- CW Months Used
- Extender Reason
- Extender Begin Date
- Extender End Date

Sanctioned:

- Sanction Effective Date
- Last WTW/REP Worker ID
- Last WTW/REP Region

Timed Out Active CW Cases:

- TANF Months Used
- CW Months Used
- Time Expiration Date
- Extender Reason
- Extender Begin Date
- Extender End Date
- Activity Type
- Activity Number
- Activity Status
- Activity Status Reason
- Activity Status Begin Date
- Activity Scheduled Start Date
- Activity Scheduled End Date

Cal-Learn Adults:

- Age
- Cal-Learn Office
- Cal-Learn Office ID
- Cal-Learn Worker ID
- Cal-Learn Secondary Worker ID
- Cal-Learn Program Status
- Cal-Learn Program Status Reason
- Cal-Learn Program Status Begin Month
- Cal-Learn Program Status End Month

CalWORKs/RCA Other:

- N/A

CW/RCA Aided

1. Report Month

2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name

11. CIN

12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role

17. Cash Aid Role Reason

18. Cash Aid Role Status

19. Cash Aid Role Status Reason

20. Prior Month Cash Aid Role Reason

21. Homeless

22. Work Registration Status

23. Work Registration Status Reason

24. Work Registration Begin Date

25. **Work Registration** Expected End Date

26. WTW/REP Program

27. WTW/REP Program Status

28. WTW/REP Program Status Reason

29. WTW/REP Program Status Begin Date

30. WTW/REP Program Status Expected End Date

31. Activity Type

- 32. Activity Number**
- 33. Activity Status**
- 34. Activity Status Reason**
- 35. Activity Status Begin Date**
- 36. Activity Scheduled Start Date**
- 37. Activity Scheduled End Date**
- 38. Volunteer**
- 39. Excluded**
- 40. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

WTW/REP Exempt:

- Work Registration Status Reason
- Work Registration Expected End Date
- Volunteer
- Excluded
- WTW/REP Program Status Expected End Date
- Activity Type
- Activity Number
- Activity Status
- Activity Status Reason
- Activity Status Begin Date
- Activity Scheduled Start Date
- Activity Scheduled End Date

WTW/REP Mandatory:

- N/A

WTW/REP Other:

- N/A

No WTW/REP Program Block:

- N/A

CalWORKs/RCA Adults by WTW/REP Category CL (Mandatory)

- 1. Report Month**
- 2. WTW/REP Region Group
- 3. WTW/REP Region
- 4. WTW/REP Office
- 5. WTW/REP Unit
- 6. WTW/REP Worker ID
- 7. District Office
- 8. EW Worker ID
- 9. Case Number
- 10. Participant Name

- 11. CIN**
- 12. Person ID
- 13. DOB
- 14. Aid Code
- 15. Cash Aid Program
- 16. Cash Aid Role
- 17. Cash Aid Role Reason**
- 18. Cash Aid Role Status
- 19. Cash Aid Role Status Reason**
- 20. Work Registration Status
- 21. Work Registration Begin Date**
- 22. WTW/REP Program
- 23. WTW/REP Program Status
- 24. WTW/REP Program Status Reason
- 25. WTW/REP Program Status Begin Date**

The following columns will only be visible when the follow Type Description parameter is selected:

Assigned to Worker:

- N/A

Not Assigned to Worker:

- N/A

Active

- 1. Report Month**
- 2. WTW/REP Region Group
- 3. WTW/REP Region
- 4. WTW/REP Office
- 5. WTW/REP Unit
- 6. WTW/REP Worker ID
- 7. District Office
- 8. EW Worker ID
- 9. Case Number
- 10. Participant Name
- 11. CIN**
- 12. Person ID
- 13. DOB
- 14. Aid Code
- 15. Cash Aid Program
- 16. Cash Aid Role
- 17. Cash Aid Role Reason**
- 18. Cash Aid Role Status
- 19. Cash Aid Role Status Reason**
- 20. Work Registration Status

- 21. Work Registration Begin Date**
- 22. WTW/REP Program
- 23. WTW/REP Program Status
- 24. WTW/REP Program Status Reason**
- 25. WTW/REP Program Status Begin Date**
- 26. Activity Type**
- 27. Activity Number**
- 28. Activity Status**
- 29. Activity Status Reason**
- 30. Activity Status Begin Date**
- 31. Activity Scheduled Start Date**
- 32. Activity Scheduled End Date**
- 33. Total Hours Employed Per Week
- 34. Source of Hours
- 35. Qlik ID**

The following columns will only be visible when the follow Type Description parameter is selected:

Single Parents 20+ Hrs/Week:

- Total hours Employed Per Week
- Source of Hours

Single Parents 30+ Hrs/Week:

- Total hours Employed Per Week
- Source of Hours

Family Employed 32+ Hrs/Week:

- Total hours Employed Per Week
- Source of Hours

RCA Participant Employed 32+ Hrs/Week:

- Total hours Employed Per Week
- Source of Hours

Open Activity:

- N/A

Referred to an Activity in the Current or Future Month:

- Activity Scheduled Start Date
- Activity Scheduled End Date

Activity Successfully Completed in the Month:

- N/A

Referred to an Activity in the Previous Month:

- Activity Scheduled Start Date
- Activity Scheduled End Date

Activity Closed in the Report Month:

- N/A

Activity Completed/Closed in the Previous Month:

- N/A

Inactive

- 1. Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name
- 11. CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
- 17. Cash Aid Role Reason**
18. Cash Aid Role Status
- 19. Cash Aid Role Status Reason**
20. Work Registration Status
- 21. Work Registration Begin Date**
22. WTW/REP Program
23. WTW/REP Program Status
- 24. WTW/REP Program Status Reason**
- 25. WTW/REP Program Status Begin Date**
26. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Identified Reason:

- N/A

Unknown Reason:

- N/A

Identified Reason (Assigned to Worker)

- 1. Report Month**
2. WTW/REP Region Group

3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name
- 11. CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
- 17. Cash Aid Role Reason**
18. Cash Aid Role Status
- 19. Cash Aid Role Status Reason**
20. Effective Sanction Date
21. Work Registration Status
- 22. Work Registration Begin Date**
23. WTW/REP Program
24. WTW/REP Program Status
25. WTW/REP Program Status Reason
- 26. WTW/REP Program Status Begin Date**
- 27. WTW/REP Program Status Expected End Date**
28. Total Hours Employed Per Week
29. Source of Hours
30. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Current Good Cause:

- **WTW/REP Program Status** Expected End Date
- Effective Sanction Date

Open Noncompliance:

- Effective Sanction Date

Exempt Program Status:

- Effective Sanction Date

Sanctioned Program Status:

- Effective Sanction Date

Deregistered Program Status:

- Effective Sanction Date

Pending Program Status:

- Effective Sanction Date

Unknown Reason

- 1. Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
7. District Office
8. EW Worker ID
9. Case Number
10. Participant Name
- 11. CIN**
12. Person ID
13. DOB
14. Aid Code
15. Cash Aid Program
16. Cash Aid Role
- 17. Cash Aid Role Reason**
18. Cash Aid Role Status
- 19. Cash Aid Role Status Reason**
20. Work Registration Status
- 21. Work Registration Begin Date**
22. WTW/REP Program
23. WTW/REP Program Status
- 24. WTW/REP Program Status Begin Date**
25. Activity Type
26. Activity Number
- 27. Activity Status Reason**
28. Activity Status Begin Date
- 29. Activity Scheduled Start Date**
- 30. Activity Scheduled End Date**
31. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Referred to an Activity Prior to the Previous Month:

- Activity Type
- Activity Number
- Activity Status Begin Date
- Activity Scheduled Start Date

Completed/Closed Activity Prior to the Previous Month:

- Activity Type

- Activity Number
- Activity Status Begin Date

Unknown Reason - Other:

- N/A

**Not Assigned to Worker / CalWORKs/RCA Adults by WTW/REP Category CL
(Identified Reason)**

- 1. Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
- 7. Last WTW/REP Worker ID**
- 8. Last WTW/REP Region**
9. District Office
10. EW Worker ID
11. Case Number
12. Participant Name
- 13. CIN**
14. Person ID
15. DOB
16. Aid Code
17. Cash Aid Program
18. Cash Aid Role
- 19. Cash Aid Role Reason**
20. Cash Aid Role Status
- 21. Cash Aid Role Status Reason**
- 22. CW/RCA Discontinuance Date**
23. Effective Sanction Date
24. Work Registration Status
- 25. Work Registration Begin Date**
26. WTW/REP Program
27. WTW/REP Program Status
28. WTW/REP Program Status Reason
- 29. WTW/REP Program Status Begin Date**
- 30. Activity Type**
- 31. Activity Number**
- 32. Activity Status Begin Date**
33. Total Hours Employed Per Week
34. Source Hours
35. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Waiting for Sanction Imposition:

- Effective Sanction Date

Future/Current Month Termination Scheduled:

- CW/RCA Discontinuance Date

Single Parents 20+ Hrs/Week:

- Total Hours Employed Per Week
- Source of Hours
- **Activity Type**
- **Activity Number**
- **Activity Status Begin Date**

Single Parents 30+ Hrs/Week:

- Total Hours Employed Per Week
- Source of Hours
- **Activity Type**
- **Activity Number**
- **Activity Status Begin Date**

Family Employed at Least 35 Hrs/Week:

- Total Hours Employed Per Week
- Source of Hours
- **Activity Type**
- **Activity Number**
- **Activity Status Begin Date**

RCA Participant Employed 32+ Hrs/Week:

- Total Hours Employed Per Week
- Source of Hours
- **Activity Type**
- **Activity Number**
- **Activity Status Begin Date**

Other Parent:

- N/A

CalWORKs/RCA Adults by WTW/REP Category CL (Should Be Registered)

- 1. Report Month**
2. WTW/REP Region Group
3. WTW/REP Region
4. WTW/REP Office
5. WTW/REP Unit
6. WTW/REP Worker ID
- 7. Last WTW/REP Worker ID**

8. Last WTW/REP Region

- 9. District Office
- 10. EW Worker ID
- 11. Case Number
- 12. Participant Name

13. CIN

- 14. Person ID
- 15. DOB
- 16. Aid Code
- 17. Cash Aid Program
- 18. Cash Aid Role

19. Cash Aid Role Reason

- 20. Cash Aid Role Status

21. Cash Aid Role Status Reason

- 22. CW/RCA Approval Date
- 23. CW/RCA Application Date
- 24. Work Registration Status

25. Work Registration Begin Date

- 26. WTW/REP Program
- 27. WTW/REP Program Status
- 28. **WTW/REP** Program Status Reason
- 29. **WTW/REP** Program Status Reason Begin Date

30. WTW/REP Program Status Begin Date

- 31. Qlik ID

The following columns will only be visible when the follow Type Description parameter is selected:

Unassigned Pool:

- CW/RCA Approval Date
- CW/RCA Application Date

Exempt Program Status:

- WTW/REP Program Status Reason

Sanctioned Program Status:

- WTW/REP Program Status Reason

Deregistered Program Status:

- WTW/REP Program Status Reason

Unidentified Reason:

- N/A

7.8 Activity Selection Logic for Timed-Out on Active CalWORKs Cases and WTW/REP Exempt Timed Out

For the 'Timed-Out on Active CalWORKs Cases and WTW/REP Exempt Timed Out' population, the following hierarchy will be used to select a single Activity to display for the adult.

1. Open Activity

- Has an existing customer activity with the following latest status (CT-21):
 - AC – Active
- The customer activity has the following Status Reason (CT-124):
 - AT – Attending

2. Referred to an Activity in the Current or Future Month

- The adult has a customer activity with a begin date in the report month or future month. The customer activity has the following latest status and status reason:
 - Customer Activity Status (CT-21):
 - AC - Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred
 - PR – Processing

OR

- The adult has a customer activity with an expected/scheduled start date in the report month or future month.

3. Activity Successfully Completed in the Month

- The adult has a customer activity effective in the report month with the following latest status and status reason:
 - Customer Activity Status (CT-21):
 - CO - Completed
 - Customer Activity Status Reason (CT-124):
 - CS – Completed Satisfactory
 - CE - Employed

4. Referred to an Activity in the Previous Month

- The adult has a customer activity with a begin date that falls in the month immediately prior to the report month with the latest status and status reason of:
 - Customer Activity Status (CT-21):
 - AC - Active
 - Customer Activity Status Reason (CT-124):
 - RE – Referred

5. Activity Close in the Report Month

- The adult has a customer activity with a begin date that falls in the report month and the latest status is the following:
 - Customer Activity Status (CT-21):
 - CL - Closed

6. Activities Completed/Closed in the Previous Month

- The adult has a customer activity with a begin date that falls in the month immediately prior to the report month.
 - Customer Activity Status (CT-21)
 - CO - Completed
 - CL – Closed
 - Status Reason (CT-124):
 - [Any]

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208603 Batch Scheduling Updates for
CalWIN Conversion (Wave 4)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eric Delaney
	Reviewed By	Howard Suksanti

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/10/2022	1.0	Initial version	Howard Suksanti, Eric Delaney
12/22/2022	1.1	Added Client Correspondence batch jobs	Phong Xiong
05/15/2023	1.2	Content Revision 1 - Updated Supporting Document Attachment Names throughout design document.	Eric Delaney

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1 OVERVIEW

This SCR will outline the necessary modifications for scheduling the CalSAWS batch jobs for the CalWIN Wave 4 Conversion. The CalWIN Wave 4 Counties include San Diego, San Mateo, Santa Cruz, and Solano.

