



[CA-226701] Create Flexible CW/CF RE Appointment Batch Job for Migration Counties

Issue Type:	SCR	Team Responsible:	Batch/Interfaces	Assignee:	Unassigned
Fix Version/s:	[23.09]	Designer Contact:	Shining Liu	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	217
Reporter:	Caroline Bui	Regulation Reference:	ACL 21-24	Created:	03/23/2021 03:14 PM
Status:	Design in Progress	Impact Analysis:		Outreach Required:	
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Funding Source ID:			
Other Agency Cross Reference:					

Current Design: Currently, there is an RE appointment scheduling job for regular telephone interviews only.

In CalSAWS, when a phone message reminder is sent, a journal entry is automatically created. For text message reminders, there exist in the case's Contact History of the text message being sent, but there is no journal entry created for it.

- Request:** The system must:
1. Eliminate the requirement that the Eligibility Status Report Form (SAR 7) be signed no earlier than the first day of the sixth month of the semi-annual reporting (SAR) period as a criterion for completeness.
 2. Remove the 'Dated Before Last Day of Report Month' and 'Dated Before Last Date of SAR Report Month' option from the PR - Incomplete Reasons block on the Customer Reporting Detail page and Customer Reporting Detail - Override page.
 2. A journal must be generated when the system sends a text to remind customers about RE/SAR7s.
 3. Update journal verbiage for phone messages sent to remind customers about RE/SAR7s.
 4. Create a new batch job to auto-schedule CWCF RE appointments with the flexible phone interview introduced with SCR CA-246603 for Migration Counties.
 5. Update existing CWCF RE Appointment batch job to send out Outlook email to worker.

Note: GEN 102 requirement moved to CA-246603.

- Recommendation:**
1. Update the Customer Reporting Detail and Customer Reporting Detail – Override page to no longer display the 'Dated Before Last Day of SAR Report Month' and 'Dated Before Last Day of Report Month' from the PR-Incomplete Reasons block when the report status is set to Incomplete.

Outreach Description:
Operational Impact: