

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-235210

Homeless Temp AU Size Based on CalWORKs AU Size Calculation

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Yale Yee
	Reviewed By	Business Analysts, Build Team, Test Team, CW/CF Committee

[illegible]

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1 OVERVIEW

1.1 Current Design

When running a Homeless – Temp (HT) EDBC, a CalWORKs (CW) program needs to be Pending or Active.

HT EDBC determines the Assistance Unit (AU) size independently and does not calculate the AU size based on CW information. All registered applicants for HT are included in the calculation.

1.2 Requests

When determining an apparently eligible household for HT, the HT AU size calculation will be updated to align with the CW AU and will not count in the AU size in HT. In addition, all non AU members will not count in the AU size in HT.

Per MPP 44-211.521(a), MPP 44-211.521(b), MPP 40-129.214(a):

In determining an apparently eligible AU for HT, the following persons are not included in the AU size:

- a. A non-citizen applicant who does not provide verification of their eligible non-citizen status; or
- b. A person with no eligible children or verified pregnancy; or
- c. A person who is sanctioned.

1.3 Overview of Recommendations

1. The HT AU size calculation is determined based on the CW AU Size calculation.

1.4 Assumptions

1. This effort will not add or update any existing Threshold Languages available for NOAs.
2. This effort will not add or modify NOAs for Homeless Temporary NOAs.
3. For LA County only, the implementation of this SCR will **NOT** affect/impact current CalSAWS functionality used to process and issue THAP+14 benefits.

2 RECOMMENDATIONS

2.1 Update HT EDBC AU Size Calculation

2.1.1 Overview

In determining an apparently eligible AU for HT, the following persons are not included in the AU size:

- (1) A non-citizen applicant who does not provide verification of their eligible non-citizen status; or
- (2) A person with no eligible children who does not provide medical verification of pregnancy; or
- (3) A person who is sanctioned.

2.1.2 Description of Changes

Add the following status reasons to the HT EDBC determination:

- 1. A non-citizen applicant who does not provide verification of their eligible non-citizen status:
 - a. Ineligible Non Citizen
- 2. A person with no eligible children or verified pregnancy:
 - a. CW - No Elig Child
- 3. A person who is sanctioned:
 - a. Refused Assign Supp Rights
 - b. FTP INS Document
 - c. Didn't Sign WTW
 - d. CW Non Part.
 - e. FTP Sponsor SOF
 - f. FTP Sponsor Dependents
 - g. SSN Enumeration
 - h. FTP Sponsor Property
 - i. FTP Sponsor Income
 - j. FTP Age Verification
 - k. Refuse to Comply Sponsorship
 - l. SAR 22 Form Not Received
 - m. Sponsor Meeting Needs
 - n. Sponsor and family resources over limit

Note: The HT EDBC will run CW rules for status reasons that meet the above criteria. The priority for the CW status reasons will be the same for HT.

2.1.3 Programs Impacted

Homeless - Temp

2.1.4 Performance Impacts

N/A

2.2 Automated Regression Test

2.2.1 Overview

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

2.2.2 Description of Changes

Create a case with CW and HT. Add the following persons to the case. Run EDBC and confirm that the persons are excluded from the AU.

- i. A non-citizen with status not verified.
- ii. Person with no children and pregnancy not verified.
- iii. Person who is sanctioned.

3 OUTREACH

3.1 Lists

Provide a list of cases with an active HT program where one of the following person status reasons (high dated record) applies:

- (1) A non-citizen applicant who does not provide verification of their eligible non-citizen status; or
- (2) A person with no eligible children who does not provide medical verification of pregnancy; or
- (3) A person who is sanctioned.

List Name: List_of_HT_Cases_Where_Status_Reason_Applies

List Criteria: A list of HT cases where one of the following person status reasons applies:

- (1) A non-citizen applicant who does not provide verification of their eligible non-citizen status; or
- (2) A person with no eligible children who does not provide medical verification of pregnancy; or

(3) A person who is sanctioned.

Standard Columns:

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

Additional Column(s): Benefit Month, Household Size, Person Name

Frequency: One-time

The list will be posted to the following location:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-235210

CalSAWS

California Statewide Automated Welfare System

Design Document

CA- 217158

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Arun Gurijala

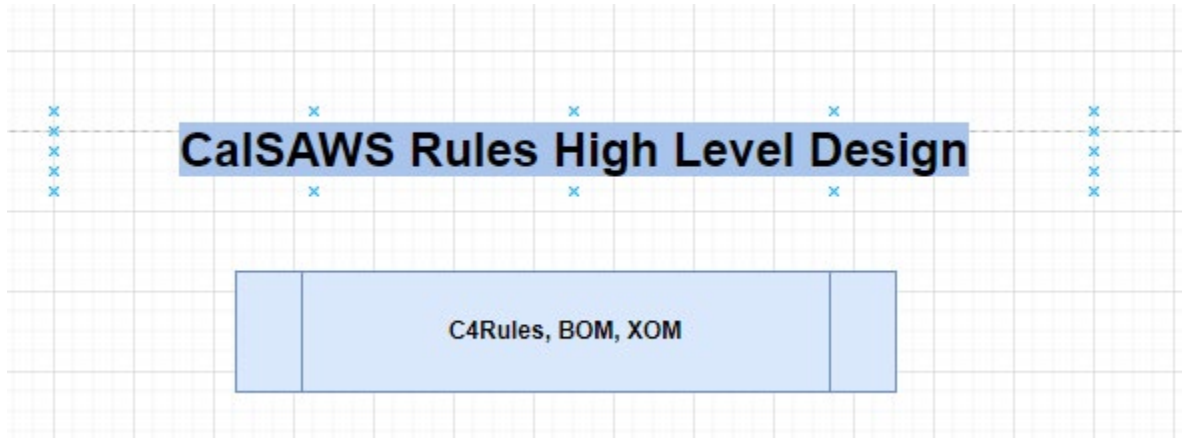
DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/19/2022	1.0	Initial Draft	Arun Gurijala
12/16/2022	1.1	Updated the Rule Execution, Security and Scaling	Arun Gurijala

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1 OVERVIEW

1.1 Current Design



1.2 Requests

1.3 Overview of Recommendations

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1.4 Assumptions

N/A

2 RECOMMENDATIONS

This SCR introduces the ODM Rules Engine SOA architecture and rule execution remotely.

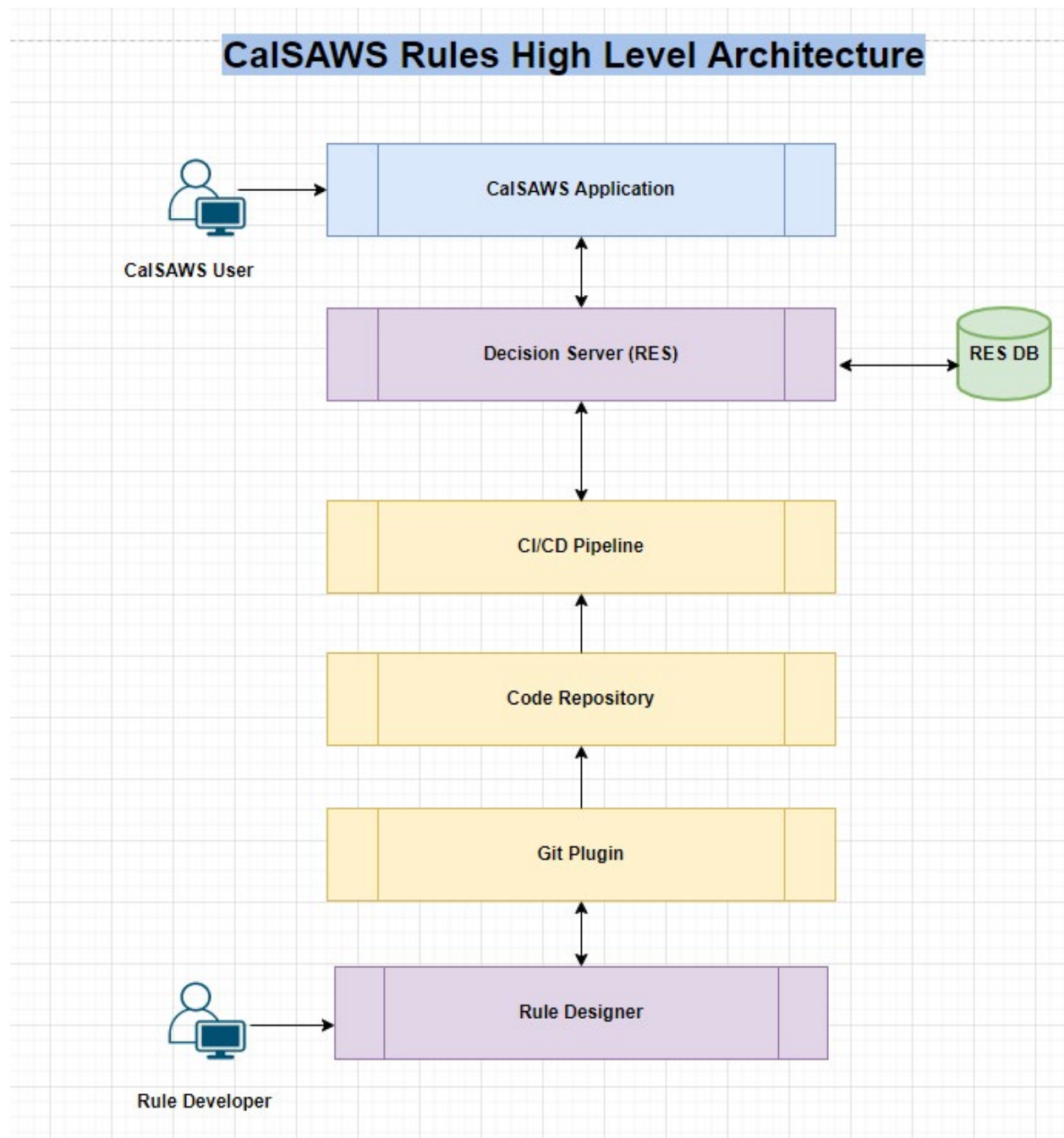
2.1 Overview

The calls to ODM Rule Services are made by CalSAWS application to execute the business rules.

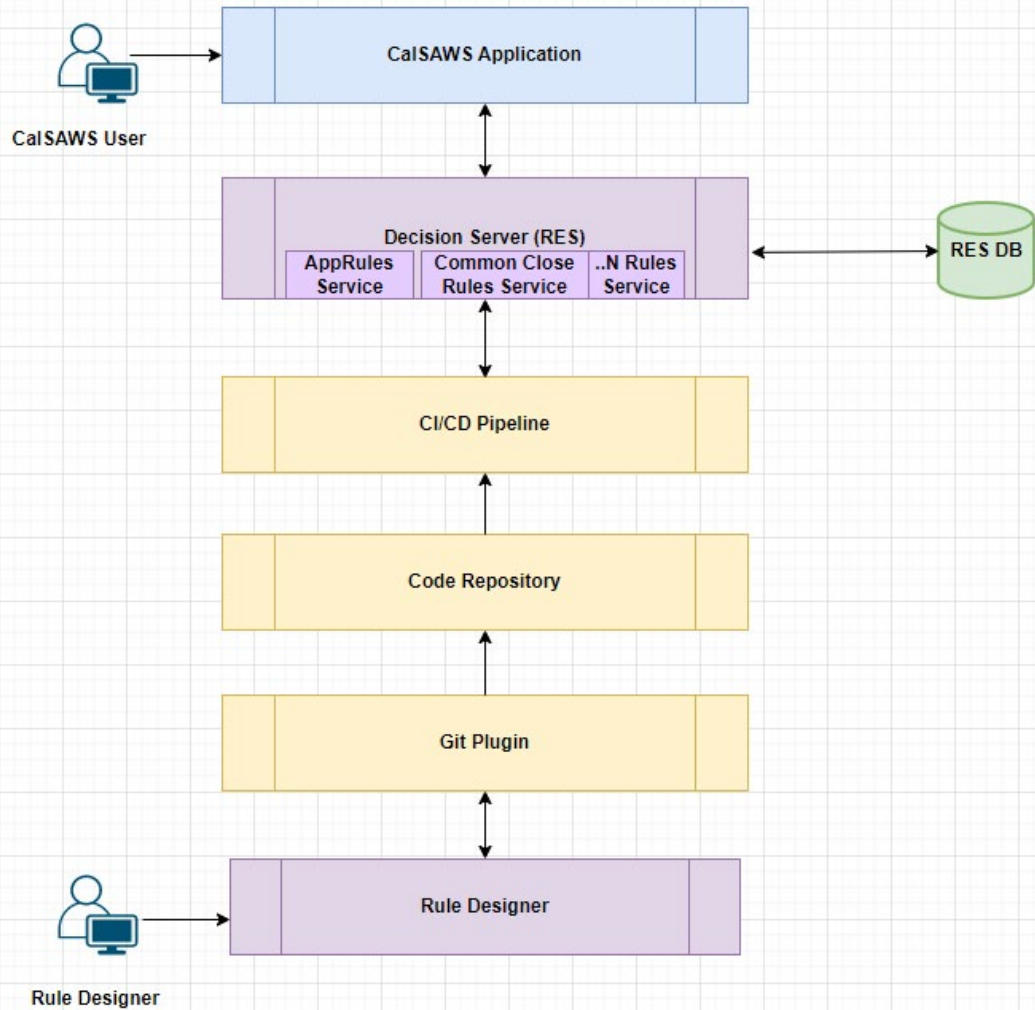
2.2 Description of Changes

Rule Execution is moved from embedded mode to remote execution using Rules Microservice architecture.

2.3 High Level Architecture

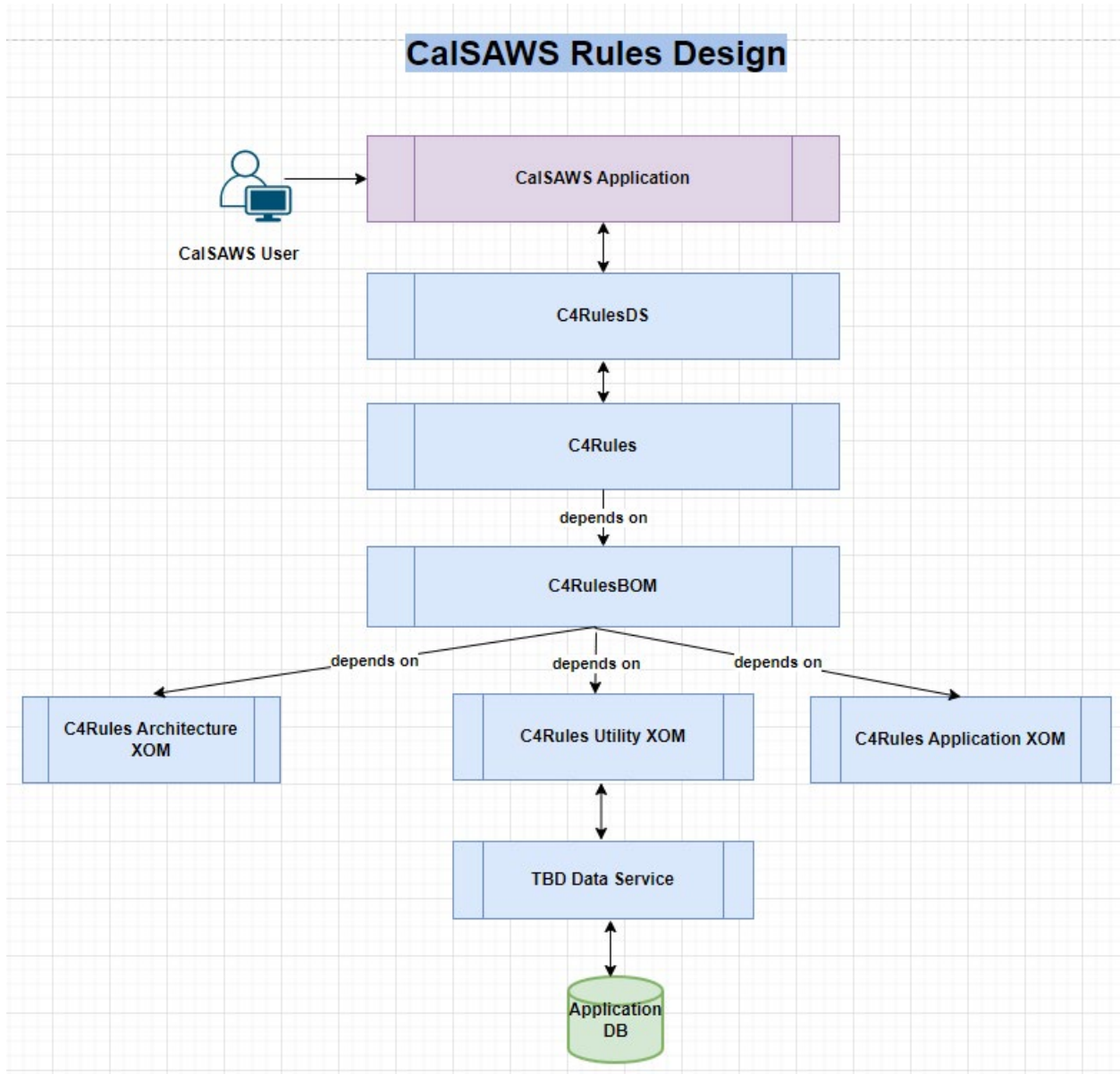


CalSAWS Rules High Level Architecture



2.4 Rule Project Design

2.4.1 C4Rules Design



2.5 Design Decisions

2.5.1.1 Rule Project Design Decisions

- Single monolithic C4Rules Rule Project
- All the 139 Rulesets will be part of one Rule Project

2.5.1.2 Rule App Deployment Design Decisions

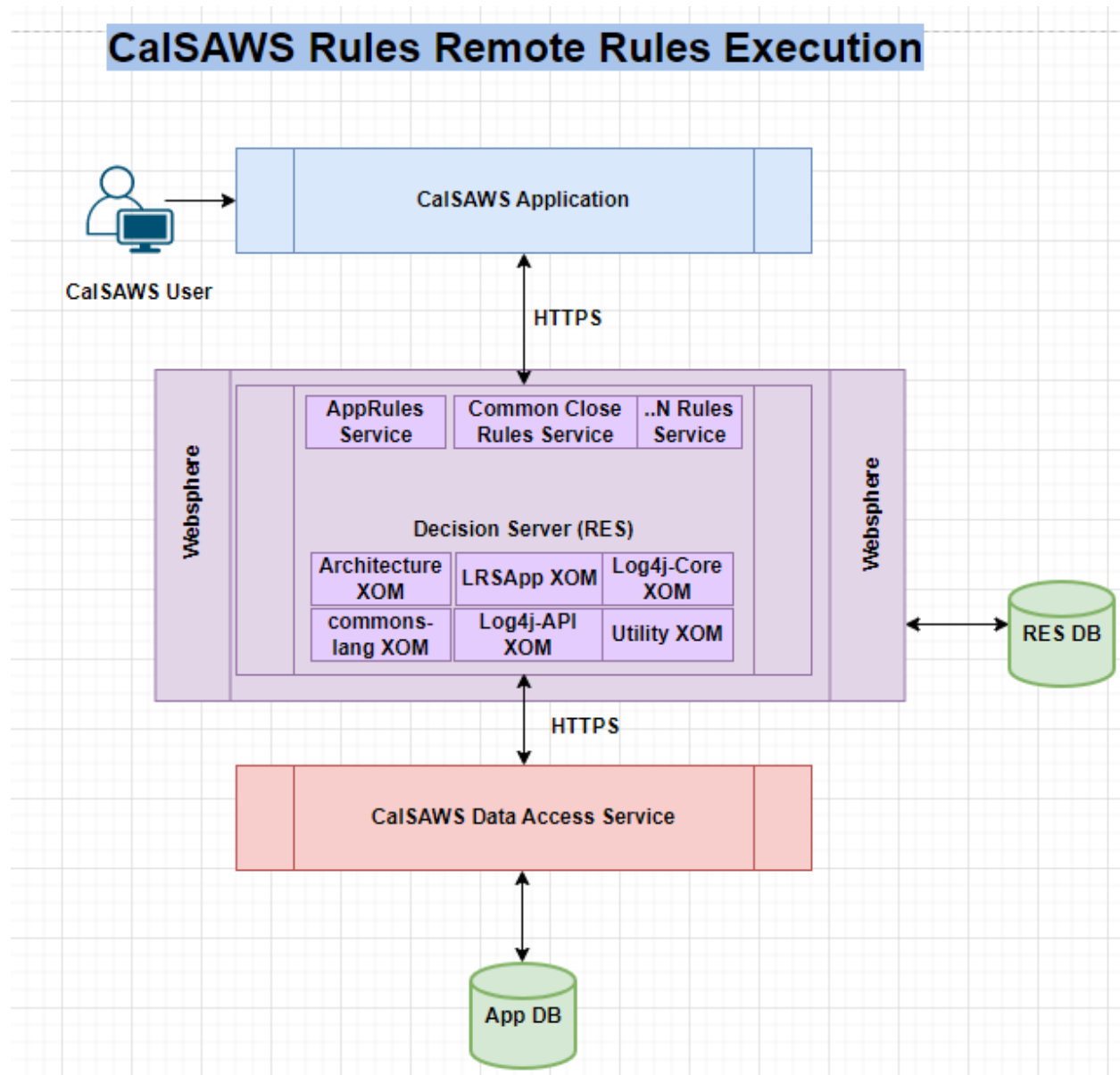
- Each Ruleset will be deployed as a single Rule App
- All the 139 Rulesets will be part of individual Rule App's

2.5.1.3 XOM Deployment Design Decisions

- XOM will be deployed along with each Rule App
- Each Rule App will refer to the same XOM version

2.6 Rule Execution

CalSAWS Rules Remote Rules Execution

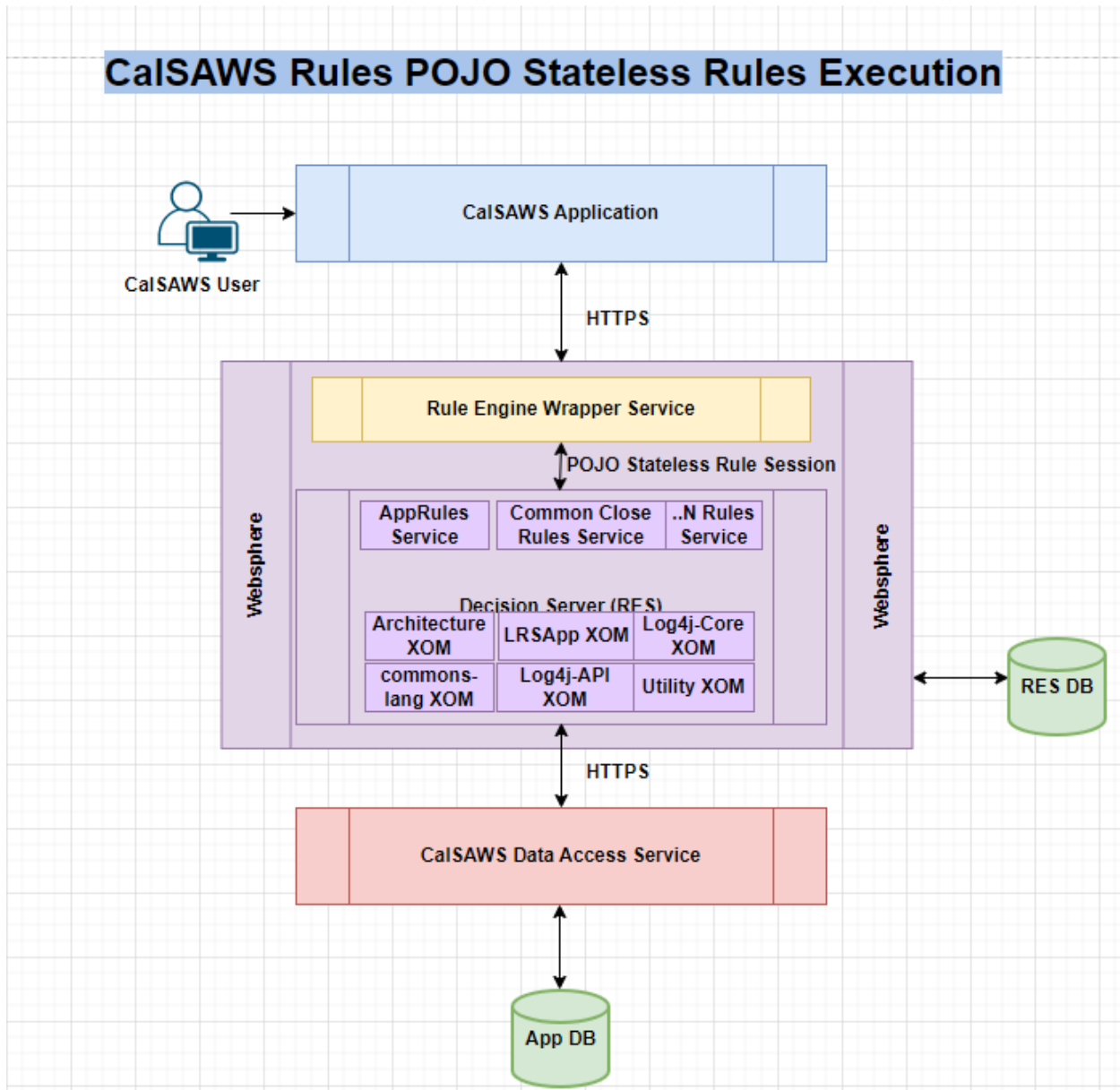


2.6.1.1 PROS

- 1) Centralized Rule Execution
- 2) Remote RESTFUL Service invocation
- 3) Transaction management is taken care by the Application Server
- 4) Reduced licensing cost
- 5) Transaction logging is taken care by the Application Server
- 6) Support for AWS Kubernetes including scaling up and down depending up on load and traffic
- 7) Supports Rules Hot Deployment

2.6.1.2 CONS

- 1) Does not support updating working memory updates



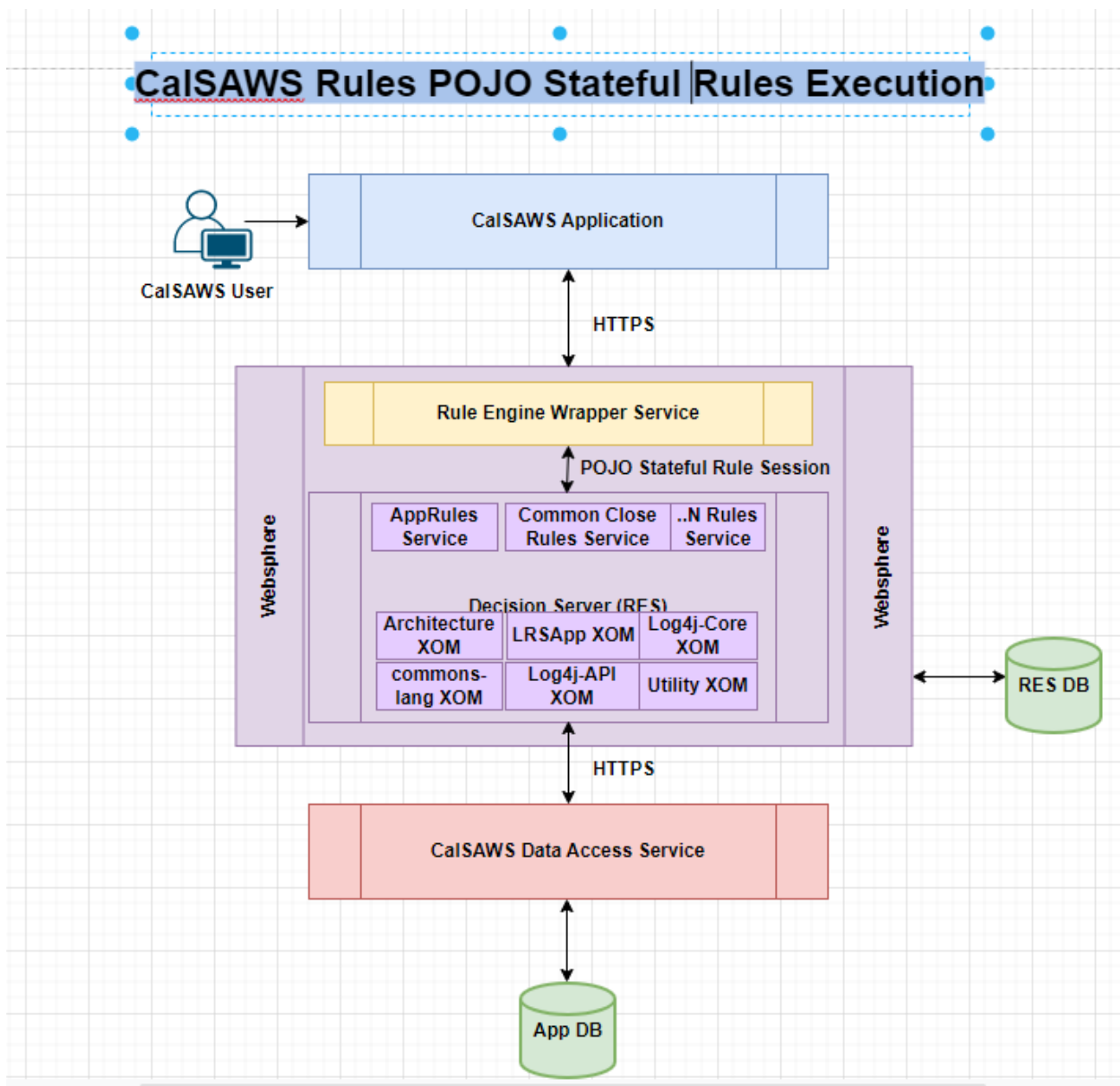
2.6.1.3 PROS

- 1) Centralized Rule Execution
- 2) Remote RESTFUL Service invocation
- 3) Transaction management is taken care by the Application Server
- 4) Reduced licensing cost
- 5) Transaction logging is taken care by the Application Server

- 6) Support for AWS Kubernetes including scaling up and down depending up on load and traffic
- 7) Supports Rules Hot Deployment

2.6.1.4 CONS

- 1) There might be licensing cost for deploying the wrapper service on WebSphere Liberty Application Server
- 2) A new Wrapper Service need to be developed and maintained
- 3) Does not support updating working memory updates



2.6.1.5 PROS

- 1) Centralized Rule Execution
- 2) Remote RESTFUL Service invocation
- 3) Transaction management is taken care by the Application Server
- 4) Reduced licensing cost
- 5) Transaction logging is taken care by the Application Server
- 6) Support for AWS Kubernetes including scaling up and down depending up on load and traffic
- 7) Supports Rules Hot Deployment
- 8) support updating working memory updates

2.6.1.6 CONS

- 1) There might be licensing cost for deploying the wrapper service on WebSphere Liberty Application Server
- 2) A new Wrapper Service need to be developed and maintained

2.6.1.7 IBM Recommendation on Working Memory

- 1) Directly accessing the rule engine is no longer suggested. The recommendation is to use a session factory.

<https://www.ibm.com/docs/en/odm/8.11.0?topic=factories-calling-ruleset-using-pojo-factory>

- 2) A stateful session can be created & it gives you access to working memory.

<https://www.ibm.com/docs/en/odm/8.11.0?topic=interfaces-ilrstatefulsession>

2.7 Rule Execution Decisions

2.7.1.1 Rule Service Execution Decisions

- All the rules will be executed remotely using HTTP protocol
- Each Ruleset is executed individually
- All the 139 Rulesets will be executed standalone way
- All the 139 Rulesets will be executed stateless way

2.8 Rule Developer Local Environment

- 1) Open Software Center
- 2) Search ODM v8.11.0 in Software Center

Applications

Updates

Operating Systems

Installation status

Device compliance

Applications > Application details



ODM v8.11.0

Published by IBM

Install

Status: Available

Version: 8.11.0

Date published: Not specified

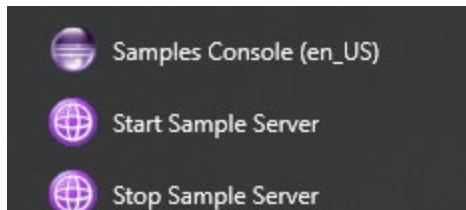
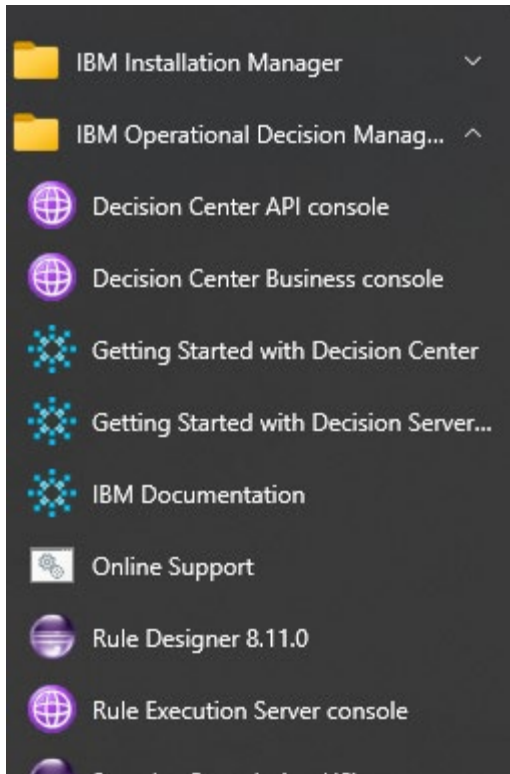
Restart required: No

Download size: Less than 1 MB

Estimated time: Not specified

Total components: 0

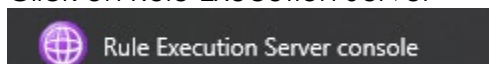
- 3) Click Install
- 4) The software installation might take 15 to 30 minutes
- 5) Once the installation is completed, got to start menu on your machine and you should see IBM Operational Decision Manager folder
- 6) Expand the folder and you should see below components



- 7) Click start Sample Server
- 8) You should see below message once the server starts

```
checkIfDSInstalled:
wait.for.decisionserverIfExist:
checkIfDCInstalled:
wait.for.decisioncenterIfExist:
checkIfDCBuildAvailable:
checkIfDCAppsDeployed:
checkIfSetSamplesSettings:
update.decisioncenter.servers:
set-samples-settings: [serverURL] 'http://localhost:9090/decisioncenter'
[set-samples-settings] [datasourceName] 'jdbc/ilogDataSource'
[set-samples-settings] [username] 'rtsAdmin'
[set-samples-settings] [password] '*****'
[set-samples-settings] INFO: { "url": "http://localhost:9090/decisioncenter", "datasource": "jdbc/ilogDataSource", "username": "rtsAdmin", "message": "Sign in successfully", "date": "December 5, 2022 11:50:26 AM" }
[set-samples-settings] Dec 05, 2022 11:50:27 AM com.ibm.rules.decisioncenter.remoting.internal.RemoteSessionHttpExecutorBuilder log
[set-samples-settings] INFO: { "url": "http://localhost:9090/decisioncenter", "datasource": "jdbc/ilogDataSource", "username": "rtsAdmin", "message": "Sign out successfully", "date": "December 5, 2022 11:50:27 AM" }
set-samples-settings: [serverURL] 'http://localhost:9090/decisioncenter'
[set-samples-settings] [datasourceName] 'jdbc/ilogDataSource'
[set-samples-settings] [username] 'rtsAdmin'
[set-samples-settings] [password] '*****'
[set-samples-settings] Dec 05, 2022 11:50:28 AM com.ibm.rules.decisioncenter.remoting.internal.RemoteSessionHttpExecutorBuilder log
[set-samples-settings] INFO: { "url": "http://localhost:9090/decisioncenter", "datasource": "jdbc/ilogDataSource", "username": "rtsAdmin", "message": "Sign in successfully", "date": "December 5, 2022 11:50:28 AM" }
[set-samples-settings] Dec 05, 2022 11:50:29 AM com.ibm.rules.decisioncenter.remoting.internal.RemoteSessionHttpExecutorBuilder log
[set-samples-settings] INFO: { "url": "http://localhost:9090/decisioncenter", "datasource": "jdbc/ilogDataSource", "username": "rtsAdmin", "message": "Sign out successfully", "date": "December 5, 2022 11:50:29 AM" }
delete.new.installation.files:
[samples.echo] Dec 05, 2022 11:50:30 AM com.ibm.rules.sampleserver.Log info
[samples.echo] INFO: GBRPS0029I: start.server is completed.
[samples.echo] GBRPS0029I: start.server is completed.
BUILD SUCCESSFUL
Total time: 1 minute 14 seconds
Press any key to continue . . .
```

- 9) Click on Rule Execution Server

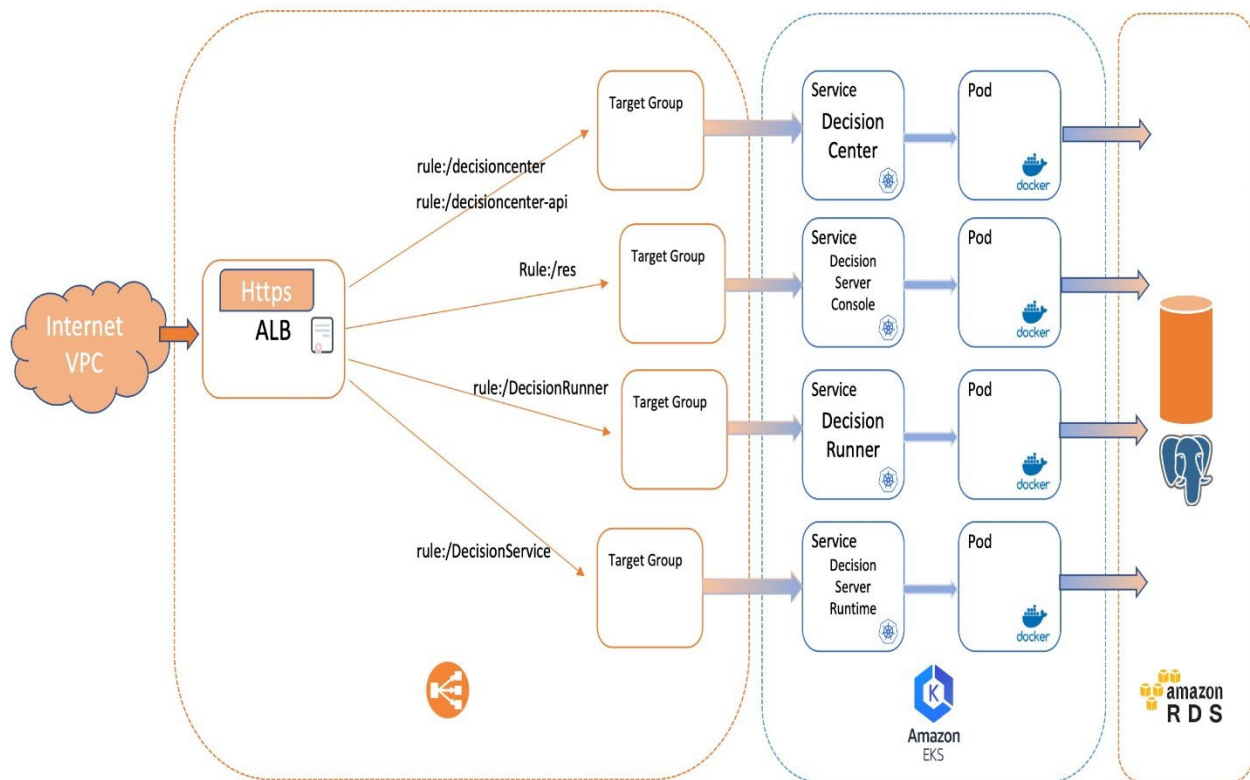


10) Log on to RES - [Rule Execution Server](#)

2.9 Rule Execution Server Database

2.10 Rule Execution Server Scaling

2.10.1 Deploying IBM Operational Decision Manager on Amazon EKS



2.10.1.1 IBM ODM Benchmark

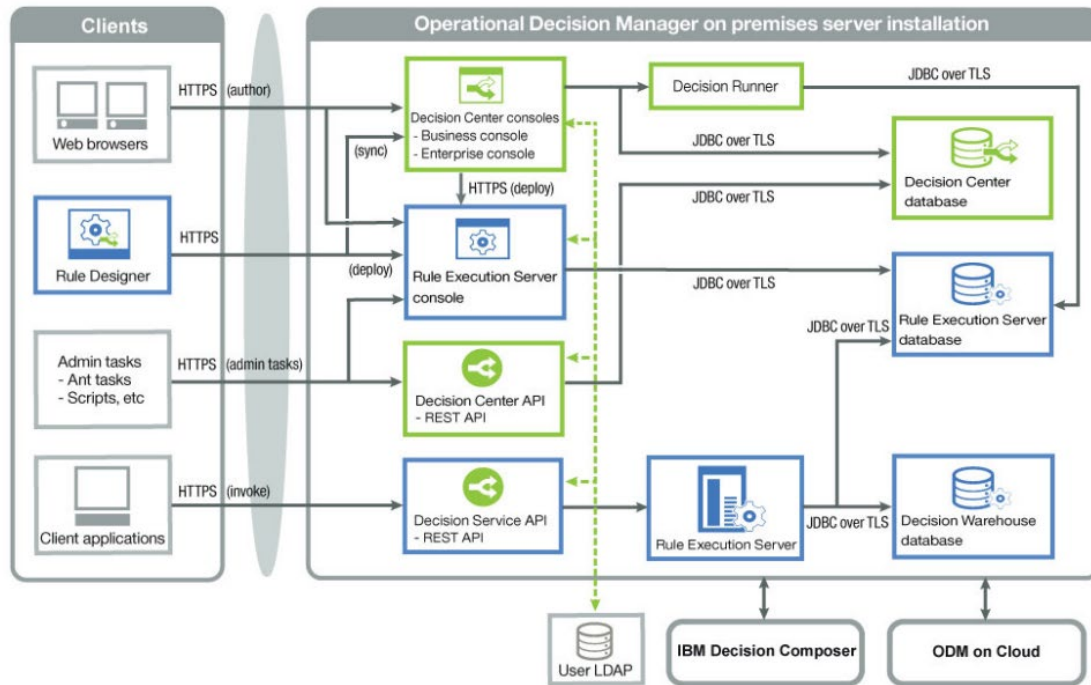
[5534ed60-46c4-b791-d94f-e925a91f9331_file.pdf \(higherlogicdownload.s3-external-1.amazonaws.com\)](#)