1.1 Current Design

Various CalSAWS Migration DDIDs implemented in R1 through R8 include functionality to turn on/turn off Batch jobs for the 58 Counties. CA-208599 implemented batch schedule updates for the C-IV Migration counties. The SCR contained DDID references and county responses from C-IV and CalWIN Counties per batch job/functionality.

CalWIN Conversion has begun with the 22.09 release of the Wave 1 Counties of Placer and Yolo. Wave 2 CalWIN Conversion Counties Contra Costa, Santa Clara, and Tulare County will be migrated with the 23.01 release. Wave 3 CalWIN Conversion Counties Orange, Santa Barbara, and Ventura will be migrated with the 23.03 release. Wave 4 CalWIN Conversion Counties San Diego, San Mateo, Santa Cruz, and Solano will be migrated with the 23.05 release.

The scheduling of the remaining CalWIN Counties will occur for each conversion wave in future system change requests.

1.2 Requests

Update Batch Scheduling CalWIN Conversion Wave 4 to schedule the various Batch jobs for San Diego, San Mateo, Santa Cruz, and Solano. Batch jobs from the following SCRs will be scheduled for the CalWIN Wave 4 Counties starting target July 3, 2023:

Batch:

- CA-207374: DDID 1110 – Update Negative Action Batch jobs to be configurable
- CA-207302: DDID 1527 - CalFresh Denial Due to Missed Interview
- CA-207363: DDID 1236 – Update the Non-MAGI RE Discontinuance Batch Job to run for all 58 Counties
- CA-208568: DDID 1967 – Modify WTW Batch job related to Sanctions for all 58
- CA-222369: Update Batch jobs for Foster Care program when NMD turns 21
- CA-207145: CAPI Discontinuance (PB00E917) for C-IV and CalWIN Counties.
- CRFI 22-031: CalWIN - CFET Automation Jobs
- CRFI 22-043: CalWIN – Update Child Care Certificate
- CRFI 22-021: CalWIN – WTW program Activation Batch Job

- Schedule the following IVR jobs for CalWIN counties: POxxM300, POxxM301, POxxM302, POxxM303, POxxM304, POxxM305

Correspondence:

- CA-50988: Automation of the Medi-Cal Request for Information Form MC 355
- CA-215153: DDID 2659 FDS: Non State Forms – Update MATURES 1
- CA-215155: DDID 2660 FDS: Non State Forms – Update MATURES 2
- CRFI 19-030: DDID 2280 CSF 285 form
- Schedule the following print bundling and print file FTP jobs for the CalWIN counties: PBXXP400, PBXXP401, PBXXP404, PBXXP405, PBXXP500, PBXXP501, PBXXP504, PBXXP420, PBXXP421, PBXXP424, etc., and conduct central print testing.
- Schedule the remaining NOA and FORM Generation thread jobs for the CalWIN Counties.
- CRFI 22-061: CalWIN County CSF 124 and CSF 125

Fiscal:

- CA-216568: DDID 1787 and 1789 – Migrate C-IV County Specific Batch Jobs Phase 5
- CA-212363: DDID 1360 - Add Direct Deposit Functionality to CalSAWS for CalWIN Migration Counties
- CA-217791: DDID 1967 – Update RDB With Direct Deposit Data Collection
- CA-207266: DDID 1652 – Enable Recovery Account Activation Batch Job for all 58 Counties
- CA-207157: DDID 2128 – Add Tax Intercept Functionality to CalSAWS
- CA-212361: DDID 2194 - Add Positive Pay Interface Functionality to CalSAWS for CalWIN Migration Counties
- Foster Care Main Payroll
 - Schedule Main Payroll on 1st of the month, similar to C-IV counties, for all CalWIN counties.
- CA-215679: DDID 2376 FDS: GA GR Overpayment Suspension/Termination Batch Changes
 - CRFI 22-003: CalWIN - Terminate GA/GR Recovery Account
- CA-235652: CRFI 21-036 Update Warrant Expiration for CalWIN Counties
- CA-207137: DDID 2196, 2200, 2201 - CalWIN Fiscal Interfaces
- CA-207493: DDID 87 – Add Batch Automation for WTW Supportive Services Overpayments

1.3 Overview of Recommendations

1. Update CalSAWS batch jobs via BPCR/BSCR to run for San Diego, San Mateo, Santa Cruz, and Solano Counties based on county opt in/opt out decisions starting July 3, 2023.

1.4 Assumptions

1. Batch Scheduling for CalWIN Migration Counties will occur with the following SCRs for each conversion wave:
 - a. CA-208603 CalWIN Wave 4: San Diego, San Mateo, Santa Cruz, and Solano (Release 23.05)
 - b. CA-208604 CalWIN Wave 5: Alameda, Fresno, Sonoma (Release 23.07)
 - c. CA-208605 CalWIN Wave 6: Sacramento, San Francisco, and San Luis Obispo (Release 23.09)
2. The CalWIN Counties will be scheduled for batch jobs that are currently running for all former C-IV Counties and Los Angeles County in CalSAWS. These batch jobs will retain their current batch job frequencies and dependencies, apart from some Fiscal jobs.
 - a. For Foster Care Main payroll, the CalWIN Counties will run on the 1st business day of the month the same as the C-IV Counties.

2 RECOMMENDATIONS

2.1 Schedule Batch Jobs to run for the CalWIN Wave 4 Counties

2.1.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for San Diego, San Mateo, Santa Cruz, and Solano counties.

2.1.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Create BSCR/BPCR (if necessary) to schedule batch jobs for the CalWIN Wave 4 Counties.
 - a. Refer to Supporting Document 'CalWIN All Other Batch Jobs Wave 4' for detailed list of batch jobs.
 - b. There are existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out responses.

2.1.3 Execution Frequency

Refer to Supporting Document 'CalWIN All Other Batch Jobs Wave 4' for batch job frequencies.

2.1.4 Key Scheduling Dependencies

Refer to Supporting Document 'CalWIN All Other Batch Jobs Wave 4' for batch job frequencies.

2.1.5 Counties Impacted

San Diego, San Mateo, Santa Cruz, and Solano

2.1.6 Data Volume/Performance

N/A

2.1.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the

file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.2 Schedule Correspondence Jobs to run for the CalWIN Wave 4 Counties

2.2.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for San Diego, San Mateo, Santa Cruz, and Solano counties.

2.2.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Create BSCR/BPCR (if necessary) to schedule batch jobs for the CalWIN Wave 4 Counties.
 - a. Refer to Supporting Document 'CalWIN Correspondence Batch Jobs Wave 4 – Content Revision' for detailed list of batch jobs.
 - b. There are existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out responses.

2.2.3 Execution Frequency

Refer to Supporting Document 'CalWIN Correspondence Batch Jobs Wave 4 – Content Revision' for batch job frequencies.

2.2.4 Key Scheduling Dependencies

Refer to Supporting Document 'CalWIN Correspondence Batch Jobs Wave 4 – Content Revision' for batch job frequencies.

2.2.5 Counties Impacted

San Diego, San Mateo, Santa Cruz, and Solano

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

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

2.3 Schedule Fiscal Jobs to run for the CalWIN Wave 4 Counties

2.3.1 Overview

This section outlines the updates necessary to include the batch jobs in the CalSAWS Batch Scheduler for San Diego, San Mateo, Santa Cruz, and Solano counties.

2.3.2 Description of Change

1. Validate the following batch jobs in the CalSAWS Batch Scheduler. Create BSCR/BPCR (if necessary) to schedule batch jobs for the CalWIN Wave 4 Counties.
 - a. Refer to Supporting Document 'CalWIN Fiscal Batch Jobs Wave 4 – Content Revision' for detailed list of batch jobs.
 - b. There are existing batch jobs that are currently scheduled. Review the Supporting Document to update batch job scheduling and/or properties based on county opt-in/opt-out responses.
2. Foster Care Main Payroll
 - a. Schedule FC Main Payroll on 1st of the month, similar to C-IV counties, for all CalWIN Counties.

2.3.3 Execution Frequency

Refer to Supporting Document 'CalWIN Fiscal Batch Jobs Wave 4 – Content Revision' for batch job frequencies.

2.3.4 Key Scheduling Dependencies

Refer to Supporting Document 'CalWIN Fiscal Batch Jobs Wave 4 – Content Revision' for batch job frequencies.

2.3.5 Counties Impacted

San Diego, San Mateo, Santa Cruz, and Solano

2.3.6 Data Volume/Performance

N/A

2.3.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the

file from the directory and contacting the external partner if there is an account or password issue, etc.)

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch/Interfaces	List of all other batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	CalWIN All Other Batch Jobs Wave 4.xlsx
2	Correspondence	List of Correspondence batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	CalWIN Correspondence Batch Jobs Wave 4 – Content Revision.xlsx
3	Fiscal	List of Fiscal batch jobs with county opt-in indicator, execution frequencies, and scheduling dependencies	CalWIN Fiscal Batch Jobs Wave 4 – Content Revision.xlsx

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226837 | DDID 2699, 2210, 2705, 2706, 2707,
2708, 2709, 2710, 2711, 2712, 2713, 2714, 2715,
2719, 2720, 2721

CalSAWS Inbound IVR

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Dheeraj Muralidara
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/18/2021	V0.1	Draft	

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1 OVERVIEW

The CalSAWS Interactive Voice Response (IVR) system will use the Amazon Connect platform for customers to call in to the County Contact Center. Currently, a customer can call into the IVR and obtain general information. Unauthenticated customers or non-primary applicants are routed to an agent. Meanwhile customers that are successfully authenticated and are primary applicants, can perform the following actions: obtain benefit program information, select a form to request, check on the status for a submitted documentation, and change their IVR PIN.

1.1 Current Design

The existing C-IV functionality migrated to CalSAWS with (SCR CA-207026). The CalSAWS Amazon Connect Contact Center Solution communicates with the CalSAWS application Database for self-service information.

1.2 Requests

Create Los Angeles and CalWIN counties individual call flows in the Amazon Connect environment.

1.3 Overview of Recommendations

1. Inbound IVR to include a customized call flow for each county that includes prompts, menus, queues, program selection, and call transfers supported for supported languages listed below:
 - a. English
 - b. Spanish
 - c. Farsi
 - d. Vietnamese
 - e. Mandarin
 - f. Tagalog
 - g. Russian
 - h. Korean
 - i. Cambodian
 - j. Hmong
 - k. Arabic
 - l. Lao
 - m. Cantonese
 - n. Armenian
 - o. Portuguese
2. Inbound IVR to include customer authentication via phone number and SSN, phone number and DOB, and voice print authentication.
3. Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts.
4. Inbound IVR self-service information for the CalWORKs and CalFresh programs.
5. Inbound IVR self-service information for the Medi-Cal program.
6. Inbound IVR self-service information for the Welfare-to-Work (WTW) programs.

7. Inbound IVR to allow the customer to select previously generated/sent forms to be re mailed.
8. Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case.
9. Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.
10. Inbound IVR to allow the customer to enter their zip code and request office hours and address.
11. Route calls to workers based on language and program selected by the customer in the IVR

1.4 Assumptions

1. Any re-mailing of documents will go to the same address as the original documents were mailed to.
2. Individual county call flows will be determined during individual county sessions
3. LA County and CalWIN county Inbound IVRs will go live with their individual county SCRs at a later date.

2 RECOMMENDATIONS

2.1 Inbound IVR Call Flow

2.1.1 Overview

The inbound IVR call flow is customized for all contact center counties including Los Angeles and the CalWIN counties. All inbound IVR call flows contain self-service menu options and the ability to speak to a worker/agent. Self-service menus are limited to customers that complete the authentication process.

2.1.2 Description of Changes

The verbiage for different languages supported in the inbound IVR will be translated and recorded by professional voice talent. Supported Languages:

- English (default)
- Spanish
- Farsi
- Vietnamese
- Mandarin
- Tagalog
- Russian
- Korean
- Cambodian
- Hmong
- Arabic

- Lao
- Cantonese
- Armenian
- Portuguese

Create self-service options, menus and prompts for Los Angeles and the CalWIN counties.

Note: Individual call flows will be customized including queues and call transfer options during the individual county sessions.

For callers who are successfully authenticated in the IVR, the system plays the self-service options if the caller is a primary applicant. One of the self-service options included provides benefit information for CalWORKs, CalFresh, Medi-Cal and Welfare to Work (WTW) programs. This information is provided dynamically based on the customers active programs.

2.1.2.1 Self-Service Option for CalWORKs and CalFresh Programs

For the CalWORKs Program and CalFresh Program, the IVR will play back the following:

- Program Status
- Total Amount issued for this month and next month.
- The system will notify the customer if benefits are on hold.
- IVR plays back both the current and upcoming benefits for CalWORKs and CalFresh programs.
- The Held status is only set when a worker manually updates an issuance and selects the 'Held' status.
- It means the customer hasn't received the benefit because the county is holding on to the warrant/check.

Callers can also check the document status of their CalWORKs status report, CalFresh Status Report, CalWORKs, and CalFresh Redetermination Packet.

2.1.2.2 Self-Service Option for the Medi-Cal Program

For the Medi-Cal program, the IVR will play back the following:

- Program Type (Medi-Cal Service Benefit)
- Program Status
- Share of cost information for each eligible member aided

Callers can also check the document status of their Medi-Cal Redetermination Packet

2.1.2.3 Self-Service Option for Welfare-to-Work (WTW) Program

For the Welfare to Work program, the IVR will play back the following:

- Program Status
- WTW reimbursement amount for each person participating in the program
- Sanction Status/Reason

2.1.2.4 Self-Service Option for Forms

The system gives the caller a dynamic set of options based on which forms are relevant to their case. They may select a form to request, based on the options available in this dynamic menu: Semi-annual report (SAR7), Transitional Medi-Cal Status report, or Verification of Benefits. The forms can be re-sent to the originally mailed address.

2.1.2.5 Self-Service Option to Request New IVR PIN

The system gives the customer the ability to change their IVR PIN. IVR PINs, such as 111111 or 123456, or non-numeric IVR PINs are not acceptable. Customers must input the same IVR PIN twice and they must match. Changes to the IVR PIN immediately take effect.

In the existing C-IV functionality, customers have a 4-digit IVR PIN that will be migrated to CalSAWS. When a new IVR PIN number is requested or generated, the system will mail a letter to the customer with a new 6-digit IVR PIN number.

2.1.2.6 Self-Service Option to Request Office Information

Callers will be prompted to enter their zip code into the IVR and the IVR will play back their County office hours and address.

2.2 Inbound IVR Authentication

2.2.1 Overview

Customers use authentication methods in the inbound IVR to access self service features. SSN/DOB/Phone Number combinations are some of the more widely used authentication methods. Additional methods of authentication include the use of an IVR PIN and/or Voice Print Authentication.

1. Phone number and SSN or DOB and IVR PIN
2. Voice print authentication

2.2.2 Description of Changes

During voice print authentication, the system asks the caller to speak their passphrase, "my voice is my password, please verify me." The passphrase is streamed to a Voice Biometric Security server to compare the passphrase with previously enrolled voice prints. On a successful match, the caller will be routed to the self-service options. Voice Authenticate is included in SCR CA-226843.

New Cases generated in CalSAWS will contain letters as well as numbers. Customers will no longer be able to enter their case number if it contains letters, so the IVR will no longer prompt them to enter it.

The IVR will now prompt the customer to enter their phone number and their social security number. If the customer does not have or doesn't know their social security number they will be prompted for their date of birth, and/or their IVR PIN. A customer will only be prompted for their date of birth or IVR PIN if the IVR is unable to narrow down the customer to a single person in the CalSAWS database.

Note: Customers issued a 4-digit IVR PIN in C-IV will be able to authenticate using their existing PIN. All IVR PINs generated in CalSAWS will be 6 digits. When a customer resets their existing 4-digit PIN migrated from C-IV the new PIN will be 6 digits.

If a caller selects to login with their social security number (SSN) and Date of Birth (DOB), the system matches the SSN and DOB combination before routing to the self-service options. Unauthenticated callers will be routed to the program menu.

2.3 Route to An Agent

2.3.1 Overview

If the caller decides to speak to a worker, the call is routed to a worker based on the program and language selected in the IVR.

2.3.2 Description of Changes

Calls are routed based on routing profiles and queues available in the county. Customers may be offered Courtesy Callback or Scheduled Callback based on the county administration of these features. Administration page features are included in SCR CA-226672

2.3.2.1 Courtesy Callback

The Courtesy Callback feature reduces the time callers must wait in queue. The feature allows the system to offer callers the option to be called back by the system when it is the caller's turn to speak to an available agent.

This option can be limited to callers who meet certain criteria. For example, callers with the possibility of being in queue for more than X minutes.

If the caller decides to be called back by the system, they will input their phone number. When the system determines that an agent is available, then a call is placed back to the caller.

2.3.2.2 Scheduled Callback

The "Scheduled Callback" feature is one where a customer will call the CalSAWS Call Center for a specific county and be placed into a queue. The system will then check if the call center is either closed or if it has reached the maximum limit of customers waiting in queue. In these cases, the customer will be offered callbacks for the next day at specified times. The Scheduled Callback functionality will be implemented with SCR CA-229573

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	AWS Inbound IVR Detailed Call Flow	Visio diagram represents inbound call flow, AWS inbound IVR Detailed Call Flow.pdf	

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2699	The CONTRACTOR shall configure the Customer Service Center solution to route calls to workers based on language and program selected by the customer in the IVR.	Section 2.3
2210	The CONTRACTOR shall configure the Customer Service Center solution to utilize call routing to	Section 2.3

	queue calls to agents specifically by language and program.	
2705	<p>The CONTRACTOR shall configure the CalSAWS inbound IVR to have a customized call flow for each county including the following:</p> <ul style="list-style-type: none"> - prompts - menus - queues - program selection - call transfers <p>All flows include all self-service features. The following languages will be supported in the CalSAWS inbound IVR:</p> <ul style="list-style-type: none"> - English - Spanish - Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao 	Section 2.1.2
2706	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to authenticate themselves in the IVR using one of the following options:</p> <ul style="list-style-type: none"> - Social Security Number and date of birth - case number and PIN - voice print authentication 	Section 2.2
2707	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts for the following programs:</p> <ul style="list-style-type: none"> - CalWORKs - CalFresh - Welfare to Work <p>The CONTRACTOR shall configure the self-service program menu to give customers the</p>	Section 2.1.2

	ability to receive active or inactive status for Medi-Cal.	
2708	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the CalWORKs and CalFresh programs as stated below:</p> <ul style="list-style-type: none"> - Program Status - Total Amount received for this month - If benefits are on hold, the system will notify the customer - If benefits are not on hold, the customer will be notified for what they are eligible to receive in the upcoming month. 	Section 2.1.2.1
2709	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Medi-Cal program as stated below:</p> <ul style="list-style-type: none"> - Medi-Cal Program Type - Status - Share of Cost - Medi-Cal Service Benefit 	Section 2.1.2.2
2710	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Welfare-to-Work (WTW) programs as stated below:</p> <ul style="list-style-type: none"> - Upcoming Activities - WTW Reimbursement Amount - Sanction Status/Reason 	Section 2.1.2.3
2711	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to select previously generated/sent forms to be mailed. The form list will be dynamically provided to the customer based on forms relevant to their case. The following forms can be re-sent:</p> <ul style="list-style-type: none"> -Semi-annual report -Transitional Medi-Cal Status report -Passport to services form 	Section 2.1.2.4
2712	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case. They may select a form to get the status of the form based on the options available in this dynamic menu:</p>	Section 2.1.2.1 and 2.1.2.2

	<ul style="list-style-type: none"> - CalWORKs status report - CalWORKs or CalFresh Redetermination packet - CalFresh status report - CalFresh Redetermination packet - Transitional Medi-Cal status report - Medi-Cal Redetermination packet 	
2713	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to change their IVR PIN. Changing the IVR PIN is real-time.	Section 2.1.2.5
2714	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.	Section 2.1.2.5
2715	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to enter their zip code and request office hours and address.	Section 2.1.2.6
2719	<p>The CONTRACTOR shall configure the Covered California Inbound IVR for the Covered California Quick Sort Transfers to route calls to the appropriate county queues. The IVR will:</p> <ul style="list-style-type: none"> - Capture the tracker ID, county code, and language code - Offer Courtesy Callback - Have a voicemail option for transfers outside of regular hours of operation and holidays 	2.3
2720	<p>The CONTRACTOR shall configure the Covered California Inbound IVR to automatically route calls between counties in the event the intended county is unavailable due to the following reasons:</p> <ul style="list-style-type: none"> - Holiday - Logged Out - Close for Emergency - Technical Issues 	2.3
2721	<p>The CONTRACTOR shall configure the Customer Service Center solution to allow Counties to call into a unique and specific phone number provided to the County and accessed through a PIN assigned to the County by CalSAWS to:</p> <ul style="list-style-type: none"> - Close their contact center remotely 	2.3

	<ul style="list-style-type: none">- Record an emergency and/or informational message to play in the IVR. The messages can be up to 120 seconds.	
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California Statewide Automated Welfare System

Design Document

CA-240164 | DDID 2705

Santa Cruz County Contact Center Deployment

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nicole Kenny
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/29/2022	0.1	Initial Draft	Nicole Kenny
6/26/2023	0.2	Content Revision 1 <ul style="list-style-type: none"> Added Web Chat opt in 	Jared Kuester

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1 OVERVIEW

Santa Cruz County does not currently have a CalSAWS contact center in the Amazon Connect Environment. This SCR will deploy a brand-new Contact Center to handle inbound and outbound calls to customers.

1.1 Current Design

Santa Cruz County currently maintains their own contact center solution.

1.2 Requests

Build a new contact center solution in the CalSAWS contact center environment.

1.3 Overview of Recommendations

1. Continuing Service Center (CSC)
 - a. Claim a new phone number for inbound calls.
 - i. County owned Toll-Free Number will be pointed to this number.
 - b. Build their county specific call flow
 - i. See attached Call Flow (CA-240164 – Santa Cruz County Call Flow.pdf) for details
 - c. Record new county specific prompts
 - i. See attached Prompts Excel sheet (CA-240164 – Santa Cruz County Verbiage.xlsx) for details
 - d. Build new Continuing Queues
 - i. See attached Exit Reasons Excel sheet (CA-240164 – Santa Cruz County Exit Reasons.xlsx) for details
 - e. Set their Hours of Operations for Inbound Queues
 - f. Create Quick Connects
 - i. See attached Quick Connects Excel sheet (CA-240164 – Santa Cruz County Quick Connects.xlsx) for details.
 - g. Holiday Dates
 - i. Upload County Holidays to the Holiday DynamoDB
 - h. Office Hours and Location
 - i. Upload County Zip Codes to the Office DynamoDB
 - ii. See the Zip Codes Excel sheet (CA-240164 – Santa Cruz County Zip Codes) for details
 - i. Upload Agents
2. Regional Call Center (RCC)
 - a. Update RCC call flow to accept county code 44 as a CalSAWS county
 - i. See attached Call Flow (CA-240164 - Wave 4 RCC Call Flow.pdf) for details
 - b. Create new Voicemail box
 - c. Build new RCC Queues
 - d. Create a Generic Worker for County 44
3. Optional Features
 - a. Web Chat

- b. Click to Call
 - c. Post Call Survey
 - d. Courtesy Call Back
 - e. Scheduled Call Back
- 4. Third-Party Integrations
 - a. Calabrio One
 - i. Integrate Amazon Connect Instance with Calabrio One
 - ii. Upload Agents to Calabrio
 - b. eGain Analytics
 - i. Integrate Amazon Connect Instance with eGain Analytics
 - ii. Set Service Level Agreement Threshold

1.4 Assumptions

1. List of Agents/Staff will be provided by County
 - a. Agent Template will be provided to county by CalSAWS
2. Historical Call Data will not be migrated to Amazon Connect, Calabrio, or eGain
3. Toll Free Number 888-421-8080 will be ported to Amazon Connect after go-live
 - a. The County is responsible for pointing the Toll-Free numbers to the Amazon Connect phone number
4. County is licensed for 175 total agents/staff (e.g., including workers, supervisors, managers, etc.)
5. Automated Outbound reminder calls will be placed to customers that opt into reminder calls.
6. Courtesy Call Back feature by default is **enabled and can be disabled** through the Administration Page in the Enhanced Call Control Panel.
7. Scheduled Call Back by default is **enabled and can be disabled** through the Administration Page in the Enhanced Call Control Panel.
8. Email address for RCC contact and, voicemail has been provided by the County, HSDBCIntakeMail@santacruzcounty.us
9. County Staff are responsible for creating and maintaining Routing Profiles for their staff.
 - a. Initial Routing Profiles will be created prior to model office
10. Calls from CBOs, Foster Care, and other County Resources will be routed through the External Party Access line and sent to the EPA specific queue(s) if the caller successfully authenticates
11. This change does not include the LEX Authentication or Welcome bots.
12. County is responsible for providing list of Holiday Dates
13. County security admins are responsible for granting rights to their staff in CalSAWS
 - a. Grant CCPAgent rights to Contact Center Agents
 - b. Grant CCPSupervisor rights to Contact Center Supervisors
 - c. Grant CCPMessageSender rights to Contact Center Managers/WFM
 - d. Grant RCC Security Rights to RCC Staff

2 RECOMMENDATIONS

2.1 Continuing Service Center (CSC)

2.1.1 Overview

The Continuing Service Center (CSC) is built in a county specific Amazon Connect Instance. Inbound calls will be routed to the queue that corresponds with the selections the customer made.