2.10.1.2 Engine Pooling

[Rule Execution Server engine pool sizing \(ibm.com\)](#)

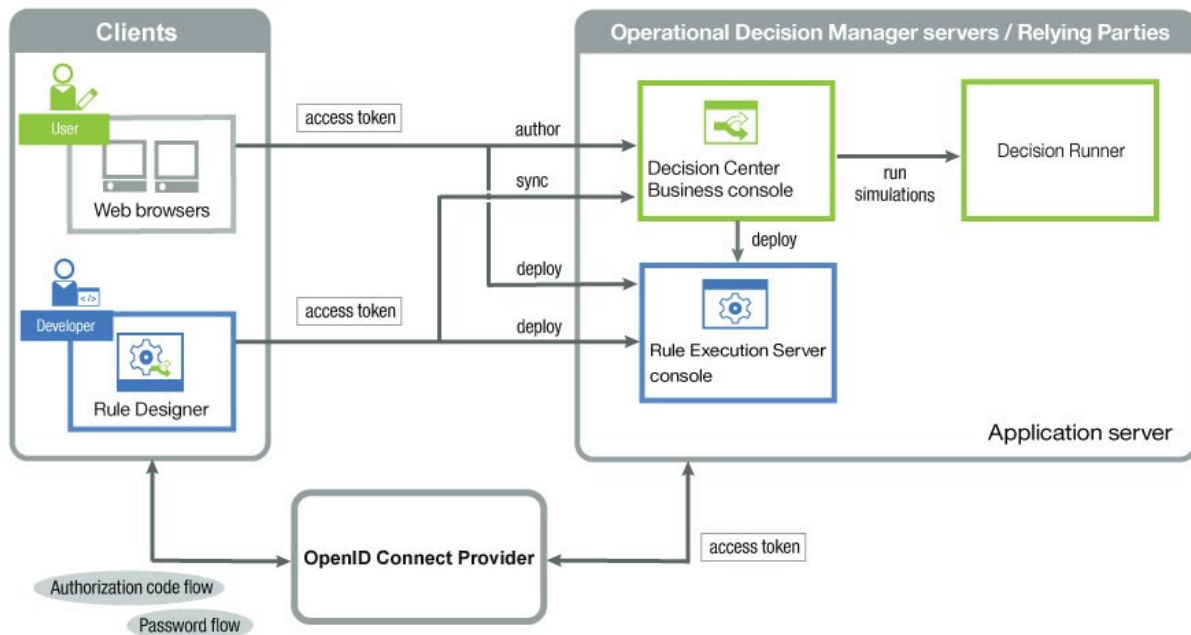
2.11 Rule Execution Server Security

The ODM services will be protected by OAUTH 2.0

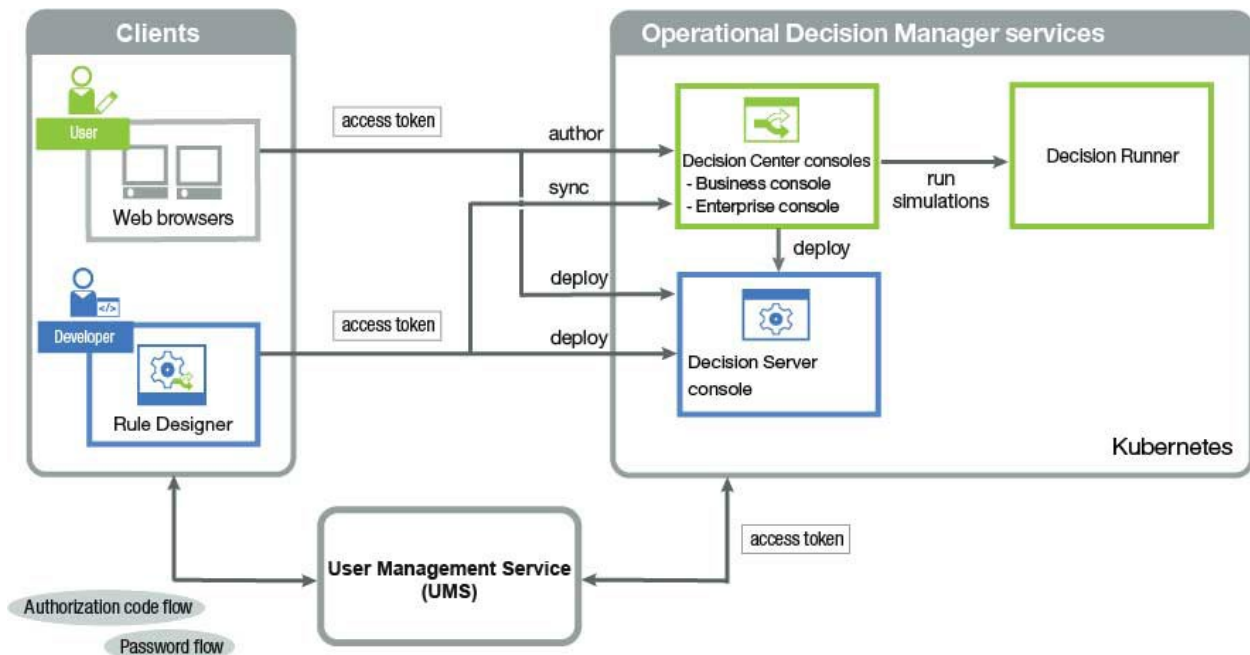


[Overview: OpenID Connect - IBM Documentation](#)

[Configuring Relying Parties in the Liberty server - IBM Documentation](#)



[Configuring user access with UMS - IBM Documentation](#)

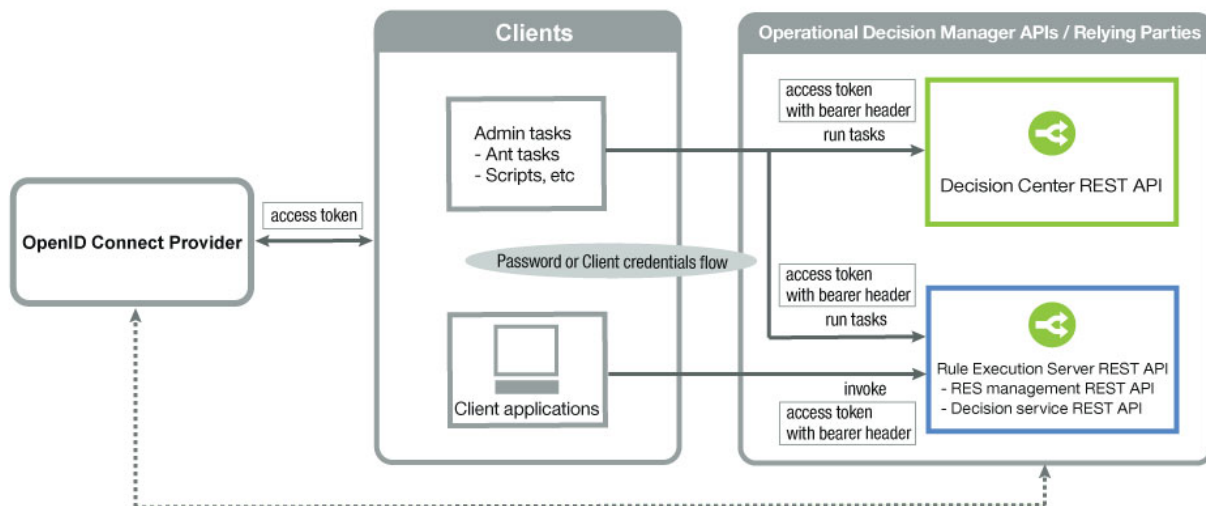


2.11.1.1 ForgeRock IAM Configuration

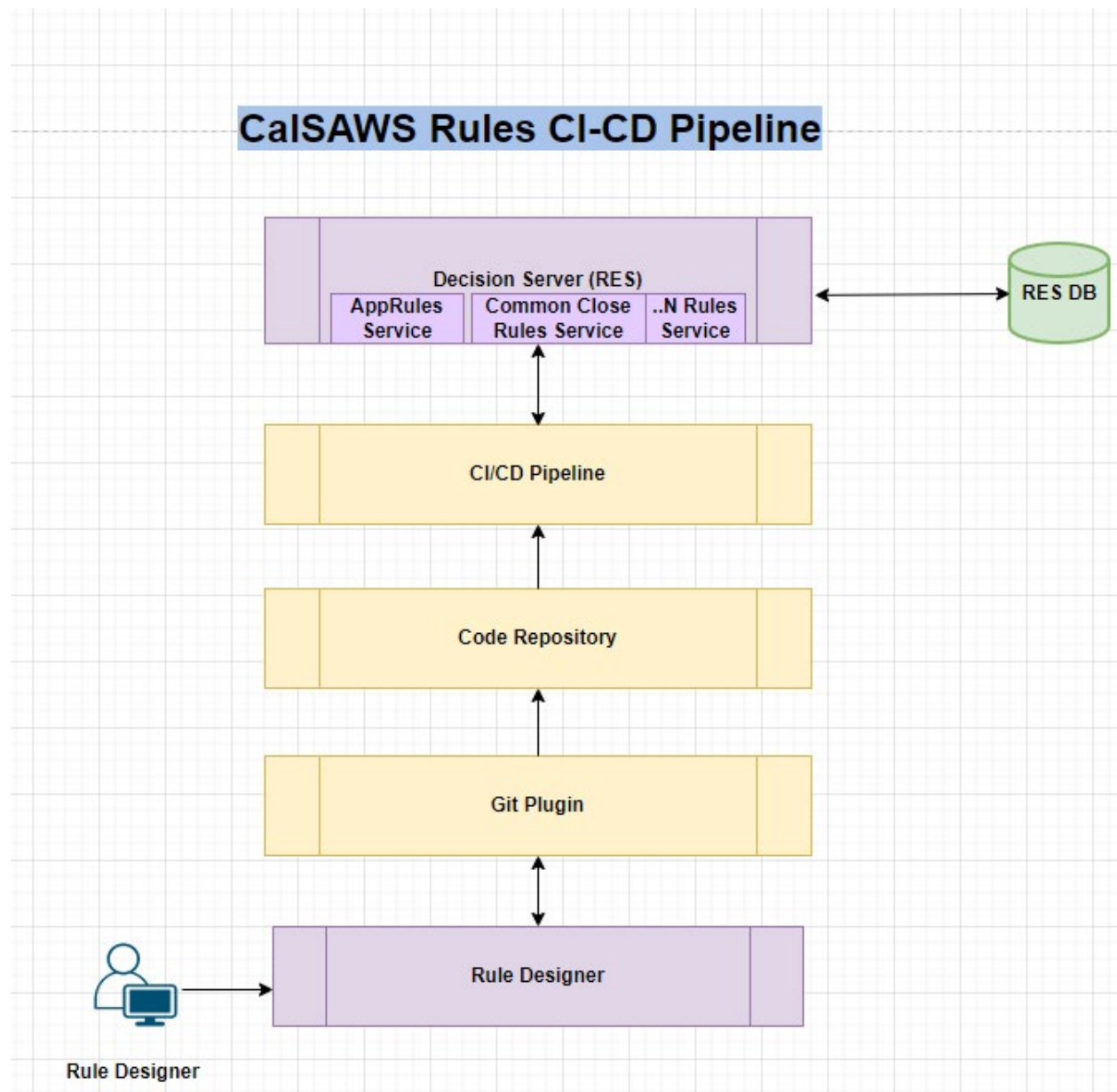
[ForgeRock Access Management 7.0.2 > OpenID Connect 1.0 Guide > OpenID Provider Configuration](#)

2.11.1.2 Securing ODM Services

[Securing IBM Operational Decision Manager](#)



2.12 CI/CD Pipeline



2.13 Logging

ODM Services supp

Number	Functional Area	Description	Attachment

3 REQUIREMENTS

N/A

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

3.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

4 MIGRATION IMPACTS

N/A

5 OUTREACH

N/A

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-242611

Update CalWIN Foster Care Clothing Allowance
Rates

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	Sidhant G., Kapil S.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/01/2023	1.0	Initial Version	Jimmy Tu

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1 OVERVIEW

1.1 Current Design

Currently, CalWIN Counties that have opted into the Annual Foster Care Clothing Allowance Batch (PBXXF103) do not have issuance amounts saved in the system.

1.2 Requests

1. Update the Foster Care Clothing Allowance Batch (PBXXF103) to include clothing allowance rates for CalWIN Counties.

1.3 Overview of Recommendations

1. Update the Foster Care Clothing Allowance Batch (PBXXF103) to include clothing allowance rates for CalWIN Counties.
2. Update Code Detail Table Category 943 to include the Foster Care Clothing Allowance rates.

1.4 Assumptions

1. The Clothing Allowance Migration batch currently excludes placements of Group Homes, STRTP, Community Treatment Facility, and Out of State Group Home, and Hospitals.
2. The Clothing Allowance batch does not distinguish between programs (e.g., Foster Care vs Kin-GAP) and will be the same rate for both programs.
3. Initial Clothing Allowance rates will not be issued by the Clothing Allowance batch and will need to be issued manually by the worker.

2 RECOMMENDATIONS

2.1 Clothing Allowance Migration Batch (PBXXF103)

2.1.1 Overview

This batch job sets the clothing allowance rates for counties that have opted into the Clothing Allowance Batch.

2.1.2 Description of Change

1. Update the Foster Care Clothing Allowance Batch (PBXXF103) to include clothing allowance rates for CalWIN Counties for the following counties.

- a. Sacramento
 - i. Annual – August
- b. San Luis Obispo
 - i. Annual – August
- c. Santa Barbara
 - i. Annual – August
- d. Santa Clara
 - i. Annual – August
- e. Santa Cruz
 - i. Annual – August
- f. Sonoma
 - i. Annually – August
- g. Tulare
 - i. Annual – July
- h. Ventura
 - i. Annually – August

Opted Out: Alameda, Contra Costa, Fresno, Orange, Placer, San Diego, San Francisco, San Mateo, Solano, Yolo

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

Opted In:

Sacramento, San Luis Obispo, Santa Barbara, Santa Clara, Santa Cruz, Sonoma, Tulare, Ventura

Opted Out:

Alameda, Contra Costa, Fresno, Orange, Placer, San Diego, San Francisco, San Mateo, Solano, Yolo

2.1.6 Data Volume/Performance

No Change.

2.1.7 Failure Procedure/Operational Instructions

No Change.

2.2 Code Table Change Request

2.2.1 Overview

This section is to update code detail table category 943 to include the Foster Care Clothing Allowance rates based on age.

2.2.2 Description of Change

1. Update Code Detail Table Category 943 to include the Foster Care Clothing Allowance rates for the following counties.

County (Reference Table 1)	Annual Rate (Reference Table 2)	Min Age (Reference Table 3)	Max Age (Reference Table 4)
Sacramento (34)	\$216	0	21
San Luis Obispo (40)	\$141	0	99
Santa Barbara (42)	\$308	0	99
Santa Clara (43)	\$69	0	4
Santa Clara (43)	\$141	5	99
Santa Cruz (44)	\$147	0	99
Sonoma (49)	\$0	0	4
Sonoma (49)	\$216	5	6
Sonoma (49)	\$251	7	12
Sonoma (49)	\$327	13	99

Tulare (54)	\$161	0	99
Ventura (56)	\$195	0	99

2.2.3 Estimated Number of Records Impacted/Performance

~11 records

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

None.

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243006

ACL 23-XX FC, KG CNI Rate Increase for Year
2023-2024

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/08/2023	1.0	Initial Draft	T. Lazio

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1 OVERVIEW

This document details the changes necessary in CalSAWS to implement the adjusted schedules of rates that reflect the California Necessities Index (CNI) increase of 6.85% for Fiscal Year (FY) 2023-24 for Foster Care (FC) and Kin-GAP (KG) programs.

In CalSAWS, ARC is a subset of the Foster Care program, so the rates for ARC are implicitly updated by updating the Foster Care rates to the new levels for the FY 2023-24.

The CNI increase is applicable to out-of-home placements and the Aid to Families with Dependent Children-Foster Care (AFDC-FC) program.

This document also reflects the CNI increase to be applied to Dual Agency and other additional rates applicable to FC programs effective July 1, 2023.

The one-time batch run details related to the CNI Rate increase for FC/KG programs can be found under the SCR CA-243007.

1.1 Current Design

Currently CalSAWS uses the CNI rates of FY 2022-23 that are effective from July 1, 2022.

CalSAWS generates 'CNI Increase' NOAs to notify FC/KG vendors when the FC/KG Monthly rate changes due to CNI.

1.2 Requests

As per the ACL 23-XX, the new CNI rate increase for the FY 2023-24 will be implemented in CalSAWS effective July 1, 2023.

1.3 Overview of Recommendations

1. The Code detail tables that reflect the CNI rates will be updated for all the applicable placement types.
2. Update the FC/KG CNI Increase reason's regulations to remove the old ACL reference.
3. Update the hard-coded CNI increase begin and end dates to the new 2023-2024 dates for the FC/KG CNI Increase NOAs to be generated.

1.4 Assumptions

1. Under this SCR, Eligibility is only updating the amounts and effective dates of CNI rates in the Code Tables.
2. CNI Rate in rate/code table updates are only the scope of this SCR.
3. No change will be made to Rate determination logic in this SCR.
4. Home Based Family Care (HBFC) Providers list referred in this SCR can be found at the end of design document.
5. Foster Family Agency (FFA) facility types list referred in this SCR can be found at the end of design document.

6. During the Batch EDBC 'CNI Increase' run, the CCR Rate Change NOA will not be generated for EDBC's that already had a rate change completed and was run for a CNI month.
7. FC/KG Monthly rates that are updated on the FC or KG Rate Detail pages by the worker may result in generation of the FC/KG CNI Increase NOA if the rate update-effective month is the same as CNI rate increase effective month for the program and EDBC is run for that month. Workers may suppress the generated CNI Increase NOA in such cases and generate a manual NOA for FC/KG Rate update.
8. No CNI Rate increases will be made to the Infant Supplement.

2 RECOMMENDATIONS

The CNI rates will be updated in CalSAWS code tables for all the applicable placement types for Foster Care (FC) and Kin-GAP (KG) Programs.

2.1 Schedule A Basic rates for HBFC Homes

2.1.1 Overview

Schedule A rates apply to Kin-GAP cases in which dependency was dismissed and NRLG cases including probate whose guardianship was established, prior to May 1, 2011.

For Foster Care programs these rates are paid when the child is in a Facility that receives the Home-Based Family Care (HBFC) rates and the selected Basic Rate Code in the rate detail page is Schedule A.

For Kin-GAP programs these rates are paid when the "Date of Legal Guardianship" is prior to May 1, 2011.

2.1.2 Description of Changes

1. Update HBFC Homes age-based standard state rates for Schedule A by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

Age	0-4	5-8	9-11	12-14	15 and Over
Basic	\$702	\$763	\$817	\$900	\$987

2.2 Schedule A specialized Rates for HBFC Homes

2.2.1 Description of Changes

1. Update the following Schedule A specialized rates:

Age	0-4	5-8	9-11	12-14	15 and Over
D Rate	\$1,478	\$1,477	\$1,480	\$1,515	\$1,549
F1 Rate	\$1,071	\$1,066	\$1,071	\$1,106	\$1,137
F2 Rate	\$1,217	\$1,215	\$1,218	\$1,254	\$1,284
F3 Rate	\$1,478	\$1,477	\$1,480	\$1,515	\$1,549

Age	0-4	5-8	9-11	12-14	15 and Over
F4 Rate	\$1,700	\$1,695	\$1,700	\$1,737	\$1,764

2.3 Schedule B Basic Rates for HBFC Homes

2.3.1 Overview

Schedule B rates applies to Kin-GAP cases where dependency was dismissed and NRLG cases including probate guardianship and guardianships established by the juvenile court, between May 1, 2011 and December 31, 2016.

For Foster Care programs these rates are paid when the child is in a Facility that receives the Home Based Family Care (HBFC) rates and the selected Basic Rate Code in the rate detail page is Schedule B.

For Kin-GAP programs these rates are paid when the "Date of Legal Guardianship" is on / after May 1, 2011 and KG Summary begin date is on / before December 31, 2016.

2.3.2 Description of Change

1. Update HBFC Homes age-based standard state rates for Schedule B by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

Age	0-4	5-8	9-11	12-14	15 and Over
Basic	\$960	\$1,036	\$1,093	\$1,144	\$1,199

2.4 Schedule B specialized Rates for HBFC Homes

2.4.1 Description of Change

1. Update the following Schedule B specialized rates:

Age	0-4	5-8	9-11	12-14	15 and Over
D Rate	\$1,736	\$1,750	\$1,756	\$1,759	\$1,761
F1 Rate	\$1,329	\$1,339	\$1,347	\$1,350	\$1,349
F2 Rate	\$1,475	\$1,488	\$1,494	\$1,498	\$1,496

Age	0-4	5-8	9-11	12-14	15 and Over
F3 Rate	\$1,736	\$1,750	\$1,756	\$1,759	\$1,761
F4 Rate	\$1,958	\$1,968	\$1,976	\$1,981	\$1,976

2.5 Level of Care Basic Rates for HBFC Homes

2.5.1 Overview

For Foster Care programs these rates are paid when the child is in a Facility that receives the Level of Care rate and the Benefit Month is on or after January 2017. For Kin-GAP programs these rates are paid when the Kin-GAP Summary Begin Date is on or after January 1, 2017 in CalSAWS.

2.5.2 Description of Change

1. Update the HBFC Homes LOC1 (Basic Level) Rate by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following LOC1 rate:

Level of Care	Basic Level Rate	LOC 2	LOC 3	LOC4
Basic	\$1,206	\$1,341	\$1,479	\$1,613

Technical Note: LOC CCR Rates in CT536 are common for all FC/KG and AAP programs.

2.6 Level of Care Specialized Rates for HBFC Homes

1. Update the CCR LOC1 (Basic Level), LOC2, LOC3 and LOC4 specialized rates (D, F1 thru F4) by end-dating the previous rate/code table records with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

Level of Care	Basic Level Rate	LOC2	LOC3	LOC4
D Rate	\$1,807	\$1,807	\$1,807	\$1,807
F1 Rate	\$1,397	\$1,397	\$1,397	\$1,397
F2 Rate	\$1,547	\$1,547	\$1,547	\$1,547

Level of Care	Basic Level Rate	LOC2	LOC3	LOC4
F3 Rate	\$1,807	\$1,807	\$1,807	\$1,807
F4 Rate	\$2,027	\$2,027	\$2,027	\$2,027

Technical Note: LOC CCR Rates in CT536 are common for all FC/KG and AAP programs.

2.7 Dual Agency / Regional Center Rates

2.7.1 Overview

These rates are paid when the rate selected on a case is "Dual Agency RC-California Early Start Intervention (P1)" or "Dual Agency RC-Lanterman Developmental Disability (P2)".

2.7.2 Description of Change

1. Update "Dual Agency/Regional Center" rates in CalSAWS by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

Description	Rate
Dual Agency RC-California Early Start Intervention (P1)	\$1,414
Dual Agency RC-Lanterman Developmental Disability (P2)	\$3,157

2.8 Foster Family Agencies (FFAs) age-based Rates

2.8.1 Overview

These rates are paid on age-based Foster Care programs with a facility type of "Foster Family Agency (FFA)" placements made prior to 12/01/2017.

2.8.2 Description of Change

1. Update "Foster Family Agencies (FFAs)" age-based rates by end-dating the rate/code table records that began 07/01/2022 with an

end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

Age	0-4	5-8	9-11	12-14	15 & Over
Basic	\$2,581	\$2,657	\$2,714	\$2,765	\$2,820

2.9 Foster Family Agencies (FFAs) Level of Care Rates

2.9.1 Overview

These rates are paid on LOC Rate Foster Care programs with a facility type of FFA placements made after 12/01/2017.

2.9.2 Description of Change

1. Update "Foster Family Agencies (FFAs)" LOC rates by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

Level of Care	Basic Level Rate	LOC2	LOC3	LOC4
Basic	\$2,638	\$2,823	\$3,011	\$3,235

2.10 Intensive Services Foster Care (ISFC) Rates

2.10.1 Overview

These rates are paid on Foster Care programs when an ISFC rate is selected.

2.10.2 Description of Change

1. Update "Intensive Services Foster Care (ISFC)" rates by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

ISFC Options	Rate
ISCO - ISFC – County	\$6,830
ISFA - ISFC – FFA	\$6,830
ISFO - ISFC - Family-Only	\$3,148
ISTF - ISFC – TFC	\$6,830

2.11 Short-Term Residential Therapeutic Program (STRTP) Rate Type

2.11.1 Overview

These rates are paid on Foster Care programs when the rate level is “Short Term Residential Therapeutic Program (STRTP)”.

2.11.2 Description of Change

1. Update “Short-Term Residential Therapeutic Program (STRTP)” rates by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rate:

	Rate
STRTP	\$16,328

2.12 Transitional Housing Placement – Plus – Foster Care (THP+FC)

2.12.1 Overview

These rates are paid on Foster Care programs when the placement is a facility type of “Transitional Housing Placement + FC (THP+FC)” and the corresponding rate from the list below is selected.

2.12.2 Description of Change

1. Update all “Transitional Housing Placement – Plus – Foster Care (THP+FC)” rates by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

	Rate
THP+FC SINGLE SITE	\$4,192
THP+FC REMOTE SITE	\$4,192
THP+FC HOST SITE	\$3,335

2.13 THP-NMD Housing Supplement rates

2.13.1 Overview

SCR CA-227842 added a new rate table in CalSAWS to store the "Transitional Housing Placement for Non-Minor Dependent (THP-NMD)" Housing Supplement Rates.

2.13.2 Description of Change

1. Update all "Transitional Housing Placement for Non-Minor Dependent (THP-NMD)" Housing Supplement rates by end-dating the rate/code table records that began 09/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

COUNTY	NON-CUSTODIAL RATE	CUSTODIAL RATE
Alameda	\$4,496	\$5,262
Alpine	\$4,192	\$4,192
Amador	\$4,192	\$4,291
Butte	\$4,192	\$4,234
Calaveras	\$4,192	\$4,218
Colusa	\$4,192	\$4,192
Contra Costa	\$4,496	\$5,262
Del Norte	\$4,192	\$4,192
El Dorado	\$4,192	\$4,693
Fresno	\$4,192	\$4,290
Glenn	\$4,192	\$4,192
Humboldt	\$4,192	\$4,200
Imperial	\$4,192	\$4,197
Inyo	\$4,192	\$4,254

COUNTY	NON-CUSTODIAL RATE	CUSTODIAL RATE
Kern	\$4,192	\$4,192
Kings	\$4,192	\$4,329
Lake	\$4,192	\$4,192
Lassen	\$4,192	\$4,192
Los Angeles	\$4,404	\$5,040
Madera	\$4,192	\$4,266
Marin	\$4,887	\$5,948
Mariposa	\$4,192	\$4,192
Mendocino	\$4,192	\$4,288
Merced	\$4,192	\$4,310
Modoc	\$4,192	\$4,192
Mono	\$4,192	\$4,430
Monterey	\$4,631	\$5,487
Napa	\$4,487	\$5,187
Nevada	\$4,192	\$4,347
Orange	\$4,563	\$5,406
Placer	\$4,192	\$4,693
Plumas	\$4,192	\$4,192
Riverside	\$4,192	\$4,691
Sacramento	\$4,192	\$4,693
San Benito	\$4,371	\$4,930
San Bernardino	\$4,192	\$4,691
San Diego	\$4,493	\$5,178
San Francisco	\$4,887	\$5,958
San Joaquin	\$4,192	\$4,451
San Luis Obispo	\$4,321	\$4,854
San Mateo	\$4,887	\$5,958
Santa Barbara	\$4,627	\$5,643
Santa Clara	\$4,764	\$5,806
Santa Cruz	\$4,940	\$5,795
Shasta	\$4,192	\$4,310
Sierra	\$4,192	\$4,192
Siskiyou	\$4,192	\$4,192
Solano	\$4,275	\$4,913

COUNTY	NON-CUSTODIAL RATE	CUSTODIAL RATE
Sonoma	\$4,419	\$5,004
Stanislaus	\$4,192	\$4,365
Sutter	\$4,192	\$4,303
Tehama	\$4,192	\$4,192
Trinity	\$4,192	\$4,192
Tulare	\$4,192	\$4,192
Tuolumne	\$4,192	\$4,195
Ventura	\$4,506	\$5,294
Yolo	\$4,219	\$4,699
Yuba	\$4,192	\$4,303

2.14 Update logic of 'CNI Increase' Change NOA Reasons

2.14.1 Overview

The generation logic for these FC / KG 'CNI Increase' Change NOA reasons will be updated to accommodate the 2023–2024 year details.

Reason Fragment Name and ID:

FC_CH_COLA_RSN (SNIPPET.ID: 7619 for CCR, 7475 for Non-CCR)

KG_CH_COLA_RSN (SNIPPET.ID: 7620 for CCR, 7476 for Non-CCR)

Current NOA Template:

FC: FC_NOA_TEMPLATE (SNIPPET.ID = 3030)

KG: KG_NOA_TEMPLATE (SNIPPET.ID = 3031)

Current Program(s): Foster Care, Kin-GAP

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

Existing Languages for all snippets:

English, Spanish

2.14.2 NOA Verbiage

There are no changes to the verbiage.

2.14.3 NOA Variable Population

1.) Variable Population

There are no changes to the variable population.

2.) Fragment Regulation

Note: The 2023-2024 FC/KG CNI ACL has not been published in time to meet System Test timelines to include the ACL number in the Regulations.

- A. Update the reason's regulations in English and Spanish for above reason fragments to remove the old ACL reference:

Existing English Regulations: W&I Code Sections 11364, 11387, 11453, 11460, 11461, 11461(d)(2)(A), 11462, 11463, 11464, 18254, 18358.30; Senate Bill (SB) 1013, Chapter 35, Statutes Of 2012; Assembly Bill (AB) 403, Chapter 773, Statutes Of 2015; AB 1997, Chapter 612, Statutes Of 2016; ACL 22-59

Updated English Regulations: W&I Code Sections 11364, 11387, 11453, 11460, 11461, 11461(d)(2)(A), 11462, 11463, 11464, 18254, 18358.30; Senate Bill (SB) 1013, Chapter 35, Statutes Of 2012; Assembly Bill (AB) 403, Chapter 773, Statutes Of 2015; AB 1997, Chapter 612, Statutes Of 2016

Existing Spanish Regulations: WIC Secciones 11364, 11387, 11453, 11460, 11461, 11461(d)(2)(A), 11462, 11463, 11464, 18254, 18358.30; SB 1013, Capitulo 35, Estatutos de 2012; AB 403, Capitulo 773, Estatutos de 2015; AB 1997, Capitulo 612, Estatutos de 2016; ACL 22-59

Updated Spanish regulations: WIC Secciones 11364, 11387, 11453, 11460, 11461, 11461(d)(2)(A), 11462, 11463, 11464, 18254, 18358.30; SB 1013, Capitulo 35, Estatutos de 2012; AB 403, Capitulo 773, Estatutos de 2015; AB 1997, Capitulo 612, Estatutos de 2016

3.) NOA Title / Footer Reference

There are no changes to the NOA Title / Footer reference.

2.14.4 NOA Generation Conditions

Updates to Fragment Generation

1. Update the hard-coded, numeric constants of:
 - a. CNI begin date to 07/01/2023
 - b. CNI end date to CNI Batch run month end date ie. 09/30/2023

For the 'CNI Increase' NOA to generate accordingly to these batch months.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 APPENDIX

HBFC (Home-Based Family Care) Providers:

- 1) Foster Family Home
- 2) Foster Family Home – Shelter Care
- 3) Legal Guardian
- 4) Non-Relative Extended Family Member Home
- 5) Relative Home
- 6) Specialized Foster family Home
- 7) Supervised Independent Living
- 8) Tribal Specific Home
- 9) County Shelter / Receiving Home (Non – EA/AFDC)
- 10) Court Specified Home
- 11) Guardian Home
- 12) Resource family Home
- 13) Small Family Home
- 14) Temporary Shelter Home

FFA Providers:

- 1) Foster Family Agency
- 2) Foster Family Agency (Intensive Programs)
- 3) Foster Family Agency (Nontreatment)
- 4) Foster Family Agency (Treatment)
- 5) Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
- 6) Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243007

ACL 23-XX FC, KG CNI Rate Increase for Year
2023-2024 - Batch EDBC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/09/2023	1.0	Initial Draft	Tom Lazio

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1 OVERVIEW

Per ACL 23-XX, the new FC/KG California Necessities Index (CNI) rate increase for the FY 2023-24 will be implemented effective July 1, 2023. This SCR will provide details for the one-time batch run that will apply the CNI Rate increase to the FC/KG programs for the benefit month of July 2023 through come-up month.

1.1 Current Design

Currently CalSAWS uses the FC/KG CNI rates of FY 2022-23 that are effective from July 1, 2022.

1.2 Requests

As per the ACL 23-XX, the new FC/KG CNI rate increase for the FY 2023-24 will be effective as of July 1, 2023. The CTCR portion of the FC/KG CNI rate increase will be implemented with SCR CA-243006 and requires a one-time batch run that will apply the CNI Rate increase to the FC/KG programs for the benefit month of July 2023 through come-up month. The batch run will also include CF programs that have a participant in common with the FC or KG program.

1.3 Overview of Recommendations

1. Run Batch EDBC for FC/KG programs to apply the new CNI rate increase along with CF programs that have an FC or KG participant in common.
2. Generate exception listings for Counties to review.
3. For all Counties - Suppress any KG 'Age Changed' NOAs if generated from the Batch EDBC run.
4. For LA County - Put FC/KG 'CNI Increase' NOAs on hold from the Batch EDBC run and release the NOAs after the eCAPS/EFT financial processes are completed.

1.4 Assumptions

1. Batch EDBC will have a run reason for every month of CNI Increase run from 07/2023 through the come-up month.
2. During the Batch EDBC 'CNI Increase' run, the CCR Rate Change NOA will not be generated for EDBC that already had a rate change completed and was run for a CNI month.
3. A regular change NOA will be generated for impacted cases if a NOA exists for the benefit change-reason.
4. For the FC/KG 'CNI Increase' NOAs put on hold (for LA County) per this effort, SCR CA-265026 will release these NOAs.
5. A list of FC and KG cases where the child has an effective income record will be provided prior to the CNI Batch Run with SCR CA-259940.

2 RECOMMENDATIONS

Batch EDBC will run for FC/KG to apply the new CNI rate increase and CF for the same FC or KG participants to apply benefit updates.

2.1 Run Batch EDBC for FC/KG

2.1.1 Overview

FC/KG/CF Batch EDBC will run for the benefit month of 07/2023 through come-up month.

2.1.2 Description of Changes

1. Run batch EDBC for active Foster Care (FC) and Kin-GAP (KG) programs starting with the month of 07/2023 through come-up month including past RE due date cases.
 - a. Batch EDBC will run with the run reason "CWS Annual COLA".
 - b. Batch EDBC records will have a run type code of 'Single Program'.
 - c. Batch EDBC will not be triggered on programs with a Non-standard rate in effect in the benefit month.
 - d. Batch EDBC will not run if there is an overridden aid code where a sub type code exists
 - e. Batch EDBC will not run if a regular EDBC has already been processed for the benefit month(s) since SCR CA-243006 went into production.
 - f. Batch EDBC will insert the below Journal entry for FC programs:

Short Description: Batch EDBC ran for [month, year]
Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: Foster Care COLA
 - g. Batch EDBC will insert the below Journal entry for KG programs:

Short Description: Batch EDBC ran for [month, year]
Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: Kin-GAP COLA.
2. Run batch EDBC for active CF and NB programs having an active CalFresh participant in common with FC or KG programs for the month of 09/2023.
 - a. Batch EDBC will run with the run reason "CWS Annual COLA" for CF program only.

- b. Batch EDBC records will have a run type code of 'Partial Program' for both CF and NB.
- c. Batch EDBC will not run on the active CF program cases if SAR7 report status is 'Generated', 'Sent' or 'Incomplete'.
- d. Batch EDBC will not run CF Program if the benefit month is past the latest RE due date.
- e. Batch EDBC will insert the below Journal entry for CF and NB programs where there is a common FC program participant:

Short Description: Batch EDBC ran for [month, year]
 Long Description: Batch EDBC Ran for <Effective Month>.
 Batch EDBC processed for the <Program Name>
 program for following reasons: Foster Care COLA

- f. Batch EDBC will insert the below Journal entry for CF and NB programs where there is a common KG program participant:

Short Description: Batch EDBC ran for [month, year]
 Long Description: Batch EDBC Ran for <Effective Month>.
 Batch EDBC processed for the <Program Name>
 program for following reasons: Kin-GAP COLA

2.1.3 Programs Impacted

FC
 KG
 CF
 NB

2.2 Correspondence – DCRs suppressing KG Age Changed, FC/KG CNI Increase NOAs

2.2.1 Overview

This effort is to suppress, the KG 'Age Changed' NOAs for all Counties. And separately, the FC/KG 'CNI Increase' NOAs will be put on hold for LA County only until released by CA-265026.

2.2.2 Description of Change

1. All Counties - Create a DCR to suppress KG 'Age Changed' NOAs by updating the NOA status (GENERATE_DOC.STAT_CODE) to 'Rejected' (CT220_RJ):

Reason Fragment

KG_CH_AGE_CHANGED_K007 (Fragment ID: 6270)

Note: This NOA exists in English only.

2. LA County Only - Create and run DCR operationally to hold the FC/KG 'CNI Increase' NOAs by updating the NOA status (GENERATE_DOC.STAT_CODE) to 'On Hold (Batch)' (CT220_BH) until they are released by CA_265026.

Reason Fragments

- a. FC_CH_COLA_RSN (Fragment ID: 7619 for CCR, 7475 for Non-CCR)
- b. KG_CH_COLA_RSN (Fragment ID: 7620 for CCR, 7476 for Non-CCR)

Note: These NOAs continue to exist in English and Spanish.

3 OUTREACH

3.1 Lists

Generate lists to aid the counties after batch EDBC completes. The listings below will be generated by the following Regions:

Region	Counties
1	Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma
2	Alpine, Amador, Calaveras, El Dorado, Mono, Nevada, Placer, Sacramento, Sierra, Sutter, Tuolumne, Yolo, Yuba
3	Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity
4	Fresno, Inyo, Kern, Kings, Madera, Mariposa, Merced, San Joaquin, San Luis Obispo, Stanislaus, Tulare
5	Imperial, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, Ventura
6	Los Angeles

All lists will have the standard list columns to display on the listings.

Standard Columns:

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

Exception List: Below are the case listing details for case exceptions (skipped, unprocessed, discontinued, etc.) with the standard columns after the batch.

1. **List Name:** List of cases with Non-Standard Rate - FosterCare or KinGAP.
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of cases with Non-Standard Rate - FosterCare or KinGAP -R1**'.
List Criteria: List of FC/KG programs with a Non-Standard Rate.
Additional Column(s): Rate column
2. **List Name:** List of FC/KG programs with Overridden Aid Code
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of FC/KG programs with Overridden Aid Code -R1**'.
List Criteria: List of FC/KG programs with overridden aid code where a sub type code exists.
Additional Column(s): Sub Type Code
3. **List Name:** List of FC/KG/**CF/NB** cases Discontinued by the Batch EDBC
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of FC/KG/**CF/NB** cases Discontinued by the Batch EDBC -R1**'.
List Criteria: List of FC/KG/**CF/NB** programs discontinued by the batch EDBC.
Additional Column(s): Program, EDBC Month, Discontinued Reason
4. **List Name:** List of FC/KG/**CF/NB** programs with Read-Only EDBC
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of FC/KG/**CF/NB** programs with Read-Only EDBC -R1**'.
List Criteria: List of FC/KG/**CF/NB** programs which resulted in Read-Only EDBC.
Additional Column(s): Program, Reason, EDBC Month
5. **List Name:** List of unprocessed FC/KG/**CF/NB** programs skipped in the COLA batch run with skip reasons.
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of unprocessed FC/KG/**CF/NB** programs skipped in the COLA batch run with skip reasons -R1**'.
List Criteria: List of FC/KG/**CF/NB** unprocessed programs skipped in the COLA batch run with the skip reasons like Override, Manual EDBC, Read Only EDBC, No Worker Assigned etc.
Additional Column(s): Program, EDBC Month, Not Processed Reason

Informational List: Below are the case listing details for informational purpose only and can be reviewed if required but batch EDBC will run on these cases as part of the CNI batch.

1. **List Name:** List of FC or KG cases with RE Date in the past.

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of FC or KG cases with RE Date in the past -R1**'

List Criteria: List of FC/KG programs where the incomplete RE has a due date in the past.

Additional Column(s): Program, RE Due Date

2. **List Name:** List of FC programs with THPP or THP+FC Facilities

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of FC programs with THPP or THP+FC Facilities -R1**'

List Criteria: List of FC programs with THPP or THP+FC Facilities with an additional column to show CalFresh (CF) cases having a CalFresh participant in common with FC program.

Additional Column(s): CF Case #

3. **List Name:** List of FC/KG Cases where NOA did not generate due to overridden EDBC from prior benefit month

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of FC/KG Cases where NOA did not generate due to overridden EDBC from prior benefit month -R1**'

List Criteria:

- i. There is at least one overridden EDBC effective in the benefit month prior to CNI months
- ii. Batch EDBC is run for the CNI month(s), 07/2023 to 09/2023
- iii. Program is Foster Care or Kin-GAP

Additional Columns: Program

Note: The case information will display only once on the list even if more than one month may be impacted.

4. **List Name:** List of cases where the FC/KG EDBC resulted in a benefit reduction

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of cases where the FC/KG EDBC resulted in a benefit reduction -R1**'

List Criteria: List of FC/KG programs in which the Batch EDBC resulted in a benefit reduction.

Additional Column(s): Include additional columns to indicate each of the benefit reduction type reasons in separate columns (Income Change, Proration Change, Over Payment Adjustment Change).

5. **List Name:** List of cases where the FC/KG EDBC resulted in an Overpayment.
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of cases where the FC/KG EDBC resulted in an Overpayment-R1**'

List Criteria: List of FC/KG programs in which the Batch EDBC resulted in an overpayment.