2.1.2 Description of Changes

1. Claim a new phone number (non-toll free) for the Inbound IVR
 - a) County IT are required to point their current toll-free number as well as any local numbers utilized by the IVR to this phone number as part of go live.
2. Record County Specific Prompts
 - a) See verbiage Excel sheet (CA-240164 – Santa Cruz County Verbiage) for details
 - b) Upload the prompts to an S3 bucket
3. Build new Queues for each program required
 - a) See the attached Queues sheet (CA-240164 – Santa Cruz County Queue List) for details
4. Set the CSC Inbound Hours
 - a) Self Service Hours: 24/7
 - b) CSC Agents: 7:30 AM – 12:00 PM and 1:00 PM – 5:00 PM Monday – Friday
5. Create a Quick Connect for all queues
 - a) See the attached Quick Connects sheet (CA-240164 – Santa Cruz County Quick Connects List) for details
6. Upload Holiday dates to Holiday DynamoDB table
7. Upload all Contact Center agents to Amazon Connect
 - a) List of Agents to be provided by Santa Cruz County

2.2 Regional Contact Center (RCC)

2.2.1 Overview

Covered California sends Medi-Cal referral calls to Regional Contact Centers.

2.2.2 Description of Changes

1. Update RCC call flow to accept county code 44 as a CalSAWS county
 - a. See the attached call flow (CA-240164 - Wave 4 RCC Call Flow.pdf) for details

2. Create new Voicemail box
 - a. The Voicemail box will be used by Covered California agents that call during non-business hours and will be monitored by county staff
 - b. Voicemails will be delivered via e-mail to the address provided by the County
3. Build new RCC Queues
 - a. See the attached queues list for details

2.3 Optional Features

2.3.1 Overview

The Contact Center solution offers three optional features. They are Web Chat, Click to Call, and Post Call Survey. The county must choose if they want to enable these features or not. Courtesy Call back and Scheduled Call back are optional but can be turned on and off via the Administration Page.

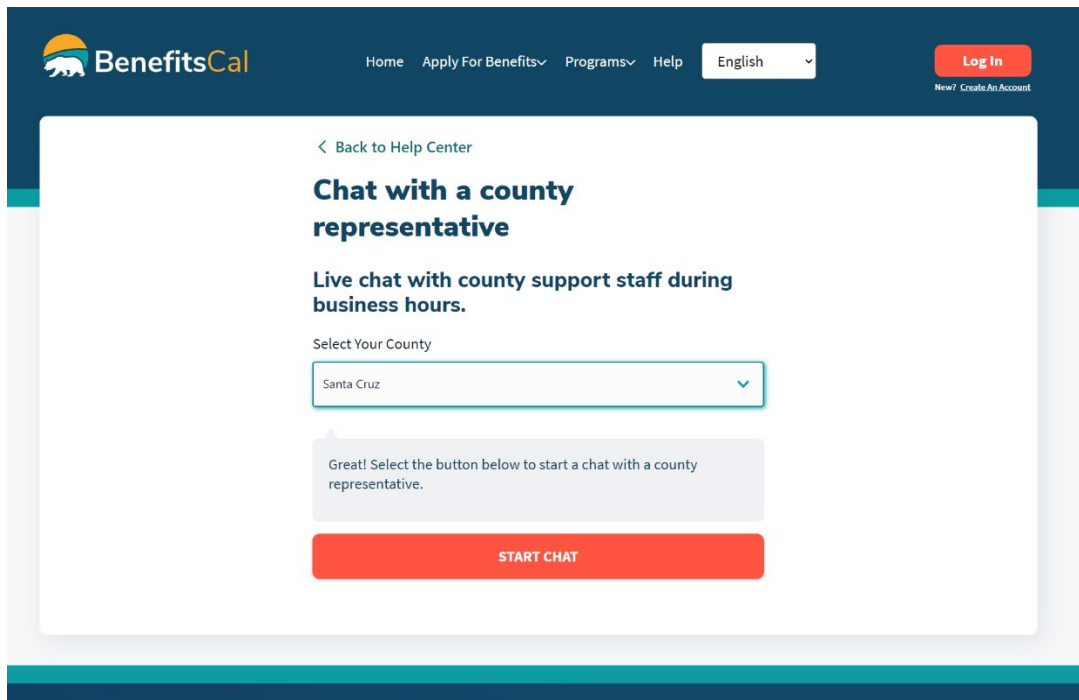
2.3.2 Web Chat

Santa Cruz County has opted into the Web Chat feature but is requesting this feature be turned off at go live. Santa Cruz County **may** enable this feature at their discretion after go-live

2.3.2.1 Description of Changes

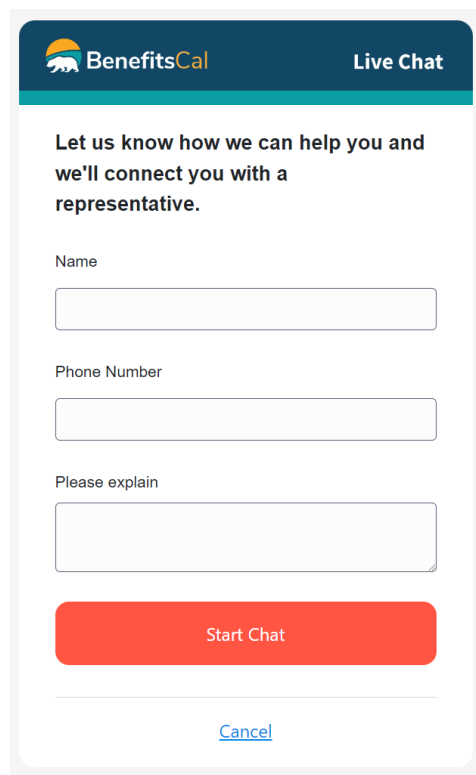
Santa Cruz County will become available to select from the drop-down menu on the BenefitsCal website. Selecting Santa Cruz County will allow the Web Chat window to be opened and allow for contact information.

2.3.2.2 Mockup of Santa Cruz County Web Chat Feature



The mockup shows a web interface for BenefitsCal. The header is dark blue with the BenefitsCal logo on the left and navigation links (Home, Apply For Benefits, Programs, Help) in the center. On the right, there is a language dropdown set to 'English' and a red 'Log In' button with a link to 'New? Create An Account' below it. The main content area is white and contains a link to 'Back to Help Center'. The title 'Chat with a county representative' is in bold. Below it, a message states 'Live chat with county support staff during business hours.' A dropdown menu labeled 'Select Your County' has 'Santa Cruz' selected. A light blue callout box says 'Great! Select the button below to start a chat with a county representative.' At the bottom is a large red 'START CHAT' button.

2.3.2.2.1 – BenefitsCal Web Chat



The web chat form is titled 'Live Chat' and features the BenefitsCal logo. It prompts the user with 'Let us know how we can help you and we'll connect you with a representative.' The form includes three input fields: 'Name', 'Phone Number', and 'Please explain'. Below these fields is a large red 'Start Chat' button. At the bottom, there is a 'Cancel' link.

2.3.2.2.2 – Web Chat Window

2.3.3 Click to Call

Santa Cruz County has opted into the Click to Call feature but is requesting this feature be turned off at go live. Santa Cruz County **may** enable this feature at their discretion after go-live.

2.3.3.1 Description of Changes

When enabled, Santa Cruz County will become available to select from the drop-down menu on the BenefitsCal website. Selecting Santa Cruz County will allow the Call Me window to be opened and allow for contact information.

2.3.3.2 Mockup of Santa Cruz County Call Me Feature

The mockup shows a web interface for requesting a call back. At the top is a dark blue header with the BenefitsCal logo (a stylized elephant) on the left. Navigation links include Home, Apply For Benefits, Programs, and Help. A language dropdown menu is set to English, and a red Log In button is on the right. Below the header, a white content area contains a link to 'Back to Help Center'. The main heading is 'Request a Call Back'. Below this, a message states: 'Can't call now? Some counties offer the option to request a call back during business hours.' A label 'Select Your County' is above a dropdown menu that currently shows 'Santa Cruz'. A light gray callout box contains the text: 'Great! Select the button below to share your details and request a call back.' At the bottom of the content area is a large red button labeled 'REQUEST A CALL BACK'.

BenefitsCal Call Me

Let us know how to contact you and we'll give you a call

First Name

Last Name

Phone Number

Submit

[Cancel](#)

2.3.4 Post Call Survey

Santa Cruz County has opted into the Post Call Survey feature.

2.3.4.1 Description of Changes

1. Configure the Post call survey to ask 4 questions
 - a. How respected did you feel? 1, very dissatisfied, 2, dissatisfied, 3, satisfied, 4, very satisfied, 5, highly satisfied.
 - b. How informed did you feel? 1, very dissatisfied, 2, dissatisfied, 3, satisfied, 4, very satisfied, 5, highly satisfied.
 - c. How well were your needs addressed? 1, very dissatisfied, 2, dissatisfied, 3, satisfied, 4, very satisfied, 5, highly satisfied.
 - d. How was your overall experience? 1, very dissatisfied, 2, dissatisfied, 3, satisfied, 4, very satisfied, 5, highly satisfied.
2. Send a daily report to a county provided e-mail address
 - a. The report will contain the following information:
 - i. Contact ID
 - ii. Agent ID
 - iii. Queue Time
 - iv. Question #
 - v. Question Text
 - vi. Answer
 - vii. Language
 - viii. Caller Phone Number

2.3.5 Courtesy Call Back

Santa Cruz County has opted to **enable** Courtesy Call Back at go-live but can **disable** the feature through the Administration Page.

2.3.6 Scheduled Call Back

Santa Cruz County has opted to **enable** Scheduled Call Back at go-live but can **disable** the feature through the Administration Page after this feature is implemented in a later release.

2.4 Third Party Integrations

2.4.1 Overview







Calabrio One, and eGain Analytics are not native to the Amazon Connect environment. The Amazon Connect instance needs to be integrated into these solutions to provide Work Force Management (WFM), Quality Assurance, and robust reporting functionality.

2.4.2 Description of Change

1. Add the new Amazon Connect Instance as an ACD in Calabrio One
 - a. Upload Agents into Calabrio One
 - i. Add appropriate security rights to agents, supervisors, and WFM
 - b. Create a new WFM View for Santa Cruz County
 - i. This limits the County to view only their resources.
 - c. Set Audio Recording amount to 100% of calls per agent
 - d. Set Screen Recording amount to random 25% of calls per agent
 - e. Set Recording retention rate
 - i. Standard retention rate is 90 days
 - ii. Tagged recordings retention is 365 days
 - iii. To exceed the retention period, there is an API to bulk download calls that will be provided.
2. Add the new Amazon Connect Instance in eGain Analytics
 - a. Create logins for Supervisors, and Manager
 - b. Set the CSC Service Level Agreement Threshold to 600 Seconds.
 - c. Set the RCC Service Level Agreement Threshold to 30 Seconds.

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	IVR	Santa Cruz County Call Flow	 CA-240164 - Santa Cruz County Call Flo
2	IVR	Santa Cruz County Exit Reasons	 CA-240164 - Santa Cruz County Exit Re:
3	IVR	Santa Cruz County Queues	 CA-240164 - Santa Cruz County Queue
4	IVR	Santa Cruz County Verbiage	 CA-240164 - Santa Cruz County Verbiag
5	RCC	Santa Cruz County RCC Call Flow	 CA-240164 - Wave 4 RCC Call Flow.pdf
6	IVR	Santa Cruz County Quick Connects	 CA-240164 Santa Cruz County Quick C

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2705	<p>The CONTRACTOR shall configure the CalSAWS inbound IVR to have a customized call flow for each county including the following:</p> <ul style="list-style-type: none">- prompts- menus- queues- program selection- call transfers <p>All flows include all self-service features.</p> <p>The following languages will be supported in the CalSAWS inbound IVR:</p> <ul style="list-style-type: none">- English- Spanish- Farsi- Vietnamese- Mandarin- Armenian- Tagalog- Russian- Korean- Cambodian- Hmong- Cantonese- Arabic- Lao	Section 2.1

5 OUTREACH

The County Contact Center go-live will include 2 weeks of enhanced support, and model office training before the go live.

5.1 Enhanced Support

Following the go live, CalSAWS staff will be onsite (or available on a virtual bridge if onsite is not possible) to provide any required support for county staff.

5.2 Model Office

Model Office will be conducted prior to go live to give contact center staff hands on experience with the software before the go live. Model office will be conducted in person or virtually if in person is not possible.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-251447

Modify the Use of the GA Annual Agreement for
LA County

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

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

		<p>one of the duplicates. Removed the Qlik ID column from the General Relief – Renewals sheet. The column is a technical column and is not needed.</p> <p>Removed the column definitions for # of Days Delinquent and Termination Indicator because they are not used in the General Relief dashboard.</p> <p>Fixed the report location for the General Relief – Renewals sheet.</p>	
05/25/2023	2.6	Content Revision – Added that BRM logic for the SSP 14 will be used for all counties. All other logic in the SCR is specific to LA County.	Phong Xiong
05/30/2023	2.7	Fixed format issues in the General Relief case list mockups.	Esequiel Herrera-Ortiz
06/02/2023	2.8	<p>Fixed the GA/GR and CF Details – Summary tab template. I had accidentally introduced a new column.</p> <p>Removed a 6-month restriction on the RE Due Month parameter in the RE Date report. The restriction is for the General Relief dashboard.</p> <p>Corrected the following Mockups because information was hidden due to zoom.</p> <p># General Relief Renewals Due (Division Drill Down) - View 1</p> <p># General Relief Renewals Completed (Division Drill Down) - View 1</p> <p>Updated the following</p>	Esequiel Herrera-Ortiz

		mockup to remove the total line. This is not standard throughout the sheet. % General Relief Renewals Completed Timely (Division Drill Down) - View 2	
06/06/2023	2.9	Updated General Relief report mockups due to incorrect text alignment.	Esequiel Herrera-Ortiz
06/13/2023	3.0	Content Revision 2 – Clarified GEN 1365 in Section 1.4 and 2.6. Corrected tracking barcode note in section 2.10.4.	Phong Xiong
06/22/2023	3.1	Content Revision 2 – Updated sections 2.9 and 2.13 to remove the NA Back 9 as part of the two GR NOAs.	Phong Xiong

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1 OVERVIEW

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

1.1 Current Design

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

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

1.2 Requests

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

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

Update reports to include the new GR Annual Renewal information.

1.3 Overview of Recommendations

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

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

1.4 Assumptions

1. There will be no change to when the SSP 14 is generated/mailed and controlled by the System.
2. The new General Relief Annual Renewal Packet will be tracked forms in the System and will utilize the existing Customer Reporting list page and statuses. If the status of either form is still "Sent," and hence not received by the 10th of the Submit Month, a Discontinuance Notice of Action ("NOA") will be generated.
3. All existing functionalities will remain the same unless called out as part of the design document.
4. CalSAWS will not generate the GEN 1365 as part of the GR Annual Renewal Packet (SCR CA-202307: LAC flat mail excludes the insertion of the GEN-1365). Central Print will continue to use the LAC pre-assembled GR Annual Agreement packets which already includes the GEN 1365 for the GR Annual Renewal Packet. The following forms are included in the pre-assembled packet inserted into the General Relief Annual Renewal Packet at the Central Print facility.
 - a. PA 1675-2, Direct Deposit Overview
 - b. PA 2457, Civil Rights Information Notice
 - c. MV 1, California Voter Registration Form.
 - d. NVRA Voter Preference Form, "Would You Like to Register to Vote?"
 - e. PA 2126, Have You Heard?
 - f. CW 2223 Demographic Questionnaire
 - g. PUB 430, Mental Health Assessment and Use of the Third-Party Verification
 - h. GEN 1365, Notice of Language Services
5. The GR RE Packet will be generated in the threshold languages specified in section 2 of the design document.
6. SCR CA-256939 will remove the automated changes of SCR CA-220229 to no longer advance the packet's status to "Complete – EDBC Accepted."
7. There exists a framework for task creation by the counties that can be used for when the SSP 14 is received. This is configurable by the counties.
8. Both the NOA for the SSP 14 and GR RE Packet can be generated at the same time; however, due to eligibility status reason hierarchy rules, only the status reason for the packet would display.
9. There is an overlap month (August 2023) in which both the GR AA Packet and GR RE Packet (including related logic such as eligibility status reasons and NOA generation) are active in the system at the same time.
10. The current NOA generation logic for the two NOAs will not be changed with this SCR.
11. There is existing NOA suppression logic that prevents duplicate NOAs from being sent in the same month. If a GR discontinuance NOA is generated on

the 11th of the month, at the 10-day batch cutoff, a GR discontinuance NOA will not generate.

12. If the GR AA Packet or the GR RE Packet is received and marked "Incomplete" on the RE due date, then no GR discontinuance NOA will generate. If it remains incomplete until the GR discontinuance batch sweep on the batch 10-day cutoff will pick up the case and send the discontinuance NOA.
13. The current batch sweep for GR discontinuance only checks for a customer reporting status of "Sent," "Incomplete," and "Error." Any other status, including a "Generated" status will not be picked up by the batch.
14. If the Worker generates a new General Relief Annual Renewal packet while there is already an unprocessed packet for the program, then the worker must take responsibility for resolving the Customer Reporting Record linked to the previous packet.
15. If the 10th of the Due/Submit Month is a weekend or holiday, then the due date will be the next business day.

2 RECOMMENDATIONS

2.1 Customer Reporting List

2.1.1 Overview

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

2.1.2 Customer Reporting List Mockup

Customer Reporting List

Images

Search Results Summary

Results 1 - 2 of 2

Display Type:

Display Name:

From:

To:

View

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

Images

This Type 1 page took 0.36 seconds to load.

Figure 2.1.2.1 – Customer Reporting List page

Customer Reporting List

[Images](#)

Search Results Summary
Results 1 - 2 of 2

Display Type:

All
 DSS GA 213
 F063-08-71A
 Foster Care RE Packet
 Former Foster Youth Packet
 GN 6365
 GN 6365B
 GN 6070
 GN 6008
 General Relief Annual Agreement
 General Relief Annual Renewal Packet
 GA/GR RE Packet
 Images Received
 Kin-GAP RE Packet
 ABD MC RE Packet
 MC 176 S
 MAGI RE Packet
 Mixed Household RE Packet
 LTC MC RE Packet
 MC 604 IPS Packet
 Pre ACA MC RE Packet

Display Name:

All

From:

To:

[View](#)

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

[Images](#)

This Type_1 page took 0.36 seconds to load.

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

2.1.3 Description of Changes

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

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

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

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

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

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Customer Reporting Detail page

2.2.1 Overview

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

2.2.2 Customer Reporting Detail Mockup

Customer Reporting Detail

*- Indicates required fields

Images

Override

Save and Return

Cancel

Report Type:

General Relief Annual Renewal Packet

Submit Month:

09/2023

Date Received:

09/16/2023

Personal Contact:

No ▾

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

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

Images

Override

Save and Return

Cancel

This Type 1 page took 0.69 seconds to load.

Figure 2.2.1 – Customer Reporting Detail page

Customer Reporting Detail

*- Indicates required fields

Images

Override

Save and Return

Cancel

Report Type:
General Relief Annual Renewal Packet

Submit Month:
09/2023

Date Received:
09/16/2023

Personal Contact:
No

Status

Program	Status	Status Detail	Date
GA	Incomplete		

Incomplete Reasons

☐ SoF not Signed/Dated
☐ Missing Verifications

☐ Missing Answers on SoF

General Assistance/General Relief Status History

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

Images

Override

Save and Return

Cancel

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

Figure 2.2.1 – Customer Reporting Detail page with Incomplete Reasons

2.2.3 Description of Changes

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

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

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

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

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

e. Status Section

i. Program

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

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

ii. Status

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

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

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

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

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

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

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

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

c. When the latest status is 'Received'.

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

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

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

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

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

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

iii. Status Detail

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

iv. Date

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

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

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Update ABP 898 Form Not Received Status Reason

2.3.1 Overview

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

2.3.2 Description of Changes

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

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

2.3.3 Programs Impacted

General Assistance/General Relief

2.3.4 Performance Impacts

N/A

2.4 Create GA/GR Hearing with New Status Reason

2.4.1 Overview

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

2.4.2 Description of Changes

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

2.4.3 Programs Impacted

General Assistance/General Relief

2.4.4 Performance Impacts

N/A

2.5 End Date the General Relief Annual Agreement

2.5.1 Overview

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

2.5.2 Description of Change

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

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

Form Number: GR AA Packet

2.6 Add the General Relief Annual Renewal Packet

2.6.1 Overview

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

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

2.6.2 Description of Change

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

2.6.2.1 List of Forms

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

2.6.2.2 Packet Generation Schedule

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

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

April 18th, 2023

May 18th, 2023

June 17th, 2023

July 20th, 2023

August 19th, 2023

2.6.2.3 Variable Population

Populate the following variables on GR 22 form.

a) GR RE, General Relief Annual Renewal

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

2.6.2.4 Template Repository Details

1. Create General Relief Annual Renewal Packet

Form Header for Coversheet: Existing BRM Header (Header_BRM_EN)

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

Programs: General Assistance/General Relief

Forms Category: Application

Template Repository Visibility: LA County Only

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

Form Number: GR RE Packet

Include NA Back9: No

Imaging Form Name: GR RE Packet

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

Form Mockups/Examples: See Supporting Document #7

2. The following parameters should be included in the Document Parameters Page for the GR RE Packet
 - Case Number
 - Customer Name
 - Program
 - Language
 - RE Month

3. Add Form Print Options and Mailing Requirements

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

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

Mailing Requirements:

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

Mailed From (Return): Office tied to the Worker

Mail-back-to Address: BRM Address

Outgoing Envelope Type: Flat Mail

Return Envelope Type: BRM

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

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

Check to Sign: No

Post to Self Service Portal (SSP): Yes

2.6.2.5 Journal Entry

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

Journal Category: All

Journal Type: Document

Short description: GR RE Packet

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

Variable population for the Journal Entry:

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

2.6.2.6 Regression Test

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

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

2.7 Add GR 22 form

2.7.1 Overview

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

Programs: General Assistance/General Relief

Forms Category: Form

Template Repository Visibility: LA County Only

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

2.7.2 Form Verbiage

Create GR 22 Form XDP

Form Header: Existing Header (Header_1)

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

Form Number: GR 22

Include NA Back9: No

Imaging Form Name: GR 22

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

Form Mockups/Examples: See Supporting Document #8

2.7.3 Variable Population

Populate the following variables on GR 22 form.

Form Body Variables:

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

2.7.4 Form generation Conditions

1. Add Form to Template Repository

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

2. Add Form Print Options and Mailing Requirements

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

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

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

Mailing Requirements:

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

Mailed From (Return): Office tied to the Worker

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: No

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

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

Check to Sign: No

Post to Self Service Portal (SSP): Yes

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

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

2.8 Update GR 21 form in Template Repository

2.8.1 Overview

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

State Forms: GR 21 (LA County Form)

Current Programs: General Assistance/General Relief

Current Attached Forms: NA

Current Forms Category: Forms

Current Template Repository Visibility: LA County

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

2.8.2 Form/NOA Verbiage

Update GR 21 Form XDP

This form has verbiage updates.

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

Form Mockups: See Supporting Document 12

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

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

2.9.1 Overview

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

Reason Fragment Name and ID: GR_TN_FAIL_RETURN_SSP_G648 & 7200

Known County NOA: ABP 4023-T

Current NOA Template: GR_TERMINATION_TEMPLATE

Current Program(s): General Assistance/General Relief

Current Action Type: None

Current Fragment Level: Case

Currently Repeatable: No

Include NA Back 9: No

Current Forms/NOAs Generated with this NOA: None

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

2.9.2 NOA Verbiage

Update Fragment XDP

The verbiage of the fragment will be updated as follows:

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

NOA Mockups/Examples: See supporting document #9

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

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

2.9.3 NOA Variable Population

There are no updates to this section.

2.9.4 NOA Generation Conditions

There are no updates to this section.

2.10 Updates to Existing SSP 14 Form

2.10.1 Overview

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

State Form: SSP 14 (09/10)

Current Programs: General Assistance/General Relief

Current Attached Form(s): GR AA Packet

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

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

2.10.2 Form Verbiage

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

Update Form XDP

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

For migration counties, use the existing coversheet.

Form Mockups/Examples: See supporting document #10

2.10.3 Form Variable Population

There are no updates to this section.

2.10.4 Form Generation Conditions

1. Updates to Form Generation

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

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

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

2. Update Form Control

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

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

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

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

3. Updates to Form Print/Mailing Options

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

Mailing Options:

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

Mailed From (Return): No change to existing logic

Mail-back-to Address: County BRM Address*

Outgoing Envelope Type: No change to existing logic

Return Envelope Type: Returned Prepaid Envelope

Post to Self Service Portal (SSP): Yes

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

2.11 Add New SSP 14 Cover Page Form

2.11.1 Overview

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

State Form: N/A – Not a state form

Current Programs: General Assistance/General Relief

Current Attached Form(s): SSP 14

Current Forms Category: Forms

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

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

2.11.2 Form Verbiage

Create Form XDP

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

Form Header: CalSAWS standard header (Header_1)

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

Form Number: SSP 14 Cover Page

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Imaging Case/Person: N/A

Form Mockups/Examples: See supporting document #10

2.11.3 Form Variable Population

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

Form Body Variables:

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

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

2.11.4 Form Generation Conditions

1. Add Form Generation

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

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

2.12 Updates to Existing GR RD SSP 14 Set

2.12.1 Overview

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

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

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

Current Programs: General Assistance/General Relief

Current Attached Form(s): GR AA Packet

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

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

2.12.2 Form Verbiage

There are no updates to this section.

2.12.3 Form Variable Population

There are no updates to this section.

2.12.4 Form Generation Conditions

1. Updates to Form Generation

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

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

2.13.1 Overview

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

Known County NOA: ABP 4023-T

NOA Template: GR_TERMINATION_TEMPLATE

Program(s): General Assistance/General Relief

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

Fragment Level: Case

Repeatable: No

Include NA Back 9: No

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

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

2.13.2 NOA Verbiage

Create Fragment XDP

The verbiage of the fragment will be as follows:

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

NOA Mockups/Examples: See supporting document #11

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

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

2.13.3 NOA Variable Population

1. **Add Fragment Variable Population**

There is no variable population for the new fragment.