Additional Column(s): Program, EDBC Benefit Month, EDBC Overpayment Amount

The list will be posted to the following location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-243007

4 APPENDIX

4.1 Batch Operations:

- a) Run FC, KG and AAP CNI Rate Increase driving queries per SCRs CA-243007 (FC, KG, CF, NB) and CA-243010 (AAP, CF, NB) to insert into SYS_TRANSACT_COLA in 'Single Program' mode (FC, KG, AAP) for all the months starting from 07/2023 to 09/2023 and in 'Partial Program' mode for benefit month 09/2023 for the associated CF/NB programs.
- b) Run Batch EDBC for cases with FC, KG and AAP per SCRs CA-243007 and CA-243010 identified in (a) above.
- c) After EDBC for item (b) above is completed, run Batch EDBC for cases with CF and NB per SCRs CA-243007 and CA-243010 identified in (a) above.
- d) Run DCRs to suppress KG 'Age Changed' NOAs, AAP CNI COLA NOAs (with SCI).
- e) Run the DCRs operationally to hold the FC/KG/AAP 'CNI Increase' NOAs until they are released by CA-265026.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243008

ACL 23-XX AAP CNI Rate Increase for Year 2023-
2024

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/10/2023	1.0	Initial Draft	Tom Lazio

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1 OVERVIEW

This document details the changes necessary in CalSAWS to implement the adjusted schedules of rates that reflect the California Necessities Index (CNI) increase of 6.85 % for Fiscal Year (FY) 2023-24 for Adoption Assistance Program (AAP) Cases.

This document reflects the CNI increase to be applied to Adoption Homes applicable to AAP cases effective July 1, 2023.

The one-time batch run details related to the CNI Rate increase for AAP program can be found under the SCR CA-243010 .

1.1 Current Design

Currently CalSAWS uses the CNI rates of FY 2022-23 for AAP Program effective from July 1, 2022.

1.2 Requests

As per the ACL 23-XX, the new CNI rate increase for the FY 2023-24 will be implemented in CalSAWS for AAP Program effective July 1, 2023.

1.3 Overview of Recommendations

1. The Code detail tables that reflect the AAP CNI rates will be updated for all the applicable placement types.
2. Update the hard-coded CNI increase begin and end dates to the new 2023-2024 dates for the AAP Rate Increase NOAs to be generated.

1.4 Assumptions

1. Under this SCR, Eligibility is only updating the amounts and effective dates of CNI rates in the Code Tables.
2. No changes will be made to Rate determination logic in this SCR.
3. AAP Placement Provider lists referred in this SCR can be found at the end of design document.
4. The STRTP rate option will be added to the 'SCHEDULE LEVEL' field on the AAP AGREEMENT DETAIL page as part of SCR CA-234976.

2 RECOMMENDATIONS

The CNI rates will be updated in CalSAWS code tables for all the applicable placement types for AAP Program Cases.

2.1 Eligibility Rate Changes: AAP Rate Details

2.1.1 Rates for initial AAP agreements signed 10/1/1992 to 12/31/2007 and adoption finalized before 05/27/2011 – Table A

Update the AAP rates in CalSAWS for initial AAP agreements signed on or after October 1, 1992 through December 31, 2007 where the adoption was finalized before May 27, 2011 by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

LA County Rates:

Age	0-4	5-8	9-11	12-14	15 & Over
Basic	\$669	\$727	\$787	\$858	\$941
D Rate	\$1,408	\$1,407	\$1,418	\$1,444	\$1,476
F1 Rate	\$1,020	\$1,016	\$1,029	\$1,054	\$1,084
F2 Rate	\$1,159	\$1,157	\$1,169	\$1,195	\$1,224
F3 Rate	\$1,408	\$1,407	\$1,418	\$1,444	\$1,476
F4 Rate	\$1,619	\$1,615	\$1,628	\$1,655	\$1,681

Non-LA County Rates:

Age	0-4	5-8	9-11	12-14	15 -21
Basic	\$669	\$727	\$778	\$858	\$941
Orange	\$669	\$727	\$778	\$990	\$990
Santa Clara	\$669	\$727	\$787	\$858	\$941

Age/County	0-4	5-6	7-12	13-21
Marin	\$669	\$727	\$837	\$951

Note: The Basic rate row is applicable to all non-LA counties that are not listed above.

2.1.2 Rates for initial AAP agreements signed 1/1/2008 to 5/27/2011 and adoption finalized before 05/27/2011 – Table B

Update the AAP rates in CalSAWS for initial AAP agreements signed on or after January 1, 2008 through May 27, 2011 where the adoption was finalized on or before May 27, 2011 by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

LA County Rates:

Age	0-4	5-8	9-11	12-14	15 & Over
Basic	\$702	\$763	\$825	\$900	\$987
D Rate	\$1,478	\$1,477	\$1,488	\$1,515	\$1,549
F1 Rate	\$1,071	\$1,066	\$1,079	\$1,106	\$1,137
F2 Rate	\$1,217	\$1,215	\$1,226	\$1,254	\$1,284
F3 Rate	\$1,478	\$1,477	\$1,488	\$1,515	\$1,549
F4 Rate	\$1,700	\$1,695	\$1,708	\$1,737	\$1,764

Non-LA County Rates:

Age	0-4	5-8	9-11	12-14	15 -21
Basic	\$702	\$763	\$817	\$900	\$987
Orange	\$702	\$763	\$817	\$1,035	\$1,035
Santa Clara	\$702	\$763	\$825	\$900	\$987

Age/County	0-4	5-6	7-12	13-21
Marin	\$720	\$763	\$879	\$999

Note: The Basic rate row is applicable to all non-LA counties that are not listed above.

2.1.3 Rates for initial AAP agreements signed 7/1/2011 to 12/31/2016 and adoption finalized on or after 05/27/2011 – Table C

Update the AAP rates in CalSAWS for initial AAP agreements signed July 1, 2011 through December 31, 2016 where the adoption was finalized on or after May 27, 2011 by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

All County Rates (Including LA County):

Age	0-4	5-8	9-11	12-14	15 & Over
Basic	\$960	\$1,036	\$1,093	\$1,144	\$1,199

LA County D, F1 thru F4 Rates:

Age	0-4	5-8	9-11	12-14	15 & Over
D Rate	\$1,736	\$1,750	\$1,756	\$1,759	\$1,761
F1 Rate	\$1,329	\$1,339	\$1,347	\$1,350	\$1,349
F2 Rate	\$1,475	\$1,488	\$1,494	\$1,498	\$1,496
F3 Rate	\$1,736	\$1,750	\$1,756	\$1,759	\$1,761
F4 Rate	\$1,958	\$1,968	\$1,976	\$1,981	\$1,976

2.1.4 Rates for initial AAP agreements signed on or after 01/01/2017 (Age Based Rate value selection)

Update the AAP rates in CalSAWS for initial AAP agreements signed on or after January 01, 2017 by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

Note: These are for cases that have an agreement sign date on or after January 01, 2017 but the worker has selected age-based rates (CT 10439) in the AAP placement page. Even though the selected rate type is age-based by the user in CalSAWS, all the rate values are updated to the Basic Level LOC rate value in the database.

All County Rates (Including LA County):

Age	0-4, 5-8, 9-11, 12-14, 15 & Over
Basic	\$1,206

LA County D, F1 thru F4 Rates:

Age	0-4, 5-8, 9-11, 12-14, 15 & Over
D Rate	\$1,807
F1 Rate	\$1,397
F2 Rate	\$1,547
F3 Rate	\$1,807
F4 Rate	\$2,027

2.1.5 Rates for initial AAP agreements signed on or after 01/01/2017 (LOC Rates)

Update the AAP rates in CalSAWS for initial AAP agreements signed on or after January 01, 2017 by end-dating the rate/code table records that began 07/01/2022 with an end date of 06/30/2023. Insert new rate/code table records effective 07/01/2023 with the following rates:

All County Rates (Including LA County):

Level of Care	Basic Level Rate	LOC2	LOC3	LOC4
Basic	\$1,206	\$1,341	\$1,479	\$1,613

LA County D, F1 thru F4 Rates:

Level of Care	Basic Level Rate	LOC2	LOC3	LOC4
D Rate	\$1,807	\$1,807	\$1,807	\$1,807
F1 Rate	\$1,397	\$1,397	\$1,397	\$1,397
F2 Rate	\$1,547	\$1,547	\$1,547	\$1,547
F3 Rate	\$1,807	\$1,807	\$1,807	\$1,807
F4 Rate	\$2,027	\$2,027	\$2,027	\$2,027

Technical Note: LOC CCR Rates in CT536 are common for all FC/KG and AAP programs.

2.2 Update NOA Reason: AA_CH_RATE_INCREASE_P009

2.2.1 Overview

The generation logic for this AAP 'Rate Increase' Change NOA reason will be updated to accommodate the 2023–2024 year details.

Reason Fragment Name and ID:

AA_CH_RATE_INCREASE_P009 (SNIPPET.ID: 6032)

Current NOA Template: AA_NOA_TEMPLATE (SNIPPET.ID: 3032)

Current Program(s): AAP

Current Action Type: Change or Supplement

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

Existing Languages (1): English, Spanish

2.2.2 NOA Verbiage

There will be no updates to the existing verbiage.

Note: The 2023-2024 AAP CNI ACL has not been published in time to meet System Test timelines to include the ACL number in the Rules.

Therefore, the following reason verbiage containing the rules/regulations will continue to be triggered for an AAP 'CNI Increase' NOA as it did prior to this effort - without the text 'ACL XX-XX' in the rules. Please see existing reason verbiage containing the rules:

Your monthly negotiated AAP rate has increased from <OldRate> to <NewRate>.

The California Necessities Index (CNI) has increased for Fiscal Year <Year>.

Rules: These rules apply: SENATE BILL (SB) 1013, CHAPTER 35, STATUTES OF 2012; ASSEMBLY BILL (AB) 403, CHAPTER 773, STATUTES OF 2015; AB 1997, CHAPTER 612, STATUTES OF 2016; WELFARE AND

INSTITUTIONS CODE (WIC) SECTIONS 11364, 11387, 11453, 11460, 11461, 11461(d)(2)(A), 11462, 11463, 11464, 18254, 18358.30.

2.2.3 NOA Variable Population

1.) Variable Population

There are no changes to the variable population.

2.) Fragment Regulation

There are no changes to the regulations tied to this reason.

Technical Note: The associated CT662 regulations tied to this reason (displayed near the bottom of the NOA) will remain the same, as these references are found and matches the State's NA 791 for AAP rate increase.

3.) NOA Title / Footer Reference

There are no changes to the NOA Title / Footer reference.

2.2.4 NOA Generation Conditions

1. Update the hard-coded, below mentioned numeric constants for the 'Rate Increase' NOA to generate accordingly to these CNI months.
 - a. CNI begin date to 07/01/2023
 - b. CNI end date to CNI Batch run month end date i.e. 09/30/2023

3 APPENDIX

AAP Placement Providers:

1. Adoptive Homes
2. Foster Family Agency
3. Foster Family Home
4. Group Home
5. Legal Guardian
6. Nonrelative Extended Family Member Home
7. Out of State Residential Treatment Facilities
8. Relative Home
9. Small Family Home
10. Specialized Foster Family Home
11. Supervised Independent Living

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243010

ACL 23-XX AAP CNI Rate Increase for Year 2023-
2024 - Batch EDBC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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1 OVERVIEW

Per ACL 23-XX, the new AAP California Necessities Index (CNI) rate increase for the FY 2023-24 will be implemented effective July 1, 2023. This SCR will provide details for the one-time batch run that will apply the CNI Rate increase to the AAP programs for the benefit month of July 2023 through come-up month.

1.1 Current Design

Currently CalSAWS uses the AAP CNI rates of FY 2022-23 that are effective from July 1, 2022.

1.2 Requests

As per the ACL 23-XX, the new AAP CNI rate increase for the FY 2023-24 will be effective as of July 1, 2023. The CTCR portion of the AAP CNI rate increase will be implemented with SCR CA-243008 and requires a one-time batch run that will apply the CNI Rate increase to the AAP programs for the benefit month of July 2023 through come-up month. The batch run will also include CF programs that have a participant in common with the AAP program.

1.3 Overview of Recommendations

1. Run Batch EDBC for AAP programs to apply the new CNI rate increase along with CF programs that have an AAP participant in common.
2. Generate exception listings for Counties to review.
3. For all Counties – Regression test AAP 2 forms not generating during the CNI Batch EDBC run.
4. For LA County - Put AAP Rate Increase NOAs on hold from the Batch EDBC run and release the NOAs after the eCAPS/EFT financial processes are completed.
5. Suppress the AAP 'Rate Increase' NOAs for the cases with SCI for the counties listed in recommendation 2.2.2.

1.4 Assumptions

1. Existing batch logic skips programs with an overridden EDBC, Manual EDBC, a pending program, or a pending person for AAP.
2. A regular change NOA will be generated for the impacted cases if a NOA exists for the benefit change reason.
3. CA-248369 updated the AAP 2 generation logic to not generate the form during 'CNI Increase' Batch EDBC runs with run reason: 'CWS Annual COLA'.
4. For the AAP 'Rate Increase' NOAs put on hold (for LA County) per this effort, SCR CA-265026 will release these NOAs.

2 RECOMMENDATIONS

Batch EDBC will run for AAP to apply the new CNI rate increase and CF for the same AAP participants to apply benefit updates.

2.1 Run Batch EDBC for AAP/CF

2.1.1 Overview

AAP/CF Batch EDBC will run for the benefit month of 07/2023 through come-up month.

2.1.2 Description of Changes

1. Run batch EDBC for active AAP programs starting with the month of 07/2023 through come-up month including past RE due date cases.
 - a. Batch EDBC will run with the run reason "CWS Annual COLA"
 - b. Batch EDBC records will have a run type code of 'Single Program'
 - c. Batch EDBC will not be triggered on programs with a Non-standard rate in effect in the benefit month
 - d. Batch EDBC will not run if a regular EDBC has already been processed for the benefit month(s) since SCR CA-243008 went into production.
 - e. Batch EDBC will insert the below Journal entry for AAP programs:
Short Description: Batch EDBC ran for [month, year]
Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: AAP COLA.
2. Run batch EDBC for active CF and NB programs having an active CalFresh participant in common with AAP program for the month of 09/2023.
 - a. Batch EDBC will run with the run reason "CWS Annual COLA" for CF program only.
 - b. Batch EDBC records will have a run type code of 'Partial Program' for both CF and NB.
 - c. Batch EDBC will not run on the active CF program cases if SAR7 report status is 'Generated', 'Sent' or 'Incomplete'.
 - d. Batch EDBC will not run CF Program if the benefit month is past the latest RE due date.
 - e. Batch EDBC will insert the below Journal entry for associated CF and NB programs:
Short Description: Batch EDBC ran for [month, year]
Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: AAP COLA.

2.1.3 Programs Impacted

AAP
CF
NB

2.2 Correspondence – Hold/Suppress/Regression Test AAP Rate Increase NOAs, AAP 2 form

2.2.1 Overview

The AAP 'Rate Increase' NOAs will be put on hold for LA County until released by the CA-265026.

The AAP 'Rate Increase' NOAs will be suppressed for the counties mentioned in the below recommendation.

2.2.2 Description of Change

1. LA County Only - Create and run DCR operationally to hold the AAP 'Rate Increase' NOAs by updating the NOA status (GENERATE_DOC.STAT_CODE) to 'On Hold (Batch)' (CT220_BH) until they are released by CA-265026:

NOA Reason Fragment

AA_CH_RATE_INCREASE_P009 (SNIPPET.ID = 6032)

Note: This NOA exists in English and Spanish.

2. Create and run DCR operationally to suppress the AAP 'Rate Increase' NOAs **for the cases with SCI** by updating the NOA Status (GENERATE_DOC.STAT_CODE) to 'Rejected' (CT220_RJ)

NOA Reason Fragment

AA_CH_RATE_INCREASE_P009 (SNIPPET.ID = 6032)

Note: This NOA exists in English and Spanish.

The AAP CNI NOAs will be suppressed for the following counties.

3-Amador	20-Madera	39-San Joaquin
4-Butte	21-Marin	41-San Mateo
5-Calaveras	22-Mariposa	42-Santa Barbara
6-Colusa	23-Mendocino	43-Santa Clara
7-Contra Costa	24-Merced	44-Santa Cruz
10-Fresno	26-Mono	45-Shasta
11-Glenn	27-Monterey	48-Solano
12-Humboldt	28-Napa	

13-Imperial

15-Kern

16-Kings

17-Lake

18-Lassen

30-Orange

31-Placer

33-Riverside

36-San Bernardino

37-San Diego

50-Stanislaus

51-Sutter

52-Tehama

53-Trinity

54-Tulare

55-Tuolumne

3. For all Counties – Regression test AAP 2 forms not generating during the CNI Batch EDBC run.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 OUTREACH

4.1 Lists

Generate lists to aid the counties after batch EDBC completes. The listings below will be generated by the following Regions:

Region	Counties
1	Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma
2	Alpine, Amador, Calaveras, El Dorado, Mono, Nevada, Placer, Sacramento, Sierra, Sutter, Tuolumne, Yolo, Yuba
3	Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity
4	Fresno, Inyo, Kern, Kings, Madera, Mariposa, Merced, San Joaquin, San Luis Obispo, Stanislaus, Tulare
5	Imperial, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, Ventura
6	Los Angeles

All lists will have the standard list columns to display on the listings.

Standard Columns:

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

Exception List: Below are the case listing details for case exceptions (skipped, unprocessed, discontinued, etc.) with the standard columns after the batch.

1. **List Name:** List of AAP cases with Non-Standard Rate

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of AAP cases with Non-Standard Rate -R1**'

List Criteria: List of AAP programs with a Non-Standard Rate.

Additional Column(s): Rate column

2. **List Name:** List of AAP/CF/NB cases Discontinued by the Batch EDBC
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of AAP/CF/NB cases Discontinued by the Batch EDBC -R1**'
List Criteria: List of AAP/CF/NB programs discontinued by the batch EDBC.
Additional Column(s): Program, EDBC Month, Discontinued Reason
3. **List Name:** List of AAP/CF/NB with Read-Only EDBCs
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of AAP/CF/NB with Read-Only EDBCs -R1**'
List Criteria: List of AAP/CF/NB programs which resulted in Read-Only EDBC.
Additional Column(s): Reason, EDBC Month
4. **List Name:** List of unprocessed AAP/CF/NB programs skipped in the COLA batch run with skip reasons
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of unprocessed AAP/CF/NB programs skipped in the COLA batch run with skip reasons -R1**'
List Criteria: List of AAP/CF/NB unprocessed programs skipped in the COLA batch run with the skip reasons like Override, Manual EDBC, Read Only EDBC, No Worker Assigned etc.
Additional Column(s): Program, EDBC Month, Not Processed Reason

Informational List: Below are the case listing details for informational purpose only and can be reviewed if required but batch EDBC will run on these cases as part of the COLA batch.

1. **List Name:** List of AAP cases with RE Date in the past
Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of AAP cases with RE Date in the past -R1**'
List Criteria: List of AAP programs where the incomplete RE has a due date in the past.
Additional Column(s): RE Due Date
2. **List Name:** List of AAP Cases where NOA did not generate due to overridden EDBC from prior benefit month

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of AAP Cases where NOA did not generate due to overridden EDBC from prior benefit month -R1**'

List Criteria:

- There is at least one overridden EDBC effective in the benefit month prior to CNI months
- Batch EDBC is run for the CNI month(s), 07/2023 to 09/2023
- Program is AAP

Note: The case information will display only once on the list even if more than one month may be impacted.

3. **List Name:** List of cases where the AAP Rate Increase NOA is suppressed.

Note: The lists generated for the Counties in recommendation 2.2.2 will be by region (see Regions in Section 4.1). The list name will include the region, for example, 'Region 1' will be '**List of cases where the AAP Rate Increase NOA is suppressed -R1**'

List Criteria: List of AAP programs with SCI for which the AAP 'Rate Increase' NOA is suppressed.

4. **List Name:** List of cases where the AAP EDBC resulted in a benefit reduction.

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of cases where the AAP EDBC resulted in a benefit reduction -R1**'

List Criteria: List of AAP programs in which the Batch EDBC resulted in a benefit reduction.

Additional Column(s): Include additional columns to indicate each of the benefit reduction type reasons in separate columns (Income Change, Proration Change, Over Payment Adjustment Change).

5. **List Name:** List of cases where the AAP EDBC resulted in an Overpayment.

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List of cases where the AAP EDBC resulted in an Overpayment -R1**'

List Criteria: List of AAP programs in which the Batch EDBC resulted in an overpayment.

Additional Column(s): Program, EDBC Benefit Month, EDBC Overpayment Amount

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-243010

5 APPENDIX

5.1 Batch Operations:

- a) Run FC, KG and AAP CNI Rate Increase driving queries per SCRs CA-243007 (FC, KG, CF, NB) and CA-243010 (AAP, CF, NB) to insert into SYS_TRANSACT_COLA in 'Single Program' mode (FC, KG, AAP) for all the months starting from 07/2023 to 09/2023 and in 'Partial Program' mode for benefit month 09/2023 for the associated CF/NB programs.
- b) Run Batch EDBC for cases with FC, KG and AAP per SCRs CA-243007 and CA-243010 identified in (a) above.
- c) After EDBC for item (b) above is completed, run Batch EDBC for cases with CF and NB per SCRs CA-243007 and CA-243010 identified in (a) above.
- d) Run DCRs to suppress KG 'Age Changed' NOAs, AAP CNI COLA NOAs (with SCI).
- e) Run the DCRs operationally to hold the FC/KG/AAP 'CNI Increase' NOAs until they are released by CA-265026.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-243213

Add the DHCS approved BIC language to the English and threshold versions of the NOA.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sahithi Pabba
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/22/2023	1.0	Initial draft	Sahithi Pabba

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1 OVERVIEW

ACWDL 18-12 provided the update English language verbiage for Denial/Discontinuance of common text Program-Level BIC message. The translations were provided as part of MEDIL I 19-09.

1.1 Current Design

Existing non-MAGI/MAGI/ mixed non-MAGI generates a common text program Level BIC message fragment for Denial/Discontinuance NOA's. will be replaced with the new common Text program- level BIC message fragments for Denial and Discontinuance as per ACWDL 18-12.

1.2 Requests

Add new message fragments for non-MAGI/MAGI/ mixed non-MAGI common text program level BIC message fragment for Denial/Discontinuance NOA's as per ACWDL 18.12.

Obsolete existing message fragment MC_DN_TN_BIC_MESSAGE.

1.3 Overview of Recommendations

1.3.1 Add a new Common Text Program-Level Message Fragment for Denial

Existing non-MAGI/ mixed non-MAGI/MAGI NOA common Text Program-Level BIC message fragment for Denial/Discontinuance will be replaced with new common Text Program-Level message fragment for Denial/Discontinuance Verbiage as per ACWDL 18-12.

1.4 Assumptions

1. The trigger conditions for existing reason fragments to which the updated message fragment verbiage will be added will not change.
2. No changes to NOA regulations are required.
3. No changes to the text, generation, or population of existing NOA fragments will be required outside of those listed specifically in this design.
4. No updates are required to the NOA title generated on the Document List page.
5. Existing NOA fragments will continue to generate in all currently available languages. No new translations will be added with this effort for existing fragments.

2 RECOMMENDATIONS

2.1 Add a New BIC message fragment for Denial

2.1.1 Overview

Add a new non-MAGI/ mixed non-MAGI/MAGI common text Program-Level Denial BIC message fragment.

Known State Verbiage: ACWDL 18-12(English), Medil I 19-09(Threshold Translations)

Program(s): Medical (Magi/Non-MAGI/ mixed non-MAGI)

Action Type(s): Denial

Fragment Level: Program

Repeatable: No

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

2.1.2 Form/NOA Verbiage

Create Medical Denial NOA Message Fragment XDP

Add a new non-MAGI/ mixed non-MAGI/MAGI Denial BIC Message.

Note: Threshold translations are attached in JIRA.

Description	Text	Formatting*
Static	Keep your Benefits Identification Card (BIC) If you have a plastic Benefits Identification Card (BIC), be sure to keep it. You will use your BIC number again if you qualify for Medi-Cal in the future.	Arial Font Size 10

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

2.1.3 Form/NOA Variable Population

N/A, this new message fragment does not require any variable population.

2.1.4 Form/NOA Generation Condition

Generate this new fragment when a NOA is being generated and one of the following fragments is triggered

1. MC_DN_RETRO_FAIL_DETER_VERIF_M411
2. MC_DN_LONGTERM_CARE_INS_VERIF_FAIL_M011
3. MC_DN_MC_SSI_DEN_NOA_M024_EN
4. MC_DN_NO_ELIG_PERS_M312
5. MC_DN_NO_LINKAGE_M325
6. MC_DN_NOT_MEET_BLINDNESS_RULES_M327
7. MC_DN_FAIL_DETER_VERIF_M410
8. MC_DN_REFUSED_DIB_NON_COMP_M414
9. MC_DN_REFUSED_MILITARY_BENEFITS_NON_COMP_M415
10. MC_DN_REFUSED_RETIREMENT_NON_COMP_M416
11. MC_DN_REFUSED_SDI_NON_COMP_M417
12. MC_DN_REFUSED_UIB_NON_COMP_M418
13. MC_DN_REFUSED_VA_NON_COMP_M419
14. MC_DN_REFUSED_WORKER_COMP_NON_COMP_M420
15. MC_DN_FTP_THIRD_PARTY_LIABILITY_NON_COMP_M421
16. MC_DN_DID_NOT_APPLY_MEDICARE_NON_COMP_M422
17. MC_DN_NAME_IDENTITY_NON_COMP_M423
18. MC_DN_NON_COOP_CHILD_NON_COMP_M424
19. MC_DN_FTP_ELIG_FORMS_M426
20. MC_DN_WRITTEN_WITHDRAWAL_M908
21. MC_DN_NOT_CA_RESIDENT_M905
22. MC_DN_CHILD_APPLIED_FOR_SELF_M909
23. MC_DN_SSI_SSP_DENIED_M911
- 24. MC_DN_DECEASED_M912**

Note: Existing Reason Fragment Verbiage can be found in Supporting Document #1.

Ordering on NOA: The program-level fragments will generate in a specific and consistent order. It follows the hierarchy from the SCR CA-204496 section 2.8.4.1.

2.2 Add a New BIC message fragment for Discontinuance.

2.2.1 Overview

Add a new non-MAGI/ mixed non-MAGI/MAGI common text Program-Level Discontinuance BIC message fragment.

Known State Verbiage: ACWDL 18-12(English), Medil I 19-09(Threshold Translations)

Program(s): Medical (Magi/Non-MAGI/ mixed non-MAGI)

Action Type(s): Discontinuance

Fragment Level: Program

Repeatable: No

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

2.2.2 Form/NOA Verbiage

Create Medical Denial NOA Message Fragment XDP

Add a new non-MAGI/ mixed non-MAGI/MAGI Discontinuance BIC Message.

Note: Threshold translations are attached in JIRA.

Description	Text	Formatting*
Static	Keep your Benefits Identification Card (BIC) If you have a plastic Benefits Identification Card (BIC), be sure to keep it. You can use your BIC number until your Medi-Cal ends. You will also use it again if you qualify for Medi-Cal in the future.	Arial Font Size 10

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

2.2.3 Form/NOA Variable Population

N/A, this new Message Fragment does not require any Variable Population.

2.2.4 Form/NOA Generation Conditions

Generate this new fragment when a NOA is being generated and one of the following fragments is triggered.

1. MC_TN_BLINDNESS_VERIF_FAIL_M014
2. MC_TN_DISCON_SENTENCED_JAIL_OR_INSTITUTION_M020
3. MC_TN_SSI_RCPNT_M024
4. MC_TN_WHRABTS_UNKNWN_M032
5. MC_TN_ICT_OUT_TERM_M033
6. MC_TN_STMNT_OF_FACT_NOT_SIGNED_M035
7. MC_TN_MC13_NOT_SIGNED_M038_EN
8. MC_TN_RSRCES_EXCEED_LIMIT_M052
9. MC_TN_COUNTY_RES_VERIF_FAIL_M080
10. MC_TN_FAIL_LTCRP_TRANSFER_M095
11. MC_TN_TMC_NO_ELIG_CHILD_IN_HOME_M169
12. MC_TN_TMC_GROSS_INC_EXD_LIMIT_M170

13. MC_TN_TMC_PWE_NOT_EMPLOYED_M171
14. MC_TN_4_MONTH_CONT_NO_ELIG_CHILD_M174
15. MC_TN_A_AND_D_FPL_INCOME_OVER_LIMIT_M177
16. MC_TN_HIC_NUM_VERIF_M301
17. MC_TN_OUT_OF_STATE_M319
18. MC_TN_MC_SUPP_COOP_FAIL_M320_EN
19. MC_TN_NOT_MEET_BLINDNESS_RULES_M327
20. MC_TN_NO_CHILD_UNDER_21_M331
21. MC_TN_FAIL_RETURN_STATUS_REPORT_M342
22. MC_TN_CEC_CHILD_TURNS_19_YRS_M352
23. MC_TN_CEC_ENDS_CHILD_MOVES_M358
24. MC_TN_FAIL_IFDS_WITH_NO_SOC_M366
25. MC_TN_FAIL_IFDS_WITH_SOC_M367
26. MC_TN_FAIL_NHR_NO_SOC_M370
27. MC_TN_FAIL_NHR_WITH_SOC_M371
28. MC_TN_FAIL_PVS_CHILD_UNDER_19_M385
29. MC_TN_FAIL_PVS_M386
30. MC_TN_CLIENT_REQ_TERMINATION_M706_EN
31. MC_TN_FAIL_DETER_VERIF_M410
32. MC_TN_FAIL_REDETER_RESPONSE_M400
33. MC_TN_IC_MINOR_IN_JUVI_M395
34. MC_TN_JUVI_MINOR_OVER_21_M398
35. MC_TN_MINOR_JUVI_OVER_12_MONTHS_M399
36. MC_TN_LONGTERM_CARE_INS_VERIF_FAIL_M011
37. MC_TN_NO_ELIG_PERS_M312
- 38.** MC_TN_PERS_NOT_LNKD_PROG_M028_EN
39. MC_TN_FTP_ELIG_FORMS_M426
40. MC_TN_NOT_CA_RESIDENT_M906
41. MC_TN_EDWARDS_FAILURE_TO_COOPERATE_M910
42. MC_TN_SSI_SSP_DENIED_M911

Note: Existing Reason Fragment Verbiage can be found in Supporting Document #1

Ordering on NOA: The program-level fragments will generate in a specific and consistent order. It follows the hierarchy from the SCR CA-204496 section 2.8.4.1.

2.3 Obsolete existing common text Program-Level BIC message fragment generation for Denial/Discontinuance

2.3.1 Overview

As per the above recommendation new message fragment were added for common text program-Level BIC Denial and Discontinuance, Obsolete the existing one.

2.3.2 Description of Change

Update the logic to no longer generate the existing non-MAGI/MAGI/Mixed-MAGI common text Program-Level BIC message fragment.

ID	Fragment Name	Available Languages*
5126	MC_DN_TN_BIC_MESSAGE	EN, SP, AE, CA, CH, KO, RU, TG, VI, FA, AR, LA, HM

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	Existing Reason Fragment Verbiage for Denial/Discontinuance.	CA-243213 -Existing Reason Fragments Verbiage



California Statewide Automated Welfare System

Design Document

CA-244065 Update App Transfer from
BenefitsCal to Include e-Signature Information
on e-Application

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Dymas Pena, Connie Buzbee, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/13/2023	.1	Initial version	Jennifer Muna

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1 OVERVIEW

This SCR outlines the necessary modifications to include the electronic signature information in the Application Transfer Application Programming Interface (API) and on the e-Application Summary Page in CalSAWS.

1.1 Current Design

A customer's e-Signature information is not viewable on the e-Application Summary page and is not a captured element in the Application Transfer API.

1.2 Requests

1. Update the Application Transfer API by adding a new element to capture and store a customer's e-Signature information
2. Add a new e-Application Signature section on the e-Application Summary page.

1.3 Overview of Recommendations

1. Update the Application Transfer API to capture a customer's e-Signature information and store the information in CalSAWS.
2. Display the e-Signature information on the e-Application Summary page.

1.4 Assumptions

1. E-Signature information will not be populated for e-Applications submitted prior to the implementation of this SCR.
2. The Signature fields in the SAWS 2 Plus PDF form transmitted from Self-Service Portal into CalSAWS will retain its current functionality. This signature information will reflect on the new 'eSignatures' section in the E-Application Summary page after the implementation of this SCR.
3. CalSAWS data retention is indefinite, including image documents in Hyland, unless the case has been closed for 7 years. At that time, the case will be purged from the database including all images on the case.
4. All API's logic and functionality not mentioned in this SCR will remain unchanged.

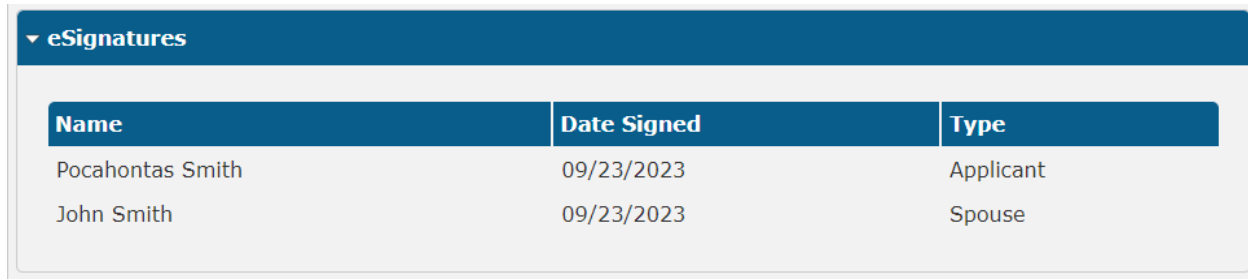
2 RECOMMENDATIONS

2.1 e-Application Summary

2.1.1 Overview

The e-Application Summary page displays information entered by an applicant when submitted via the Self-Service Portal. This section outlines the necessary modifications to include a section to display the electronic signature(s) of the applicant(s) and/or their Authorized Representatives.

2.1.2 E-Application Summary Mockup



▼ eSignatures		
Name	Date Signed	Type
Pocahontas Smith	09/23/2023	Applicant
John Smith	09/23/2023	Spouse

Figure 2.1.1 – E-Application Summary page – eSignatures block

2.1.3 Description of Changes

1. Create a new block titled 'eSignature(s)' on the E-Application Summary page. This block will display the electronic signatures for the e-Application. The columns will include the following:
 - a. Name
 - i. This will display the individual's First and Last Name
 1. The fields' maximum length is 61 characters.
 - a. **Note:** The First Name and Last Name elements in the Application Transfer API each have a maximum length of 30 characters each.
 - b. Date Signed
 - i. This will display the date of Signature.
 - ii. Format: MM/DD/YYYY
 - c. Type
 - i. This will display the individual type whom the Signature belongs to.
 - ii. This column will have one of the following values:
 1. Adult Household Member
 2. Applicant
 3. Authorized Representative

4. Caretaker Relative
 5. Guardian
 6. Other Aided Adult
 7. Other Parent
 8. Registered Domestic Partner
 9. Spouse
2. If two signatures are provided for an e-application, then display the Signatures in the following order, grouped by Signature type:
Note: In the Self-Service Portal, there can only be 1 signature associated to a signature type (primary and secondary) in an e-application.

Individual Type	Signature Type
Applicant	Primary Signature
Adult Household Member	Primary Signature
Authorized Representative	Primary Signature
Caretaker Relative	Primary Signature
Guardian	Primary Signature
Other Parent	Secondary Signature
Other Aided Adult	Secondary Signature
Registered Domestic Partner	Secondary Signature
Spouse	Secondary Signature

2.1.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** e-Application Search → e-Application Summary page

2.1.5 Security Updates

1. No impacts to Security

2.1.6 Page Mapping

Add page mapping for eSignature information.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Update App Transfer API

2.2.1 Overview

The Application Transfer API is a RESTful webservice which purpose is to save an applicant's information into the CalSAWS system. This applicant information is transmitted through the API from the Self-Service Portal. This section outlines the necessary modifications to include e-Signature information in the API upon submission via the Self-Service Portal.

2.2.2 Description of Change

1. Update the App Transfer API by adding the following e-Signature elements. See [Supporting document](#) section for additional API Swagger documentation.
 - a. First Name
 - i. This captures the first name of the individual signing the e-Application.
 - b. Last Name
 - i. This captures the last name of the individual signing the e-Application.
 - c. Signature Date
 - i. This captures the date the e-Application was signed
 - d. Individual Type
 - i. This captures the individual type of the origin of the signature.
 - ii. Type will include one of the following values:
 1. Applicant
 2. Adult Household Member
 3. Authorized Representative
 4. Caretaker Relative
 5. Guardian
 6. Other Parent
 7. Other Aided Adult
 8. Registered Domestic Partner
 9. Spouse

Note: In the Self-Service Portal, a Primary signature must be provided for an application. A Secondary Signature may be required in some circumstances. When another adult is included in the application, that individual must provide a secondary signature. There can be only 1 signature associated to a signature type (primary and/or secondary). See [Appendix](#) section for Self-Service Portal signature mappings.

2. If two signatures are received for an e-application, then display the Signatures in the following order, grouped by signature type:

Individual Type	Signature Type
Applicant	Primary Signature
Adult Household Member	Primary Signature
Authorized Representative	Primary Signature
Caretaker Relative	Primary Signature
Guardian	Primary Signature
Other Parent	Secondary Signature
Other Aided Adult	Secondary Signature
Registered Domestic Partner	Secondary Signature
Spouse	Secondary Signature

2.2.3 Partner Integration Testing

Self-Service Portal

2.2.4 Execution Frequency

Real-time

2.2.5 Key Scheduling Dependencies

N/A

2.2.6 Counties Impacted

All CalSAWS Counties

2.2.7 Category

Real-time API

2.2.8 Data Volume/Performance

N/A

2.2.9 Interface Partner

Self-Service Portal

2.2.10 Failure Procedure/Operational Instructions

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

2.3 Automated Regression Test

2.3.1 Overview

Create new regression test scripts based on the system test scenarios for the permanent functional changes outlined above.

2.3.2 Description of Change

1. Evaluate each system test scenario for the potential of automation.
Known exclusionary criteria:
 - a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
 - b. Technical limitations (ex., visual comparison of a static document against a template)
 - c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
 - d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
 - a. Repeatability: The script must be able to execute multiple times between data refreshes
 - b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interface	Application Transfer YAML file	ApplicationTransfer.yaml
2	Interface	Application Transfer HTML file	ApplicationTransfer.html

4 APPENDIX

The Self-Service Portal Signature mappings

Code Number	Short Code Name	Signature Screen Mapping
AP	Applicant	Primary Applicant Signature
CR	Caretaker Relative	Primary Applicant Signature
AH	Adult Household Member	Primary Applicant Signature
AR	Authorized Representative	Primary Applicant Signature
GR	Guardian	Primary Applicant Signature
SP	Spouse	Second Signature
OP	Other Parent	Second Signature
OA	Other Aided Adult	Second Signature
RD	Registered Domestic Partner	Second Signature



California Statewide Automated Welfare System

Design Document

CA-246136

Expand the Referral Detail page in CalSAWS to
allow for e-referral.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Michael Wu, Naga Chinduluru, Aaron Fowler, William Baretsky, Himanshu Jain, Chitra Barsagade

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/01/2022	1.0	Initial	Kusnadi.E
06/28/2023	1.1	Update after committee review: <ul style="list-style-type: none"> • Updated Section 2.2 <ul style="list-style-type: none"> ○ Figure 2.2.2 from Section 2.2.2 is updated to reflect the updated validation message. ○ Updated Section 2.2.3 #3A with the update validation message to make it clearer so the user knows what they need to do and why the validation is thrown. • Updated Section 2.4 <ul style="list-style-type: none"> ○ Updated all the Figures on Section 2.4.2 to display the “Approved for County Use” field on the Search section. ○ Updated Section 2.4.3 <ul style="list-style-type: none"> ▪ Added to 1.a #x to include the description of the new field being added to the search section the “Approved for County Use”. ▪ Updated #1.e.vi to add more details on what Address will be displayed on the Address column on the Search 	Kusnadi.E

		<div>Result Summary Section.</div> <ul style="list-style-type: none">Added the project requirement details on Section 3	

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1 OVERVIEW

Currently in CalSAWS, information that are entered on the referral pages in CalSAWS are not being used or sent to external agency. This SCR will make updates to the CalSAWS application in preparation to expand the existing Child Care Administrator portal to provide referral information to external provider/agencies.

1.1 Current Design

When referrals are created in CalSAWS, counties are still required to manually provide the referral information to the external agencies, or providers for services they refer out.

1.2 Requests

Update CalSAWS application to prepare for the expansion of the existing Child Care Administrator portal to provide referral information to external provider/agencies.

1.3 Overview of Recommendations

1. Update the Referral Detail page with a new Referral Section that will contain information on who the external agency/provider the referral is for, Referral ID, program information if the referral is specific for a certain program and the worker information that is responsible for the referral.
2. Update the Resource Detail page with a new field to identify if the resource accepts e-referral or not and a new e-mail type option on the Internet section.
3. Update the Approved for County Use List page so that the county can determine if the resource is approved for e-Referral.
4. Create a new Select Provider/Agency page so that user can select a provider or agency as the resource associated to the referral.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out in the design.
2. The functionality to validate Resource e-mail addresses will be added as part of SCR CA-253124. A subsequent SCR will be created to update the e-Referral functionality to only send to a validated e-mail address.
3. CA-263212 is the SCR that will add the e-referral email functionality in CalSAWS and expanding the Child Care Administrator portal (to be rebranded as the CalSAWS Administrator portal) to display referral information.
4. CA-263213 is the SCR that will update the CalSAWS Administrator Portal to allow external provider/agencies to update the referral status.
5. CA-263214 is the SCR that will update the existing URL for the Child Care Portal (to be rebranded as the CalSAWS Administrator portal) to match with the rebrand.

2 RECOMMENDATIONS

Update the CalSAWS application in preparation to expand the existing Child Care Administrator portal to provide referral information to external provider/agencies.

2.1 Referral Detail page

2.1.1 Overview

The Referral Detail page allows users to add, edit or view the details of a referral for a participant/beneficiary. This SCR will add a new Referral Information block that has additional field to determine the external agency or provider that the referral is for, along with an option for the users to indicate the program to be associated to the referral, worker contact information.