2. **Add Fragment Regulations**

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

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

The NOA title and description will be as follows:

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

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

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

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

2.13.4 NOA Generation Conditions

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

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

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

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

2.14 Regression Testing for GR Discontinuance Batch Sweep

2.14.1 Overview

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

2.14.2 Description of Changes

Perform regression testing for the following scenario:

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

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

2.15 RE Date Report

2.15.1 Overview

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

2.15.2 RE Date Report Screenshot

CalSAWS Summary

Data extracted daily as of: 03/08/2023 06:03:38 AM

County: ~

User: User Name

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

RE Due Month Department Office Unit Worker Missing REs Reset

CalWORKs/CalFresh

Program	Total	Customer Reports	Missing RE Data Total
CalFresh Only	3,836,284	387,736	0
CalWORKs and CalFresh	588,712	57,876	182,738
CalWORKs Only	216,348	61,312	0

Medi-Cal

Program	Total	Customer Reports	Missing RE Data Total
Medi-Cal	9,276,974	1,895,189	41,899

Transitional Nutrition Benefit

Program	Total	Customer Reports
Transitional Nutrition Benefit	2,782	192

GA/GR Only

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

*Currently only includes General Relief for LA county.

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

2.15.3 Description of Change

1. GA/GR and CF Base Population:

- The program is General Relief.

Code-18	Short Description
GA	General Assistance/General Relief

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

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

Code-72	Short Description
AC	Active
IN	Ineligible

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

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

Code-72	Short Description
DS	Discontinued

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

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

- The program is CalFresh.

Code-18	Short Description
FS	CalFresh

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

Code-368	Short Description
TC	Transitional

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

Code-72	Short Description
AC	Active

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

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

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

Code-72	Short Description
DS	Discontinued

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

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

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

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

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

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

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

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

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

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

CalSAWS

GA/GR and CF Details

Data extracted daily as of:
03/08/2023 06:38:38 AM

County:
-

User:
User Name

Summary

CW and CF Details

MC Details

TNB Details

GA/GR and CF Details

RE Due Month

Department

Office

Unit

Worker

Reset

*Currently only includes General Relief for LA county.

Total:
1,283

Case List

Summary

Case Number	Case Name	RE Due Month	GA/GR Worker	GA/GR Worker Begin Date	GA/GR Applic... Date	GA/GR Disco... Date	GA/GR RE Due Month	GA/GR Previ... RE Compl... Date	GA/GR Customer Report Type	GA/GR Customer Report Date	GA/GR Customer Report Current Status	GA/GR Custo... Report Current Status	CalFre... Worker Begin Date	CalFre... Applic... Date	CalFre... Disco... Date
1B0H936	Case Name	-	57L8892385	12/30/2022	09/01/2019	01/01/2023	08/2024	09/30/2021	-	-	-	-	-	-	-
1B0ZV98	Case Name	-	57L8892386	12/30/2022	10/01/2019	10/01/2019	03/2024	09/08/2021	-	-	-	-	-	-	-
1B07T54	Case Name	-	31L8892M29	10/03/2022	09/01/2019	09/01/2019	02/2024	10/15/2021	-	-	-	-	-	-	-
1B08M43	Case Name	-	57L8892386	12/30/2022	12/01/2019	12/01/2019	11/2023	05/07/2021	-	-	-	-	-	-	-
1B15K88	Case Name	-	31L8892MIQ	07/02/2020	07/01/2019	07/01/2019	12/2023	06/23/2021	-	-	-	-	-	-	-
1B19P93	Case Name	-	57L8810T1G	11/01/2022	09/21/2022	11/01/2022	03/2023	-	-	-	-	-	-	-	-
A218442	Case Name	-	33LS710P03	05/24/2022	12/11/2018	06/01/2020	01/2022	07/02/2021	-	-	-	-	-	-	-
A241662	Case Name	-	33LS22676D	08/31/2022	08/01/2019	08/01/2020	01/2023	07/21/2022	-	-	-	-	-	-	-
A258878	Case Name	-	33LS35A88	12/05/2022	08/04/2009	02/01/2021	01/2022	07/07/2021	-	-	-	-	-	-	-

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

CalSAWS

GA/GR and CF Details

Data extracted daily as of:
03/08/2023 06:38:38 AM

County:
-

User:
User Name

Summary

CW and CF Details

MC Details

TNB Details

GA/GR and CF Details

RE Due Month

Department

Office

Unit

Worker

Reset

*Currently only includes General Relief for LA county.

Total:
0

Case List

Summary

Program	Total	Customer Reports
GA/GR and CalFresh	0	0
GA/GR Only	0	0

8. GA/GR and CF Details – Filters

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

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

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

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

	customer report was generated for the GA/GR RE.
--	---

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

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

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

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

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

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

11. GA/GR and CF Details – Total

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

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

Format:

Total: [Row Count]

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

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

2.15.4 Report Location

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

2.15.5 Counties Impacted

The new sheet will only capture data for LA county.

2.15.6 Security Updates

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

2.15.7 Report Usage/Performance

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

2.16 General Relief Dashboard

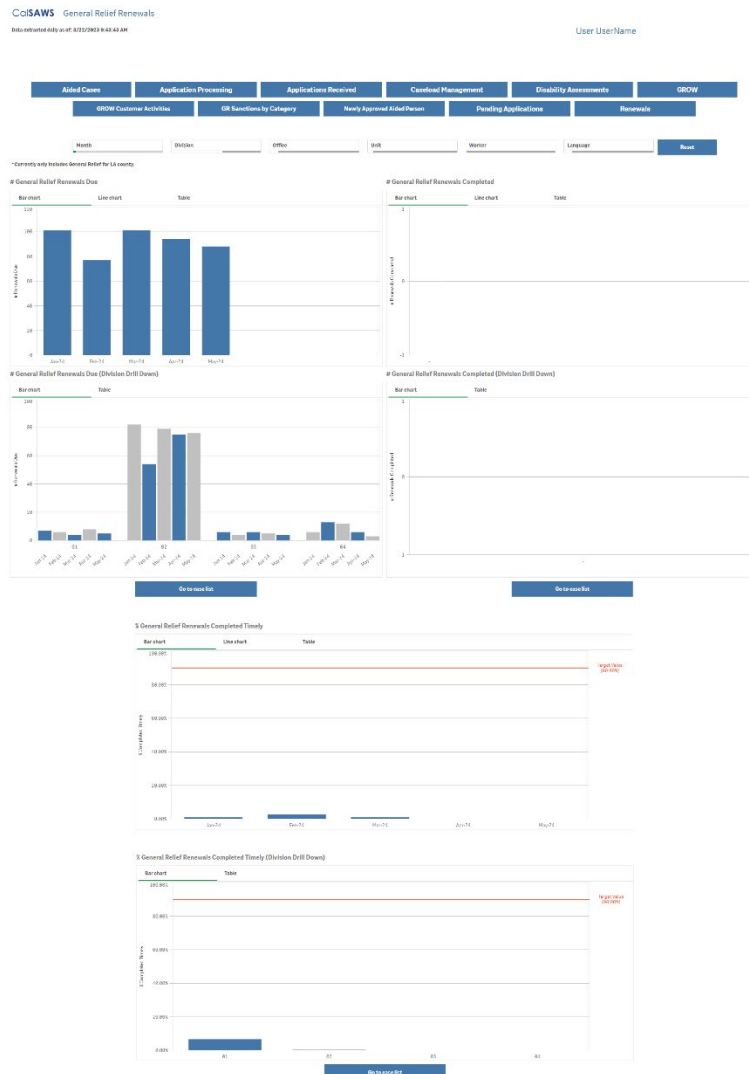
2.16.1 Overview

The General Relief Dashboard provides the following information:

Aided Cases, Application Processing, Applications Received, Caseload Management, Disability Assessments, GROW, GROW Customer Activities, GR Sanctions by Category, Newly Approved Aided Person, Pending Applications.

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

2.16.2 General Relief Renewals Sheet Screenshot



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

2.16.3 Description of Change

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

Base Population:

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

- The program is General Relief.

Code-18	Short Description
GA	General Assistance/General Relief

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

Code-72	Short Description
AC	Active

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

Code-1892	Short Description
NV	No Longer Valid
CO	Conversion

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

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

3. **Navigation Bar** – Every sheet on the Dashboard has the same navigation bar. Update all sheets to include a new 'Renewals' link which navigates the user to the new 'General Relief Renewals' sheet.

See the attached mockups in the Supporting Documents section for reference.

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

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

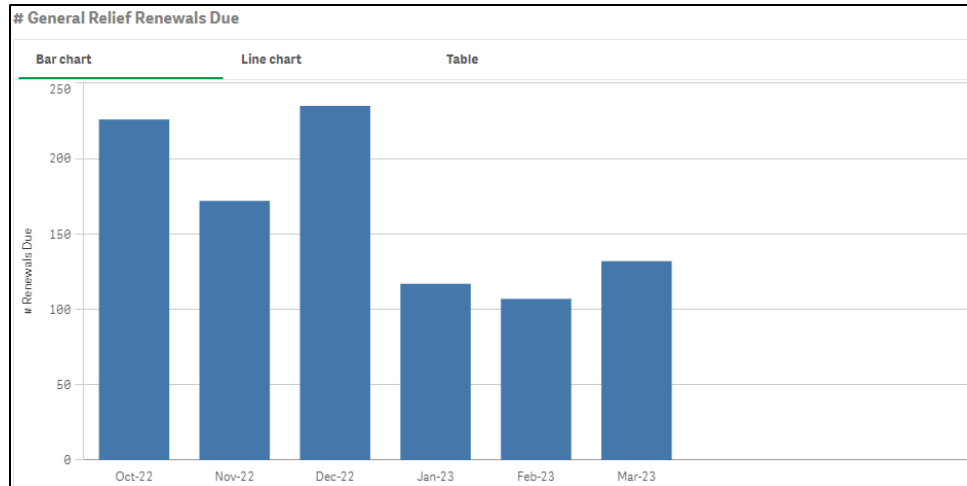
Filter	Description
Month	<p>A multi select parameter which filters the base population to those records where the RE Due Month is equal to the selected value(s).</p> <p>By default, the current month and the last 5 months are selected.</p> <p>Format: Mon-YY</p>

Filter	Description
Division	A multi select parameter which filters the base population to those records where the Division is equal to the selected value(s). By default, no value is selected.
Office	A multi select parameter which filters the base population to those records where the Office is equal to the selected value(s). By default, no value is selected.
Unit	A multi select parameter which filters the base population to those records where the Unit is equal to the selected value(s). By default, no value is selected.
Worker	A multi select parameter which filters the base population to those records where the Worker is equal to the selected value(s). By default, no value is selected.
Language	A multi select parameter which filters the base population to those program person that have their language set to the selected value(s). By default, no value is selected.