2.1.2 Referral Detail Mockup

Referral Detail

*- Indicates required fields

Save and Return Cancel

Need*

Type	Name	Category	Begin Date
<input type="radio"/> Child Care	Mouse, Minnie 46F	Dependent Care	08/30/2022

Referral Information

Referral ID:

Resource: *
Select

Worker ID: *
Select

Program:

Send Referral E-mail:

Comments:

Status History*

Status	Status Reason	Status Date	Updated By
<input type="text"/>	<input type="text"/>	09/08/2022	

Save and Return Cancel

This [Type 1](#) page took 0.31 seconds to load.

Figure 2.1.1 – Referral Detail (Create mode landing page)

Referral Detail

*- Indicates required fields

Save and Return

Cancel

Need *

Type	Name	Category	Begin Date
<input type="radio"/> Child Care	Mouse, Minnie 46F	Dependent Care	08/30/2022

Referral Information

Referral ID:

Resource: *

[Career Counseling](#)

Select

Worker ID: *

[36LS08GG00](#)


Select

Program:

Send Referral E-mail:

Comments:

Status History *

Status	Status Reason	Status Date	Updated By
<input type="text"/>	<input type="text"/>	09/08/2022 	

Save and Return

Cancel

This [Type 1](#) page took 0.31 seconds to load.

Figure 2.1.2 – Referral Detail (Create mode)

Referral Detail

*- Indicates required fields

Save and Return

Cancel

Name:

Mouse, Minnie 46F

Need *

Need Type:

[Career Counseling](#)

Need Category:

Counseling

Need Status:

Met

Need Description:

Referral Information

Referral ID:

1234567

Resource: *

[Career Counseling](#)

Worker ID: *

[36LS08GG00](#)


Select

Program:

Send Referral E-mail:

Comments:

Status History *

Status	Status Reason	Status Date	Updated By
Referred	Eligible for Service	09/08/2022	1234567
<input type="text"/>	<input type="text"/>	<input type="text"/> 	

Last Updated On 09/08/2022 2:59:26 PM By: [1030878](#)

Save and Return

Cancel

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

Figure 2.1.3 – Referral Detail (Edit mode)

Referral Detail

*- Indicates required fields

Generate Form

Edit

Close

Name:

Mouse, Minnie 46F

Need *

Need Type:

[Career Counseling](#)

Need Category:

Counseling

Need Status:

Met

Need Description:

Referral Information

Referral ID:

1234567

Resource: *

[Career Counseling](#)

Worker ID: *

[36LS08GG00](#)

Program:

CalWORKs

Send Referral E-mail:

Yes

Comments:

Testing 12345

Status History *

Status	Status Reason	Status Date	Updated By
Referred	Eligible for Service	09/08/2022	1234567

Generate Form

Edit

Close

Last Updated On 09/08/2022 2:59:26 PM By: [1030878](#)

This [Type 1](#) page took 0.33 seconds to load.

Figure 2.1.4 – Referral Detail (View mode)

Referral Detail

*- Indicates required fields

Save and Return

Cancel

- [Send Referral E-mail](#) - Resource does not accept e-Referral. Please update your selection.

Need *

Type	Name	Category	Begin Date
<input checked="" type="radio"/> Mentoring	Bernaer, Fallon 46F	Counseling	06/02/2023

Figure 2.1.5 – Referral Detail - validation

2.1.3 Description of Changes

1. Add a new block titled 'Referral Information' to the Referral Detail page and will have the following fields:
 - a. Referral ID
 - i. This field will display the referral id that the system generates when the referral is created and saved.
 1. The referral id will not display when the Referral Detail page is in create mode. Referral id will display when the Referral Detail page is in edit or view mode.
 - b. Resource
 - i. Rename the required "Provider" field to "Resource" and the "Select" button will display when the Referral Detail page is in create mode (landing page) as referenced on Figure 2.1.1.
 1. Update the "Select" button to take the user to the new Select Provider/Agency page (see section 2.4 for more details).
 - ii. For existing referral record, the selected provider will continue to display.

Note: Clicking the Select button will no longer take the user to the Select Service and Provider page.
 - iii. The field will display the name of the provider or agency (name entered on the Name field on the Resource Detail page) that was selected as a hyperlink once the resource is selected from the Select Provider/Agency page.
 1. Display the "Select" button next to the Resource name when it is in create mode as referenced on Figure 2.1.2. when the resource is selected.

- a. "Select" button will not display when the Referral Detail page is in edit or view mode.
 - 2. Clicking the hyperlink will take the user to the Resource Detail page in View mode.
 - a. Clicking the Close button from the Resource Detail page will take the user back to the Referral Detail page in the same mode that the user was in and will retain the same information that was already entered on the Referral Detail page.
- c. Worker ID
 - i. This will be a required field and will have a "Select" button when the Referral Detail page is in create mode (landing page) as referenced on Figure 2.1.2.
 - 1. "Select" button will take the user to the existing Select Worker page.
 - a. Clicking the "Select" button on the Select Worker page will take the user back to the Referral Detail page in the same mode that the user was in and will retain the same information that was already entered on the Referral Detail page.
 - ii. The field will display the Worker ID information that was selected as a hyperlink once the worker is selected from the Select Worker page.
 - 1. Display the "Select" button next to the Worker ID when it is in create or edit mode as referenced on Figure 2.1.2 and Figure 2.1.3.
 - a. "Select" button will not display when the Referral Detail page is in view mode.
 - 2. Clicking the hyperlink will take the user to the Worker Detail page.
 - a. Clicking the Close button from the Worker Detail page will take the user back to the Referral Detail page in the same mode the user was in and will retain the same information that was already entered on the Referral Detail page.
 - iii. For existing referral record, the field will remain blank. User will be required to select a worker when they update the record by clicking the Save and Return button while in Edit mode.
- d. Program
 - i. This will be an editable drop-down field and will display "Blank" and the list of programs that are available for the county that the user is associated to.
 - 1. This field will default to "Blank".

2. For existing referral records, the field will default to "Blank".
- e. Send Referral E-Mail
 - i. This will be an editable drop-down field and will display the following options:
 1. Blank (default value)
 2. Yes
 3. No
 - ii. For existing referral records, the field will default to "Blank".
2. Add a new column titled "Updated By" to the Status History block.
 - a. Display the staff id of the user that last updated the status of the Referral Detail page.
 - i. Staff id will be display as a hyperlink and will only display when the Referral Detail page is in edit or view mode.
 - ii. Clicking the hyperlink will take the user to the Worker Detail page.
 1. Clicking the "Close" button will take the user back to the Referral Detail page in the same mode it was in and will retain the same information that was already entered on the Referral Detail page.
3. Update the Comments box field to be editable when it is in "Edit" mode.
4. Update the existing validation message "Select – Please select a Service Provider" to "Select – Please select a Resource".
 - a. Validation message will display when the user clicks on the "Save and Return" button and no Resource is selected on the required "Resource" field.
5. Create a new validation message on the Referral Detail page (Create and Edit mode).
 - a. Validation message will be "Send Referral E-Mail – Resource does not accept e-Referral. Please update your selection."
 - i. Validation message will display when the user clicks on the "Save and Return" button and the "Send Referral E-mail" field is set to "Yes" and the Resource have the "Does This Resource accepts e-Referrals" field on the Resource Detail page to "Blank" or "No".

Note: When this validation message display, user will need to update the value to either "Blank" or "No" or the user will need to update the "Does This Resource accepts e-Referrals" field to "Yes" on the Resource Detail page.

2.1.4 Page Location

- **Global: Empl. Services**
- **Local: Supportive Services**
- **Task: Referrals**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping for the new fields that are added to the Referral Detail page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Resource Detail page

2.2.1 Overview

The Resource Detail page allow users to add, edit or view a Resource. This SCR will add additional fields to the Resource Detail page to allow users to indicate whether a Resource is able to accept e-Referrals or not.

2.2.2 Resource Detail Mockup

Resource Detail

* - Indicates required fields

Save

Cancel

Basic Information

ID:	Status: *	IVR PIN:
	Active	Create PIN
Name: *	Payee Name: *	
eCAPS Vendor Number:		

Resource Access

Name	Login	Email
No data found		
Add		

Category

- ☒ Agency
☐ Employer
☒ Provider
☐ School

Agency Type

- ☐ Child Care Agency ☐ CBO

Tax Information

Type: *	ID:	ID Type:
-Select-		-Select-

Additional Information

Recruitment Method:
-

Contact Information: Hours of Operation:

Comments:

Language:

Does This Resource accept e-Referrals:
-

Does This Resource accept Vouchers:
-

Addresses

Type	Address
Add Address	

Phone Information

Type	Number	Extension
Add		
Remove		

Internet Information

Type	Address
Add	
Remove	

Maintainer Information

Update Frequency:	Next Review Date:	Worker ID: *
Every 2 Years	5/24/2025	90ES005V00 Select

Save

Cancel

This Type_1 page took 2.02 seconds to load.

Figure 2.2.1 – Resource Detail (Provider/Agency selected)

Resource Detail

* Indicates required fields

Images Save Cancel

Does This Resource accept e-Referrals - The selected value of Yes is not valid, when there is no e-mail address with the type of E-mail.

Basic Information

ID: 2899868028 Status: Active IVR PIN: Create PIN

Name: Referral Payee Name: Referral

eCAPS Vendor Number:

Resource Access

Name	Login	Email
No data found		

Add

Category

☒ Agency
☐ Employer
☒ Provider
☐ School

Agency Type

☒ Child Care Agency ☐ CBO

Tax Information

Type: Non Profit - 1099 Exempt ID: ID Type: Select

Additional Information

Recruitment Method:

Contact Information: Hours of Operation:

Comments:

Language: English

Does This Resource accept e-Referrals: Yes

Does This Resource accept Vouchers: Yes

Addresses

Type	Address
<input type="checkbox"/> 1099 Mailing	1032 S E ST SAN BERNARDINO, CA 92408-1913
<input type="checkbox"/> Billing	1032 S E ST SAN BERNARDINO, CA 92408-1913
<input type="checkbox"/> Mailing	1032 S E ST SAN BERNARDINO, CA 92408-1913
<input type="checkbox"/> Physical	1032 S E ST SAN BERNARDINO, CA 92408-1913

Remove Add Address

Phone Information

Type	Number	Extension
<input type="checkbox"/> 		

Remove

Internet Information

Type	Address
<input type="checkbox"/> Web Site	jshdov@bestcalhears.org
<input type="checkbox"/> 	

Remove Add

Maintainer Information

Update Frequency: Every 2 Years Next Review Date: 06/02/2025 Worker ID: 90AS00KQ6Q

Images Save Cancel

Last Updated On 06/02/2023 12:51:54 AM By: 1181498

Figure 2.2.2 – Resource Detail (validation 1)

Resource Detail

* - Indicates required fields

Images

Save

Cancel

E-mail Address - Input [asdfasdfsdf@] is not valid for this field

Basic Information

ID:

2899868028

Status: *

Active

IVR PIN:

Create PIN

Name: *

Referral

Payee Name: *

Referral

eCAPS Vendor Number:

Resource Access

Name	Login	Email
No data found		

Add

Category

☒ Agency
 ☐ Employer
 ☒ Provider
 ☐ School

Agency Type

☒ Child Care Agency
 ☐ CBO

Tax Information

Type: *

Non Profit - 1099 Exempt

ID:

ID Type:

-Select-

Additional Information

Recruitment Method:

Contact Information:

Hours of Operation:

Comments:

Language:

English

Does This Resource accept e-Referrals:

Yes

Does This Resource accept Vouchers:

Yes

Addresses

Type	Address
<input type="checkbox"/> 1099 Mailing	1032 S E ST SAN BERNARDINO, CA 92408-1913
<input type="checkbox"/> Billing	1032 S E ST SAN BERNARDINO, CA 92408-1913
<input type="checkbox"/> Mailing	1032 S E ST SAN BERNARDINO, CA 92408-1913
<input type="checkbox"/> Physical	1032 S E ST SAN BERNARDINO, CA 92408-1913

Remove

Add Address

Phone Information

Type	Number	Extension
<input type="checkbox"/>		

Remove

Internet Information

Type	Address
<input type="checkbox"/> E-mail	asdfasdfsdf@
<input type="checkbox"/>	

Remove

Add

Maintainer Information

Update Frequency:

Every 2 Years

Next Review Date:

06/02/2025

Worker ID: *

90AS00KQ6Q

Select

Images

Save

Cancel

Last Updated On 06/02/2023 12:51:54 AM By: 1181498

Figure 2.2.3 – Resource Detail (validation 2)

2.2.3 Description of Changes

1. Create a new drop-down field titled “Does This Resource accept e-Referrals” on the Additional Information block on the Resource Detail page.
 - a. This field will be an editable field and will have the following drop-down options:
 - i. Blank (default)
 - ii. No
 - iii. Yes
 - b. This field will only display when the Category selected is “Provider” and/or “Agency”.
 - i. Field will display when one or both of the above category is selected when multiple categories are selected.
 - c. For existing resources, the “Does This Resource accept e-Referrals” will default to “Blank”.
2. Create a new Internet Information Type.
 - a. New Type will be ‘E-mail’.
 - b. User can add more than one ‘E-mail’ type for the resource.
3. Create the following new validations.
 - a. “Does This Resource accept e-Referrals – The selected value of Yes is not valid, when there is no e-mail address with the type of E-mail.”
 - i. Validation message will be triggered, when the user clicks on Save button and the “Does This Resource accept e-Referrals” field is equal to Yes but there is no e-mail address entered on the Internet Information section with the Type of “E-mail” that is being added to the resource or when there is no e-mail address with the Type of E-mail already existing for the Resource.
 - b. “E-mail Address – Input [XXX] is not valid for this field”
 - i. This validation will be triggered when the user clicks on the ‘Save’ button and the Type is equal to ‘E-mail’ and the value entered on the Address field is not following the standard e-mail constraint.
 - ii. XXX will be the value entered on the Address field where the Type is equal to “E-mail”.

2.2.4 Page Location

- **Global: Resource Databank**
- **Local: Resources**
- **Task: Resource Search**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update Page Mapping for the new fields being added.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Approved for County Use List page

2.3.1 Overview

The Approved for County Use List allows users to add, edit or view a resource's approval status. This SCR will add a new option for counties to determine if that resource is approved for e-Referrals or not.

2.3.2 Approved for County Use List Mockup

Approved for County Use List

*- Indicates required fields

Edit

Approved	IVR PIN Access	Approved for e-Referrals	Comments	Date	User
Yes	No	Yes		06/02/2023	1181498

Edit

This Type 1 page took 0.52 seconds to load.

Figure 2.3.1 – Approved for County Use List (View)

Approved for County Use List

*- Indicates required fields

SaveCancel

Approved	IVR PIN Access	Approved for e-Referrals	Comments	Date	User
Yes	No	Yes		06/02/2023	1181498

Change Approval for Resource to

Approved: *

Yes

IVR PIN Access: *

No

Approved for e-Referrals:

Yes

Date:
06/02/2023

Comments:

SaveCancel

This [Type 1](#) page took 0.47 seconds to load.

Figure 2.3.2 – Approved for County Use List (Edit)

2.3.3 Description of Changes

1. Add a new column to the Approved for County Use List titled "Approved for e-Referrals" as referenced on Figure 2.3.1 and Figure 2.3.2.
 - a. This column will display the selected value from the Approved for e-Referrals drop-down field under the Change Approval for Resource to section.
 - i. Value displayed will be "Blank", "Yes" or "No"
 1. Value displayed will be based for the County that the logged in user belongs to.
 - b. This column will not display if the Resource is Foster Care or Money Management.

Note: This will work the same way as the existing Approved column.
2. Add a new drop-down field to the Approved County Use List page when the page is in Edit mode under the "Change Approval for Resource to" section.
 - a. This will be a drop-down field and will have the following options:
 - i. Blank (Default value)
 - ii. No
 - iii. Yes

- b. The value saved will be specific for the specific county that the logged in user belongs to.
- c. For existing records, the "Approved for e-Referrals" field will default to "Blank".
- d. This drop-down field will not display if the Resource is Foster Care or Money Management.

Note: This will work the same way as the existing Approved drop-down field.

2.3.4 Page Location

- **Global: Resource Databank**
- **Local: Resources**
- **Task: Resource Search**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update Page Mapping for the new fields being added.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Select Provider/Agency

2.4.1 Overview

Create a new page in CalSAWS to allow users to search and select for a provider or agency.

2.4.2 Select Provider/Agency Mockup

Select Provider/Agency

*- Indicates required fields

Cancel

Search

Search All Statuses

Resource Name:	Resource ID:	Accept e-Referral:
<input type="text"/>	<input type="text"/>	Yes ▾
Category:		
<input type="text"/>		
Address Type:	e-Referrals Approved for County Use:	
Starting Address ▾	<input type="text"/>	
Starting Address: *	Approved for County Use:	
14 WILBERT RD	<input type="text"/>	
City: *	State: *	Zip Code:
Burbank	CA ▾	70501
Maximum Distance From Address:		
All ▾		

Results per Page: 25 ▾

Search

Search All Statuses

Cancel

This Type 1 page took 0.37 seconds to load.

Figure 2.4.1 – Select Provider/Agency (Landing page)

Select Provider/Agency

*- Indicates required fields

Cancel

▼ Refine Your Search

Search

Search All Statuses

Resource Name:	Resource ID:	Accept e-Referral:
<input type="text"/>	<input type="text"/>	Yes ▼
Category:	Type:	
Agency ▼	<input type="text"/>	
Address Type:	e-Referrals Approved for County Use:	
Actual Address ▼	<input type="text"/>	
Starting Address: *	Approved for County Use:	
1032 S E ST	<input type="text"/>	
City: *	State: *	Zip Code:
SAN BERNARDINO	CA ▼	92408
Maximum Distance From Address: *		
5 miles ▼		

Figure 2.4.2 – Select Provider/Agency (Agency Category)

Select Provider/Agency

*- Indicates required fields

Resource Name:

Category:

Service Category:

Address Type:

Address:

City:

Resource ID:

Service Type:

e-Referrals Approved for County Use:

Approved for County Use:

State:

Accept e-Referral:

Zip Code:

Results per Page:

This Type 1 page took 0.37 seconds to load.

Figure 2.4.3 – Select Provider/Agency (Provider Category)

27

Select Provider/Agency

*- Indicates required fields

Cancel

- [Zip Code](#) - Whole numbers must be entered in this field.

Search

Search All Statuses

Resource Name: <input type="text"/>	Resource ID: <input type="text"/>	Accept e-Referral: <input type="button" value="Yes"/>
Category: <input type="button" value="Provider"/>		
Service Category: <input type="button" value=""/>	Service Type: <input type="button" value=""/>	
Address Type: <input type="button" value="Actual Address"/>	e-Referrals Approved for County Use: <input type="button" value=""/>	
Address: <input type="text" value="14 WILBERT RD"/>	Approved for County Use: <input type="button" value=""/>	
City: <input type="text" value="Burbank"/>	State: <input type="button" value="CA"/>	Zip Code: <input type="text" value="a"/>

Results per Page: 25

Search

Search All Statuses

Cancel

This Type 1 page took 0.37 seconds to load.

Figure 2.4.4 – Select Provider/Agency (validation)

Select Provider/Agency

*- Indicates required fields

Cancel

▼ Refine Your Search

Search

Search All Statuses

Resource Name:

Pawel

Resource ID:

Accept e-Referral:

Yes ▼

Category:

▼

Address Type:

Starting Address ▼

e-Referrals Approved for County Use:

▼

Starting Address: *

1032 S E ST

Approved for County Use:

▼

City: *

SAN BERNARDINO

State: *

CA ▼

Zip Code:

92408

Maximum Distance From Address: *

5 miles ▼

Results per Page: 25 ▼

Search

Search All Statuses

Search Results Summary

Results 1 - 5 of 5

Select

Name	Category	Type/ Service Type	Address	County Approved	County Approved for e- Referrals
<input checked="" type="radio"/> PAWEL	Provider	Assessment	99 CHESTNUT HILL Savannah, CA 31682	Yes	Yes
<input type="radio"/> PAWEL	Provider	WEX	99 CHESTNUT HILL Savannah, CA 31682	Yes	Yes
<input type="radio"/> PAWEL	Provider	Community Services	99 CHESTNUT HILL Savannah, CA 31682	No	
<input type="radio"/> PAWEL	Provider	Voc/Ed Training	99 CHESTNUT HILL Savannah, CA 31682	No	No
<input type="radio"/> PAWEL	Agency	Child Care Agency	99 CHESTNUT HILL Savannah, CA 31682	No	Yes
<input type="radio"/> PAWEL	Agency	Child Care Agency	99 CHESTNUT HILL Savannah, CA 31682		

Select

Cancel

This Type 1 page took 2.41 seconds to load.

Figure 2.4.5 – Select Provider/Agency (Result)

2.4.3 Description of Changes

1. Create a brand-new page titled "Select Provider/Agency" that will be accessible through the "Select" button on the Resource field from the Referral Detail page.
 - a. Refine Your Search section
 - i. Resource Name
 1. This will be a text field.
 2. This will search for a resource that have the same Resource Name as what is entered.
 - ii. Resource ID
 1. This will be a text field.
 2. This will search for a resource that have the same Resource ID as what is entered.
 - iii. Accept e-Referral
 1. This will be a drop-down field and will have the following values
 - a. Blank (default)
 - i. This will search for resources that have "Blank", "Yes" or "No" selected on the "Does This Resource accept e-Referrals" field on the Resource Detail page.
 - b. Yes
 - i. This will search for resources that have "Yes" selected on the "Does This Resource accept e-Referrals" field on the Resource Detail page.
 - c. No
 - i. This will search for resources that have "No" selected on the "Does This Resource accept e-Referrals" field on the Resource Detail page.
 - iv. Category
 1. This will be a drop-down field and will have the following values
 - a. Blank (default)
 - i. This will search for resources that are categorized as Agency and/or Provider.
 - b. Agency
 - i. This will search for resources that is categorized as Agency.
 - c. Provider
 - i. This will search for resources that is categorized as Provider.
 - v. Type

1. This will be a dynamic drop-down field and will display when "Agency" option is selected from the Category field.
 2. This field will have the following options:
 - a. Blank (default value)
 - i. When the "Blank" option is selected, this will search for all Agency Type.
 - b. All the option that is available for an Agency Type.
- vi. Service Category
1. This will be a dynamic drop-down field and will display when "Provider" option is selected from the Category field.
 2. The value available on the drop-down field will be "Blank" and all the available Services for a Provider category type.
 - a. When the "Blank" option is selected, this will search for all Service Category for a Provider category type.
 - b. When one of the other values (other than Blank) is selected, it will search for the specific Service Category that was selected.
- vii. Service Type
1. This will be a dynamic drop-down field and will display when the "Provider" option is selected from the Category field.
 2. The value available on the drop-down field will be "Blank" and all the available services type associated to the service category that is selected.
 - a. When the Service Category field is set to "Blank" the Service Type will only have a "Blank" option. value display on this field will be dependent on the value selected on the Service Category field.
 - b. There When the "Blank" option is selected, this will search for all Service Type for the Service Category that was selected.
 - c. When one of the other values (other than Blank) is selected, it will search for the specific Service Type that was selected.
- viii. Address Type
1. This will be a drop-down field and will have the following values.
 - a. Actual Address
 - i. The default value for the below fields when the page first load will be the

- address that the users is associated to.
- b. Search for the resource that have address elements which match the below inputted address fields.
 - i. When this option is selected display the following fields
 1. Address
 - a. This will be a text field
 2. City
 - a. This will be a text field
 3. State
 - a. This will be a drop-down field
 - b. This will list all the States that CalSAWS currently displays throughout the applications.
 4. Zip Code
 - a. This will be a text field
 - c. Starting Address (default)
 - i. The default value for the below fields when the page first load will be the address that the users is associated to.
 - ii. Search for a resource based on the Starting Address (information inputted in the below fields) in the proximity that was selected (Maximum Distance From Address).
 - iii. When this option is selected display the following fields
 1. Starting Address
 - a. This will be a required text field.
 2. City
 - a. This will be a required text field.
 3. State
 - a. This will be a required drop-down field
 - b. This will list all the States that CalSAWS currently displays throughout the applications.
 4. Zip Code
 - a. This will be a text field.

5. Maximum Distance From Address
 - a. This will be a required drop-down field and will have the following options
 - i. 5 miles (default value)
 - ii. 10 miles
 - iii. 20 miles
 - iv. 30 miles
 - v. 40 miles
 - vi. 50 miles
 - vii. 100 miles
 - viii. 200 miles
 - ix. All
- ix. e-Referrals Approved for County Use
 1. This will be a drop-down field and will have the following values
 - a. Blank (default)
 - i. This will search for resources that are both county approved and not county approved for e-referrals.
Note: This will pull information based on the value selected from the Approved for County Use List page from the Approved for e-Referrals field.
 - b. Yes
 - i. This will search for resources that are county approved for e-referrals.
Note: This will pull information based on the value selected from the Approved for County Use List page from the Approved for e-Referrals field.
 - ii.
 - c. No
 - i. This will search for resources that are not county approved for e-referrals.
Note: This will pull information based on the value selected from the Approved for County Use List page from the Approved for e-Referrals field.
- x. Approved for County Use
 1. This will be a drop-down field and will have the following values

- a. Blank (default)
 - i. This will search for resources that are both county approved and not county approved.
Note: This will pull information based on the value selected from the Approved for County Use List page from the Approved field.
 - b. Yes
 - i. This will search for resources that are county approved.
Note: This will pull information based on the value selected from the Approved for County Use List page from the Approved field.
 - c. No
 - i. This will search for resources that are not county approved.
Note: This will pull information based on the value selected from the Approved for County Use List page from the Approved field.
- b. Results per Page:
 - i. This dropdown limits how many records pulled per results page.
 - ii. The options are:
 - 1. 25 (default)
 - 2. 50
 - 3. 75
 - 4. 100
- c. Search button
 - i. Clicking this button loads the search results based on the search parameters enter and for resources that are Active status.
- d. Search All Statuses
 - i. Clicking this button loads the search results based on the search parameters and will display resources for all statuses.
- e. Search Result Summary section
 - i. Select button
 - 1. Clicking this button will select the resource that was selected (radio button selected) and will take the user back to the Referral Detail in the same mode that it was in prior to accessing this page.
 - ii. Radio button

1. Default the radio button to select the first value on the search result summary section.
- iii. Name
 1. Display the name of the resource that is being returned based on the search parameter.
 2. This will be a hyperlink, and clicking the hyperlink will take the user to the Resource Detail page in view mode for that specific resource.
- iv. Category
 1. Display the category of the resource that is being returned based on the search parameters.
 - a. It will be either Provider or Agency.
- v. Type/Service Type
 1. Display the Type or the Service Type of the resource that is being returned based on the search parameters.
 - a. For a resource with an "Agency" category, display the Type for the resource being returned.
 - b. For a resource with a "Provider" category, display the Service Type for the resource being returned.
- vi. Address
 1. Display the Address of the resource that is being returned based on the search parameters.
 - a. When the Resource being returned have a Category of Provider and the Type/Service Type returned/displayed is not Null (this will display as "-") then the Address column will display the Service Address.
 - b. When the Resource being returned have a Category of Provider and the Type/Service Type returned/displayed is Null (this will display as "-") then the Address column will display the address for the Resource.
 - c. When the Resource being returned have a Category of Agency then the Address column will display the address for the Resource.
- vii. County Approved
 1. Display the county approved for the resource that is being returned based on the search parameter.
 - a. This will return information specific for the county that the logged in user belongs to.
 - b. This is based on the latest value selected from the Approved field from the Approved for County Use List.
- viii. County Approved for e-Referral

1. Display the county approved for e-Referral for the resource that is being returned based on the search parameter.
 - a. This will return information specific for the county that the logged in user belongs to.
 - b. This is based on the latest value selected from the Approved for e-Referrals field from the Approved for County Use List.

Note: This will work similar to the Approved for County User search parameter that exist on other pages such as the Select Service and Provider page.

- ix. Results per Page is set to 25 as a default, but update based on the option selected under the Results per page field.
- f. Cancel button
 - i. Clicking this button will take the user back to the Referral Detail page.
- g. Select button
 - a. Clicking the "Select" button from the Select Provider/Agency page will take the user back to the Referral Detail page in create mode and retain the same information that was already entered on the Referral Detail page.
- h. Create a new validation "Zip Code – Whole numbers must be entered in this field."
 - i. This validation will be triggered when the user clicks on the Search or Search All Statuses button and the value entered on the Zip Code field is not in the correct 5 numerical digit or it contains alpha characters.

Note: This page will work like the existing 'Select Service and Provider page'.

2.4.4 Page Location

- **Global: Empl. Services**
- **Local: Supportive Services**
- **Task: Referrals**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Create a new page mapping for the new page being created.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Automated Regression Test

2.5.1 Overview

TBD in progress

2.5.2 Description of Changes

1. TBD in progress

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.15.1.1	The LRS shall generate the appropriate referrals at the time of case approval, based on information entered and programs requested.	CalSAWS will be updated to allow e-referrals to be generated. This SCR will add additional fields to the referrals pages in preparation for the upcoming SCR that will add the functionality for e-referrals to be sent out.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-246388

Add M82-510A to CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Thanushree Veereshappa
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/14/2023	1.0	Initial Draft	Thanushree Veereshappa

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1 OVERVIEW

The purpose of this SCR is to add M82-510A (6/98) to CalSAWS in English and all available threshold languages.

1.1 Current Design

Currently M82-510A (6/98) Cooperate - Change is not available in the CalSAWS.

1.2 Requests

Add M82-510A (6/98) Cooperate - Change to CalSAWS Template Repository in English and available threshold languages.

Languages Include: English, Spanish, Chinese, Russian and Vietnamese.

1.3 Overview of Recommendations

Add M82-510A (6/98) Cooperate - Change to CalSAWS Template Repository in English and following threshold languages: Spanish, Chinese, Russian and Vietnamese.

1.4 Assumptions

1. All fields (blank or prepopulated) will be editable.
2. No variables will be populated on the new M82-510A Form (aside from the standard header and footer information).
3. Supporting Documents section references attachments found on JIRA.

2 RECOMMENDATIONS

2.1 Add M82-510A to CalSAWS in English and all available threshold languages.

2.1.1 Overview

The M82-510A form will be added in English and all available threshold languages to CalSAWS.

State Form: M82-510A (6/98)

Programs: CalWORKs

Attached Forms: NA 200

Forms Category: NOA

Template Repository Visibility: All Counties

Form Title (Document List Page Displayed Name): Cooperate - Change

Imaging Form Name: Cooperate - Change

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

2.1.2 Form Verbiage

Create M82-510A XDP.

A new XDP will be added for M82-510A form with version (6/98).

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Languages: English, Spanish, Chinese*, Russian and Vietnamese.

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

Include NA Back 9: Yes

Form number: M82-510A

Form Mockups/Examples: See supporting documents #1

2.1.3 Form Generation Conditions

Add M82-510A (6/98) Cooperate - Change form to Template Repository

The M82-510A (6/98) Cooperate - Change is added only to the Template Repository.

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

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for M82-510A.

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

Mailing Options:

Mailing Options	Option for M82-510A
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address

Mailing Options	Option for M82-510A
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Add Form Control

Add an imaging barcode for M82-510A.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for M82-510A Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	M82-510A (6/98) Cooperate - Change	M82-510A.pdf M82-510A_Spanish.pdf M82-510A_Chinese.pdf M82-510A_Russian.pdf M82-510A_Vietnamese.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none">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;	M82-510A is being added in English, and available languages.

	<p>p. Transitioning of aid notices;</p> <p>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</p> <p>r. Non-compliance and sanction notices;</p> <p>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</p> <p>t. Corrective NOAs on State Fair Hearing decisions;</p> <p>u. CSC paper ID cards with LRS-generated access information; and</p> <p>v. CSC PIN notices.</p>	
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CalsAWS

California Statewide Automated Welfare System

Design Document

CA-247694

Asset Limit Changes - Forms and Informational
Notices

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Maria Jensen
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/15/2023	0.1	Initial Draft	Maria Jensen
07/13/2023	0.2	Updated draft	Phong Xiong
07/17/2023	0.3	Updates as per BA/QA review meeting	Phong Xiong

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1 OVERVIEW

MEDIL I 22-22 updated forms and informational notices and changed asset limits for Non-MAGI Medi-Cal programs. With CA-249671 CalSAWS updated the following forms to revision 7/22: MC 007, DHCS 7077. This effort will update the rest of the forms in the CalSAWS system.

1.1 Current Design

These forms currently exist in the system: MC 008, MC 010, MC 176 PI, PUB 10, and MC 14 A. These forms exist in English and Spanish with the exception of the MC 176 PI and MC 14 A. The MC 176 PI only exists in English and the MC 14 A exists in all threshold languages.

The Non-MAGI Screening Packet and the Non-MAGI Turning 65 Packet contains the PUB 10 as part of the packet itself. Both packets exist in English and Spanish.

1.2 Requests

Effective July 1, 2022, the asset limits for Non-MAGI Medi-Cal programs have changed.

CalSAWS must update the following Asset Limit Changes – Forms and Informational Notices to reflect the new amounts via Medi-Cal Eligibility Division Information Letter- MC 008, MC 010, MC 176 PI, PUB 10, and MC 14 A.

Note: All of the forms are updated only in English with the exception of the MC 14 A as the State has provided all the translations for the MC 14 A.

1.3 Overview of Recommendations

1. Update the following forms in English to reflect the new Asset Limit amounts in the CalSAWS system: MC 008, MC 010, MC 176 PI, and PUB 10. Turn off the Spanish version for MC 008, MC 010, PUB 10
2. Update the following packets to reflect the new PUB 10: Non-MAGI Screening Packet, Non-MAGI Turning 65 packet. Update the Spanish version of the 2 packets to use the English version of PUB 10.
3. Update the MC 14 A in all threshold languages to the latest state version.

1.4 Assumptions

1. When generated in the context of a case, the body fields will be editable for all counties, as per CalSAWS standards.
2. The forms will be implemented in the rest of the threshold languages available in the CalSAWS system when the State will provide them.
3. MEDIL I 22-22 also mentions form DHCS 7102, but this form is not present in the CalSAWS system. The DHCS 7102 form is used only by brokers and will not be

added to CalSAWS.

2 RECOMMENDATIONS

2.1 Update Form MC 008

2.1.1 Overview

This SCR will update form 'MC 008 Information Notice' (revision 10/11) (ID 5717) in CalSAWS to match the latest version available on the State website (07/22).

State Form: MC 008 Information Notice (10/11)

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Brochure/Flyer

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

2.1.2 Form/NOA Verbiage

Update Form XDP

This SCR will bring updates to the verbiage, punctuation, formatting and will change the amounts on this form. Please see below table for verbiage changes:

Location	Old Verbiage	New Verbiage
Page 1 – Number 2	A QMB must have income which is equal to or less than \$908 if he/she is a single person or \$1,226 if he/she is married and living with a spouse.	A QMB must have monthly income which is equal to or less than \$1,153 if he/she is a single person or \$1,546 if he/she is married and living with a spouse.
Page 1 – Number 3	A QMB must have property which is equal to or less than \$6,680 if he/she is single or equal to or less than \$10,020 if he/she is married and living with a spouse.	A QMB must have property which is equal to or less than \$130,000 if he/she is single or equal to or less than \$195,000 if he/she is married and living with a spouse.

Page 1 – First Paragraph under Requirement 2	A QMB who is not married or not living with a spouse must have countable income which is equal to or less than \$908. A QMB living with a spouse must have countable income which is equal to or less than \$1,226. These amounts are expected to increase sometime in April.	A QMB who is not married or not living with a spouse must have countable income which is equal to or less than \$1,153. A QMB living with a spouse must have countable income which is equal to or less than \$1,546. These amounts are expected to increase sometime in April.
Page 2 – Asterisked verbiage at the bottom of the page	If you are not married, this total cannot exceed \$908. If you are married and living with your spouse, this total cannot exceed \$1,226. However, if you have children or your spouse has low income, this total may be higher. If you received a Title II Social Security cost of living adjustment, this amount will not be counted until April.	If you are not married, this total cannot exceed \$1,153. If you are married and living with your spouse, this total cannot exceed \$1,546. However, if you have children or your spouse has low income, this total may be higher. If you received a Title II Social Security cost of living adjustment, this amount will not be counted until April.
Page 3 – First Paragraph under Requirement 3	A QMB who is not married or not living with his/her spouse must have countable property which is equal or less than \$6,680. A QMB who is married and living with his/her spouse must have countable property which is equal to or less than \$10,020.	A QMB who is not married or not living with his/her spouse must have countable property which is equal or less than \$130,000. A QMB who is married and living with his/her spouse must have countable property which is equal to or less than \$195,000.

Page 3 – Asterisked verbiage at the end of Requirement 3	** This total cannot exceed \$6,680 for a single person or \$10,020 for a couple.	** This total cannot exceed \$130,000 for a single person or \$195,000 for a couple.
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Updated Languages: English

Form Number: MC 008 Information Notice

Form Mockups/Examples: See Supporting Documents #1

This effort will not bring changes to the form header.

2.1.3 Form/NOA Variable Population

This effort does not have any changes to variable population.

2.1.4 Form/NOA Generation Conditions

There will be no updates to the Form Generation, Form Control, nor Print/Mailing Options. The form will continue to be Print Only.

Turn Off Threshold Language Forms

This effort is only updating the English version. The existing Spanish threshold language will be turned off until an updated version is made available on the State website.

2.2 Update Form MC 010

2.2.1 Overview

This SCR will update form MC 010 (revision 05/07) (ID 5836) in CalSAWS to match the latest version available on the State website (07/22).

State Form: MC 010 (05/07)

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

2.2.2 Form/NOA Verbiage

Update Form XDP

This SCR will bring updates to the verbiage, punctuation, formatting and will change the amounts on this form. Please see below table for verbiage changes:

Location	Old Verbiage	New Verbiage
Page 1 – Number 2	A QDWI must have a monthly income which is equal to or less than \$1,265 if he/she is a single person or \$1,692 if he/she is married and living with a spouse.	A QDWI must have a monthly income which is equal to or less than \$2,266 if he/she is a single person or \$3,052 if he/she is married and living with a spouse.
Page 1 – Number 3	A QDWI must have property which is equal to or less than \$4,000 if he/she is single or \$6,000 if he/she is married and living with a spouse.	A QDWI must have property which is equal to or less than \$130,000 if he/she is single or \$195,000 if he/she is married and living with a spouse.
Page 1 – First Paragraph under Requirement 2	A QDWI who is not married or not living with a spouse must have countable income which is equal to or less than \$1,265 per month. A QDWI living with a spouse must have countable income which is equal to or less than \$1,692 per month. These amounts are expected to increase sometime in April.	A QDWI who is not married or not living with a spouse must have countable income which is equal to or less than \$2,266 per month. A QDWI living with a spouse must have countable income which is equal to or less than \$3,052 per month. These amounts are expected to increase sometime in April.
Page 3 – Last paragraph below Section C	If you are not married, this amount cannot exceed \$1,265 per month. If you are married and living with your spouse, this total cannot exceed \$1,692 per month. However, if	If you are not married, this amount cannot exceed \$2,266 per month. If you are married and living with your spouse, this total cannot exceed \$3,052 per month. However, if

	you have children or your spouse has low income, this total may be higher.	you have children or your spouse has low income, this total may be higher.
Page 3 – First Paragraph under Requirement 3	A QDWI who is not married or not living with his/her spouse must have countable property which is equal to or less than \$4,000. A QDWI who is married and living with his/her spouse must have countable property which is equal to or less than \$6,000.	A QDWI who is not married or not living with his/her spouse must have countable property which is equal to or less than \$130,000. A QDWI who is married and living with his/her spouse must have countable property which is equal to or less than \$195,000.
Page 3 – Last sentence of Requirement 3	This amount cannot exceed \$4,000 for a single person or \$6,000 for a couple.	This amount cannot exceed \$130,000 for a single person or \$195,000 for a couple.

Updated Languages: English

Form Number: MC 010

Form Mockups/Examples: See Supporting Documents #2

This effort will not bring changes to the form header.

2.2.3 Form/NOA Variable Population

This effort does not have any changes to variable population.

2.2.4 Form/NOA Generation Conditions

There will be no updates to the Form Generation, Form Control, nor Print/Mailing Options. The form will continue to be Local Print only.

Turn Off Threshold Language Forms

This effort is only updating the English version. The existing Spanish threshold language will be turned off until an updated version is made available on the State website.

2.3 Update Form MC 176 PI

2.3.1 Overview

This SCR will update form MC 176 PI (revision 05/07) (ID 5424) in CalSAWS to match the latest version available on the State website (07/22).

State Form: MC 176 PI (05/07)

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Existing Languages: English

2.3.2 Form/NOA Verbiage

Update Form XDP

This SCR will bring updates to the verbiage, punctuation, and formatting. It will also change the amounts on this form and rearrange the title and case fields. Please see below table for verbiage changes:

Location	Old Verbiage	New Verbiage
Page 1 – Section E, Item 4	Enter \$2,000. (If the applicant is an institutionalized spouse with a community spouse, include the Community Spouse Resource Allowance (CSRA) in effect at the time of application in addition to the \$2,000.)	Enter \$130,000. (If the applicant is an institutionalized spouse with a community spouse, include the Community Spouse Resource Allowance (CSRA) in effect at the time of application in addition to the \$130,000.)
Page 1 – Section E, Item 5	Uncompensated value which would have resulted in excess property, transferred to establish eligibility (line 3 minus line 4). If greater than amount in line 2, enter amount in line 2.	Uncompensated value which would have resulted in excess property, transferred to establish eligibility (line 3 minus line 4). If greater than amount in line 2, copy amount in line 2.

Page 2 – Last sentence/bullet point	If undue hardship DOES NOT exist, forward case information to DHCS Medi-Cal Eligibility Division Property Analyst for review.	If undue hardship DOES NOT exist, you may forward case information to DHCS Medi-Cal Eligibility Division Property Analyst for review prior to sending the 10-day Notice of Action
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Updated Languages: English

Form Number: MC 176 PI

Form Mockups/Examples: See Supporting Documents #3

This effort will not bring changes to the form header.

2.3.3 Form/NOA Variable Population

This effort does not have any changes to variable population.

2.3.4 Form/NOA Generation Conditions

There will be no updates to the Form Generation, Form Control, nor Print/Mailing Options. The form will continue to be Local Print only.

2.4 Update Form PUB 10

2.4.1 Overview

This SCR will update form PUB 10 (revision 02/17) (ID 6327) in CalSAWS to match the latest version available on the State website (07/22).

State Form: PUB 10 (02/17)

Current Programs: Medi-Cal

Current Attached Forms:

- When generated within Non-MAGI Screening Packet: Coversheet, Non-MAGI Informing Letter, MC 604 IPS, MC 007, DHCS 7077, DHCS 7077 A, APTC CSR Brochure
- When generated within Non-MAGI Turning 65 packet: Coversheet, Non-MAGI Informing Letter, MC 604 IPS, MC 007, DHCS 7077, DHCS 7077 A

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

2.4.2 Form/NOA Verbiage

Update Form XDP

This SCR will bring updates to the verbiage, links and will change the amounts on this form. Please see below table for verbiage changes:

Location	Old Verbiage	New Verbiage
Page 1 – Middle column, bottom bullet points	<ul style="list-style-type: none">• 1 person – \$2,000• 2 people – \$3,000• 3 people – \$3,150• More people – \$3,150 plus \$150 for each added person	<ul style="list-style-type: none">• 1 person – \$130,000• 2 people – \$195,000• More people – \$195,000 plus \$65,000 for each added person

Updated Languages: English

Form Number: PUB 10

Form Mockups/Examples: See Supporting Documents #4

This effort will not bring changes to the form header.

Technical Note: The PUB 10 also exists as fragments and the fragments must also be updated.

PUB10_P1_EN.xdp

PUB10_P2_EN.xdp

2.4.3 Form/NOA Variable Population

This effort does not have any changes to variable population.

2.4.4 Form/NOA Generation Conditions

There will be no updates to the Form Generation, Form Control, nor Print/Mailing Options. The form will continue to be Print Only.

Turn Off Threshold Language Forms

This effort is only updating the English version. The existing Spanish threshold language will be turned off until an updated version is made

available on the State website (this includes the PUB 10 Spanish fragments).

2.5 Update Non-MAGI Screening Packet

2.5.1 Overview

This effort is updating the Template Repository version of the PUB 10 form in English, in Recommendation 2.4. This form is part of the Non-MAGI Screening Packet (ID 6346) and as such the packet needs updating to match the form update. See Recommendation 2.4 for the updates to the form.

2.5.2 Description of Changes

1. Update the Non-MAGI Screening Packet in English to match the PUB 10 revision 7/22.
2. Update the Non-MAGI Screening Packet in Spanish to use the English version of PUB 10 revision 7/22, since the Spanish version of PUB 10 hasn't been updated.

Tech Note: Test the packet (EN, SP) via Batch trigger as well.

Note: Non-MAGI Screening Packet contains the following forms: Coversheet, Non-MAGI Informing Letter, MC 604 IPS, MC 007, PUB 10, DHCS 7077, DHCS 7077 A, APTC CSR Brochure.

2.6 Update Non-MAGI Turning 65 Packet

2.6.1 Overview

This effort is updating the Template Repository version of the PUB 10 form in English, in Recommendation 2.4. This form is part of the Non-MAGI Turning 65 packet (ID 6253) and as such the packet needs updating to match the form update. See Recommendation 2.4 for the updates to the form.

2.6.2 Description of Changes

1. Update the Non-MAGI Turning 65 packet in English to match the PUB 10 revision 7/22.
2. Update the Non-MAGI Turning 65 packet in Spanish to use the English version of PUB 10 revision 7/22, since the Spanish version of PUB 10 hasn't been updated.

Tech Note: Test the packet (EN, SP) via Batch trigger as well.

Note: Non-MAGI Turning 65 packet contains the following forms: Coversheet, Non-MAGI Informing Letter, MC 604 IPS, MC 007, PUB 10, DHCS 7077, DHCS 7077 A.

2.7 Update Form MC 14 A

2.7.1 Overview

This SCR will update form MC 14 A (revision 03/21) (ID 5331) in CalSAWS to match the latest version available on the State website (07/22).

State Form: MC 14 A (03/21)

Current Programs: Medi-Cal

Current Attached Forms: None

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

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

2.7.2 Form/NOA Verbiage

Update Form XDP

The XDP will be updated to with the following verbiage changes:

Location	Old Verbiage	New Verbiage
Page 1 – QMB Checkbox	(at or below \$1,074* for a single person, or \$1,452* for a couple).	(at or below \$1,153* for a single person, or \$1,546* for a couple).
Page 1 – SLMB Checkbox	(below \$1,288* for a single person, or \$1,742* for a couple).	(below \$1,380* for a single person, or \$1,852* for a couple).
Page 1 – QI Checkbox	(below \$1,449* for a single person, or \$1,960* for a couple)	(below \$1,550* for a single person, or \$2,081* for a couple)
Page 1 – 4 th Bullet Point	Have no more than \$7,970 in nonexempt property for a single person or \$11,960 for a couple.	Have no more than \$130,000 in nonexempt property for a single person or \$195,000 for a couple.

Page 2 – Item 6, first checkbox	(at \$1,074* for a single person, or at \$1,452* for a couple).	(at or below \$1,153* for a single person, or \$1,546* for a couple).
Page 2 – Item 6, second checkbox	(below \$1,288* for a single person, or \$1,742* for a couple).	(below \$1,380* for a single person, or \$1,852* for a couple).
Page 2 – Item 6, third checkbox	(below \$1,449* for a single person, or \$1,960* for a couple)	(below \$1,550* for a single person, or \$2,081* for a couple)
Page 3 – First paragraph	A QMB, SLMB, or QI who is not married or not living with his/her spouse may have countable property which is equal to or less than \$7,970. A QMB, SLMB, or QI who is married and living with his/her spouse must have countable property which is equal to or less than \$11,960.	A QMB, SLMB, or QI who is not married or not living with his/her spouse may have countable property which is equal to or less than \$130,000. A QMB, SLMB, or QI who is married and living with his/her spouse must have countable property which is equal to or less than \$195,000.

Updated Languages: Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese

Form Number: MC 14 A

Form Mockups/Examples: See Supporting Documents #5

This effort will not bring changes to the form header.

2.7.3 Form/NOA Variable Population

This effort does not have any changes to variable population.

2.7.4 Form/NOA Generation Conditions

There will be no updates to the Form Generation, Form Control, nor Print/Mailing Options. The form will continue to be Print Only.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Form	MC 008 (English)	MC008_EN.pdf
2.	Form	MC 010 (English)	MC010_EN.pdf
3.	Form	MC 176 PI (English)	MC176PI_EN.pdf
4.	Form	PUB 10 (English)	PUB10_EN.pdf
5.	Form	MC 14 A (English)	MC14A_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none">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;u. CSC paper ID cards with LRS-generated access information; andv. CSC PIN notices.	<p>With SCR CA-247694, the following forms will be updated in the CalSAWS system to match the latest State version: MC 008, MC 010, MC 176 PI, PUB 10.</p>

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-248100

~~Enable Form Number lookups in workflow~~

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Create API to Enable Form Number lookups in
workflow

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CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Robyn Anderson
	Reviewed By	Christopher Vasquez, Rhiannon Chin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/27/2023	1.0	Initial draft	Robyn Anderson
<u>7/13/2-23</u>	<u>2.0</u>	<u>Move Hyland development work to CA-264873</u>	<u>Robyn Anderson</u>

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1 OVERVIEW

1.1 Current Design

Currently, users cannot search by or select form numbers while the document is in workflow. The Form Number field is grayed out and they are prevented from entering any information into the form number field on any of the Hyland screens.

1.2 Requests

~~Allow users to search by and select the form number while the document is in workflow.~~ Develop a new webservice that will work with future Hyland changes to allow users to search for Form Numbers while in workflow

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1.3 Overview of Recommendations

- ~~1. Update the Batch Capture, QA & Indexing, Reindex All, Reindex All Confidential, Exception, Exception Confidential, pages in Hyland to allow the user to look up forms by the form number.~~
2. Develop a new web service, GetFormNumber, which will be similar to GetFormInfo. This new web service will be invoked on demand from the user and will filter information via Form Number, Doc Type and Time Sensitive information entered by the user

1.4 Assumptions

1. Form name lookups will not be impacted. They will function as they do today.
- ~~2. Updates to Hyland screens to allow the user to search for Form Numbers will be discussed in CA-264873.~~

2 RECOMMENDATIONS

2.1 ~~Hyland screens~~

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~~2.1.1 Overview~~

~~Users will be able to search by form numbers while the documents are in workflow.~~

~~2.1.2 Description of Change~~

The form number field will remain grayed out and user will not be able to edit/enter information in the field directly, but a magnifying glass icon will be placed next to the box. Clicking the icon will open a pop up that will allow the user to enter up to 3 fields:

- Form Number: Users can type a partial or full form number
- Doc Type: Users can type a partial or full Doc Type
- Time Sensitive: Users can select True or False

Once the user enters the information and clicks on the Submit button, it will be sent to the Get Form Name web service. A list of Form Names, Form Numbers, Doc Types and Time Sensitive Flags will be returned, allowing the user to select from the list.

The following Hyland pages will need to be modified:

- QA & Indexing
- Batch Capture
- Reindex
- Reindex Confidential
- Reindex All
- Reindex All Confidential
- Person Selection
- Exception
- Exception Confidential

2.2 Get Form Number

2.2.1 Overview

Create a Get Form Number Web Service in which the Imaging Solution will make a request to CalSAWS on demand from user to receive form numbers filtered by the user entered criteria.

2.2.2 Description of Change

1. Create a web service in which the Imaging Solution will make a dynamic request to CalSAWS for a list of form numbers based on the following information:
 - Form Number: Filter on any form number that contains the user supplied information
 - Document Type: Filter on any doc type that contains the user supplied information
 - Time Sensitive Flag: Filter on True or False based on the user supplied information
 - While all these fields are technically optional, sending at least one is required. If no parameters are supplied, HTTP Response Code 400 Invalid Request will be returned.

Table 1 – Get Form Number Request Parameters

Get Form Number – REQUEST			
FIELD NAME	TYPE	COMMENTS	REQUIRED
This web service requests CalSAWS provide to the Imaging System all form numbers that fit the user specified criteria. The user may supply any combination of the fields below.			
formNumber	String (20 char. Limit)	This can be a partial form number. The webservice will search for Form Numbers that contain the user entered information,	N
documentType	String (40 char. Limit)	This can be a partial Doc Type. The webservice will search for Doc Types that contain the user entered information,	N
timeSensitive	Boolean	The user will enter True or False based on Time sensitive status of document in CalSAWS.	N

Table 2 – Get Form Number Response Parameters

Get Form Number – RESPONSE			
FIELD NAME	TYPE	COMMENTS	REQUIRED
This web service requests CalSAWS to provide the Imaging System with all form numbers that fit the user supplied criteria.			
responseCode	HTTP Response Code: 200	Return HTTP response code 200 if the call was completed successfully.	Y
formName	String (40 char. Limit)	Form Name that corresponds to the From Number in the next field	Y
formNumber	String (20 char. Limit)	All Form Numbers that fit the user entered criteria	Y


documentType	String (40 char. Limit)	This can be a partial Doc Type. The webservice will search for Doc Types that contain the user entered information,	Y
timeSensitive	Boolean	The user will enter True or False based on Time sensitive status of document in CalSAWS..	Y

2. If the search returns no results, an empty ~~json~~ list will be returned for the response body.

2.3. The relative URL for this new webservice will be "POST /inbound/form" since the request has a body.

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
CA-214054	Workflow	Get Person Info, Get Override Flags Info and Get Form Info Imaging Inbound Web Services	 CA-214054 Get Person Info, Get Ovr

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-250318

Update the Due Date for the Non-MAGI Turning
65 Packet

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Smit Shah
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
24/01/2023	1.0	Initial Draft	Smit Shah

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1 OVERVIEW

The purpose of this change is to update the due date of the Non-MAGI Turning 65 Packet so that the beneficiary has 30 days from the date the letter is mailed to complete and return the Non-MAGI Screening Packet.

1.1 Current Design

The due date for the Non-MAGI Turning 65 Packet is the 10th day of the individual's (person turning 65) birth month. If the 10th day falls on a weekend or on a county holiday, the due date is moved to the next business day.

1.2 Requests

Per policy, the beneficiary has 30 days from the date the packet is mailed to complete and return the packet.

1.3 Overview of Recommendations

Update the due date of the Non-MAGI Turning 65 Packet to be 30 days from the packet generation date.

1.4 Assumptions

1. There are changes to the form's variable population logic with this effort.
2. There are no changes to the verbiage of the form with this effort.
3. There are no changes to the existing generation conditions of the form with this effort.
4. There are no attached documents included.

2 RECOMMENDATIONS

2.1 Update Due Date of Non-MAGI Turning 65 Packet

2.1.1 Overview

Due date is to be updated to the 30 days from the packet generation date.

NOTE: If the due date falls on a weekend or holiday, the due must populate as the next business day.

State Form: Non-MAGI Turning 65

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Application

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

Template Description: The following forms are included in this packet: Cover Letter, Non-MAGI Informing Letter, MC 604 IPS, MC 007, PUB 10, DHCS 7077, DHCS 7077A, and VRC. This packet can be printed locally or centrally.

Imaging Form Name: Non-MAGI Turning 65 Packet

Imaging Document Type: Medi-Cal

2.1.2 Form Verbiage

No Updates in this Section. Use the existing generation condition.

2.1.3 Form Variable Population

Update Due Date population logic from DAO file to 30 days from the packet generation date.

Technical Note: vCL65MC604IPSDaoImpl.java

2.1.4 Form Generation Conditions

No Updates in this Section. Use the existing generation condition.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none">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.u. CSC paper ID cards with LRS-generated access information; andv. CSC PIN notices.	<p>Due Date variable population logic is updated for Non-MAGI Turning 65 Packet.</p>



California Statewide Automated Welfare System

Design Document

CA-251146

Add NOA Fragments in Threshold Languages for
CalFresh NOA Generation (CF 377.4 SAR)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lianel Richwin
	Reviewed By	Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/19/2023	1.0	Initial Document	Lianel Richwin

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1 OVERVIEW

The purpose of this change is to add Threshold languages for CalFresh NOA Generation (CF 377.4 SAR).

1.1 Current Design

Not all NOAs generate in all Threshold Languages (Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese).

1.2 Requests

1. Add Threshold languages to GAIN Sanctioned with reason code F090C (Snippet ID - 7229).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese
2. Add Threshold languages to Residency VRF Pending with reason code F068T (Snippet ID - 6045).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese
3. Add Threshold languages to Ineligible Boarder - SFU with reason code F031T (Snippet ID - 6029).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese
4. Add Threshold languages to TVisa Not Apply W/In 1 yr with reason code F160C (Snippet ID - 7214).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese
5. Add Threshold languages to CalFresh COLA Change with reason code F713C (Snippet ID - 7480).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
6. Add Threshold languages to Fail App Process with reason code F924T (Snippet ID - 10214).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
7. Add Threshold languages to Non-Coop Sponsored Non-Citizen with reason code F377T (Snippet ID - 6104).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
8. Add Threshold languages to EBT Whereabouts Unknown with reason code F715T (Snippet ID - 6492).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
9. Add Threshold languages to Child Supt Deduct Now Excluded with reason code F707C (Snippet ID - 7251).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

10. Add Threshold languages to Voluntary Job Quit with reason code F021T (Snippet ID - 6023).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
11. Add Threshold languages to Indv Left TCF Household with reason code F617C (Snippet ID - 6484).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
12. Add Threshold languages to Ineligible Institution with reason code F004C (Snippet ID - 6002).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
13. Add Threshold languages to Household Left State with reason code F622T (Snippet ID - 6110).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
14. Add Threshold languages to Non-Coop: QC Federal with reason code F058T (Snippet ID - 6041).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
15. Add Threshold languages to Above 21 Not Pur/Pre with reason code F401C (Snippet ID - 6107).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
16. Add Threshold languages to Non-Coop: QC State with reason code F057T (Snippet ID - 6040).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
17. Add Threshold languages to Alien Sponsor Income Ver Refus with reason code F320C (Snippet ID - 6099).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
18. Add Threshold languages to Alien Sponsor Income Ver Refus with reason code F320T (Snippet ID - 6480).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
19. Add Threshold languages to CF_CH_ACTION2 action fragment (Snippet ID - 4063).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
20. Add Threshold languages to CF_CH_ACTION4 action fragment (Snippet ID - 4030).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
21. Add Threshold languages to CF_CH_MESSAGE7 message fragment (Snippet ID - 5029).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

1.3 Overview of Recommendations

1. Add Threshold languages to GAIN Sanctioned with reason code F090C (Snippet ID - 7229).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese
2. Add Threshold languages to Residency VRF Pending with reason code F068T (Snippet ID - 6045).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese
3. Add Threshold languages to Ineligible Boarder - SFU with reason code F031T (Snippet ID - 6029).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese
4. Add Threshold languages to TVisa Not Apply W/In 1 yr with reason code F160C (Snippet ID - 7214).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog and Vietnamese
5. Add Threshold languages to CalFresh COLA Change with reason code F713C (Snippet ID - 7480).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
6. Add Threshold languages to Fail App Process with reason code F924T (Snippet ID - 10214).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
7. Add Threshold languages to Non-Coop Sponsored Non-Citizen with reason code F377T (Snippet ID - 6104).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
8. Add Threshold languages to EBT Whereabouts Unknown with reason code F715T (Snippet ID - 6492).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
9. Add Threshold languages to Child Supt Deduc Now Excluded with reason code F707C (Snippet ID - 7251).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
10. Add Threshold languages to Voluntary Job Quit with reason code F021T (Snippet ID - 6023).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
11. Add Threshold languages to Indv Left TCF Household with reason code F617C (Snippet ID - 6484).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

12. Add Threshold languages to Ineligible Institution with reason code F004C (Snippet ID - 6002).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
13. Add Threshold languages to Household Left State with reason code F622T (Snippet ID - 6110).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
14. Add Threshold languages to Non-Coop: QC Federal with reason code F058T (Snippet ID - 6041).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
15. Add Threshold languages to Above 21 Not Pur/Pre with reason code F401C (Snippet ID - 6107).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
16. Add Threshold languages to Non-Coop: QC State with reason code F057T (Snippet ID - 6040).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
17. Add Threshold languages to Alien Sponsor Income Ver Refus with reason code F320C (Snippet ID - 6099).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
18. Add Threshold languages to Alien Sponsor Income Ver Refus with reason code F320T (Snippet ID - 6480).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
19. Add Threshold languages to CF_CH_ACTION2 action fragment (Snippet ID - 4063).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
20. Add Threshold languages to CF_CH_ACTION4 action fragment (Snippet ID - 4030).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
21. Add Threshold languages to CF_CH_MESSAGE7 message fragment (Snippet ID - 5029).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

1.4 Assumptions

1. The triggering conditions of the NOA Fragments for Threshold Generation remain the same and are not being updated.
2. The NOA template remains the same and is not being updated.
3. The existing variable population is not being updated with this effort.

2 RECOMMENDATIONS

2.1 Add Threshold languages to GAIN Sanctioned with reason code F090C.

2.1.1 Overview

Add Threshold languages to GAIN Sanctioned with reason code F090C.

Reason Fragment Name and ID:

CF_CH_GAIN_PA_NOT_COMPLY_WORK_RULES_NO_CAUSE_F090
(Fragment ID: 7229)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Include NA Back 9: Yes

Existing Languages: English

2.1.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.1.3 Form/NOA Variable Population

No updates to variable population.

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2 Add Threshold languages to Residency VRF Pending with reason code F068T.

2.2.1 Overview

Add Threshold languages to Residency VRF Pending with reason code F068T.

Reason Fragment Name and ID: CF_TN_RES_VRF_PEND_F068

(Fragment ID: 6045)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Include NA Back 9: Yes

Existing Languages: English

2.2.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.2.3 Form/NOA Variable Population

No updates to variable population.

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.3 Add Threshold languages to Ineligible Boarder - SFU with reason code F031T.

2.3.1 Overview

Add Threshold languages to Ineligible Boarder - SFU with reason code F031T.

Reason Fragment Name and ID: CF_TN_INELIG_BOARDER_F031

(Fragment ID: 6029)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Include NA Back 9: Yes

Existing Languages: English

2.3.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.3.3 Form/NOA Variable Population

No updates to variable population.

2.3.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.4 Add Threshold languages to TVisa Not Apply W/In 1 yr with reason code F160C.

2.4.1 Overview

Add Threshold languages to TVisa Not Apply W/In 1 yr with reason code F160C.

Reason Fragment Name and ID:

CF_CH_TVISA_NOT_APPLY_WITHIN_YEAR_F160
(Fragment ID: 7214)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Include NA Back 9: Yes

Existing Languages: English

2.4.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.4.3 Form/NOA Variable Population

No updates to variable population.

2.4.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.5 Add Threshold languages to CalFresh COLA Change with reason code F713C.

2.5.1 Overview

Add Threshold languages to CalFresh COLA Change with reason code F713C.

Reason Fragment Name and ID: CF_CH_NEW_COLA_BENEFIT_AMT
(Fragment ID: 7480)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Include NA Back 9: Yes

Existing Languages: English, Spanish

2.5.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.5.3 Form/NOA Variable Population

No updates to variable population.

2.5.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.6 Add Threshold languages to Fail App Process with reason code F924T.

2.6.1 Overview

Add Threshold languages to Fail App Process with reason code F924T.

Reason Fragment Name and ID: CW_CF_DN_TN_FAIL_COMPLETE_DETER
(Fragment ID: 10214)
State Form/NOA: CF 377.4 SAR (6/13)
Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)
Current Program(s): CalFresh
Current Action Type: Termination
Include NA Back 9: Yes
Existing Languages: English, Spanish

2.6.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.6.3 Form/NOA Variable Population

No updates to variable population.

2.6.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.7 Add Threshold languages to Non-Coop Sponsored Non-Citizen with reason code F377T.

2.7.1 Overview

Add Threshold languages to Non-Coop Sponsored Non-Citizen with reason code F377T.

Reason Fragment Name and ID: CF_TN_NCOOP_SPNSR_NCTZN_F377
(Fragment ID: 6104)
State Form/NOA: CF 377.4 SAR (6/13)
Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)
Current Program(s): CalFresh
Current Action Type: Termination
Include NA Back 9: Yes
Existing Languages: English, Spanish

2.7.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.7.3 Form/NOA Variable Population

No updates to variable population.

2.7.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.8 Add Threshold languages to EBT Whereabouts Unknown with reason code F715T.

2.8.1 Overview

Add Threshold languages to EBT Whereabouts Unknown with reason code F715T.

Reason Fragment Name and ID: CF_TN_EBT_WHRABTS_UNKWN_F715
(Fragment ID: 6492)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Include NA Back 9: Yes

Existing Languages: English, Spanish

2.8.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.8.3 Form/NOA Variable Population

No updates to variable population.

2.8.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.9 Add Threshold languages to Child Supt Deduc Now Excluded with reason code F707C.

2.9.1 Overview

Add Threshold languages to Child Supt Deduc Now Excluded with reason code F707C.

Reason Fragment Name and ID: CF_CH_CS_NOW_EXCLUDED_F707
(Fragment ID: 7251)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Include NA Back 9: Yes

Existing Languages: English, Spanish

2.9.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.9.3 Form/NOA Variable Population

No updates to variable population.

2.9.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.10 Add Threshold languages to Voluntary Job Quit with reason code F021T.

2.10.1 Overview

Add Threshold languages to Voluntary Job Quit with reason code F021T.

Reason Fragment Name and ID: CF_TN_VLNTRY_JOB_QUIT_F021
(Fragment ID: 6023)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination
Include NA Back 9: Yes
Existing Languages: English, Spanish

2.10.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.10.3 Form/NOA Variable Population

No updates to variable population.

2.10.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.11 Add Threshold languages to Indv Left TCF Household with reason code F617C.

2.11.1 Overview

Add Threshold languages to Indv Left TCF Household with reason code F617C.

Reason Fragment Name and ID: CF_CH_INDIV_LEFT_TFS_F617
(Fragment ID: 6484)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Include NA Back 9: Yes

Existing Languages: English, Spanish

2.11.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.11.3 Form/NOA Variable Population

No updates to variable population.

2.11.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.12 Add Threshold languages to Ineligible Institution with reason code F004C.

2.12.1 Overview

Add Threshold languages to Ineligible Institution with reason code F004C.

Reason Fragment Name and ID: CF_CH_INELIG_INST_F004

(Fragment ID: 6002)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Include NA Back 9: Yes

Existing Languages: English, Spanish

2.12.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.12.3 Form/NOA Variable Population

No updates to variable population.

2.12.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.13 Add Threshold languages to Household Left State with reason code F622T.

2.13.1 Overview

Add Threshold languages to Household Left State with reason code F622T.

Reason Fragment Name and ID: CF_TN_HH_LEFT_ST_F622
(Fragment ID: 6110)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Include NA Back 9: Yes

Existing Languages: English, Spanish

2.13.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.13.3 Form/NOA Variable Population

No updates to variable population.

2.13.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.14 Add Threshold languages to Non-Coop: QC Federal with reason code F058T.

2.14.1 Overview

Add Threshold languages to Non-Coop: QC Federal with reason code F058T.

Reason Fragment Name and ID: CF_TN_NCOOP_QC_FDRL_F058
(Fragment ID: 6041)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination
Include NA Back 9: Yes
Existing Languages: English, Spanish

2.14.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.14.3 Form/NOA Variable Population

No updates to variable population.

2.14.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.15 Add Threshold languages to Above 21 Not Pur/Pre with reason code F401C.

2.15.1 Overview

Add Threshold languages to Above 21 Not Pur/Pre with reason code F401C.

Reason Fragment Name and ID: CF_CH_ABV21_NPRCHS_F401
(Fragment ID: 6107)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Include NA Back 9: Yes

Existing Languages: English, Spanish

2.15.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.15.3 Form/NOA Variable Population

No updates to variable population.

2.15.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.16 Add Threshold languages to Non-Coop: QC State with reason code F057T.

2.16.1 Overview

Add Threshold languages to Non-Coop: QC State with reason code F057T.

Reason Fragment Name and ID: CF_TN_NCOOP_QC_ST_F057

(Fragment ID: 6040)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Include NA Back 9: Yes

Existing Languages: English, Spanish

2.16.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.16.3 Form/NOA Variable Population

No updates to variable population.

2.16.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.17 Add Threshold languages to Alien Sponsor Income Ver Refus with reason code F320C.

2.17.1 Overview

Add Threshold languages to Alien Sponsor Income Ver Refus with reason code F320C.

Reason Fragment Name and ID: CF_CH_ALIEN_SPNSR_INC_F320
(Fragment ID: 6099)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Include NA Back 9: Yes

Existing Languages: English, Spanish

2.17.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.17.3 Form/NOA Variable Population

No updates to variable population.

2.17.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.18 Add Threshold languages to Alien Sponsor Income Ver Refus with reason code F320T.

2.18.1 Overview

Add Threshold languages to Alien Sponsor Income Ver Refus with reason code F320T.

Reason Fragment Name and ID: CF_TN_SPON_WIFE_INC_NOT_VERIF_F320
(Fragment ID: 6480)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)
Current Program(s): CalFresh
Current Action Type: Termination
Include NA Back 9: Yes
Existing Languages: English, Spanish

2.18.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.18.3 Form/NOA Variable Population

No updates to variable population.

2.18.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.19 Add Threshold languages to CF_CH_ACTION2 action fragment.

2.19.1 Overview

Add Threshold languages to CF_CH_ACTION2 action fragment.

Action Fragment Name and ID: CF_CH_ACTION2
(Fragment ID: 4063)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Existing Languages: English, Spanish

2.19.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.19.3 Form/NOA Variable Population

No updates to variable population.

2.19.4 Form/NOA Generation Conditions

N/A.

2.20 Add Threshold languages to CF_CH_ACTION4 action fragment.

2.20.1 Overview

Add Threshold languages to CF_CH_ACTION4 action fragment.

Action Fragment Name and ID: CF_CH_ACTION4

(Fragment ID: 4030)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Existing Languages: English, Spanish

2.20.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.20.3 Form/NOA Variable Population

No updates to variable population.

2.20.4 Form/NOA Generation Conditions

N/A.

2.21 Add Threshold languages to CF_CH_MESSAGE7 message fragment.

2.21.1 Overview

Add Threshold languages to CF_CH_MESSAGE7 message fragment.

Message Fragment Name and ID: CF_CH_MESSAGE7
(Fragment ID: 5029)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Existing Languages: English, Spanish

2.21.2 Form/NOA Verbiage

Add CF 377.4 SAR NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.21.3 Form/NOA Variable Population

No updates to variable population.

2.21.4 Form/NOA Generation Conditions

N/A.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	CF 377.4 SAR NOA fragments	Fragments_Verbiage.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none">a. Appointment notices;b. RedeDenial, Recertification, and/or Annual Agreement notices and forms;c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);d. Periodic reporting notices;e. Contact letters;f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a 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;	CF 377.4 SAR NOA Reason fragments are added in available Threshold languages.

	<p>t. Corrective NOAs on State Fair Hearing decisions;</p> <p>u. CSC paper ID cards with LRS-generated access information; and</p> <p>v. CSC PIN notices.</p>	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-251148

Add NOA Fragments in Threshold Languages for
CalFresh NOA Generation (CF 377.1A)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Indira Ramasamy
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/20/2023	1.0	Initial Document	Indira Ramasamy

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1 OVERVIEW

The purpose of this change is to Add NOA Fragments in Threshold Languages for CalFresh NOA Generation (CF 377.1A)

1.1 Current Design

Not all NOAs generate in all Threshold Languages (Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese). Generation of a Threshold Language is dependent on the translations available for other NOA fragments and the State Template.

1.2 Requests

1. Add Threshold language to Snippet ID 7257 - CalFresh Denial (NOA Code F922D) to CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
2. Add Threshold language to Snippet ID 7800 - CalFresh Denial (NOA Code F925D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
3. Add Threshold language to Snippet ID 7801 - CalFresh Denial (NOA Code F926D) to CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
4. Add Threshold language to Snippet ID 7802 - CalFresh Denial (NOA Code F927D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
5. Add Threshold language to Snippet ID 7804 - CalFresh Denial (NOA Code F928D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
6. Add Threshold language to Snippet ID 7805 - CalFresh Denial (NOA Code F929D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
7. Add Threshold language to Snippet ID 7806 - CalFresh Denial (NOA Code F930D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
8. Add Threshold language to Snippet ID 7807 - CalFresh Denial (NOA Code F931D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
9. Add Threshold language to Snippet ID 7808 - CalFresh Denial (NOA Code F932D) to CalSAWS.

- Languages include** Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
10. Add Threshold language to Snippet ID 7810 - CalFresh Denial (NOA Code F934D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
11. Add Threshold language to Snippet ID 7812 - CalFresh Denial (NOA Code F936D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
12. Add Threshold language to Snippet ID 7815 - CalFresh Denial (NOA Code F939D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
13. Add Threshold language to Snippet ID 7817 - CalFresh Denial (NOA Code F941D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
14. Add Threshold language to Snippet ID 7818 - CalFresh Denial (NOA Code F942D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
15. Add Threshold language to Snippet ID 7819 - CalFresh Denial (NOA Code F943D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
16. Add Threshold language to Snippet ID 7820 - CalFresh Denial (NOA Code F944D) to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
17. Add Threshold language to Snippet ID 7638 - CalFresh Denial (NOA Code F032D) to CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
18. Add Threshold language to Snippet ID 7639 - CalFresh Denial to CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
19. Add Threshold language to Snippet ID 7642 - CalFresh Denial to CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
20. Add Threshold language to Snippet ID 10211 - CalFresh Denial to CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
21. Add Threshold language for common fragments action and Title used by the reasons added above.

1.3 Overview of Recommendations

1. Add remaining available threshold languages for the following CalFresh Denial Templates.
 1. Recert Missing Verifs (NOA Code F926D)
 2. RE Denial - interview was not completed (NOA Code F922D)
 3. On Aid Another Case (NOA Code F461D)
 4. Mandatory Optional Rules (NOA Code F032D)
 5. On Aid Another Case (NOA Code F091D)
 6. Failed Recert Process (NOA Code F932D)
 7. Failed Recert Process (NOA Code F927D)
 8. Fail App Process (NOA Code F924D)
 9. Recert Missing Verifs (NOA Code F925D)
 10. Failed Recert Process (F942D)
 11. Failed Recert Process (F943D)
 12. Failed Recert Process (F929D)
 13. Failed Recert Process (F931D)
 14. Failed Recert Process (F936D)
 15. Failed Recert Process (F944D)
 16. Failed Recert Process (F928D)
 17. Failed Recert Process (F930D)
 18. Failed Recert Process (F941D)
 19. Failed Recert Process (F934D)
 20. Failed Recert Process (F939D)
2. Add Common Action Fragments CF_DN_ACTION4 and CF_DN_ACTION5 in Remaining available threshold languages.
3. Add Common NOA Title CF_DN_NOA_TYPE_RE in Remaining available threshold languages.

1.4 Assumptions

1. The triggering conditions of the NOA Fragments for Threshold Generation remain the same and are not being updated.
2. The NOA template remains the same and is not being updated.
3. The existing variable population is not being updated with this effort.

2 RECOMMENDATIONS

2.1 Add threshold Languages for the Recert Missing Verifs with reason code F926D.

2.1.1 Overview

Add threshold languages for Recert Missing Verifs reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_FTP_VERIF_DESC_F926
(Fragment ID: 7801)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English

2.1.2 Form/NOA Verbiage

Add CalFresh Recert Missing Verifs NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	<p><LIST_OF_VERIFS></p> <p>We asked you for the above information when you attempted to recertify for CalFresh benefits. You did not give us the information within ten (10) days of the day it was requested, and you did not ask us for help in getting the missing information. If the information is received on or before <DUE_DATE> (30 days after the end of the certification period), your application will be reopened, and you will not need to reapply. If eligible, you will be granted CalFresh benefits from the date we receive the information.</p>	Arial Font Size 10

Note: Variable Translations for <LIST_OF_VERIFS> field is added in missing languages. Refer Supporting Documents #2.

2.1.3 Form/NOA Variable Population

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

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2 Add threshold Languages for the RE Denial - interview was not completed with reason code F922D.

2.2.1 Overview

Add threshold languages for RE Denial - interview was not completed reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_NO_RECERT_INTERVIEW_F922 (Fragment ID: 7257)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English

2.2.2 Form/NOA Verbiage

Add RE Denial - interview was not completed NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	Recertification Interview was not completed.	Arial Font Size 10

2.2.3 Form/NOA Variable Population

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

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.3 Add threshold Languages for the On Aid Another Case with reason code F461D.

2.3.1 Overview

Add threshold languages for On Aid Another Case Reason Fragment in CalSAWS.

Reason Fragment Name and ID:

CF_CW_IN_AP_DN_50_50_CUSTODY_SPLIT_PERSON (Fragment ID: 7639)

State Form/NOA: CF 377.1A

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Person

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English

2.3.2 Form/NOA Verbiage

Add On Aid Another Case NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	<Person> already gets <ProgramType> on another case.	Arial Font Size 10

2.3.3 Form/NOA Variable Population

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

2.3.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.4 Add threshold Languages for the Mandatory Optional Rules with reason code F032D.

2.4.1 Overview

Add threshold languages for Mandatory Optional Rules reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_AP_DN_Boader_F032 (Fragment ID: 7638)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English

2.4.2 Form/NOA Verbiage

Add Mandatory Optional Rules NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	To get CalFresh, a person must meet one of the following. <Person> does not meet any of these rules. <ul style="list-style-type: none">• A child under 18 years of age, living with and under the parental control of a household member who is not the child's parent.	Arial Font Size 10

	<ul style="list-style-type: none"> • Parents living with their natural, adopted or step children, or children living with their natural, adopted, or stepparents unless the children are 22 years of age or older and purchase food and prepare meals for home consumption separately from their parents or are participating in the other parent's CalFresh household. • An individual living with the household who is a spouse of a member of the household. • A boarder. • Children of narcotic addicts or alcoholics who live at a treatment center. • A parent who equally shares (50/50) joint physical custody of children and the County Welfare Department has determined that the children are eligible to participate in that parent's household. • A person or a person with children who are temporary residents of a shelter for battered persons and/or children. • A person who is 60 years of age or older who is unable to purchase and prepare meals because of a permanent disability under the Social Security Act or because of a non-disease-related, severe, permanent disability. 	
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2.4.3 Form/NOA Variable Population

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

2.4.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.5 Add threshold Languages for the On Aid Another Case with reason code F091D.

2.5.1 Overview

Add threshold languages for On Aid Another Case Reason Fragment in CalSAWS.

Reason Fragment Name and ID:

CF_CW_IN_DN_50_50_CUSTODY_SPLIT_PROGRAM (Fragment ID: 7642)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English

2.5.2 Form/NOA Verbiage

Add On Aid Another Case NOA Fragment in threshold languages.

Add Threshold languages: Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	All household members are aided on another case.	Arial Font Size 10

2.5.3 Form/NOA Variable Population

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

2.5.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.6 Add threshold Languages for the Failed Recert Process with reason code F932D.

2.6.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_INELIG_ALIEN_F932D
(Fragment ID: 7808)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.6.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	The following person(s) is(are) either an undocumented or ineligible non-citizen. Undocumented or ineligible non-citizens cannot get CalFresh benefits. <Person>	Arial Font Size 10

2.6.3 Form/NOA Variable Population

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

2.6.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.7 Add threshold Languages for the Failed Recert Process with reason code F927D.

2.7.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID:

CF_DN_RE_FAILED_TO_COMPLETE_RECERT_F927D (Fragment ID: 7802)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.7.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You did not complete the recertification process.	Arial Font Size 10

2.7.3 Form/NOA Variable Population

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

2.7.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.8 Add threshold Languages for the Fail App Process with reason code F924D.

2.8.1 Overview

Add threshold languages for Fail App Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CW_CF_DN_TN_FAIL_COMPLETE_DETER (Fragment ID: 10211)

State Form/NOA: CF 377.1A

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.8.2 Form/NOA Verbiage

Add Fail App Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You did not complete the application/reapplication process.	Arial Font Size 10

2.8.3 Form/NOA Variable Population

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

2.8.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.9 Add threshold Languages for the Recert Missing Verifs with reason code F925D.

2.9.1 Overview

Add threshold languages for Recert Missing Verifs reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_FTP_VERIF_F925D (Fragment ID: 7800)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.9.2 Form/NOA Verbiage

Add Recert Missing Verifs NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	<LIST_OF_VERIFS> We asked you for the above information when you attempted to recertify for CalFresh benefits. You did not give us the information within ten (10) days of the day it was requested, and you did not ask us for help in getting the missing information. If the information is received on or before <DUE_DATE> (30 days after the end of the certification period), your application will be reopened, and you will not need to reapply. If eligible, you will be granted CalFresh benefits from the date we receive the information.	Arial Font Size 10

Note: Variable Translations for <LIST_OF_VERIFS> field is added in missing languages. Refer Supporting Documents #2.

2.9.3 Form/NOA Variable Population

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

2.9.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.10 Add threshold Languages for the Failed Recert Process with reason code F942D.

2.10.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_EXCD_PGRS_INC_LMT_F942D (Fragment ID: 7818)

State Form/NOA: CF 377.1A (08/21)
Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)
Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.10.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	Your household's gross income is higher than the limit of <ProgramLimit> for <HouseholdSize> person(s).	Arial Font Size 10

2.10.3 Form/NOA Variable Population

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

2.10.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.11 Add threshold Languages for the Failed Recert Process with reason code F943D.

2.11.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID:

CF_DN_RE_EXCD_PRO_NET_INC_LMT_F943D (Fragment ID: 7819)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)
Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.11.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	Your household's net income is now higher than the limit of <ProgramLimit> for <HouseholdSize> people.	Arial Font Size 10

2.11.3 Form/NOA Variable Population

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

2.11.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.12 Add threshold Languages for the Failed Recert Process with reason code F929D.

2.12.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_INELIG_STUD_F929D (Fragment ID: 7805)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh
Current Action Type: Denial
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish

2.12.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	<p><Person></p> <p>Is/are no longer eligible student. To be an eligible student, the student must meet at least one of the following conditions:</p> <ul style="list-style-type: none"> - The student works 20 hours a week and is paid minimum wage. - The student is in a college work study program paid for by the Federal government. - The student is a parent or guardian of a child under age 6. - The student is a parent or guardian of a child age 6 to 12 and cannot work 20 hours a week or be in a work study program because the student cannot get child care. - The student gets CalWORKs. - The student goes to school through JTPA, E&T, JOBS, a program under the Trade Act of 1974, or a training program paid for by the state or local government. - The student is a single parent caring for a child under 12 and goes to school full time. 	Arial Font Size 10

2.12.3 Form/NOA Variable Population

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

2.12.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.13 Add threshold Languages for the Failed Recert Process with reason code F931D.

2.13.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_WDRWL_CLNT_REQ_F931D
(Fragment ID: 7807)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.13.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You asked us to deny your CalFresh application.	Arial Font Size 10

2.13.3 Form/NOA Variable Population

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

2.13.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.14 Add threshold Languages for the Failed Recert Process with reason code F936D.

2.14.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_NOT_CNTY_RESIDENT_F936D (Fragment ID: 7812)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.14.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You do not live in this County. You should apply in the County where you live.	Arial Font Size 10

2.14.3 Form/NOA Variable Population

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

2.14.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.15 Add threshold Languages for the Failed Recert Process with reason code F944D.

2.15.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_RSRCES_EXCED_LMT_F944D
(Fragment ID: 7820)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.15.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You cannot get CalFresh benefits if your total countable property is more than <PropertyLimit>	Arial Font Size 10

2.15.3 Form/NOA Variable Population

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

2.15.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.16 Add threshold Languages for the Failed Recert Process with reason code F928D.

2.16.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_INELIG_INST_F928D (Fragment ID: 7804)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.16.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	<Person> is (are) living in an institution. A person who lives in an institution cannot get CalFresh.	Arial Font Size 10

2.16.3 Form/NOA Variable Population

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

2.16.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.17 Add threshold Languages for the Failed Recert Process with reason code F930D.

2.17.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_INELIG_BOARDER_F930D
(Fragment ID: 7806)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.17.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	<p>You are a boarder in someone else's residence.</p> <p>The rules say when you are a boarder:</p> <p>You can only receive CalFresh if the household you are living with has applied for CalFresh and has requested that you be part of their household, and you or your authorized representative must provide information on all persons in your household.</p>	Arial Font Size 10

2.17.3 Form/NOA Variable Population

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

2.17.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.18 Add threshold Languages for the Failed Recert Process with reason code F941D.