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

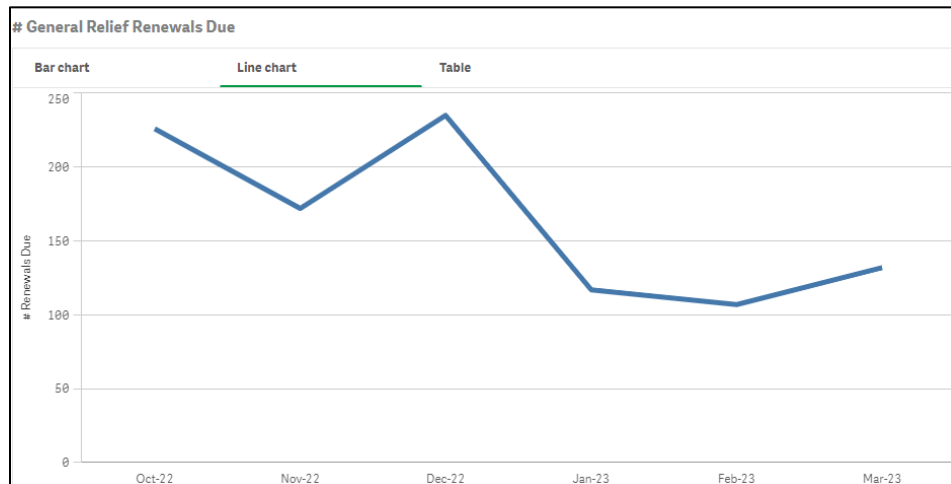
General Relief Renewals Due

View 1: Bar chart



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

View 2: Line chart



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

View 3: Table

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

Column 1: Due Date Month

Format: Mon-YY

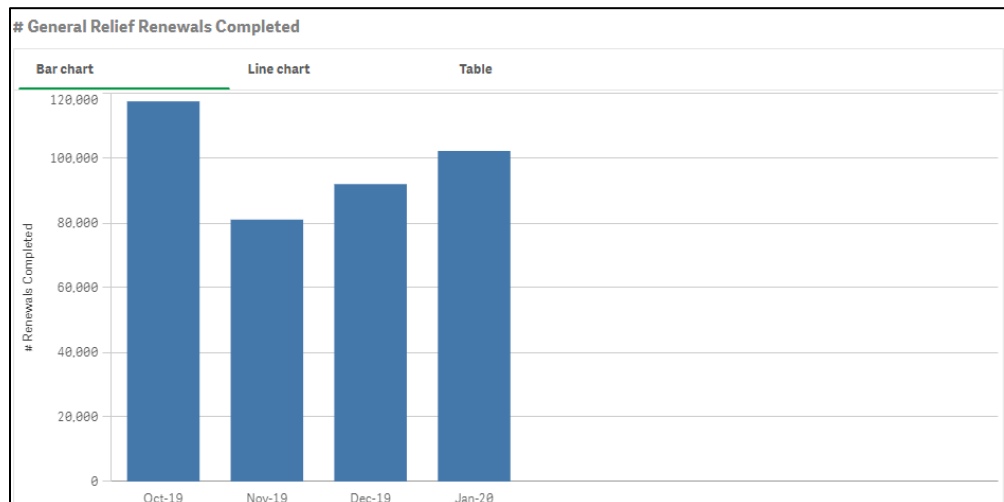
Order: Ascending

Column 2: # Renewals Due

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

General Relief Renewals Completed

View 1: Bar chart



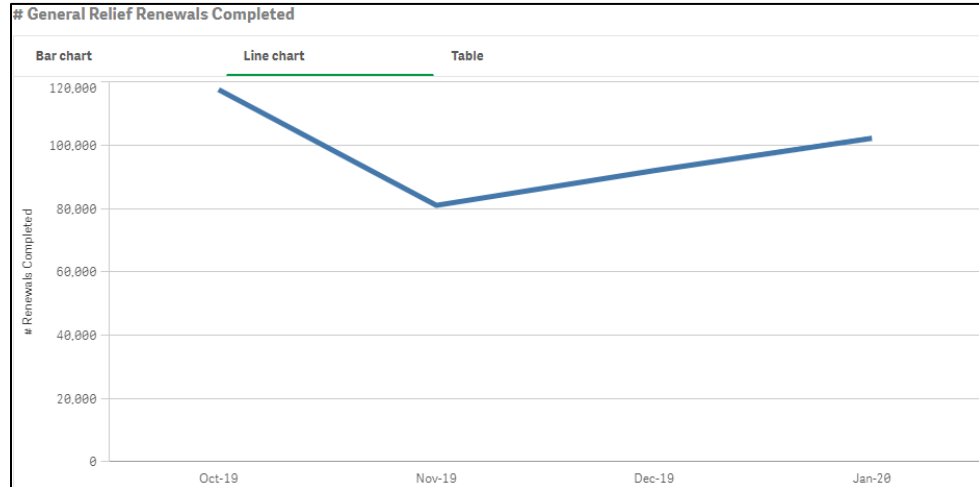
Bars = Completion Date

Format: Mon-YY

Order: Ascending

Length of bars = # Renewals Completed

View 2: Line chart



Line: Completion Date

Format: Mon-YY

Order: Ascending

Height of line: # Renewals Completed

View 3: Table

General Relief Renewals Completed

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

Column 1: Completion Month

Format: Mon-YY

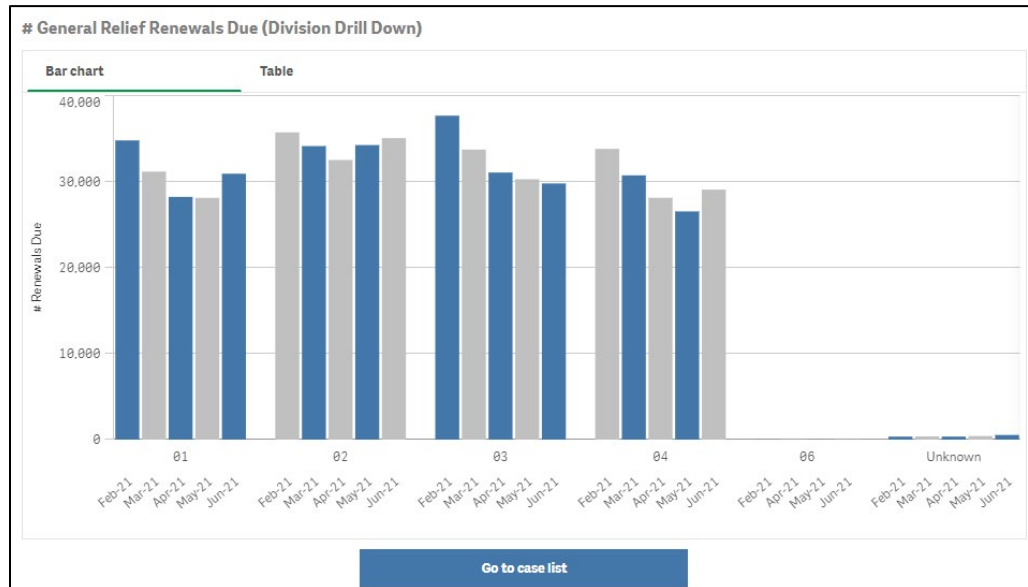
Order: Ascending

Column 2: # Renewals Completed

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

General Relief Renewals Due (Division Drill Down)

View 1: Bar chart



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

View 2: Table

General Relief Renewals Due (Division Drill Down)

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

Go to case list

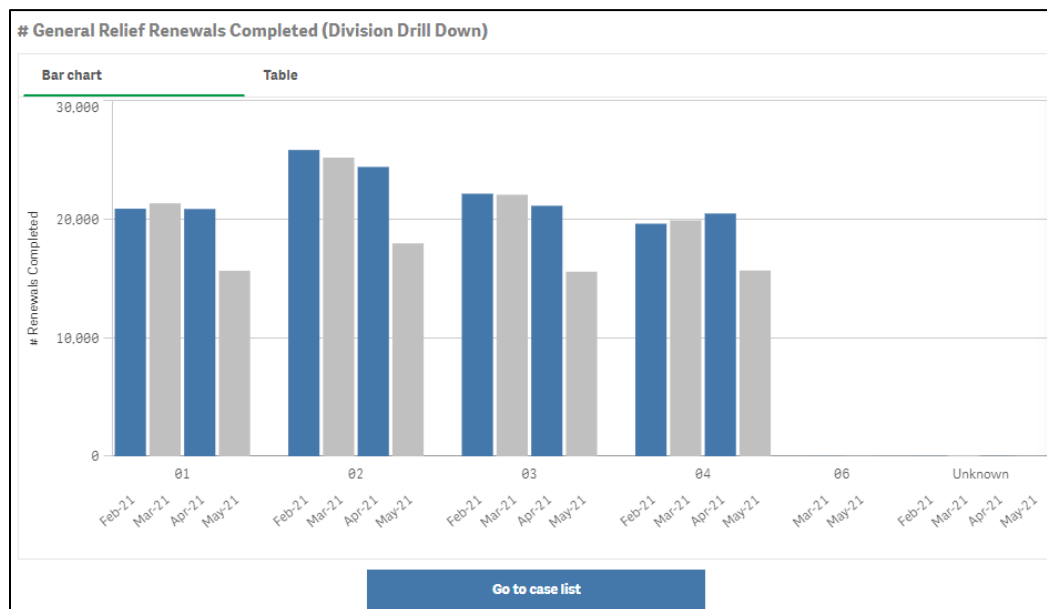
Column 1: Division Drill Down
 Order: Ascending

Columns 2: # Renewals Due

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

General Relief Renewals Completed (Division Drill Down)

View 1: Bar chart



Group = Division Drill Down

Order: Ascending

Bars = Completion Month

Order: Ascending

Length of bars = # Renewals Completed

View 2: Table

General Relief Renewals Completed (Division Drill Down)

Bar chart

Table

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

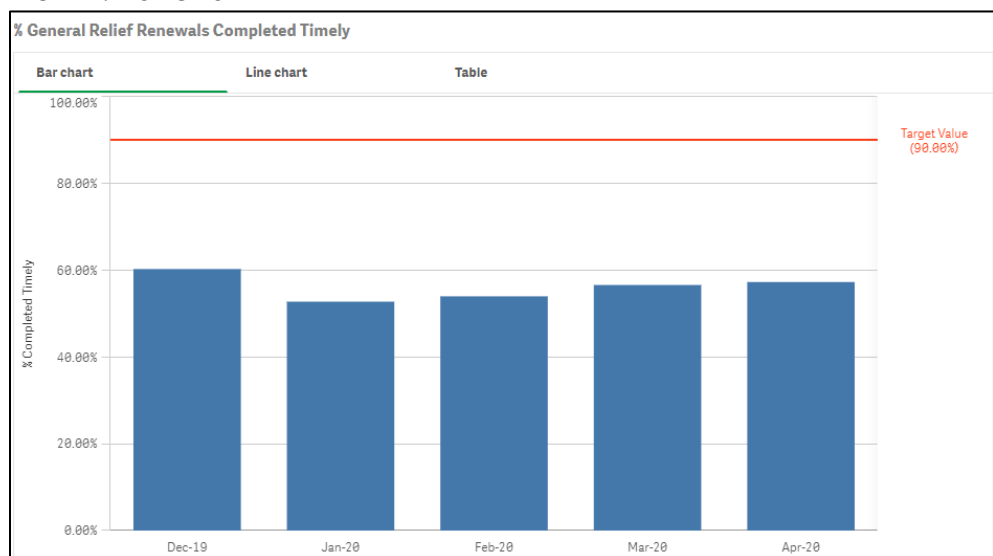
Go to case list

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

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

% General Relief Renewals Completed Timely

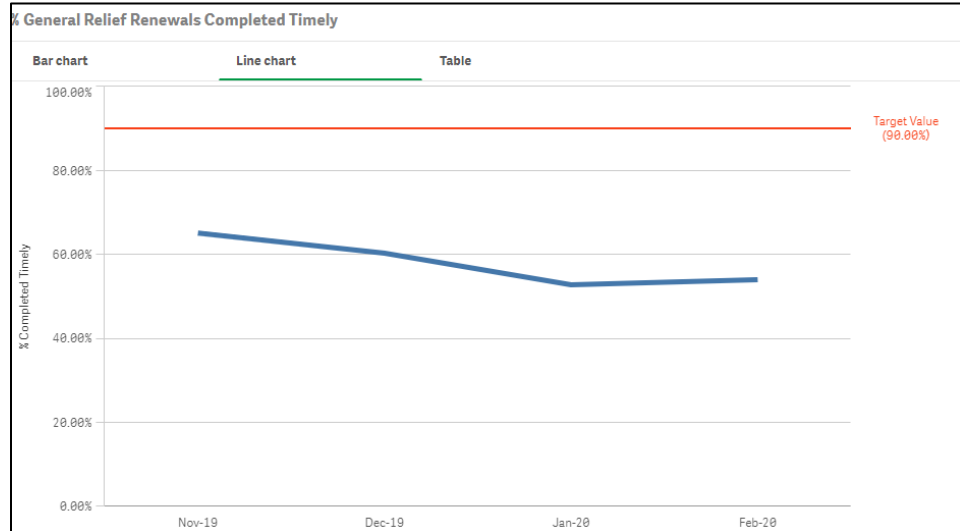
View 1: Bar chart



Group = Renewal Due Month

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

View 2: Line Chart



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

View 3: Table

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

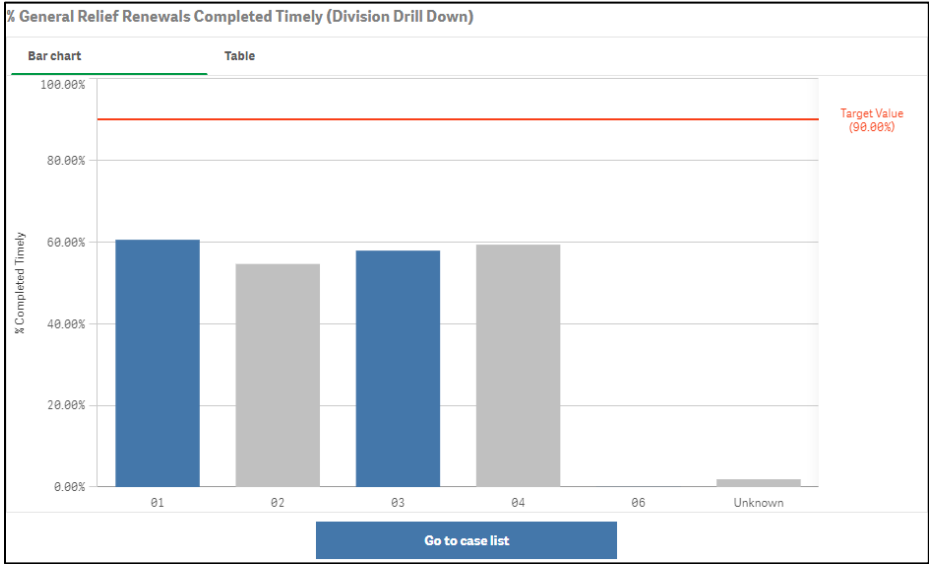
Column 1: RE Due Month
Order: Ascending
Columns 2: % Renewals Completed Timely

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

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

% General Relief Renewals Completed Timely (Division Drill Down)

View 1: Bar chart



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

View 2: Table

% General Relief Renewals Completed Timely (Division Drill Down)		
Bar chart		Table
Division	Q	% Renewals Completed Timely
01		51.79%
02		49.61%
03		48.48%
04		51.97%
06		25.00%
Unknown		1.76%