2.18.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_VLNTRY_JOB_QUIT_F941D
(Fragment ID: 7817)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.18.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	The County is taking the following action because <Person> did not follow the CalFresh Employment and Training (E&T) work rule(s) listed below. You Did Not Keep your job or keep working at least 30 hours a week. Please call us if you think you have a reason for not meeting the work rule. TO BE EXCUSED FROM THE WORK RULE(S), YOU MUST BE - Under 16 or 60 years of age or older; - 16 or 17 and not the head of your CalFresh household; - Physically or mentally unfit for employment; - Meeting the CalWORKs Welfare to Work rules; - Caring for a child under six or an injured or sick person;	Arial Font Size 10

	<ul style="list-style-type: none"> - Participating in an alcohol or drug treatment program that keeps you from working 30 hours or more a week. - Getting or have applied for Unemployment Insurance benefits. - Employed or self-employed at least 30 hours per week or receiving weekly earnings at least equal to the federal minimum wage multiplied by 30 hours. - Going to school at least half-time. 	
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2.18.3 Form/NOA Variable Population

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

2.18.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.19 Add threshold Languages for the Failed Recert Process with reason code F934D.

2.19.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_FLEE_FELON_F934D (Fragment ID: 7810)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.19.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	You are a fleeing felon and/or in violation of your probation or parole.	Arial Font Size 10

2.19.3 Form/NOA Variable Population

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

2.19.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.20 Add threshold Languages for the Failed Recert Process with reason code F939D.

2.20.1 Overview

Add threshold languages for Failed Recert Process reason Fragment in CalSAWS.

Reason Fragment Name and ID: CF_DN_RE_IPV_SANCTION_PERIOD_F939D (Fragment ID: 7815)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish

2.20.2 Form/NOA Verbiage

Add Failed Recert Process NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Reason Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	<p><Person></p> <p>was told before about a disqualification for an Intentional Program Violation (IPV).</p>	Arial Font Size 10

2.20.3 Form/NOA Variable Population

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

2.20.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.21 Add Common Fragments CF_DN_ACTION4 and CF_DN_ACTION5 in available threshold languages.

2.21.1 Overview

Add Common Fragments CF_DN_ACTION4 and CF_DN_ACTION5 in available threshold languages.

Action Fragment Name and ID:

CF_DN_ACTION4 (Fragment ID: 4066)

CF_DN_ACTION5 (Fragment ID: 4156)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Existing Languages: English, Spanish

2.21.2 Form/NOA Verbiage

Add CF_DN_ACTION4 and CF_DN_ACTION5 NOA Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

Action Fragment Verbiage:

Description	English Verbiage	Formatting
CF_DN_ACTION4	Your household's recertification application for CalFresh benefits has been denied because:	Arial Font Size 10
CF_DN_ACTION5	Your household's recertification application for CalFresh benefits has been denied because you did not provide the requested information listed below:	Arial Font Size 10

2.21.3 Form/NOA Variable Population

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

2.21.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.22 Add Common Fragments CF_DN_NOA_TYPE_RE in available threshold languages.**2.22.1 Overview**

Add Common Fragments CF_DN_NOA_TYPE_RE in available threshold languages.

NOA Type Fragment Name and ID:

CF_DN_NOA_TYPE_RE (Fragment ID: 7803)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Existing Languages: English, Spanish

2.22.2 Form/NOA Verbiage

Add CF_DN_NOA_TYPE_RE Fragment in threshold languages.

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

NOA Mockups/Examples: Supporting Documents #2

Action Fragment Verbiage:

Description	English Verbiage	Formatting
<STATIC_SECTION>	NOTICE OF DENIAL	Arial Font Size 10

2.22.3 Form/NOA Variable Population

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

2.22.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	CF 377.1A NOA Fragments	CA-251148_Variable_Translation.xlsx
2.	Correspondence	Variable Translations	CA-251148_Variable_Translation_1.xlsx CA-251148_Variable_Translation_2.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. RedeDenial, Recertification, and/or Annual Agreement notices and forms;	F926D, F922D, F461D, F032D, F091D, F932D, F927D, F924D, F925D, F942D, F943D, F929D, F931D, F936D, F944D, F928D, F930D, F941D, F934D, F939D Reason Codes are added in threshold languages.

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

Design Document

CA-251562

Adult Expansion for Medi-Cal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sireesha Kommajosyula
	Reviewed By	Renee Gustafson

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/25/2023	0.1	Original Draft	Sireesha Kommajosyula

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1 OVERVIEW

The purpose of this document is to satisfy the functional specifications in support of ACWDL 23-08 and changes with CalHEERS Change Request 210202. CalHEERS and CalSAWS will grant full scope Medi-Cal to all eligible individuals 26 thru 49 years old, inclusive, regardless of citizenship or immigration status.

1.1 Current Design

CalSAWS grants restricted scope Medi-Cal to individuals who are 26 through 49 years of age, and who do not have satisfactory immigration status if they meet all other eligibility criteria.

CalSAWS considers an individual age 26 or above for MAGI Medi-Cal eligibility if the individual's 26th birthday falls on or before the first day of the EDBC benefit month. In other words, if the individual is 25 years of age on any day of the EDBC benefit month, CalSAWS considers the individual 25 for that entire month and considers 26 years of age from the following month.

For Example: Individual age turns 26 on 01/02/2024.

- Date of birth is 01/02/1998.
- EDBC Benefit Month is 01/2024
- Individual turns 26 years old: 01/02/2024
- Individual is eligible to MAGI Medi-Cal
- Individual does not have satisfactory citizenship or immigration status.
- The individual is still 25 years of age on 01/01/2024.
- CalSAWS considers the individual 26 years old from the month of 02/2024

Also, CalSAWS automatically re-evaluates Medi-Cal for Medi-Cal beneficiaries turning ages 1, 6, 19, 26, 50 and 65.

1.2 Requests

Per ACWDL 23-08, effective 01/01/2024, all eligible individuals who are 26 through 49 years of age, inclusive, are eligible to full scope Medi-Cal regardless of their citizenship or immigration status if they meet all other eligibility criteria.

With CalHEERS Change Request 210202, CalHEERS will update their eligibility rules to grant full scope MAGI Medi-Cal to eligible individuals who are 26 through 49 years of age, inclusive, regardless of citizenship or immigration status.

1. Update Medi-Cal EDBC rules to grant full scope Non-MAGI Medi-Cal to eligible individuals who are 26 through 49 years of age, inclusive, regardless of citizenship or immigration status, if otherwise eligible.

2. As of the go-live of CA-251562, Obsolete automated Age 26 batches (PB00CH115 and PB00E252)
3. As of the go-live of CA-251562, Obsolete Age 50 batch for MAGI and Non-MAGI (PB00CH117, PB00E117)

Commented [SK1]: Is this proposal finalized?

Commented [RG2R1]: Not yet. We need to discuss with the MC Analysts.

Commented [RG3R1]: CA-220233 This SCR will update the FFY Age out for non-LA county.

1.3 Overview of Recommendations

1. Update the Medi-Cal EDBC rules to grant full scope Non-MAGI Medi-Cal for all eligible individuals who are 26 through 49 years of age, inclusive, regardless of citizenship or immigration status, if they meet all other eligibility criteria.
2. As of the go-live of CA-251562, Obsolete automated Age 26 batches (PB00CH115 and PB00E252)
3. As of the go-live of CA-251562, Obsolete Age 50 batch for MAGI and Non-MAGI (PB00CH117, PB00E117)
4. Store Medi-Cal individuals who are 26 through 49 years of age, and does not have satisfactory immigration status but receiving full scope aid code with Conditionally eligible/Eligible status in Temp table in Database.

Commented [SK4]: Is this proposal finalized?

Commented [RG5R4]: Not yet. We need to discuss with the MC Analysts.

Commented [RG6R4]: CA-220233 This SCR will update the FFY Age out for non-LA county.

1.4 Assumptions

1. One-time batches to transition Medi-Cal for the Adult Expansion population from restricted scope to full scope Medi-Cal will be addressed with SCR CA-251565. The SCR will provide lists of any processing exceptions to the County for follow-up.
2. Medi-Cal Notice updates for Adult Expansion will be addressed with SCR CA-251569.
3. Individuals who turn 26 years of age between January 2, 2024, and January 31, 2024, are considered age -25 for the month of January 2024, and remain eligible for full scope coverage under the Young Adult Expansion.
4. Individuals who turn 26 years of age on January 1, 2024, are considered 26 years of age for the month of January 2024 and are eligible for full scope coverage under the Adult Expansion.
5. As of Go-Live of CA-251562, Age 50 batch will be Obsoleted along with Age 26 batch and no longer runs in production.

6. There are no new aid codes for the Adult Expansion. Individuals who are eligible under this expansion will be placed into existing full scope MAGI and Non-MAGI Medi-Cal aid codes, respectively.

7. All new applicants who are 26 thru 49 years of age, inclusive, will be eligible for Restricted scope if they do not have satisfactory immigration status and the application date is prior to policy effective date (January 1, 2024)

8. CalSAWS grants restricted scope for Individuals who are 26 thru 49 years of age, inclusive, if they do not have satisfactory immigration status and the Individual requests for retroactive benefits for the benefit month prior to effective date of implementation (January 1, 2024).

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2 RECOMMENDATIONS

2.1 Eligibility Rules Update

2.1.1 Overview

Update the Medi-Cal EDBC Rules to grant full scope Non-MAGI Medi-Cal for adults who are 26 through 49 years of age, inclusive, regardless of their immigration status or citizenship verification status, if they meet all other eligibility criteria.

2.1.2 Description of Changes

1. Update Medi-Cal EDBC rules effective for the benefit month of January 2024, to grant full scope Non-MAGI Medi-Cal to eligible individuals who are 26 through 49 years of age, inclusive, regardless of citizenship verification status or immigration status if they meet all other eligibility criteria. This is referred to as "Adult Expansion".
2. Update the aid code assignment logic within Medi-Cal EDBC to assign a full scope aid code for Adult Expansion if the individual's birthday

who are 26 through 49 years of age, inclusive, is within or prior to the benefit month and the benefit month is January 2024 or later.

For example: An individual who are 26 through 49 years of age, inclusive, any time in January 2024 will be eligible for full scope Medi-Cal under any eligibility group, for the entire month of January 2024, if they are otherwise eligible.

- i. Exclude CMSP aid codes.

3. Obsolete automated Age 26 batches (PB00CH115 and PB00E252).
4. Obsolete MAGI Age50 batch (PB00CH117)
5. Obsolete Non-MAGI Age50 batch (PB00E117)

2.2 Automated Regression Test

2.2.1 Overview


Create new regression test scripts to verify that full-scope Medi-Cal is granted to applicants lacking verified citizenship status who are between 26 and thru 49 years of Age (inclusive).

2.2.2 Description of Change

1. Create a new regression test script to create a MAGI Medi-Cal-only case with applicants who are age 26 lacking verified citizenship status, run EDBC for the intake month (January 1, 2024 or later), and verify that full-scope MAGI Medi-Cal is granted.
2. Create a new regression test script to create a Non-MAGI Medi-Cal-only case with applicants who are age 26 lacking verified citizenship status, run EDBC for the intake month (January 1, 2024 or later), and verify that full-scope Medi-Cal is granted.

3. Create a new regression test script to use an active ongoing Non-MAGI Medi-Cal-only case with an applicant who is age 26 lacking verified citizenship status on restricted scope. Run EDBC for the benefit month of January 1, 2024 or later and verify that a full scope aid code is granted.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	ACWDL 23-08	 ACWDL 23-08.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.2	The LRS shall determine an applicant's/participant's eligibility for a program or programs.	CalSAWS will update Medi-Cal EDBC rules to grant full scope MAGI Medi-Cal for all eligible adults who are 26 thru 49 years of age, regardless of their citizenship or immigration status if they meet all other eligibility criteria.



California Statewide Automated Welfare System

Design Document

CA-251565

One-time Batches to Transition Adults (26 thru
49years old) from Restricted to Full Scope Medi-
Cal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sireesha Kommajosyula
	Reviewed By	Renee Gustafson, Tisha Mutreja

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/25/2023	0.1	Original Draft	Sireesha Kommajosyula

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1 OVERVIEW

This SCR will automate the transition of individuals who are 26 thru 49 years old, inclusive, currently in restricted scope Medi-Cal to full scope MAGI Medi-Cal with a one-time batch process.

1.1 Current Design

In CalHEERS Release 23.9 and in CalSAWS Release 23.09, CalHEERS and CalSAWS were updated to grant full scope Medi-Cal for individuals 26 thru 49 years old, inclusive, regardless of satisfactory citizenship or immigration status if they meet all other eligibility criteria for the benefit month starting January 2024 with CA-251562 and CalHEERS Change Request CH-210202. This population is referred to as “Adult Expansion”.

CalSAWS has individuals who are 26 thru 49 years old, inclusive, still receiving restricted scope Medi-Cal who should be transitioned to full scope Medi-Cal.

CalSAWS Batch EDBC functionality allows Batch EDBC to automatically add a standard Journal entry to cases processed by Batch EDBC with:

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for [MONTH/YEAR].

Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the Medi-Cal program for the following reasons: <Batch EDBC Sweep Code Short Description>

There is no Batch EDBC Sweep Code for Adult Expansion one-time transition batch processing, so CalSAWS will automatically create the journal entry with a missing reason in the Long Description.

1.2 Requests

1. Automate the transition of individuals who are 26 thru 49 years old, inclusive, currently receiving restricted scope Medi-Cal to full scope Medi-Cal based on the transition Aid Code Crosswalk provided by DHCS.
2. Add a Batch EDBC Sweep Code so the auto-journal Long Description will display the reason: “Adult Expansion”.
3. Provide one-time County lists for County Eligibility Workers to follow-up on any individuals who remain in restricted scope Medi-Cal or are discontinued from Medi-Cal after the one-time transition batch processing is complete.
4. Generate one-time list to provide county with the statistics.

1.3 Overview of Recommendations

1. Initiate a one-time process to send Eligibility Determination Requests (EDRs) to CalHEERS and run Batch EDBC for identified individuals who are 26 thru 49 years of age, inclusive and receiving restricted scope Medi-Cal to transition to full scope Medi-Cal.
2. Add a Batch EDBC Sweep Code to display the Journal Long Description reason: "Adult Expansion one-time transition batch".
3. Generate one-time County lists to aid the counties to complete the transition of Adult Expansion to full scope Medi-Cal after Batch EDBC completes.
4. Generate one-time list to provide county with the statistics.

1.4 Assumptions

1. This one-time batch process includes Medi-Cal programs with an overdue RE or an in-process RE.
2. The RE due date remains unchanged for Medi-Cal programs processed by one-time batch for Adult Expansion
3. No Change to MEDS

2 RECOMMENDATIONS

2.1 One-Time Batch

2.1.1 Overview

Initiate a one-time process to send EDRs to CalHEERS and run Batch EDBC for identified individuals who are 26 thru 49 years of age, inclusive and receiving restricted scope Medi-Cal to be transitioned to full scope Medi-Cal. Create a Journal entry for the cases processed successfully in the one-time process.

2.1.2 Description of Changes

1. Batch MAGI

- a. Identify Medi-Cal programs that meet all the following conditions for one-time Batch MAGI processing:
 - i. The Medi-Cal program contains an individual that meets all the following conditions:
 - I. The individual's 26th birthday is on or before 01/31/2024

Commented [RG1]: Do we want an upper limit so we don't process over 50 year olds?

- II. The individual is currently receiving any of the following aid codes during the Jan 2024 benefit month:
 - a. A restricted scope adult MAGI Medi-Cal aid code
 - i. Parent/Caretaker Relative: M4
 - ii. Pregnant Individual: M0, M8
 - iii. Adults 19-64 Years Old: M2, L7
 - or
 - b. A restricted scope Non-MAGI Medi-Cal aid code
 - Exclude CMSP aid codes.
- ii. The program contains at least one MAGI Medi-Cal beneficiary.
- iii. The CEW has not already processed MAGI and a corresponding Medi-Cal EDBC for Jan 2024 benefit month since the start date of the Adult Expansion rules update in CA-251562.
- iv. The Medi-Cal EDBC effective Jan 2024 is not an overridden, read-only, or manual EDBC.
- b. Send an EDR for the benefit month of Jan 2024 based on the Medi-Cal program assigned to the most recent EDR. If there is no prior EDR, then assign the Medi-Cal program for the EDR based on the Medi-Cal program assigned to the most recent DER.

2. Batch EDBC

A. MAGI Medi-Cal and mixed MAGI/Non-MAGI

- a. Identify MAGI Medi-Cal and mixed MAGI/Non-MAGI Medi-Cal programs that meet all the following conditions for one-time Batch EDBC processing:
 - i. The DER is received from Recommendation 1 and all the following conditions are true:
 - 1. There are no 'Pending Eligible' MAGI Medi-Cal individuals on the DER.
 - 2. No individual was discontinued or ineligible for MAGI Medi-Cal who was previously a recipient of MAGI Medi-Cal.
 - 3. There are no individuals on Soft Pause on the DER.
 - ii. Medi-Cal EDBC has not been processed against the DER from Recommendation 1 or any subsequent DER for the Jan 2024 benefit month.
 - iii. The Medi-Cal EDBC effective Jan 2024 is not an overridden, read-only, or manual EDBC.

- b. Run Batch EDBC for Jan 2024 benefit month for the Medi-Cal program in Targeted Program mode with Type Code "Batch Eligibility" (BE). Include the new Batch EDBC Sweep Code added in Recommendation 2.1.2.3.

B. Non-MAGI Medi-Cal

- a. Identify Non-MAGI Medi-Cal cases that meet all the following conditions for one-time Batch EDBC processing:
 - i. The program does not contain a MAGI Medi-Cal beneficiary.
 - ii. The program contains an individual where all the following are true:
 - 1. The individual's 26th birthday is on or before 01/31/2024.
 - 2. The individual is currently receiving a restricted scope Non-MAGI Medi-Cal aid code during the Jan 2024 benefit month.
 - Exclude CMSP aid codes.
 - iii. Medi-Cal EDBC has not been processed for Jan 2024 benefit month since the start date of the Adult Expansion rules update in CA-251562.
 - iv. The Medi-Cal EDBC effective Jan 2024 is not an overridden, read-only, or Manual EDBC.
- b. Run Batch EDBC for Jan 2024 benefit month only for the Medi-Cal program in Targeted Program mode with Type Code 'BE' (Batch Eligibility). Include the new Batch EDBC Sweep Code added in Recommendation 2.1.2.3.

Commented [RG2]: Do we want an upper bound to not process individuals over age 50?

3. Journal Entry

- a. Add Batch EDBC Sweep Code (CT_942) for "Adult Expansion one-time transition batch" to the code table.

Code Table	Description
New/Update	New
Category Id	942

Short Description	Adult Expansion
Long Description	Adult Expansion one-time transition batch

This will allow CalSAWS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.1.2.2.

Journal Category: Eligibility
Journal Type: Batch EDBC

Short Description: Batch EDBC ran for 01/2024.
Long Description: Batch EDBC ran for 01/2024. Batch EDBC processed for the Medi-Cal program for the following reason: Adult Expansion one-time transition batch.

2.1.3 Execution Frequency

This is a one-time batch.

2.1.4 Key Scheduling Dependencies

- **Tuesday 11/21/2023**
Batch operations team will run the Data Change Request (DCR) for Batch MAGI before regularly scheduled batch. Then Tuesday's regularly scheduled batch will send the EDRs during Batch MAGI.
- **Wednesday 11/22/2023**
Batch operations will run the DCR for Batch EDBC before regularly scheduled batch processing. On the same day the nightly scheduled batch will process the above DCR picked cases through Batch EDBC

Batch Operations will repeat this process nightly on business days until November 30,2023 to process DERs returned.

2.1.5 Counties Impacted

All counties

2.1.6 Data Volume/Performance

Approximately 680K individuals will be processed with this change.
At least one Notice of Action is expected for each of the cases processed in Batch EDBC.

Commented [SK3]: Need to know the approximate count

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	ACWDL 23-08	 ACWDL 23-08.pdf

4 OUTREACH

1. Generate one-time County lists to aid the counties to complete the transition of Adult Expansion to full scope Medi-Cal after Batch EDBC completes.

The lists will display the below columns:

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

List will be posted at following locations:

CalACES Web Portal>System Changes>SCR and SIR Lists>2024>CA-251565

1. **List Name:** Medi-Cal Program Discontinued

Generate a list of cases where the Medi-Cal program was discontinued due to the one-time Batch EDBC processing for Adult Expansion transition to full scope.

County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate.

2. **List Name:** Medi-Cal Individual Discontinued

Generate a list of cases where an individual was discontinued from the Medi-Cal program due to the one-time Batch EDBC processing for Adult Expansion transition to full scope.

Additional Columns:

- CIN
- Prior Aid Code – *Display the aid code the individual was on prior to the discontinuance*
- DOB

County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close individuals, review these cases to verify the closure was accurate.

3. **List Name:** Adult Expansion remains in restricted scope

Generate a list of cases where an individual having 26 thru 49 years old, inclusive, remains in restricted Medi-Cal after the one-time Batch EDBC processing for Adult Expansion completes.

Additional Columns:

- CIN
- Aid Code
- DOB

County Action: These individuals should be transitioned to full scope Medi-Cal but remain in restricted scope.

2. Generate one-time list to provide county with the statistics

The list will display the below columns:

- County
- Total Targeted Population
- Individuals moved to Full scope
- Individuals remained in Restricted scope
- Percent successful

Note:-Percent successful is calculated as total Individuals moved to full scope by total targeted population

- Count of Notice of Actions generated

List will be posted at following locations:

CalACES Web Portal>System Changes>SCR and SIR Lists>2024>CA-251565

2.1 List Name: Adult Expansion statistics

Generate a list with number of Individuals who are 26 thru 49 years old, inclusive, targeted for Adult Expansion one-time batch and got transitioned to Full scope/remained in Restricted scope

County Action: TBD

5 REQUIREMENTS

5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.2	The LRS shall determine an applicant's/participant's eligibility for a program or programs.	CalSAWS will automate the transition of individuals ages 26-49, inclusive, currently in restricted scope MAGI Medical to full scope MAGI Medical with a one-time batch process.



California Statewide Automated Welfare System

Design Document

CA-251842

Update Expungement Detail page to display back-out transactions

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1 OVERVIEW

1.1 Current Design

The Expungement Detail page will allow staff to post the Expungement Transaction directly to a Recovery Account. If the staff person backs out a Recovery Account Transaction of type Expungement (posted via Expungement Detail page or by the Grant Expungement Reader), the 'Remaining Balance' field on the Expungement Detail Page does not reflect the back out amount.

1.2 Requests

Update the Expungement Detail page in CalSAWS to display back-out transactions by the user and display the Recovery Account Number in the Recovery Account Transaction Details section.

1.3 Overview of Recommendations

1. Update the Expungement Detail page in CalSAWS to display back-out transactions by the user and add the balance back to the 'Remaining Balance' field.
2. Update the Expungement Detail page to display the Recovery Account Number in the Recovery Account Transaction Details section.
3. Update the logic to link the backout expungement transaction on click of Backout button on Transaction Detail Page.

1.4 Assumptions

1. If a Recovery Account Transaction of type Expungement (posted via Expungement Detail page or by the Grant Expungement Reader) is backed out, the information on the Expungement Detail page will be automatically reversed. The Expungement can then be reposted to same or another Recovery Account via the Expungement Detail page if needed.
For example: Say an Expungement has a current amount of \$70. The user then posts an Expungement Transaction of \$50 to a Recovery Account via the Expungement Detail Page, leaving the Expungement's current amount at \$20. Shortly after, the user backs out the \$50 transaction. The Expungement Detail page should show the amount left on the Expungement including the backed-out funds (\$20 + \$50 = \$70 as the Expungement's current amount. If necessary, the user can repost the backed-out funds to same or another Recovery Account via the Expungement Detail page.

Commented [AMH1]: Please clarify the following:

1. What is the timeframe to utilize expungements to post to RAs?
2. When is an expungement returned to the FNS after it is expunged?
3. If an expungement was posted to an RA but later backed out, can we post the expungement to another RA at anytime, or is there a timeframe/time limit that applies to re-utilizing the expungement to post to an RA before it is returned to FNS?
4. Are the backed-out expungements reported/reflected on FNS 209?

Commented [SG2R1]: There is no timeframe limitation and it is up to the counties discretion when to post expungements to RA.

For 2nd question, it is not current CalSAWS functionality. This would be a question to the State and we advise county to reach out to CDSS for further clarification.

Yes, remaining balance on expungement can be posted to RA anytime.

Yes, for 4th question.

Commented [AMH3]: Please add a field showing an expiration date to re-post the expungement to another RA, if applicable based on clarification requested in previous comment.

Commented [SG4R3]: N/A

Commented [AMH5]: Please clarify whether there is a timeframe or time limit to repost the expungement.

Commented [SG6R5]: Please see response above.

- Only the backout transaction done after the implementation of the SCR CA-251842 will be reflected on the Expungement detail Page. The existing expunged back-out transaction records will not be reflected in the Expungement Detail Page.

2 RECOMMENDATIONS

2.1 Expungement Detail Page

2.1.1 Overview

The Expungement Detail page provides information regarding the expungement record which is received from the EBT Vendor. This update is to enhance the page to view the back-out transactions done by the user to Recovery Accounts. Furthermore, update the page to show how much of the original Expungement amount is left so that user would know how much is available to post to a recovery account when needed.

2.1.2 Expungement Detail Mockup

Los Angeles UC | Case Info | Eligibility | Empl. Services | Child Care | Resource Database | **Fiscal** | Special Units | Reports | Client Corresp. | Admin Tools

Expungements | **Expungement Detail**

Expungement Search | Edit | Close

★ - Indicates required fields

Expungement Id: 203715444	EBT Account Number: 19018022T62	Amount: \$ 84.62
Case Number: B022T62	Case Name: Case Name	Payee Name: KIMBERLEY GARRAY
Transaction Date: 02/2023	Benefit/Service Month: 02/2023	Status: Applied Partial
Benefit Type: CalFresh	Original Issuance: 6093049776	Remaining Balance: \$ 84.62
EBT Program Type: FSP	Expungement Date: 03/02/2023	Reactivated Issuance:

Status	Status Reason	Status Date	Authorized By
Applied Partial		04/18/2023 8:27:00 PM	582388
Applied Full		03/02/2023 8:27:00 PM	System
Received	New	03/02/2023 8:02:43 PM	System

Recovery Account Transaction Details					
Transaction Number	Recovery Account Number	Posted Date	Effective Month	Authorized By	Amount
4008783520	21370106	03/02/2023	02/2023	582388	84.62
4008783519	21370106	04/18/2023	02/2023	582388	(84.62)

Edit | Close

Figure 2.1.1 – Expungement Detail Page with Back-out Transaction View Mode Mockup

Commented [AMH7]: Please clarify the following:

- How will the users know the correct remaining balance, if the existing expunged back-out transaction record will not be reflected in the expungement detail page?
- Is there going to be a manual process? If so, what would be the manual process?
- Will there be a list provided for backed-out transactions prior to implementation of the SCR?
- What happens to the the backed-out expungements prior to this SCR that will not reflect on the expungement detail page? Will they be lost expungement amounts as users will not be able to repost to another RA?
- How will this impact FNS209 report, where the benefits are reported as expunged then reversed but not posted to another RA nor returned to FNS?

Commented [SG8R7]: For 1st question, the county would need to audit the Recovery Accounts to identify this. This also happens to be the current functionality which is not being altered/modified.

2nd question, please see response above.

3rd question, the list is not part of the SCR, however an ad-hoc list can be generated if needed on county's request.

Commented [AMH9]: Please add a field to reflect the expiration date showing the timeframe/time limit to post the expungement to an RA, if there are any limitations.

Commented [SG10R9]: N/A

Commented [JC11]: Recommend having this data mirror the format as shown in a receipts posting details which also includes transaction type

Commented [SG12R11]: On the page, there can only exists two types of transactions type, Expungement or Backed Out, which can be determined by looking at the amount at the end. If required, the user can also click on the hyperlink

Commented [JC13]: CWP: Recommend adding logic limiting the expungement amount that posts on the RA to be in whole dollars to avoid an RA balance with cents.

Commented [SG14R13]: That is a county functionality and we believe not all CalSAWS counties will agree to this modification.

Los Angeles, LC

Case Info Eligibility Empl. Services Child Care Resource Databank **Fiscal** Special Units Reports Client Corresp. Admin Tools

Expungement Search

★ - Indicates required fields

Save Cancel

Expungement Id: 203715444 EBT Account Number: 19018022T62 Amount: \$ 84.62

Case Number: 8022TS2 Case Name: Case Name Payee Name: KIMBERLEY GARRAY

Transaction Date: 02/2023 Benefit/Service Month: 02/2023 Status: Applied Partial

Benefit Type: CalFresh Original Issuance: 6093049776 Remaining Balance: \$ 84.62

EBT Program Type: FSP Expungement Date: 03/02/2023 Reactivated Issuance:

Posting Type: ★ Transaction Amount: ★

Transaction Amount:

Status	Status Reason	Status Date	Authorized By
Applied Partial		04/18/2023 8:27:00 PM	582388
Applied Full		03/02/2023 8:27:00 PM	System
Received	New	03/02/2023 8:02:43 PM	System

Recovery Account Transaction Details

Transaction Number	Recovery Account Number	Posted Date	Effective Month	Authorized By	Amount
4008783520	21370106	03/02/2023	02/2023	582388	84.62
4008783519	21370106	04/18/2023	02/2023	582388	(84.62)

Save Cancel

Figure 2.1.2 – Expungement Detail Page Edit Mode Mockup

2.1.3 Description of Changes

- Update the logic of the 'Remaining Balance Field' to add the backed-out transaction amount when a user back-out the transaction from the Transaction Detail Page.
- Update Recovery Account Transaction Details section of the page with the following new fields:
 - a. Add a 'Recovery Account Number' field as shown in all the Figures under section 2.1.2.
 - i. This field shows the 'Recovery Account Number' as a hyperlink in View and Edit modes.
 - On click of Recovery Account Number hyperlink navigates to Recovery Account Detail Page.
 - ii. The Section should include the back out transaction done from the Transaction Detail Page as shown in figure 2.1.1 and 2.1.2.

2.1.4 Page Location

- Global: Case Info
- Local: Case Summary
- Task: Expungement History

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add page mapping for the new "Recovery Account Number" field.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Transaction Detail Page

2.2.1 Overview

The transaction detail page allows the worker to backout the transaction posted. This page is being modified so that when a worker backout an expungement transaction then the respective transaction would be displayed on Expungement Detail page.

2.2.2 Transaction Detail Page Mockup

CalSAWS | Journal | Tasks | Help | Resources | Page Mapping | Imaging | Log Out

Los Angeles LC | Case Info | Eligibility | Emp. Services | Child Care | Resource Databank | Fiscal | Special Units | Reports | Client Corresp. | Admin Tools

Transaction Detail

★ Indicates required fields

Generate Form | Transfer | Back Out | Edit | Close

Transaction Number: 4008783519	Receipt Number:	Invoice Number:
Posted Date: 03/02/2023	Effective Month: 02/2023	Transaction Amount: 84.62
Posting Type:	Posting Status:	State Cycle Number:
Source Document Number:	Transaction Type: Expungement	Vendor Id:
Responsible Party:	Transaction Method: System	Created By: 207208
Location:	Advance Refund Clearing:	
GLDoc ID:	Comments:	

Recovery Account Information

Recovery Account Number: 21370106	Original Balance: \$124.00	Remaining Balance: \$0.00	Program Type: CalFresh
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Overpayment Distribution

Flags:

Figure 2.2.1 – Transaction Detail Page with Back-out Button View Mode Mockup

2.2.3 Description of Changes

- Add the logic to insert the back-out transaction to the expungement recovery account table to link the backout expunge transaction when we click the Back Out button as per the figure under section 2.2.1.
- Add the logic to update the expungement status to "Applied Partial" when the Remaining Balance is greater than zero after the user back-out the transaction.

2.2.4 Page Location

- **Global:** Fiscal
- **Local:** Collections
- **Task:** Transaction Summary

2.2.5 Security Updates

N/A.

2.2.6 Page Mapping

N/A.

2.2.7 Page Usage/Data Volume Impacts

N/A.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.11.2.6	The LRS shall include the ability to post, adjust, change, refund, reverse, and transfer an overpayment/overissuance claim balance, payment, and/or amounts.	The Expungement Detail page will be updated to allow posting of Recovery Account Expungement transactions.

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
None					

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-254620

Add NOA Fragments in Threshold Languages for Medi-Cal
NOA Generation (MC 359 R)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rohan Dayanand Bedre
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/20/2023	1.0	Initial Revision	Rohan Dayanand Bedre

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1 OVERVIEW

The purpose of this change is to Add Threshold languages for Medi-Cal NOA Generation (MC 359 R).

1.1 Current Design

Currently MC 359 R Medi-Cal NOA is available only in English and Spanish languages in CalSAWS.

1.2 Requests

1. Add Threshold Languages to MC AP ICT FULL AID WITH SOC with a reason code: M186A.
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.
2. Add Threshold Languages to MC AP ICT FULL AID NO SOC with a reason code: M185A.
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.
3. Add Threshold Languages to MC AP ICT RESTRICT AID NO SOC with a reason code: M184A.
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.

1.3 Overview of Recommendations

1. Add Threshold Languages to MC AP ICT FULL AID WITH SOC with a reason code: M186A (Snippet ID- 6592).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.
2. Add Threshold Languages to MC AP ICT FULL AID NO SOC with a reason code: M185A (Snippet ID- 6591).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.
3. Add Threshold Languages to MC AP ICT RESTRICT AID NO SOC with a reason code: M184A (Snippet ID- 6590).
Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.

1.4 Assumptions

1. The triggering conditions of the NOA Fragments for Threshold Generation remains the same and are not being updated.
2. The NOA template remains the same and is not being updated.
3. The existing variable population is not being updated with this effort.

2 RECOMMENDATIONS

2.1 Add threshold Languages for the MC AP ICT FULL AID WITH SOC Approved with reason code M186A.

2.1.1 Overview

Add threshold languages for MC_AP_ICT_FULL_AID_WITH_SOC_M186 NOA reason Fragments in CalSAWS.

Reason Fragment Name and ID: MC_AP_ICT_FULL_AID_WITH_SOC_M186 (Fragment ID: 6592)

State Form/NOA: MC 359 R (05/07)

Current NOA Template: MC_NOA_TEMPLATE (ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Approval

Currently Repeatable: No

Include NA Back 9: Yes

Existing Languages: English, Spanish.

2.1.2 Form/NOA Verbiage

Add MC NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #3

2.1.3 Form/NOA Variable Population

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

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.2 Add threshold Languages for the MC AP ICT FULL AID NO SOC Approved with reason code M185A.

2.2.1 Overview

Add threshold languages for MC_AP_ICT_FULL_AID_NO_SOC_M185 NOA reason Fragments in CalSAWS

Reason Fragment Name and ID: MC_AP_ICT_FULL_AID_NO_SOC_M185 (Fragment ID: 6591)

State Form/NOA: MC 359 R (05/07)

Current NOA Template: MC_NOA_TEMPLATE (ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Approval

Currently Repeatable: No

Include NA Back 9: Yes

Existing Languages: English, Spanish.

2.2.2 Form/NOA Verbiage

Add MC NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.2.3 Form/NOA Variable Population

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

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.3 Add threshold Languages for the MC AP ICT RESTRICT AID NO SOC Approved with reason code M184A.

2.3.1 Overview

Add threshold languages for MC_AP_ICT_RESTRICT_AID_NO_SOC_M184
NOA reason Fragments in CalSAWS

Reason Fragment Name and ID: MC_AP_ICT_RESTRICT_AID_NO_SOC_M184
(Fragment ID: 6590)

State Form/NOA: MC 359 R (05/07)

Current NOA Template: MC_NOA_TEMPLATE (ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Approval

Currently Repeatable: No

Include NA Back 9: Yes

Existing Languages: English, Spanish.

2.3.2 Form/NOA Verbiage

Add MC NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.3.3 Form/NOA Variable Population

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

2.3.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	MC 359 R NOAs	CA-254620 Fragments Verbiage.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none">a. Appointment notices;b. 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;	M186A, M185A, M184A Reason Codes are added in threshold languages.

	<p>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</p> <p>r. Non-compliance and sanction notices;</p> <p>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</p> <p>t. Corrective NOAs on State Fair Hearing decisions;</p> <p>u. CSC paper ID cards with LRS-generated access information; and</p> <p>v. CSC PIN notices.</p>	
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California Statewide Automated Welfare System

Design Document

CA-254633

Add NOA Fragments in Threshold Languages for
Medi-Cal NOA Generation (MC 239 A3)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Karuna Ganeri
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION kkk	AUTHOR
06/13/2023	1.0	Initial Document	Karuna Ganeri

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1 OVERVIEW

The purpose of this change is to add NOA Fragments in Threshold languages For Medi-Cal NOA Generation (MC 239 A3)

1.1 Current Design

Currently MC 239 A3 NOA is available in the Threshold Languages except for Arabic, Farsi, Hmong and Lao.

1.2 Requests

1. Add Threshold Languages to APP REG MC FULL SCOPE w/SOC with a reason code: M132A.
Languages Include: Arabic, Farsi, Hmong and Lao.
2. Add Threshold Languages to APP REG MC RESTRICTED W/SOC with a reason code: M130A.
Languages Include: Arabic, Farsi, Hmong and Lao.
3. Add Threshold Languages to RESTRICTED-SCOPE APPROVAL with a reason code: M224A.
Languages Include: Arabic, Farsi, Hmong and Lao.
4. Add Threshold Languages to RESTRICTED-SCOPE APPROVAL with a reason code: M224A.
Languages Include: Arabic, Hmong and Lao.
5. Add Threshold Languages to RESTRICTED-SCOPE RETRO APPROVAL with a reason code: M225A.
Languages Include: Arabic, Hmong and Lao.
6. Add Threshold Languages to RESTRICTED-SCOPE APPROVAL with a reason code: M225A.
Languages Include: Arabic, Farsi, Hmong and Lao.
7. Add Threshold Languages to APP REG MC RESTRICTED NO SOCL with a reason code: M129A.
Languages Include: Arabic, Farsi, Hmong and Lao.

1.3 Overview of Recommendations

1. Add Threshold Languages to APP REG MC FULL SCOPE w/SOC with a reason code: M132A (Snippet ID- 6562).
Languages Include: Arabic, Farsi, Hmong and Lao.
2. Add Threshold Languages to APP REG MC RESTRICTED W/SOC with a reason code: M130A (Snippet ID- 6560).
Languages Include: Arabic, Farsi, Hmong and Lao.

3. Add Threshold Languages to RESTRICTED-SCOPE APPROVAL with a reason code: M224A (Snippet ID- 7629).
Languages Include: Arabic, Farsi, Hmong and Lao.
4. Add Threshold Languages to RESTRICTED-SCOPE APPROVAL with a reason code: M224A (Snippet ID- 9529).
Languages Include: Arabic, Hmong and Lao.
5. Add Threshold Languages to RESTRICTED-SCOPE RETRO APPROVAL with a reason code: M225A (Snippet ID- 9530).
Languages Include: Arabic, Hmong and Lao.
6. Add Threshold Languages to RESTRICTED-SCOPE APPROVAL with a reason code: M225A (Snippet ID- 7630).
Languages Include: Arabic, Farsi, Hmong and Lao.
7. Add Threshold Languages to APP REG MC RESTRICTED NO SOCL with a reason code: M129A (Snippet ID-6559).
Languages Include: Arabic, Farsi, Hmong and Lao.

1.4 Assumptions

1. The triggering conditions of the NOA Fragments for Threshold Generation remains the same and are not being updated.
2. The NOA template remains the same and is not being updated.
3. The existing variable population is not being updated with this effort.

2 RECOMMENDATIONS

2.1 Add APP REG MC FULL SCOPE w/SOC with a reason code: M132A for Threshold Generation in CalSAWS

2.1.1 Overview

Add APP REG MC FULL SCOPE w/SOC with a reason code: M132A for Threshold Generation in CalSAWS.

Reason Fragment Name and ID:

MC_AP_MC_FULL_SCOPE_APP_WITH_SOC_M132
(Fragment ID: 6562)

State Form/NOA: MC 239 A3

Current NOA Template: MC_NOA_TEMPLATE (Fragment ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

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

2.1.2 Form/NOA Verbiage

Add Medi-Cal NOA fragments in the following languages:

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

NOA Mockups/Examples: Supporting Documents #1

2.1.3 Form/NOA Variable Population

No updates required for this section.

2.1.4 Form/NOA Generation Conditions

No updates required for this section.

2.2 Add APP REG MC RESTRICTED W/SOC with a reason code: M130A for Threshold Generation in CalSAWS

2.2.1 Overview

Add APP REG MC RESTRICTED W/SOC with a reason code: M130A for Threshold Generation in CalSAWS.

Reason Fragment Name and ID: MC_AP_RESTRICT_MC_WITH_SOC_M130
(Fragment ID: 6560)

State Form/NOA: MC 239 A3

Current NOA Template: MC_NOA_TEMPLATE (Fragment ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Approved

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

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

2.2.2 Form/NOA Verbiage

Add Medi-Cal NOA fragments in the following languages:

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

NOA Mockups/Examples: Supporting Documents #1

2.2.3 Form/NOA Variable Population

No updates required for this section.

2.2.4 Form/NOA Generation Conditions

No updates required for this section.

2.3 Add RESTRICTED-SCOPE APPROVAL with a reason code: M224A for Threshold Generation in CalSAWS

2.3.1 Overview

Add to RESTRICTED-SCOPE APPROVAL with a reason code: M224A for Threshold Generation in CalSAWS.

Reason Fragment Name and ID:

MC_AP_RESTRICT_MC_NO_SOC_M224_NEW
(Fragment ID:9529)

State Form/NOA: MC 239 A3

Current NOA Template: MC_NOA_TEMPLATE (Fragment ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Terminate

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

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

2.3.2 Form/NOA Verbiage

Add Medi-Cal NOA fragments in the following languages:

Add Threshold Languages: Arabic, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.3.3 Form/NOA Variable Population

No updates required for this section.

2.3.4 Form/NOA Generation Conditions

No updates required for this section.

2.4 Add RESTRICTED-SCOPE APPROVAL with a reason code: M224A for Threshold Generation in CalSAWS

2.4.1 Overview

Add RESTRICTED-SCOPE APPROVAL with a reason code: M224A for Threshold Generation in CalSAWS.

Reason Fragment Name and ID: MC_AP_RESTRICT_MC_NO_SOC_M224 (Fragment ID:7629)

State Form/NOA: MC 239 A3

Current NOA Template: MC_NOA_TEMPLATE (Fragment ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

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

2.4.2 Form/NOA Verbiage

Add Medi-Cal NOA fragments in the following languages:

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

NOA Mockups/Examples: Supporting Documents #1

2.4.3 Form/NOA Variable Population

No updates required for this section.

2.4.4 Form/NOA Generation Conditions

No updates required for this section.

2.5 Add RESTRICTED-SCOPE RETRO APPROVAL with a reason code: M225A for Threshold Generation in CalSAWS

2.5.1 Overview

Add RESTRICTED-SCOPE RETRO APPROVAL with a reason code: M225A F035T for Threshold Generation in CalSAWS.

Reason Fragment Name and ID: MC_AP_RESTRICT_RETRO_MC_M225_NEW
Fragment ID:9530)

State Form/NOA: MC 239 A3

Current NOA Template: MC_NOA_TEMPLATE (Fragment ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

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

2.5.2 Form/NOA Verbiage

Add Medi-Cal NOA fragments in the following languages:

Add Threshold Languages: Arabic, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.5.3 Form/NOA Variable Population

No updates required for this section.

2.5.4 Form/NOA Generation Conditions

No updates required for this section.

2.6 Add RESTRICTED-SCOPE RETRO APPROVAL with a reason code: M225A for Threshold Generation in CalSAWS

2.6.1 Overview

Add RESTRICTED-SCOPE RETRO APPROVAL with a reason code: M225A F035T for Threshold Generation in CalSAWS.

Reason Fragment Name and ID: MC_AP_RESTRICT_RETRO_MC_M225 (Fragment ID:7630)

State Form/NOA: MC 239 A3

Current NOA Template: MC_NOA_TEMPLATE (Fragment ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

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

2.6.2 Form/NOA Verbiage

Add Medi-Cal NOA fragments in the following languages:

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

NOA Mockups/Examples: Supporting Documents #1

2.6.3 Form/NOA Variable Population

No updates required for this section.

2.6.4 Form/NOA Generation Conditions

No updates required for this section.

2.7 Add APP REG MC RESTRICTED NO SOCL with a reason code: M129A for Threshold Generation in CalSAWS

2.7.1 Overview

Add APP REG MC RESTRICTED NO SOCL with a reason code: M129A F035T for Threshold Generation in CalSAWS.

Reason Fragment Name and ID: MC_AP_RESTRICT_MC_NO_SOC_M129 (Fragment ID:6559)

State Form/NOA: MC 239 A3

Current NOA Template: MC_NOA_TEMPLATE (Fragment ID: 3028)

Current Program(s): Medi-Cal

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

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

2.7.2 Form/NOA Verbiage

Add Medi-Cal NOA fragments in the following languages:

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

NOA Mockups/Examples: Supporting Documents #1

2.7.3 Form/NOA Variable Population

No updates required for this section.

2.7.4 Form/NOA Generation Conditions

No updates required for this section.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	MC 239 A3 NOA's Threshold languages	Fragments Verbiage.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none">a. Appointment notices;b. 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;	NOA Fragments for MC 239 A3 are added in Arabic, Farsi, Hmong and Lao languages.

	<p>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</p> <p>r. Non-compliance and sanction notices;</p> <p>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</p> <p>t. Corrective NOAs on State Fair Hearing decisions;</p> <p>u. CSC paper ID cards with LRS-generated access information; and</p> <p>v. CSC PIN notices.</p>	
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CalSAWS | Enhancement Request (CER)

PPOCs: Please send the completed request to CER@CalSAWS.org and cc your RM.

Submission Date	1/13/2023
Title	CALSAWS Collection Outbound File: Legacy information needed

Region #: 4	County: San Diego	
Submitter: Diana Eid-Chammas	Email: Diana.chammas@sdcounty.ca.gov	Phone: 858-637-5836

Program(s) Impacted:			
<input type="checkbox"/> Adoptive Services	<input type="checkbox"/> ARC	<input type="checkbox"/> CalFresh	<input type="checkbox"/> Cal-Learn
<input type="checkbox"/> CalWORKS / RCA	<input type="checkbox"/> CAPI	<input type="checkbox"/> Child Care	<input type="checkbox"/> CMSP
<input type="checkbox"/> Foster Care	<input type="checkbox"/> GA/GR	<input type="checkbox"/> GAIN/REP/WTW	<input type="checkbox"/> GROW
<input type="checkbox"/> Kin-GAP	<input type="checkbox"/> Medi-Cal / RMA	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Other – specify CALSAWS			

Area(s) Impacted:			
<input type="checkbox"/> Call Center	<input type="checkbox"/> Case Assignment	<input type="checkbox"/> Client Correspondence	<input type="checkbox"/> Eligibility
<input checked="" type="checkbox"/> Fiscal / Collections	<input type="checkbox"/> Hearings	<input type="checkbox"/> Imaging	<input type="checkbox"/> Lobby Management
<input type="checkbox"/> Reports	<input type="checkbox"/> Resource Data Bank	<input type="checkbox"/> Schedule Appt	<input type="checkbox"/> Security
<input type="checkbox"/> Self Service Portal	<input type="checkbox"/> Special Investigation	<input type="checkbox"/> Task Mgmt	<input type="checkbox"/> Time Limits
<input type="checkbox"/> Training			
<input checked="" type="checkbox"/> Interface(s) - specify CALSAWS Collections Outbound interface file			
<input type="checkbox"/> Other – specify			

CalSAWS | Enhancement Request (CER)

Justification / Request Summary:

Issue:

In the San Diego - CalWIN Wave 4 - Development & Design IPT meeting dated 1/10/2023, it was communicated that the CALSAWS Collection Outbound interface file will NOT include legacy recovery fields (CALWIN claim numbers). It was suggested in that meeting to open a CER with the request for assistance from the CALSAWS team to help bridge the gap between CALWIN claim numbers and CALSAWS Recovery Account numbers.

The CALWIN claim number is necessary to match existing CALWIN claims in the Collections ancillary system to the corresponding CALSAWS data interfacing via the CALSAWS outbound collection file.

Proposed Recommendation:

Provide the County of San Diego a list of the existing CALWIN claim numbers and their corresponding CALSAWS Recovery Account Numbers. This should facilitate the initial load of data into the Ancillary Collection system in preparation to receive the data for CALSAWS Recovery Account Numbers in the CALSAWS Outbound Collection file and match to the existing CALWIN accounts in the Ancillary system.

It was mentioned on the call that the information requested may be available in the "EDR ad hoc" process that pulls data from the reporting database. If this process will achieve the proposed recommendation, the County would like to be granted access and provided know-how needed to extract that information.

Priority/Implementation Consideration(s):

This is a high priority request needed to meet the CALSAWS go-live prerequisite timeline, specifically the February 17th 2023 deadline for file configuration and the March 15th 2023 deadline for file interface testing.

CalSAWS Response:

CER Tracking #: (automatically generate by JIRA)

SCR #

Rejected By:

Date:

Rejection Reason(s) or other Comments:



California Statewide Automated Welfare System

Design Document

CA-255933

Update all DCFS specific forms (AAP, FC & KG) with DCFS headquarters address to new address.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Karuna Ganeri
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/28/2023	1.0	Initial Draft	Karuna Ganeri

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1 OVERVIEW

This effort will update all DCFS specific forms (AAP, FC & KG) from old DCFS headquarters address to new address.

1.1 Current Design

Currently all DCFS specific forms (AAP, FC & KG) with DCFS headquarters address are showing old address "425 Shatto Place, Los Angeles, CA 90020".

1.2 Requests

Update all DCFS specific forms (AAP, FC & KG) with new DCFS headquarters address "510 S. Vermont Ave, Los Angeles, CA 90020".

1.3 Overview of Recommendations

Update all DCFS specific forms (AAP, FC & KG) with new DCFS headquarters address "510 S. Vermont Ave, Los Angeles, CA 90020".

1.4 Assumptions

1. AA_NOA_TEMPLATE English form currently do not contain the DCFS headquarter address, it has to be removed from Spanish form as well.
2. KG_NOA_TEMPLATE English form currently do not contain the DCFS headquarter address, it has to be removed from Spanish form as well.
3. There are no changes to the generation logic of these forms.
4. No updates to population logic.

2 RECOMMENDATIONS

2.1 Update all DCFS specific forms (AAP, FC & KG) with new DCFS headquarters address

2.1.1 Overview

This section will cover the requirements for updating all DCFS specific forms (AAP, FC & KG) with new DCFS headquarters address.

Existing DCFS headquarters address: 425 Shatto Place, Los Angeles, CA 90020

New Address: 510 S. Vermont Ave, Los Angeles, CA 90020

2.1.2 Form Verbiage

Update below DCFS Forms with new address

List of Form Names:

DCFS2322ADM102

DCFS5125

DCFS_6025

DCFS_6026

DCFS_6027

DCFS_6028

DCFS_6029

Please see the below example for DCFS5125 form:

Old Address:

Please mail this request to:

DCFS Ombudsman
425 Shatto Place
Los Angeles, CA 90020

SEND E-MAIL TO:
pinquiries@dcfs.lacounty.gov

New Address:

Please mail this request to:

DCFS Ombudsman
510 S. Vermont Ave
Los Angeles, CA 90020

SEND E-MAIL TO:
pinquiries@dcfs.lacounty.gov

2.1.3 Form Variable Population

N/A

2.1.4 Form Generation Conditions

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
N/A	-	-	-

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none">a. Appointment notices;b. 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;u. CSC paper ID cards with LRS-generated access information; andv. CSC PIN notices.	<p>All DCFS specific forms (AAP, FC & KG) with DCFS headquarters address being updated to new address.</p>



California Statewide Automated Welfare System

Design Document

CA-255969

Voice Bots Rollout: Placer County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/5/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Placer County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Placer County.

1.2 Requests

Add the voice bots into Placer County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Placer County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Placer County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-255969

Voice Bots Rollout: Shasta County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/5/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Shasta County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Shasta County.

1.2 Requests

Add the voice bots into Shasta County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Shasta County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Shasta County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-260472

Update Disaster Services Page to allow adding
Disaster info by Consortium

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	John B., Kapil S.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/26/2023	1.0	Initial Version	Jimmy Tu

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1 OVERVIEW

1.1 Current Design

The Disaster Services List page is a Read Only page in CalSAWS where information for a declared Disaster can be viewed.

1.2 Requests

Update Disaster Services page to allow adding Disaster related information for Consortium when a Disaster is declared by the President.

1.3 Overview of Recommendations

1. Update the Disaster Services List Page to include an 'Add' button that will allow users to add Disasters.
2. Update Disaster Services Detail Page in Create Mode to have editable fields to enter the required Disaster Services Dates.
3. Update the Disaster Services Detail Page in Edit Mode to have editable fields to update the required Disaster Services Dates.

1.4 Assumptions

1. Universal User is a project staff user.

2 RECOMMENDATIONS

2.1 Disaster Services List Page

2.1.1 Overview

The Disaster Services List page is currently used to view Disasters set up in the system. We will update this page to allow users to add disasters with this page.

2.1.2 Disaster Services List Page Mockup

Disaster Services List

Disaster Name:

From:

To:

Add

View

Search Results Summary

Results 1 - 25 of 25

Disaster Name	Begin Date	End Date	Application Begin Date	Application End Date	Processing End Date	
Los Angeles October 2023 DSED Test Disaster	10/01/2023	10/31/2023	10/01/2023	11/08/2023	11/15/2023	Edit
Los Angeles October 2023 DGIL Test Disaster	10/01/2023	10/31/2023	10/01/2023	11/08/2023	11/15/2023	Edit
Los Angeles September 2023 DSED Test Disaster	09/01/2023	09/30/2023	09/01/2023	10/08/2023	10/15/2023	Edit
Los Angeles September 2023 DGIL Test Disaster	09/01/2023	09/30/2023	09/01/2023	10/08/2023	10/15/2023	Edit
Los Angeles August 2023 DGIL Test Disaster	08/01/2023	08/31/2023	08/01/2023	09/08/2023	09/15/2023	Edit

Figure 2.1.1 – Disaster Services List Page – Add Button

2.1.3 Description of Changes

1. Update the Disaster Services List Page to include an 'Add' button that will allow users to add Disasters.
 - a. To view and use the 'Add' button, the user will need to have the 'DisasterServicesDetailEdit' security right and be a Universal User. This button will take users to the Disaster Services Detail page in create mode.

Commented [JT1]: Check with BA if we want a new security right

Commented [JT2R1]: DisasterServicesDetailAdd

2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin

- **Task:** Disaster Services

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

N/A.

2.1.7 Page Usage/Data Volume Impacts

N/A.

2.2 Disaster Services Detail Page

2.2.1 Overview

The Disaster Services Detail page is currently used to set the processing end date for disaster set in the system. We will be updating this page to allow users to add Disasters through the Disaster Services List Page in Create Mode.

2.2.2 Disaster Services Detail Page Mockup

Disaster Services Detail

* - Indicates required fields

Save Cancel

Disaster Name: *
Los Angeles October 2023 DSED Test Disaster

Begin Date: * 10/01/2023 **End Date: *** 10/31/2023

Application Begin Date: * 10/01/2023 **Application End Date: *** 11/08/2023

Processing End Date: * 11/15/2023

Save Cancel

Last Updated On 05/25/2023 1:30:56 PM By: [216654](#)

Figure 2.2.1 – Disaster Services Detail Page – Create Mode & Edit Mode

2.2.3 Description of Changes

1. Update Disaster Services Detail Page in Create Mode to have editable fields to enter the required Disaster Services Dates.
 - a. Upon clicking Save, the user will be navigated to the Disaster Services Detail page in View Mode.
2. Update the Disaster Services Detail Page in Edit Mode to have editable fields to update the required Disaster Services Dates.
 - a. Upon clicking Save, the user will be navigated to the Disaster Services Detail page in View Mode.
3. Validation:
 - a. End Date cannot be before to the Begin Date.
 - b. Application End Date cannot be before the Application Begin Date.
4. For any new records being created in a specific county, the Application Begin Date or Application End Date cannot fall into the range of any existing Disaster record's application begin and end date in that county.
 - a. Validation Message:
 - i. Application Begin Date or Application End Date cannot fall into the range of any existing disaster record's Application Begin and End Date.

2.2.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Disaster Services

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.2.6 Page Mapping

N/A.

2.2.7 Page Usage/Data Volume Impacts

N/A.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 OUTREACH

N/A.

6 APPENDIX

N/A.



California Statewide Automated Welfare System

Design Document

CA-260569

Update Valuable Voucher Type for Ventura
County.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	John B., Kapil S.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/21/2023	1.0	Initial Version	Jimmy Tu

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1 OVERVIEW

1.1 Current Design

Valuable Voucher Types are stored in the database and appear in the drop-down list for Valuable Category Voucher. When there are no Voucher Types stored for a County, the drop-down is empty.

1.2 Requests

1. Add Valuable Voucher Types for Ventura County.

1.3 Overview of Recommendations

1. Update the Valuable Type table to include new Valuable Types.
2. Update the Valuable Type Program table to include new mappings for Valuable Voucher types.

1.4 Assumptions

None.

2 RECOMMENDATIONS

2.1 Data Change Request

2.1.1 Overview

This Data Change Request is to add additional Valuable Voucher Types for Ventura.

2.1.2 Description of Change

1. Update the Valuable Type (Valbl_type) table to include the following new Valuable Voucher Types:

Category Code (Cat_Code)	Valuable Description	County Code
Voucher ('VO')	CalLearn Voucher	Ventura (56)
Voucher ('VO')	GA Voucher	Ventura (56)
Voucher ('VO')	GA Shoe Voucher	Ventura (56)
Voucher ('VO')	GA Clothing Voucher	Ventura (56)
Voucher ('VO')	Other Program Voucher	Ventura (56)
Voucher ('VO')	Voucher	Ventura (56)
Voucher ('VO')	WTW College Book Voucher	Ventura (56)
Voucher ('VO')	WTW Book Voucher	Ventura (56)
Voucher ('VO')	WTW Car Repair	Ventura (56)
Voucher ('VO')	WTW Voucher	Ventura (56)
Voucher ('VO')	WTW Uniform Voucher	Ventura (56)
Voucher ('VO')	WTW Driving Voucher	Ventura (56)
Voucher ('VO')	WTW Assessment	Ventura (56)
Voucher ('VO')	WTW Shoe Voucher	Ventura (56)
Voucher ('VO')	WTW Adult School Voucher	Ventura (56)

2. Update the Valuable Type Program (Valbl_type_pgm_code) table to include new program to voucher type mappings for the new voucher types above.

Program Code (PGM_CODE)	Valuable Type (Valbl_type_ID)
CalLearn	CalLearn Voucher
GA/GR Automated Solution (GR)	GA Voucher
GA/GR Automated Solution (GR)	GA Shoe Voucher
GA/GR Automated Solution (GR)	GA Clothing Voucher
GA/GR Automated Solution (GR), WTW, CalLearn, CFET	Other Program Voucher
GA/GR Automated Solution (GR), WTW, CalLearn, CFET	Voucher
WTW	WTW College Book Voucher
WTW	WTW Book Voucher
WTW	WTW Car Repair
WTW	WTW Voucher
WTW	WTW Uniform Voucher
WTW	WTW Driving Voucher
WTW	WTW Assessment
WTW	WTW Shoe Voucher
WTW	WTW Adult School Voucher

2.1.3 Estimated Number of Records Impacted/Performance

36 records impacted.

3 SUPPORTING DOCUMENTS

None.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

5 MIGRATION IMPACTS

None.

6 OUTREACH

None.

7 APPENDIX

None.



California Statewide Automated Welfare System

Design Document

CA-262348

Voice Bots Rollout: Contra Costa County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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	2.1.1 Overview	5
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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Contra Costa County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Contra Costa County.

1.2 Requests

Add the voice bots into Contra Costa County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Contra Costa County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Contra Costa County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262349

Voice Bots Rollout: Santa Clara County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Santa Clara County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Santa Clara County.

1.2 Requests

Add the voice bots into Santa Clara County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Santa Clara County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Santa Clara County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262352

Voice Bots Rollout: Tulare County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Tulare County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Tulare County.

1.2 Requests

Add the voice bots into Tulare County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Tulare County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Tulare County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262355

Voice Bots Rollout: Orange County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Orange County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Orange County.

1.2 Requests

Add the voice bots into Orange County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Orange County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Orange County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262356

Voice Bots Rollout: Ventura County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Ventura County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Ventura County.

1.2 Requests

Add the voice bots into Ventura County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Ventura County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Ventura County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262357

Voice Bots Rollout: Santa Barbara County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Santa Barbara County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Santa Barbara County.

1.2 Requests

Add the voice bots into Santa Barbara County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Santa Barbara County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Santa Barbara County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262358

Voice Bots Rollout: Butte County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Butte County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Butte County.

1.2 Requests

Add the voice bots into Butte County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Butte County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Butte County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262361

Voice Bots Rollout: Sutter County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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	2.1.2 Description of Changes	5
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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Sutter County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Sutter County.

1.2 Requests

Add the voice bots into Sutter County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Sutter County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Sutter County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262364

Voice Bots Rollout: Stanislaus County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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	2.1 Deploy the Voice Bots	5
	2.1.1 Overview	5
	2.1.2 Description of Changes	5
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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Stanislaus County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Stanislaus County.

1.2 Requests

Add the voice bots into Stanislaus County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Stanislaus County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Stanislaus County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262365

Voice Bots Rollout: Humboldt County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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	2.1.1 Overview	5
	2.1.2 Description of Changes	5
3	Supporting Documents	6
4	Appendix.....	7

1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Humboldt County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Humboldt County.

1.2 Requests

Add the voice bots into Humboldt County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Humboldt County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Humboldt County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262366

Voice Bots Rollout: Kings County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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	2.1 Deploy the Voice Bots	5
	2.1.1 Overview	5
	2.1.2 Description of Changes	5
3	Supporting Documents	6
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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Kings County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Kings County.

1.2 Requests

Add the voice bots into Kings County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Kings County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Kings County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262368

Voice Bots Rollout: Marin County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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	2.1.1 Overview	5
	2.1.2 Description of Changes	5
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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Marin County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Marin County.

1.2 Requests

Add the voice bots into Marin County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Marin County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Marin County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262371

Voice Bots Rollout: Monterey County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Monterey County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Monterey County.

1.2 Requests

Add the voice bots into Monterey County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Monterey County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Monterey County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262373

Voice Bots Rollout: Kern County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Kern County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Kern County.

1.2 Requests

Add the voice bots into Kern County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Kern County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Kern County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262375

Voice Bots Rollout: Riverside County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Riverside County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Riverside County.

1.2 Requests

Add the voice bots into Riverside County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Riverside County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Riverside County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262377

Voice Bots Rollout: Solano County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Solano County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Solano County.

1.2 Requests

Add the voice bots into Solano County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Solano County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Solano County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262378

Voice Bots Rollout: San Diego County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **San Diego County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in San Diego County.

1.2 Requests

Add the voice bots into San Diego County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for San Diego County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	San Diego County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262379

Voice Bots Rollout: Santa Cruz County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Santa Cruz County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Santa Cruz County.

1.2 Requests

Add the voice bots into Santa Cruz County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Santa Cruz County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Santa Cruz County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262380

Voice Bots Rollout: San Mateo County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **San Mateo County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in San Mateo County.

1.2 Requests

Add the voice bots into San Mateo County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for San Mateo County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	San Mateo County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262383

Voice Bots Rollout: Fresno County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Fresno County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Fresno County.

1.2 Requests

Add the voice bots into Fresno County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Fresno County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Fresno County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262384

Voice Bots Rollout: Sonoma County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Sonoma County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Sonoma County.

1.2 Requests

Add the voice bots into Sonoma County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Sonoma County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Sonoma County Call Flow [Visio]	Attached on Jira

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California Statewide Automated Welfare System

Design Document

CA-262385

Voice Bots Rollout: Alameda County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Alameda County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Alameda County.

1.2 Requests

Add the voice bots into Alameda County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Alameda County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Alameda County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262387

Voice Bots Rollout: Yuba County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Hazim Qudah
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/25/2023	0.01	Initial Version	Hazim Qudah

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1 OVERVIEW

This request will add the Welcome and Authentication voice bot functionalities to **Yuba County**. These voice bots are being rolled out statewide following a successful pilot at San Bernardino [CA-245963].

1.1 Current Design

In the current design, there are no automated voice bots in Yuba County.

1.2 Requests

Add the voice bots into Yuba County.

1.3 Overview of Recommendations

1. Deploy Voice Bots

1.4 Assumptions

1. There is no difference in core functionality between the bots to be deployed in this county vs. the pilot bot.
2. Reports will be sent out automatically at a daily cadence.

2 RECOMMENDATIONS

2.1 Deploy the Voice Bots

2.1.1 Overview

The recommendation is to deploy the Welcome and Authentication bots to the IVR for Yuba County. These bots will assist customers in the Welcome process and automate the authentication process using voice [IVR].

2.1.2 Description of Changes

1. Create bi-lingual voice bots [English/Spanish] to assist callers with questions.
2. Build reports to be sent to county at a recurring cadence.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR	Yuba County Call Flow [Visio]	Attached on Jira

4 APPENDIX



California Statewide Automated Welfare System

Design Document

CA-262742

Refactor Cryptographic Hash

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	
	Approved by	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/19/2023	1.0	Initial Draft	Alan Young

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1 OVERVIEW

Currently cryptographic hash uses Secure Hash Algorithm SHA-1 for its web services which includes calling eHIT and VLP services with CalHEERS partner. Due to potential security vulnerabilities, it is recommended to change SHA-1 to a stronger hash algorithm.

1.1 Requests

The current implementation of cryptographic hash is SHA-1, which is considered vulnerable. National Institute of Standards and Technology (NIST) recommends that anyone relying on SHA-1 for security switch to using the more secure SHA-2 and SHA-3 groups of algorithms. The use of SHA-1 should be discontinued, and it should be updated to SHA-256.

1.2 Overview of Recommendations

This SCR describes a replacement of the current cryptographic hash SHA-1 with a popular SHA-256 algorithm. This replacement requires algorithm changes at both CalSAWS and CalHEERS partner. The cryptographic hash update will minimize the security vulnerabilities from malicious attacks.

1.3 Assumptions

This cryptographic hash update should not change the functional behavior of the current application.

2 RECOMMENDATIONS

This SCR describes a replacement of the current cryptographic hash SHA-1 with a popular SHA-256 algorithm. This replacement requires algorithm changes at both CalSAWS and CalHEERS partner. The security update should not change the functional behavior of the current application. The use of the SHA-256 algorithm will minimize security vulnerabilities to meet security compliance requirements.

2.1 Description of Changes

The current SHA-1 algorithm will be updated to the SHA-256 algorithm for both CalSAWS and CalHEERS partner. This section will only describe the required changes for CalSAWS. The proposed changes are described in the following:

1. Update of the current cryptographic hash from SHA-1 to SHA-256 when creating a Message Digest instance.

Current:

```
MessageDigest sha1MessageDigest =  
    MessageDigest.getInstance(MESSAGE_DIGEST_ALGORITHM_NAME_SHA_1);  
  
MESSAGE_DIGEST_ALGORITHM_NAME_SHA_1 = "SHA-1";
```

Proposed:

```
MessageDigest sha256MessageDigest =  
    MessageDigest.getInstance(MESSAGE_DIGEST_ALGORITHM_NAME_SHA_256);  
  
MESSAGE_DIGEST_ALGORITHM_NAME_SHA_256 = "SHA-256";
```

2. Replace the security random algorithm with the default SecureRandom constructor.

Current:

```
SecureRandom secureRandom =  
    SecureRandom.getInstance(SECURE_RANDOM_ALGORITHM_SHA_1_PRNG);
```

Proposed:

```
SecureRandom secureRandom = new SecureRandom();
```

2.2 Security Updates

This is an update of the cryptographic hash from SHA-1 to SHA-256 in web services related to its CalHEERS partner.

3 SUPPORTING DOCUMENTS

N/A

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

N/A

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A



California Statewide Automated Welfare System

Design Document

CA-263212

Expand the Child Care Admin portal to display
referral information for external
provider/agencies

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Michael Wu, Naga Chinduluru, Aaron Fowler, William Baretsky, Himanshu Jain, Chitra Barsagade, Raji Reddy, Sumeet Patel

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/01/2022	1.0	Initial	Kusnadi.E
07/02/2023	1.1	<p>Updates based on further input from Build team.</p> <ol style="list-style-type: none"> Added to Section 1.4 Assumption #8 that the external provider/agency can accept HTML formatted email messages. Updates to Section 2.1 <ol style="list-style-type: none"> Updates was made to Section 2.1.3 that the Send E-mail button matches with the mockup. Updates to Section 2.3 <ol style="list-style-type: none"> #1c to remove the reference asking the user to select a button. Update the title of the buttons instead in order to make sure it makes sense in the scenario where only 1 button is being displayed on the page. Updated the note in reference of not seeing any buttons at all. Since user that 	Kusnadi.E

		<p>are not assign to any security role, will not see the welcome page once they log in.</p> <p>b. Added to #2b that clicking the CalSAWS logo will bring the user back to the Welcome Page. #2d.ii is updated to include a clarification on what an "error" is. #2d.iii.1.f is updated from Referral Type to Need Type so that it aligns with the Summary Type and CalSAWS since there is no Referral Type.</p> <p>c. Added a note to #3b about clicking the CalSAWS logo. Added to #3c what the Dashboard page will look like when user click on the left arrow icon from the summary page. Added a Note to #3ei2e on where the Primary language of the person will be based on in CalSAWS application.</p> <p>4. The following updates were made throughout Section 2.3.3:</p>	
--	--	--	--

		<ul style="list-style-type: none"> a. Added the format of what telephone number information will display as. b. Added the format of what address information will display as. c. Updated e-Mail Address to E-mail address. d. Added to the Case Manager Section for the Phone number to also include Extension information if available. e. Added #4 to update the Window title from Child Care Administrator Portal to CalSAWS Administrator Portal <ul style="list-style-type: none"> 5. Updated Section 2.5.10 to N/A 6. Added to Project Requirement to Section 4.1 7. Added to Section 2.1.3 to the e-mail body to include "Code Code: 33" to make it clear that 33 is the county code that the external agency/provider will need to input on the Portal search parameter. Also, added additional verbiage that the e-mail address used 	
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		to send the e-mail is not monitored, so they should not be replying to the e-mail.	

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1 OVERVIEW

The Child Care Administrator Portal was created to provide a read only summary that provide information needed to determine eligibility for childcare services as mandated by ACL-19-99 and ACL 19-110. This SCR will expand the Child Care Administrator portal to provide a summary page that provide referral information for services that the counties refer out to external agencies or providers.

1.1 Current Design

Currently, the Child Care Administrator Portal provide information to determine eligibility for childcare services. Secondly, when referrals are created in CalSAWS, counties are still required to manually provide the referral information to the external agencies, or providers for services they refer out.

1.2 Requests

Expand the Child Care Administrator Portal to provide a read only summary page to provide referral information that's inputted in CalSAWS to be available for external agencies or providers for services that are refer out.

1.3 Overview of Recommendations

1. Update the Referral Detail page to send e-mail out to resources when new referrals are created.
2. Update the CalSAWS.org resource section to rebrand the Child Care Portal title as CalSAWS Administrator portal.
3. Rebrand the Child Care Admin Portal as the CalSAWS Administrator Portal along with new pages for the referral portal functionality.
4. Create a new Security Role in ForgeRock that will provide user access to the Referral Portal pages of the CalSAWS Administrator Portal.
5. Create a new Referral API that will pull referral information from CalSAWS so it is being displayed on the Referral Portal pages of the CalSAWS Administrator portal.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out in the design.
2. This SCR will not impact any data/information/monthly report that are currently being used to determine eligibility for childcare services that are mandated by ACL 19-99 and ACL 19-110.
3. This SCR will not impact existing security for users that are currently provisioned to access the Child Care Administrator portal to determine eligibility for childcare services.
4. The functionality to validate Resource e-mail addresses will be added as part of SCR CA-253124. A subsequent SCR will be created to update the e-Referral functionality to only send to a validated e-mail address.

5. Users that will need to be added to ForgeRock application and be assigned to the security role that will provide them access to the CalSAWS Administrator portal will continue to be done by the delegated admin. It will continue to follow the existing process.
6. CA-263213 is the SCR that will update the CalSAWS Administrator Portal to allow external provider/agencies to update the referral status.
7. CA-263214 is the SCR that will update the existing URL for the Child Care Portal (to be rebranded as the CalSAWS Administrator portal) to match with the rebrand.
8. E-mail that's being sent to external provider/agency through CalSAWS application will be a HTML formatted email. The external provider/agency is assumed to be able to accept HTML formatted email messages.

2 RECOMMENDATIONS

Expand the Child Care Administrator portal to provide a read only summary page that provide referral information for services that the counties refer out to external agencies or providers. This will include rebranding the Child Care Administrator portal and adding a new referral flow along with new pages and security to allow external agencies, and providers to have a read only access to referral information that's created in CalSAWS. CalSAWS will be updated to support this new functionality so that e-mails can be sent out to external agencies and providers to inform them when new referrals are entered in CalSAWS. The calsaws.org resource page will also be updated to display a link to the portal that the external agencies and providers can access to view the information for the referrals.

2.1 Referral Detail page

2.1.1 Overview

The Referral Detail page allows users to add, edit or view the details of a referral for a participant/beneficiary. This SCR will add the functionality to send an e-mail out to the provider/agency for referral that are created in CalSAWS.

2.1.2 Referral Detail Mockup

Referral Detail

*- Indicates required fields

Save and Return Cancel

Need*

Type	Name	Category	Begin Date
<input type="radio"/> Child Care	Mouse, Minnie 46F	Dependent Care	08/30/2022

Referral Information

Referral ID:

Resource: *
Select

Worker ID: *
Select

Program:

Send Referral E-mail:

Comments:

Status History*

Status	Status Reason	Status Date	Updated By
<input type="text"/>	<input type="text"/>	09/08/2022	

Save and Return Cancel

This [Type 1](#) page took 0.31 seconds to load.

Figure 2.1.1 – Referral Detail (Create mode landing page – Reference only)

Referral Detail

*- Indicates required fields

Generate Form

Edit

Close

Name:

Mouse, Minnie 46F

Need *

Need Type:

[Career Counseling](#)

Need Category:

Counseling

Need Status:

Met

Need Description:

Referral Information

Referral ID:

1234567

Resource: *

[Career Counseling](#)

Worker ID: *

[36LS08GG00](#)

Program:

CalWORKs

Send Referral E-mail:

Yes

[Send E-mail](#)

Comments:

Testing 12345

Status History *

Status	Status Reason	Status Date	Updated By
Referred	Eligible for Service	09/08/2022	1234567

Generate Form

Edit

Close

Last Updated On 09/08/2022 2:59:26 PM By: [1030878](#)

This [Type 1](#) page took 0.33 seconds to load.

Figure 2.1.2 – Referral Detail (View mode)

2.1.3 Description of Changes

1. Display a button titled "Send E-mail" on the Send Referral E-mail field when the Referral Detail page is in view mode.
 - a. "Send E-mail" button will only display when the value selected is "Yes" and the Resource selected have the "Does This Resource accept e-Referrals" field set to "Yes" on the Resource Detail page.
 - i. Clicking the "Send E-mail" button will trigger CalSAWS to send an e-mail to the Resource that was selected on the

"Resource field" (please refer to requirement #4 on the e-mail that is to be sent to the Resource).

1. The e-mail will be sent to the e-mail address that is entered on the Resource Detail page under the Internet Information where the Type is equal to "E-mail".
 - a. Multiple e-mail will be sent when there are multiple e-mail addresses with the Type of "E-mail".
2. Send out an e-mail to the Resource that is selected on the "Resource" field when the user clicks on the "Save and Return" button or the "Send E-mail" button.
 - a. Send out the e-mail to the resource upon clicking the "Save and Return" button when the Referral Detail page is in create mode and the "Send Referral E-mail" field is equal to "Yes".
 - i. The e-mail will be sent to the e-mail address that is entered on the Resource Detail page under the Internet Information where the Type is equal to "E-mail".
 1. Multiple e-mail can be sent when there's multiple e-mail addresses with the Type of "E-mail".
 - b. Send out the e-mail to the resource upon clicking the "Save and Return" button when the Referral Detail page is in edit mode and the "Send Referral E-mail" field was changed from "No" to "Yes" or "blank" to "Yes".
 - i. E-mail will not be sent to the resource when the value on the "Send Referral E-mail" field was changed from "Yes" to "No" or "Yes" to "blank".
 - ii. E-mail will not be sent to the resource when there is no change in the value on the "Send Referral E-mail" field.
 - iii. The e-mail will be sent to the e-mail address that is entered on the Resource Detail page under the Internet Information where the Type is equal to "E-mail".
 1. Multiple e-mail can be sent when there's multiple e-mail addresses with the Type of "E-mail".
3. Create a new e-mail to be sent to the Resource that was selected.
 - a. Subject: A new service referral has been created from XX County
 - i. XX will be the name of the County that the Referral belongs to.
 - ii. Example:
Email Subject: "A new service referral has been created from Riverside County"
 - b. Body:
A new service referral (Referral ID: XXXXX) has been created for you from XX County (##). Please log in to the CalSAWS Administrator Portal to view the referral information for more details.

- i. The CalSAWS Administrator Portal will be a hyperlink to the CalSAWS Administrator Portal log in page (previously the Child Care Administrator Portal).
 1. Hyperlink will be: <https://childcare.calsaws.net/>
 - ii. XXXX for the Referral ID will be the Referral ID assigned to the Referral.
 - iii. XX for the County will be the name of the County that the referral belongs to and ## will be the County code.
 - iv. Example:
 Email Body: "A new service referral (Referral ID: 123456) has been created for you from Riverside County (County Code: 33). Please log in to the [CalSAWS Administrator Portal](#) to view the referral information for more details. Please do not reply to this e-mail as this e-mail address is unmonitored. If you need to get a hold of a county worker, please log in to the CalSAWS Administrator Portal for further information.
 - c. To: <e-mail address of the Resource>
 - i. This is the e-mail address that is inputted on the Internet Section from the Resource Detail page where the Type is "E-mail"
 - d. From: referral.noreply@app.calsaws.org
 - i. Note: For Test environments, the e-mail address used is referral.noreply.dev@app.calsaws.org
4. Create a new e-mail address to be used by CalSAWS to send referral emails.
- a. For production environment, the e-mail address to be used by CalSAWS when sending the referral email will be:
["referral.noreply@app.calsaws.org"](mailto:referral.noreply@app.calsaws.org)
 - b. For test environment, the e-mail address to be used by CalSAWS when sending the referral email will be:
["referral.noreply.dev@app.calsaws.org"](mailto:referral.noreply.dev@app.calsaws.org)

2.1.4 Page Location

- **Global: Empl. Services**
- **Local: Supportive Services**
- **Task: Referrals**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping for the new fields that are added to the Referral Detail page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Resources section of the CalSAWS.org website

2.2.1 Overview

The Resource section on the CalSAWS.org provide pertinent resources information that participants can use. This section also provides the link that Child Care Providers can use to access the Child Care Administrator Portal. This SCR will update the Resource section of the CalSAWS.org website to relabel the existing link for the Child Care Administrator Portal.

2.2.2 Resource section of the CalSAWS.org Mockup

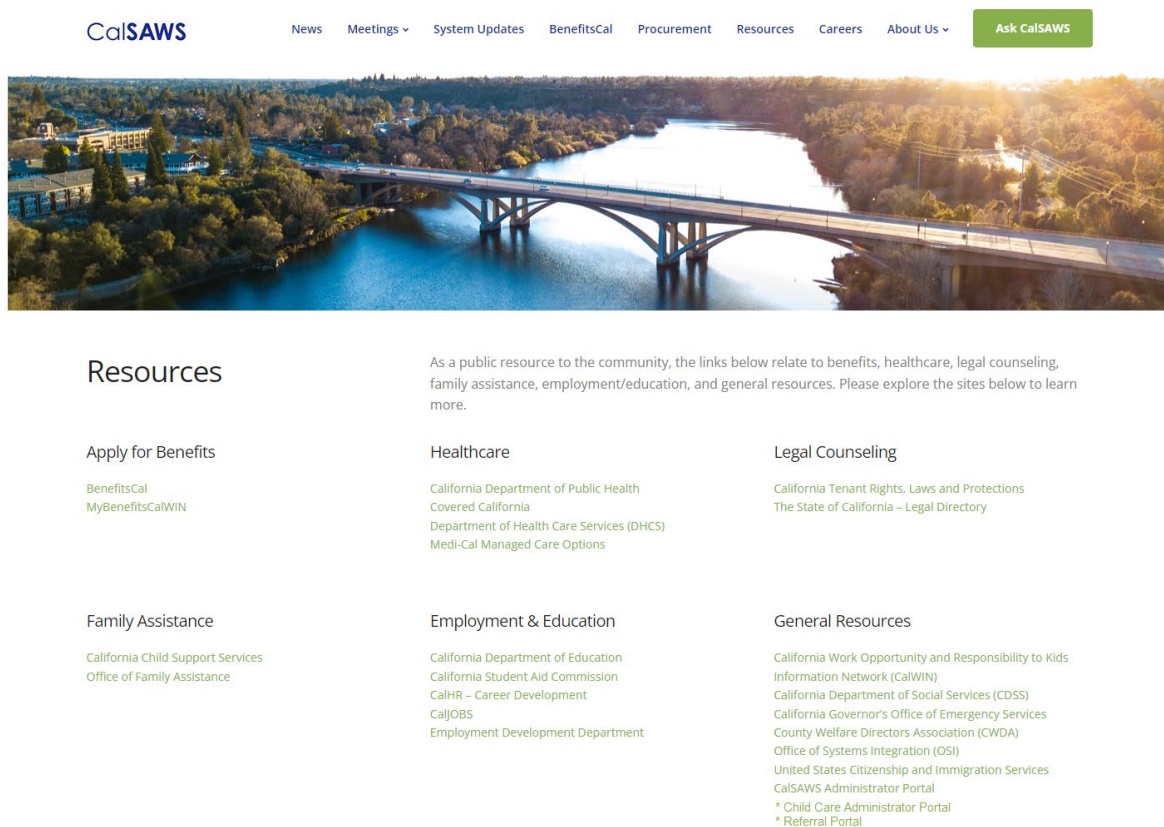


Figure 2.2.1 Resources section of the CalSAWS.org

2.2.3 Description of Changes

1. Update the label for the Child Care Administrator Portal link from "Child Care Administrator Portal" to "CalSAWS Administrator Portal"

- * Child Care Administrator Portal
- * Referral Portal"
 - a. Clicking this link will take the user to the production CalSAWS Administrator Portal website (as part of this SCR the Child Care Administrator Portal is rebranded as CalSAWS Administrator Portal).
 - i. Website: <https://childcare.calsaws.net/>

2.2.4 Page Location

<https://www.calsaws.org/resources/>

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 CalSAWS Administrator Portal

2.3.1 Overview

The existing Child Care portal will be updated with a brand-new functionality to allow external Provider/Agency to view a summary for Referrals that are created in CalSAWS. This SCR will rebrand the Child Care Portal as the CalSAWS Administrator Portal and will add brand new pages that will display Referral information.