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

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

CoiSAWS General Relief Renewals Due

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

User UserName

Case Number	Case Name	Program	Primary Language	Division	Office	Unit	Worker	Renewal Due Month
8RQW47	Case Name	General Assistance/General Relief	English	02	036 Pomona	4Q - CASHIER	180P364Q88	04/2024
8RYN88	Case Name	General Assistance/General Relief	Armenian	01	082 West Valley	2K - Medi-Cal/CaFresh Approved	180P822K11	01/2024
81PU085	Case Name	General Assistance/General Relief	English	02	092 Hawthorne Medi-Cal Regional		08 180P92080E	01/2024
81R0773	Case Name	General Assistance/General Relief	Armenian	01	002 Glendale	A0 - Medi-Cal Approved/MSP-NATS	180P01A017	03/2024
81S0286	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	05/2024
81UM498	Case Name	General Assistance/General Relief	English	03	070 Metro Special Office	BS - Morelos - BS	180P70BS65	04/2024
81VU171	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	01/2024
81W0087	Case Name	General Assistance/General Relief	Spanish	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	03/2024
81Z8388	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	03/2024
81Z7683	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	01/2024
81ZWL04	Case Name	General Assistance/General Relief	English	01	003 Pasadena	1T - GR APPROVED	180P031T10	03/2024
81ZWM15	Case Name	General Assistance/General Relief	Spanish	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	05/2024
81ZK464	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	03/2024
82B133	Case Name	General Assistance/General Relief	English	03	040 Norwalk	3W	180P403W26	01/2024
82L126	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	03/2024
82N241	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	05/2024
82FH20	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	01/2024
82GR055	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	01/2024
82K006	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	01/2024
82K047	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	02/2024
82K751	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	02/2024
82Q087	Case Name	General Assistance/General Relief	English	02	016 Child Medi-Cal Enroll. Project	TJ - Fair Hearing	180P16TJ84	01/2024
Return								

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

Base Population:

Includes all tasks in the Historical Time Task Management Sheet's base population. The data is restricted by the filters that were selected in the previous page.

Columns:

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

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

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

ColSAWS General Relief Renewals Completed

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

User UserName

Case Number	Case Name	Program	Primary Language	Division	Office	Unit	Worker	Renewal Due Month	Renewal Completion Date
B080801	Case Name	General Assistance/General Relief	Spanish	04	006 Southwest Special	A1	19DP060119	1/7/2020	01/17/2021
B080819	Case Name	General Assistance/General Relief	English	01	004 Lancaster	4W - MC APPROVED	19DP0440016	04/2020	03/22/2021
B080C71	Case Name	General Assistance/General Relief	English	01	002 Glendale	2F - Medi-Cal/CalFresh Approved	19DP0227F1	01/2020	01/25/2021
B080G46	Case Name	General Assistance/General Relief	Spanish	01	003 Pasadena	1Y - Fair Hearing	19DP03172D	05/2020	03/21/2021
B080H18	Case Name	General Assistance/General Relief	English	02	036 Pomona	4P - CDC	19DP06409Q	04/2020	01/06/2021
B080H52	Case Name	General Assistance/General Relief	Spanish	02	002 Hawthorne Medi-Cal Regional	14 - Kokoova - 14	19DP021484	06/2020	03/04/2021
B080H74	Case Name	General Assistance/General Relief	Spanish	03	070 Metro Special Office	66 - Pineda - 66	19DP07068E	03/2020	03/25/2021
B080J04	Case Name	General Assistance/General Relief	English	01	002 West Valley	68 - Davtyan - 68	19DP02682X	02/2020	02/16/2021
B080K04	Case Name	General Assistance/General Relief	English	01	034 Lancaster	5F - JUV	19DP04598O	06/2020	02/05/2021
B080P12	Case Name	General Assistance/General Relief	English	01	007 Lancaster General Relief Office	A1	19DP074284	06/2020	03/03/2021
B080C12	Case Name	General Assistance/General Relief	Armenian	02	030 Metro North Office	AE - Aysapetian - AE	19DP0304E1A	04/2020	03/07/2021
B080R12	Case Name	General Assistance/General Relief	Spanish	02	006 Long Term Care	SL - SVS	19DP06013P	04/2020	03/15/2021
B080R04	Case Name	General Assistance/General Relief	Spanish	02	003 Hawthorne Medi-Cal Regional	1L - MACO Approved	19DP0211L6	04/2020	03/11/2021
B080R02	Case Name	General Assistance/General Relief	English	01	002 West Valley	1X - CalFresh/Medi-Cal Approved	19DP0212X26	04/2020	01/07/2021
B080S41	Case Name	General Assistance/General Relief	English	04	003 Southwest Family	B5 - CW Approved Bilingual	19DP033851Q	12/2020	01/26/2021
B080S41	Case Name	General Assistance/General Relief	English	04	003 Southwest Family	B5 - CW Approved Bilingual	19DP033851Q	01/2021	01/26/2021
B080S41	Case Name	General Assistance/General Relief	English	04	003 Southwest Family	B5 - CW Approved Bilingual	19DP033851Q	02/2021	02/18/2021
B080V07	Case Name	General Assistance/General Relief	Cantonese (Chinese)	03	020 San Gabriel Valley	3W	19DP0209W17	04/2020	03/11/2021
B080V10	Case Name	General Assistance/General Relief	English	01	002 Glendale	2K - Medi-Cal/CalFresh	19DP0212K0U	06/2020	03/03/2021

Return

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

Base Population:

Includes all tasks in the Historical Time Task Management Sheet's base population that are completed. The data is restricted by the filters that were selected in the previous page.

Columns:

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

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

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

Case Number	Case Name	Program	Primary Language	Division	Office	Unit	Worker	Renewal Due Month	Renewal Completion Date	Timeliness Indicator
BBWZ15	Case Name	General Assistance/General Relief	Spanish	04	031 South Family	40	19DP3140W	03/2023	-	Not Timely
BBDC673	Case Name	General Assistance/General Relief	English	03	040 Norwalk	4C - MEDS RECON	19DP404C4D	12/2022	-	Not Timely
BBG1469	Case Name	General Assistance/General Relief	Spanish	02	000 Long Term Care	5L - 3V3	19DP805L3L	10/2022	-	Not Timely
BBGQ367	Case Name	General Assistance/General Relief	Spanish	02	030 Metro North Office	2N - 333	19DP302N0U	11/2022	-	Not Timely
BBGQV37	Case Name	General Assistance/General Relief	English	03	040 Norwalk	4C - MEDS RECON	19DP404C4P	10/2022	-	Not Timely
BBH0076	Case Name	General Assistance/General Relief	Arabic	02	030 Rethma	4V - 3UP	19DP304V0L	12/2022	-	Not Timely
BBJ0N10	Case Name	General Assistance/General Relief	Spanish	03	000 Cudahy	PE - MGR	19DP80PE00	12/2022	-	Not Timely
BBJZ198	Case Name	General Assistance/General Relief	English	01	014 Lancaster	17 - 202	19DP141707	12/2022	-	Not Timely
BBK0679	Case Name	General Assistance/General Relief	Mandarin (Chinese)	02	014 Civic Center	1K - CalFresh/Medi-Cal Approved	19DP141K2Z	12/2022	-	Not Timely
BBK3F63	Case Name	General Assistance/General Relief	English	03	000 Cudahy	PE - MGR	19DP80PE01	10/2022	-	Not Timely
BBKT117	Case Name	General Assistance/General Relief	Spanish	03	000 Cudahy	PE - MGR	19DP80PE00	10/2022	-	Not Timely
BBM1402	Case Name	General Assistance/General Relief	English	02	000 Long Term Care	1S - 2004	19DP001S07	11/2022	-	Not Timely
BBM1503	Case Name	General Assistance/General Relief	Spanish	02	010 Welfare Special Office	KJ - GRCC	19DP10KJ00	11/2022	-	Not Timely
BBNCC32	Case Name	General Assistance/General Relief	Spanish	02	000 Long Term Care	1K - CalFresh/Medi-Cal Approved	19DP801K10	12/2022	-	Not Timely
BBNCT74	Case Name	General Assistance/General Relief	English	02	002 Hawthorne Medi-Cal Regional	1J - CalFresh/Medi-Cal Approved	19DP021J0K	12/2022	-	Not Timely
BBNPP56	Case Name	General Assistance/General Relief	Mandarin (Chinese)	02	014 Civic Center	1K - CalFresh/Medi-Cal Approved	19DP141K2K	10/2022	-	Not Timely
BBN2M68	Case Name	General Assistance/General Relief	Spanish	03	000 Belvedere	A2 - Alvarado - A2	19DP00A210	10/2022	-	Not Timely
BBP7035	Case Name	General Assistance/General Relief	English	02	000 Long Term Care	1K - CalFresh/Medi-Cal Approved	19DP801K10	12/2022	-	Not Timely

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

Base Population:

Includes all tasks in the Historical Time Task Management Sheet's base population. The data is restricted by the filters that were selected in the previous page.

Columns:

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

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

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

Column Name	Column Description
Case Number	Displays the Case Number on the case.
Case Name	Displays the Case Name on the case.

Column Name	Column Description
Program	Displays the program name of the program.
Primary Language	Displays the current Primary Language of the primary applicant.
Division	Displays the Division of the program assigned worker.
Office	Displays the Office of the program assigned worker.
Unit	Displays the Unit of the program assigned worker.
Worker	Displays the current program assigned worker of the program.
Renewal Due Month	Displays the RE Due Month of the renewal. Format: MM/YYYY
Renewal Completion Date	Displays the completion date of the Renewal. Format: MM/DD/YYYY The column will be blank if the RE was not competed.
Timeliness Indicator	Indicates whether the RE was completed timely. Possible Values: <ul style="list-style-type: none"> • Timely – If the completion date is less than or equal to the RE Due month. • Not Timely - If the completion date is greater than the RE Due month.

2.16.4 Report Location

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

2.16.5 Counties Impacted

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

2.16.6 Security Updates

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

2.16.7 Report Usage/Performance

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

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

2.17.1 Overview

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

2.17.2 Description of Change

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

2.17.3 Execution Frequency

No Change

2.17.4 Key Scheduling Dependencies

No Change

2.17.5 Counties Impacted

LA







2.17.6 Data Volume/Performance

N/A

2.17.7 Failure Procedure/Operational Instructions

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	RE Date Report – Summary Sheet Mockup	 RE Date Report Summary Sheet.png
2	Reports	RE Date Report – GA/GR Details Sheet Mockup	 RE Date Report GAGR Details Mockup
3	Reports	General Relief Renewals Sheet Mockup	 General Relief Renewals Sheet Mock
4	Reports	General Relief Renewals Due Case List Mockup	 General Relief Renewals Due Case Li
5	Reports	General Relief Renewals Completed Case List Mockup	 General Relief Renewals Completed
6	Reports	% General Relief Renewals Completed Timely Case List	 % General Relief Renewals Completed
7	Forms	General Relief Annual Renewal Packet Mockup	General Relief Annual Renewal Packet Mockup.pdf
8	Forms	GR 22 Form Mockup	GR22_Form_Mockup.pdf

9	NOAs	GR Discontinuance NOA - Failed to Return SSP 14 NOA Mockup	Failed to Return SSP 14_EN.pdf
10	Forms	SSP 14 and Cover Page Mockup	SSP14_EN.pdf
11	NOAs	GR Discontinuance NOA - Failed to Return GR RE Packet NOA Mockup	Failed to Return GR RE Packet_EN.pdf
12	Form	GR 21 Form Mockup	GR21_Form_Mockup.pdf

4 APPENDIX

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

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

1. Customer Report Type Code is QR7 or General Relief Annual Agreement, and
2. Current date is between program begin date and end date, and
3. Customer Report Effective Month is current month, and
4. EDBC begin date is less than or equal to beginning of current month, and
5. EDBC end date is greater than or equal to beginning of current month, and
6. EDBC status is Accepted – Saved, and
7. Customer Report Type Detail Status code is Sent, Incomplete, or Error

5 REQUIREMENTS

5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none">a. Appointment notices;b. Redetermination, Recertification, and/or Annual Agreement notices and forms;c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);d. Periodic reporting notices;e. Contact letters;f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;g. Information notices and stuffers;h. Case-specific verification/referral forms;i. GR Vendor notices;k. Court-mandated notices, including Balderas notices;l. SSIAP appointment notices;m. Withdrawal forms;n. COLA notices;o. Time limit notices;p. Transitioning of aid notices;q. Interface triggered forms and notices (e.g., IFDS, IEVS);r. Non-compliance and sanction notices;s. Benefit issuance and benefit recovery forms and notices, including reminder notices;t. Corrective NOAs on State Fair Hearing decisions;	<p>Replacing the Annual Agreement packet with the new Annual Renewal Packet. Updating the NOAs tied to the annual renewal for General Relief.</p>

	u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	
2.12.1.1 CAR-1037	The LRS shall identify and display cases subject to periodic reporting requirements, by program or combination of programs.	The Customer Reporting pages will be updated to capture the new Packet for LA county in order for the renewal packet to be track.