2.3.2 CalSAWS Administrator Portal Mockup

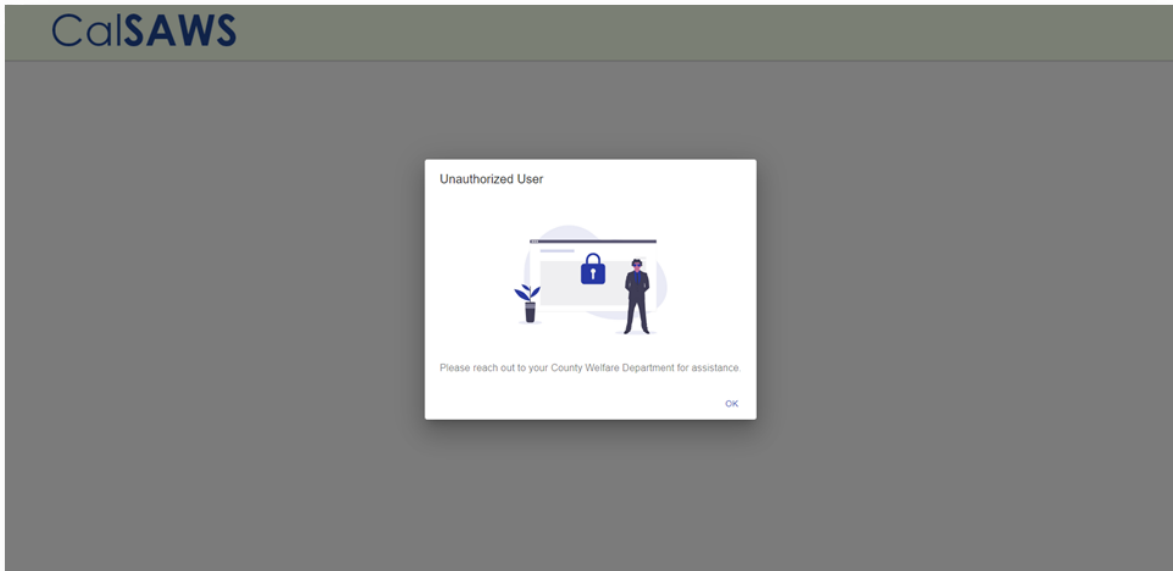


Figure 2.3.1 – Unauthorized User

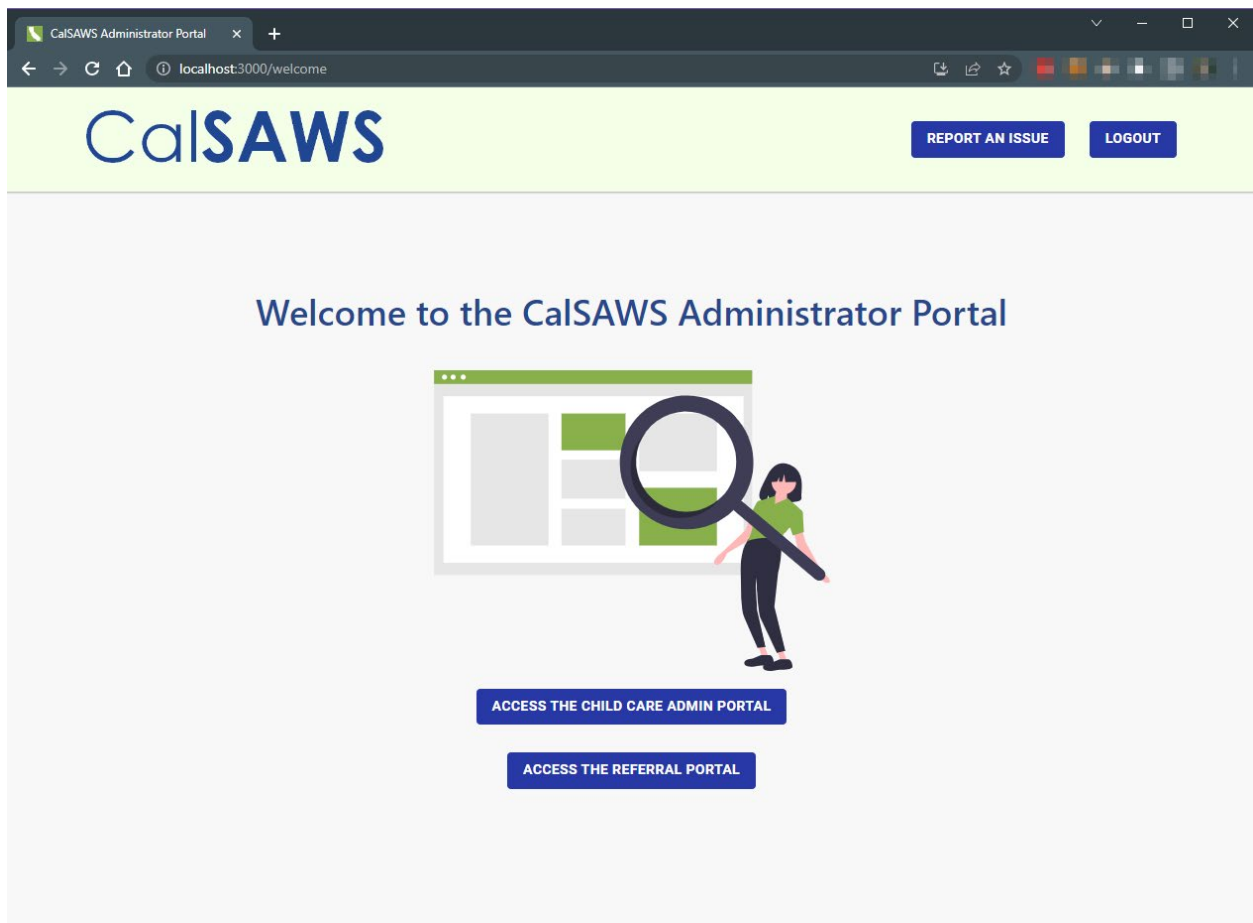


Figure 2.3.2 – Welcome Homepage

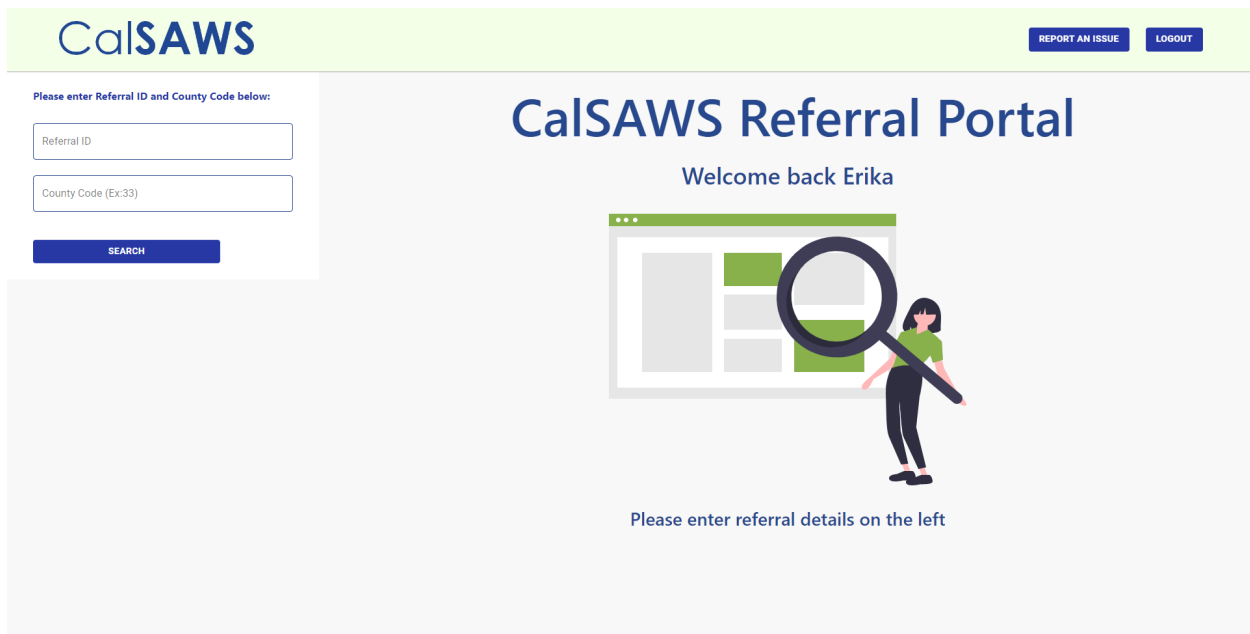


Figure 2.3.3 – Referral Portal Dashboard

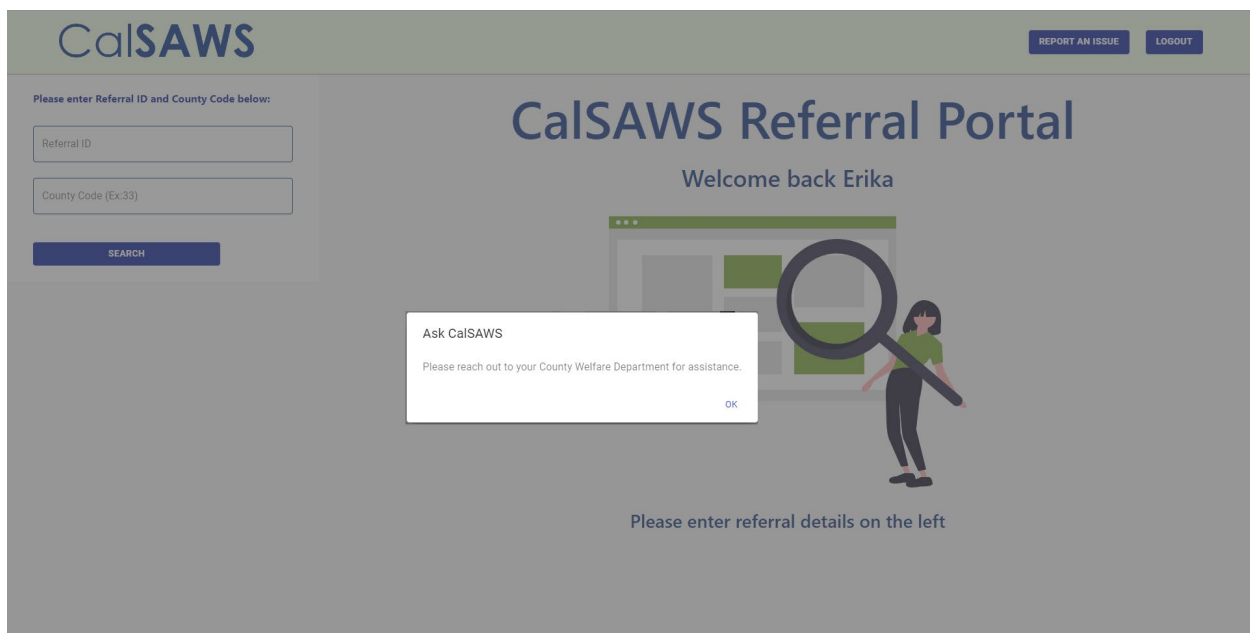


Figure 2.3.4 – Referral Portal Dashboard Report an issue modal

CalSAWS

REPORT AN ISSUELOGOUT

Please enter Referral ID and County Code below:

Referral ID

Referral ID required


County Code (Ex: 33)

County Code is required

SEARCH

CalSAWS Referral Portal

Welcome back Erika



Please enter referral details on the left

Figure 2.3.5 – Referral Portal Dashboard with required validation

CalSAWS

REPORT AN ISSUELOGOUT

Please enter Referral ID and County Code below:

Referral ID

a

Invalid Referral ID format

County Code


a

Invalid County Code format

SEARCH

CalSAWS Referral Portal

Welcome back Erika



Please enter referral details on the left

Figure 2.3.6 – Referral Portal Dashboard with not correct format validation

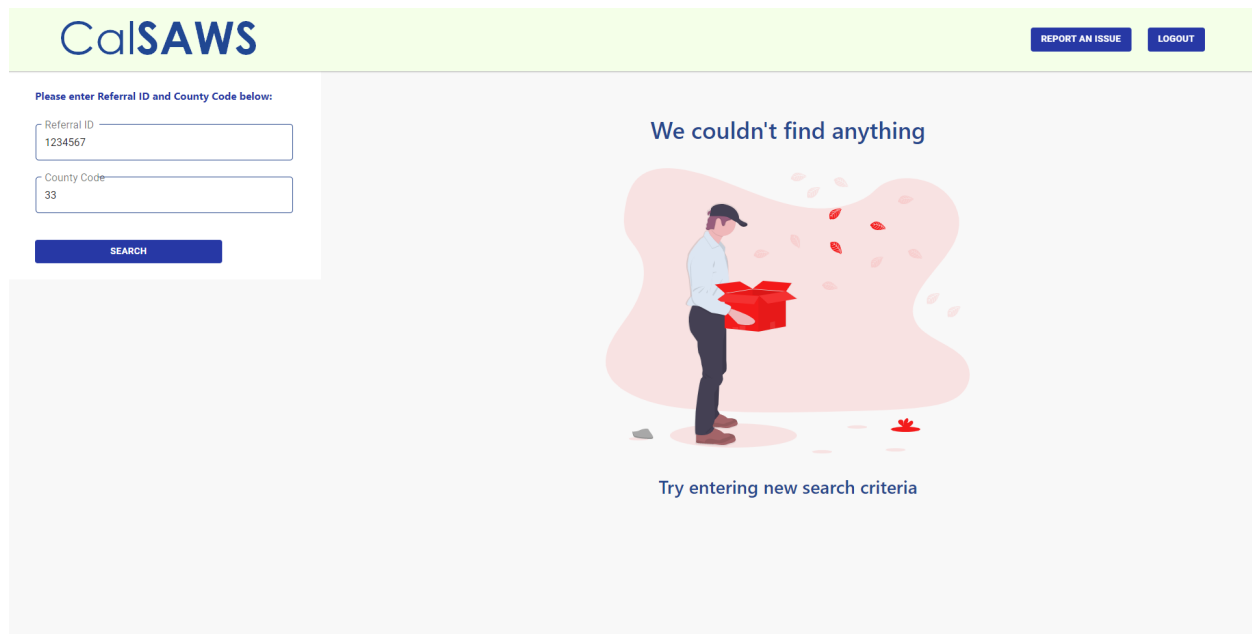


Figure 2.3.7 – Referral Portal Dashboard No Result found

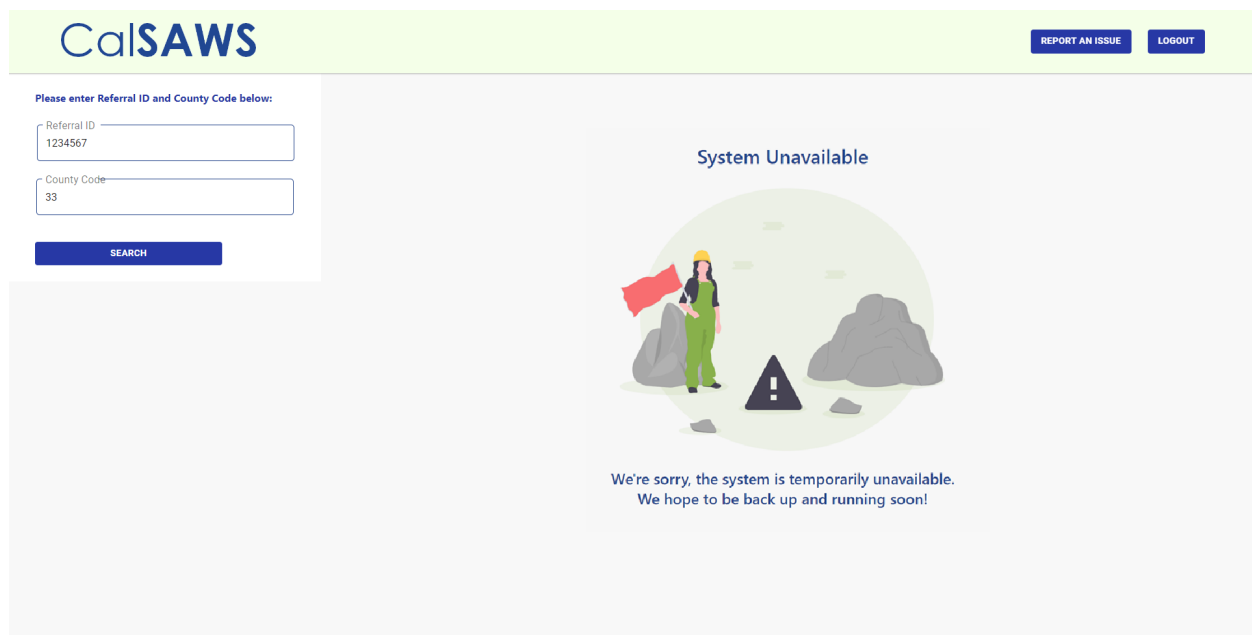


Figure 2.3.8 – Referral Portal Dashboard System Unavailable

CalSAWS

[REPORT AN ISSUE](#)
[LOGOUT](#)

Please enter Referral ID below:

Referral ID

1234567

County Code

33

SEARCH

Referral ID	Case Number	First Name	M.I	Last Name	Need Type	Referral Date
1234567	A1235BC	DAISY	-	DUCK	Child Care	12/01/2023

Figure 2.3.9 – Referral Portal Dashboard Result View

CalSAWS

[REPORT AN ISSUE](#)
[LOGOUT](#)

Please enter Referral ID below:

Referral ID

1234567

County Code

33

SEARCH

Referral ID	Case Number	First Name	M.I	Last Name	Need Type	Referral Date
1234567	A1235BC	DAISY	-	DUCK	Child Care	12/01/2023

Figure 2.3.10 – Referral Portal Dashboard Result View with hover

[Return to Dashboard](#)

Summary

Referral ID	Case Number	County	Referral Status	Status Reason
1234567	A1235BC	Riverside	Referred	Eligible for Service

Referral Information

[Referral ID: 1234567](#)

First Name	Daisy	Need Category	Dependent Care
Middle Initial	-	Need Type:	Child Care
Last Name	Duck	Need Begin Date	08/01/2022
Date of Birth	10/05/1981	Need End Date	08/01/2023
Language	English	Program	Child Care

Contact Information

Cell	(209) 283-9538
Home	-
Main	-
Mailing	PO BOX 1234 IONE CA 95640-1573
Physical	500 Disney Way IONE CA 95640-9637
E-mail Address	Daisy.Duck@gmail.com

Case Manager Information

Name	Minnie Mouse
Phone Number	(123) 456-7891 EXT 1234
E-mail Address	Minnie.Mouse@dland.org

Referral Comments

Testing Comments for new referral portal. This will include information such as Funding Source if needed, if funding source is for Child Care etc.

Children Information

[Donald Duck](#) Mickey Duck

First Name	Donald
Middle Initial	-
Last Name	Duck
Date of Birth	01/26/2012

Figure 2.3.11 – Referral Portal Summary – Summary Section

Summary

Referral ID	Case Number	County	Referral Status	Status Reason
1234567	A1235BC	Riverside	Referred	Eligible for Service

Referral Information

Referral ID: 1234567

First Name	Daisy	Need Category	Dependent Care
Middle Initial	-	Need Type:	Child Care
Last Name	Duck	Need Begin Date	08/01/2022
Date of Birth	10/05/1981	Need End Date	08/01/2023
Language	English	Program	Child Care

Contact Information		Case Manager Information	
Cell	(209) 283-9538	Name	Minnie Mouse
Home	-	Phone Number	(123) 456-7891 EXT 1234
Main	-	E-mail Address	Minnie.Mouse@dland.org
Mailing	PO BOX 1234 IONE CA 95640-1573		
Physical	500 Disney Way IONE CA 95640-9637		
E-mail Address	Daisy.Duck@cmail.com		

Referral Comments

Testing Comments for new referral portal. This will include information such as Funding Source if needed, if funding source is for Child Care etc.

Figure 2.3.12– Referral Portal Summary – Referral Information Section

Children Information

Donald Duck Mickey Duck

First Name	Donald
Middle Initial	-
Last Name	Duck
Date of Birth	01/26/2012

Figure 2.3.13 – Referral Portal Summary – Children Information

2.3.3 Description of Changes

1. Create a new Welcome Homepage that will allow users to access either the Child Care Administrator Portal or the Referral Portal.
 - a. Create a Welcome Homepage that will display after the user logs in to the CalSAWS Administrator Portal.
 - i. For users that have an 'Active' status in ForgeRock but are not assigned to at least one of the following security roles in ForgeRock: 'Child Care Portal User' or 'Referral Portal User' role, the page will display the unauthorized user message as shown on Figure 2.3.1.

1. Clicking 'OK' on the dialog box will take the user back to the login page.
2. The Header on the page when the unauthorized user message is being displayed will only have the CalSAWS logo on the left hand side.

Note: This is the same unauthorized message that is currently being displayed on the portal, when the user has an Active status in ForgeRock but is not assigned to the 'Child Care Portal User' security role.

- b. Add a Header panel at the top of the page and will have the following:
 - i. CalSAWS logo on the left-hand side of the Header panel
 - ii. "REPORT AN ISSUE" button on the right-hand side of the Header Panel.
 1. Clicking this button will display the Report an Issue Modal Dialog that will display the following:
 - a. Add the title: "Ask CalSAWS"
 - b. Add text: "Please reach out to your County Welfare Department for assistance."
 - c. Show an "OK" button.
 - i. Clicking on the button will dismiss the modal dialog.
 - d. Clicking outside of the dialog, will close/dismiss it.

Note: The Report an Issue Modal Dialog will work the same way as in the Child Care Administrator Portal.

- iii. "LOGOUT" button on the right-hand side of the Header Panel, next to the "REPORT AN ISSUE" button.
 1. Clicking the "LOGOUT" button will end/invalidate the user's login session.
 2. User will be re-directed to the ForgeRock login page.
- c. Display the following on the Welcome Homepage
 - i. Title: "Welcome to the CalSAWS Administrator Portal"
 - ii. Display the Search Image underneath the title.
 1. This is the same Search Image that is currently existing for the Child Care Administrator Portal.
 - iii. Display the following buttons that will provide access to the Child Care Administrator Portal or the Referral Portal.
 1. Display a button titled "ACCESS THE CHILD CARE ADMIN PORTAL" for users that are assigned to the "Child Care Portal User" security role (this is a role that is assigned directly through the ForgeRock application).
 - a. The "Child Care Portal User" security role is an existing security role within ForgeRock

- that is needed to access the Child Care Administrator Portal Dashboard page.
 - b. Clicking the button will take the user to the existing Child Care Admin Portal Dashboard page.
 - c. Users that are not assigned to the "Child Care Portal User" security role will not see the "ACCESS THE CHILD CARE ADMIN PORTAL" button.
2. Display a button titled "ACCESS THE REFERRAL PORTAL" for users that are assigned to the "Referral Portal User" security role.
 - a. This will be a new security role that will be created within ForgeRock that will allow users access to the Referral Portal Dashboard pages on the CalSAWS Admin Portal.
 - b. Clicking the button will take the user to the Referral Portal pages (see below requirements for more details).
 - c. Users that are not assigned to the "Referral Portal User" security role will not see the "ACCESS THE REFERRAL PORTAL" button.

Note: Buttons that are displayed on the Welcome Homepage is dependent on the security role that the users are assigned to in ForgeRock. Dependent on their security role they might see one or both buttons being displayed on the page.

2. Create a new Dashboard page to search by Referral ID and County Code.
 - a. This page will be protected by the "Referral Portal User" security role.
 - i. This page is accessible by clicking on the "Referral Portal" button from the Welcome Homepage.
 - b. Add a Header panel at the top of the page and will have the following:
 - i. CalSAWS logo on the left-hand side of the Header panel
 1. Clicking the CalSAWS logo will take the user back to the Welcome screen.

Note: This will also apply when users click the CalSAWS logo from the Child Care Portal pages.

- ii. "REPORT AN ISSUE" button on the right-hand side of the Header Panel.
 1. Clicking this button will display the Report an Issue Modal Dialog that will display the following:
 - a. Add the title: "Ask CalSAWS"

- b. Add text: "Please reach out to your County Welfare Department for assistance."
- c. Show an "OK" button.
 - i. Clicking on the button will dismiss the modal dialog.
- d. Clicking outside of the dialog, will close/dismiss it.

Note: The Report an Issue Modal Dialog will work the same way as in the Child Care Administrator Portal.

- iii. "LOGOUT" button on the right-hand side of the Header Panel, next to the "REPORT AN ISSUE" button.
 - 1. Clicking the "LOGOUT" button will end/invalidate the user's login session.
 - 2. User will be re-directed to the ForgeRock login page.
- c. Add a Search panel along the left edge of the page.
 - i. Add instructive text "Please enter Referral ID and County Code below:"
 - ii. Add a "Referral ID" text input box.
 - 1. The maximum number of characters allowed is 28.
 - a. When the maximum number of characters is reached, no more characters can be entered.
 - iii. Add a "County Code (Ex: 33)" text input box.
 - 1. The maximum number of characters allowed is 2.
 - a. When the maximum number of characters is reached, no more characters can be entered.
 - iv. Add the following validations to require a Referral ID and County Code.
 - 1. Display the validation message "Referral ID is required" when the user clicks on the Search button and no values are entered on the "Referral ID" textbox.
 - 2. Display the validation message "County Code is required" when the user clicks on the Search button and no values are entered on the "County Code" textbox.
 - v. Add the following validations when the value entered on the Referral ID and County Code text box are not in numeric format.
 - 1. Display the validation message "Invalid Referral ID format" when the user enters a value that is not numeric on the Referral ID textbox.
 - 2. Display the validation message "Invalid County Code format" when the user enters a value that is not numeric on the County Code textbox.

- vi. Add a "Search" button.
 - 1. Clicking this button will verify the user's logged in session is still valid; if not, re-direct the user to the login page.
 - 2. Execute the search using the Referral ID and the County Code entered to search the CalSAWS database.
 - a. Display the search result based on the Referral ID and County Code entered on the search parameter (please see #d below for more details on the Result panel).
 - b. Display the No Result View on the Result panel when there's no result being returned based on the Referral ID and County Code entered on the search parameter (Please see #d below for more details).
- d. Add a Results panel, on the right side of the page.
 - i. Create a No Result View on the Result panel when a search does not return a result based on the Referral ID and County Code search parameters.
 - 1. If a search does not return any results, display a No Results message in the Results panel:
 - 2. Display text: "We couldn't find anything"
 - 3. Display the No Results image
 - 4. Display text: "Try entering new search criteria"
 - ii. Create a System Unavailable View.
 - 1. The page will display when an error occurs, on searching or on loading the Summary page.
 - a. An "error" is anything that is being returned by the webservice that does not fall into the scenario of requirement d.i. above (which will result in a No Result View) or requirement d.iii below (which will result in a Result View).
 - 2. Display text: "System Unavailable"
 - 3. Display the System Unavailable image.
 - 4. Display text: "We're sorry, the system is temporarily unavailable. We hope to be back up and running soon!"
 - iii. Create a Result View on the Result panel when a search returns a result based on the Referral ID and County Code that was entered.
 - 1. Result View will display a Results table in the Result panel. Add column headers for:
 - a. Referral ID
 - i. Display the Referral ID
 - b. Case Number

- i. Display the Case Number that the referral was created for.
 - c. First Name
 - i. Display the first name of the person that the need associated to the referral is created for.
 - d. M.I
 - i. Display the middle initial of the person that the need associated to the referral was created for.
 - e. Last Name
 - i. Display the last name of the person that the need associated to the referral was created for.
 - f. Need Type
 - i. Display the need type for the referral.
 - g. Referral Date
 - i. Display the date that the referral was created.
 - 1. This will display in the format of MM/DD/YYYY
 - h. Blank Header
 - i. On hovering over a record/row, this column will hold an ellipsis (...) link, for navigating to the Summary page
- 2. If data for a field is unavailable, show a dash "-" for the value
- 3. On hovering over a record/row, temporarily:
 - a. Highlight the record/row
 - b. Show an ellipsis (...) link, under the Blank header column; on clicking the ellipsis:
 - c. Re-direct the user to the Summary page for the selected record.
- e. Show a Welcome message in the Result panel, until/unless the user initiates a search
 - i. Display a text "CalSAWS Referral Portal" at the top of the Result panel.
 - ii. Display a text "Welcome back" + "{User_First_Name}"
 - 1. User First Name will be the First name of the logged in user.
 - iii. Display the Search image
 - iv. Display the text "Please enter referral details on the left".
- 3. Create a new Summary page, to show detailed information about a record.
 - a. Protect this page with the "Referral Portal User" security role
 - b. Carry over the Top Header as described in the Dashboard page.

Note: As mentioned above on #2, clicking the CalSAWS logo will take the user back to the Welcome page.

- c. Add a left arrow icon and text: "Return to Dashboard"; on clicking, re-direct the user to the Dashboard page.
 - i. The Dashboard page will display the result view information that was returned based on the search parameters, prior to the user accessing the Summary page.
 - ii. The Referral ID and County Code text fields will be blank.

Note: This will work like the Child Care Admin Portal, when the user clicks on the Return to Dashboard from the Summary page.

- d. Add a section titled 'Summary'.
 - i. Add a 'Referral ID' label and the Referral ID of the selected record.
 - ii. Add a 'Case Number' label and the Case Number of the selected record.
 - iii. Add a 'County' label and the County information that the Case of the selected record belongs to.
 - iv. Add a 'Referral Status' label and the Referral Status of the selected record.
 - 1. When the Summary page first loads, it will display a text of the latest Referral Status.
 - a. When the page initially loads, the latest status will be based on the information that is being pulled from the CalSAWS database.
 - v. Add a 'Status Reason' label and the Status Reason of the selected record.
 - 1. When the Summary page first loads it will display a text of the latest Status Reason.
 - a. When the page initially loads, the latest Status Reason will be based on the information that is being pulled from the CalSAWS database.
- e. Add a 'Referral Information' section.
 - i. The 'Referral Information' section will have a sub section titled 'Referral ID: xxxxx'
 - 1. xxxxx will be the Referral ID of the record selected.
 - 2. On the left-hand side display the following information:
 - a. First Name
 - i. This will display the First name of the person that the Need for the Referral is created for.
 - b. Middle Initial

- i. This will display the Middle initial of the person that the Need for the Referral is created for.
 - ii. If the person does not have a middle initial display a "-".
 - c. Last Name
 - i. This will display the Last name of the person that the Need for the Referral is created for.
 - d. Date of Birth
 - i. This will display the Date of Birth of the person that the Need for the Referral is created for.
 - 1. This will be in the format of MM/DD/YYYY
 - e. Language
 - i. This will display the Primary language of the Person that the Need for the Referral is created for.
Note: This is the value selected on the Spoken Language field from the Individual Demographics Detail page in CalSAWS.
- 3. On the right-hand side display the following information:
 - a. Need Category
 - i. This will display the Need Category that is associated to the Referral.
 - b. Need Type
 - i. This will display the Need Type that is associated to the Referral.
 - c. Need Begin Date
 - i. This will display the Begin Date for the Need that is associated to the Referral.
 - ii. This will display in the format of MM/DD/YYYY
 - d. Need End Date
 - i. This will display the End Date for the Need that is associated to the Referral.
 - ii. This will display in the format of MM/DD/YYYY
 - e. Program
 - i. This will display the Program that is associated to the Referral.

- ii. If the referral does not have a Program associated to it display a “-”.
- ii. The ‘Referral Information’ section will have a sub section titled ‘Contact Information’ on the left-hand side that will display the Contact information of the Person that the Need for the Referral is created for and will display the following information:
 - 1. Cell
 - a. This will display the Cell Phone Number of the Person that the Need for the Referral is created for.
 - i. This will display in the format of (XXX) XXX-XXXX
 - 1. Example: (123) 567-8910
 - b. If the person does not have a Cell Phone Number display as “-”.
 - 2. Home
 - a. This will display the Home Phone Number of the Person that the Need for the Referral is created for.
 - i. This will display in the format of (XXX) XXX-XXXX
 - 1. Example: (123) 567-8910
 - b. If the person does not have a Home Phone Number display as “-”.
 - 3. Main
 - a. This will display the Main Phone Number of the Person that the Need for the Referral is created for.
 - i. This will display in the format of (XXX) XXX-XXXX
 - 1. Example: (123) 567-8910
 - b. If the person does not have a Main Phone Number display as “-”.
 - 4. Mailing
 - a. This will display the Mailing Address of the Person that the Need for the Referral is created for.
 - i. This will display in the format of Address Line 1 Address Line 2 (when one is available) City State Postal Code-Postal Code Suffix (when one is available).
 - 1. Example of Address with no Address Line 2 information and Postal Code Suffix: 500

Disneyland Way Anaheim CA
90210

2. Example of Address with
Address Line 2 and Postal
Code Suffix: 500 Disneyland
Way APT#2 Anaheim CA
90210-1234

- b. If the person does not have a Mailing
Address display as "-".

5. Physical

- a. This will display the Physical Address of the
Person that the Need for the Referral is
created for.

- i. This will display in the format of
Address Line 1 Address Line 2 (when
one is available) City State Postal
Code-Postal Code Suffix (when one
is available).

1. Example of Address with no
Address Line 2 information
and Postal Code Suffix: 500
Disneyland Way Anaheim CA
90210

2. Example of Address with
Address Line 2 and Postal
Code Suffix: 500 Disneyland
Way APT#2 Anaheim CA
90210-123

- b. If the person does not have a Physical
Address display as "-".

6. E-mail Address

- a. This will display the E-mail address of the
Person that the Need for the Referral is
created for.

- b. If the person does not have an E-mail
address display as "-".

- iii. The 'Referral Information' section will have a sub section
titled 'Case Manager Information' on the right-hand side
that will display the worker information associated to the
referral and will display the following information:

1. Name

- a. This will display the Name of the Worker
associated to the Referral.
- b. It will display in the format of First Name
Middle Initial Last Name
- c. If the Referral is not associated to a Worker
or the Position is not associated to a Staff
display as "-".

Note: The Name of the Worker will be the name of the Staff that is associated to the Position (Worker ID).

2. Phone Number

- a. This will display the Main Phone number and the extension (if information is available) of the Worker associated to the Referral.
- b. It will display in the format of (xxx) xxx-xxxx
EXT #####
 - i. The EXT and ##### will not display when there is no Extension.
 - 1. Example without extension:
(123) 456-7891
 - ii. Example with extension: (123) 456-7891 EXT 1234
- c. If the Referral is not associated to a Worker display as "-".

Note: The Phone number is the Main Phone Number Type that is associated to the Position.

3. E-Mail Address

- a. This will display the E-mail address of the Worker associated to the Referral.
- b. If the Referral is not associated to a Worker or the Position is not associated to a Staff display as "-".

Note: The e-Mail address of the Worker will be the E-mail address of the Staff that is associated to the Position (Worker ID).

- f. Add a section titled 'Referral Comments'.
 - i. Display a text box that will have the Comment information that was entered for the Referral.
- g. Add a section titled 'Children Information'
 - i. This section will have a tab for each Child that is selected for the referral.
 - 1. This section will only display when there are children that are associated to the referral.
 - ii. Label each tab as: {First_Name} + "{Middle Initial} " + {Last_Name}; append the name suffix if child has a suffix.
 - 1. Middle initial will display if one is available.
 - 2. Examples: Donald Duck, Donald M Duck, Donald, Donald M Duck Jr
 - iii. Order the tabs by Date of Birth with the oldest person on the left; use First Name for a secondary sort, in ascending order, if needed.
 - iv. Clicking the tab will display the information for that specific child and will display the following information:

- a. First Name
 - i. This will display the First name of the child.
 - b. Middle Initial
 - i. This will display the Middle initial of the child.
 - ii. If the person does not have a middle initial display a "-".
 - c. Last Name
 - i. This will display the Last name of the child.
 - d. Date of Birth
 - i. This will display the Date of Birth of the child.
 1. This will be in the format of MM/DD/YYYY
4. Update the Window title from the "Child Care Administrator Portal" to "CalSAWS Administrator Portal".

2.3.4 Page Location

- **CalSAWS Administrator Portal → Referral Portal.**

2.3.5 Security Updates – ForgeRock

1. Security Role

Security Role	Role Description
Referral Portal User	Allow users to access the Referral Portal section of the CalSAWS Administrator Portal.

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 ForgeRock Application – New Security Role

2.4.1 Overview

The Delegated Administration feature within the ForgeRock application grants delegated administrators the abilities to create users, modify users (roles and details), disable users, assign users to groups, and grant other users' administrative privileges. A delegated administrator is a user who is granted admin-level privileges to carry out these functions. As part of this SCR, a brand-new Security Role will be created within ForgeRock application that will allow the delegated administrator to assign users to the new security role that will grant them access to the CalSAWS Administrator Portal and access to the Referral portal pages.

2.4.2 Description of Changes

1. Create a brand-new user role for the CalSAWS Administrator portal for the Referral Portal.
 - a. New Role Name: "Referral Portal User"
 - b. New Role Description: "Access to the CalSAWS Admin Portal – Referral"

2.4.3 Page Location

ForgeRock Application.

2.5 Referral API

2.5.1 Overview

The Referral API is a RESTful webservice that will pull referral information from the CalSAWS database to the CalSAWS Administrator portal.

2.5.2 Description of Change

1. Create a new RESTful Referral API webservice for the CalSAWS Administrator Portal in the GET method for a matched Referral ID and County Code and will send the following Referral form attributes.
 - a. Referral Attributes – These are the attributes that the CalSAWS Administrator Portal will display on the new Referral Portal section.
 - i. Refer to the Supporting Documents section (Section 3) for the Referral API data field mapping.

Attribute	Description
-----------	-------------

Referral ID	The Referral ID that information is being requested from. Note: This is the CalSAWS generated identifier for the referral.
Case Number	The Case Number that the Referral is created for.
County	The name of the County that the Case for the referral is created for.
Referral Status	The latest Referral Status for the Referral. The status will include the following: Referred, Accepted, Not Accepted.
Status Reason	The latest Status Reason for the Referral. The status reason will include the following: Eligible for Service, Funding Available, Resource Available, Funding Not Available, No Resource Available.
First Name	The First Name of the Person that the Referral is created for.
Middle Initial	The Middle Initial of the Person that the Referral is created for.
Last Name	The Last Name of the Person that the Referral is created for.
Date of Birth	The Date of Birth of the Person that the Referral is created for.
Language	The primary language of the Person that the Referral is created for. Note: Please refer to swagger document on the possible options.
Need Category	The Need Category associated to the Referral. Note: Please refer to swagger document on the possible options.
Need Type	The Need Type associated to the Referral. Note: Please refer to swagger document on the possible options.
Need Begin Date	The Need Begin Date that is associated to the Referral.
Need End Date	The Need End Date that is associated to the Referral.
Program	The Program information for the Referral.
Cell	The Cell Phone number of the Person that the Referral is for.
Home	The Home Phone number of the Person that the Referral is for.
Main	The Main Phone Number for the Person that the Referral is for.

Mailing	The Mailing Address for the Person that the Referral is for. Note: This will include the full address (Street Name, City, State, and Zip Code)
Physical	The Physical Address for the Person that the Referral is for. Note: This will include the full address (Street Name, City, State, and Zip Code)
e-Mail Address	The e-Mail address for the Person that the Referral is for.
Worker Name	The First and Last name of the Worker that is associated to the Referral.
Worker Phone Number	The Phone Number of the Worker that is associated to the Referral
Worker e-Mail Address	The e-Mail address of the Worker that is associated to the Referral
Referral Comment	Comment information for the Referral.
Child First Name	The First Name of the Child associated to the Referral.
Child Middle Initial	The Middle Initial of the Child associated to the Referral.
Child Last Name	The Last Name of the Child associated to the Referral.
Child Date of Birth	The Date of Birth of the Child associated to the Referral.

2.5.3 Partner Integration Testing

No

2.5.4 Execution Frequency

Real-Time web service

2.5.5 Key Scheduling Dependencies

N/A

2.5.6 Counties Impacted

CalSAWS

2.5.7 Category

N/A

2.5.8 Data Volume/Performance

N/A

2.5.9 Interface Partner

N/A

2.5.10 Failure Procedure/Operational Instructions

N/A

2.6 Automated Regression Test

2.6.1 Overview

Create new automated regression test scripts to verify the availability of the "Send E-mail" button on the Referral Detail page, and the primary functionality of the rebranded "CalSAWS Administrator Portal". Update existing regression scripts that reference the "Child Care Administrator Portal" to use the new name.

Technical Note: The functionality of the "Send E-mail" button is out of scope for automation and will need to be manually tested.

2.6.2 Description of Change

1. Create new regression scripts to verify the availability of the "Send E-mail" button when the field value is "Yes" in view mode.
Technical Note: Clicking the "Send E-mail" button and verifying receipt of the email message(s) is out of scope for automation and will need to be manually tested.
2. Create new regression scripts to verify the new functionality of the CalSAWS Administrator Portal related to Referrals.
Technical Note: System testing of this functionality will be automated where feasible, with the remaining scenarios to be executed manually. The specific test scenarios, and breakout between those that are and are not candidates for automation, will be determined per the system test process during the development phase.
3. Update existing regression scripts that reference the "Child Care Administrator Portal" to use the new Portal name ("CalSAWS Administrator Portal").
4. Update the log-in functionality of the existing regression scripts that reference the "Child Care Administrator Portal", to click through the Welcome Homepage.

Technical Note: This will be implemented in one of two ways depending on the specific security layout of the automated test account at the time of implementation: Either (1) within the log-in functionality of the CAT Framework, or (2) at the individual script level.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interface	This attachment will contain the referral API data field mappings.	Data Dictionary for CA-263212.xlsx
2	Interface	Referral-API YAML	Referral-API.yaml
3	Interface	Referral-API YAML	Referral-API.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.15.11	The LRS shall generate the appropriate referrals at the time of case approval, based on information entered and programs requested.	CalSAWS will be updated to allow e-referrals to be generated. This SCR will add the functionality to CalSAWS to send out email to the provider/agency that was selected on the referral. This SCR will also update the existing Child Care Admin Portal with a new functionality for external providers/agency to see referral information that's created in CalSAWS.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-264004

Update Document Received Texting
Functionality to include API Received
Documents

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shining Liu
	Reviewed By	Himanshu Jain, Chitra Barsagade, Balakumar Murthy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/7/2023	1.0	Initial draft	Shining Liu

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1 OVERVIEW

This SCR will add functionality to trigger real-time text messages to participants when documents are received via API.

1.1 Current Design

Real-time 'Form Received' text messages are only sent when applicable documents are marked Received on the Barcodes page or the Customer Reporting page.

1.2 Requests

Update functionality to also trigger text messages when documents are received via API (CalSAWS Imaging Solution - Hyland).

1.3 Overview of Recommendations

1. After a document is marked Received via API, send a real-time Form Received text message to the participant.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.

2 RECOMMENDATIONS

2.1 Send text message when document is received via API

2.1.1 Overview

Trigger the existing Form Received text message when a document is marked Received via the MarkDocumentReceived API.

2.1.2 Description of Change

1. Trigger a real-time text message using the existing 'Form Received' text message campaign when a document is marked Received via the MarkDocumentReceived API. The text message should only be sent to the Primary Applicant of the program corresponding to the received document if they are opted-in and verified for text messaging and the 'Form Received' Automated Action is active for their county.
2. Create an entry on the Customer Contact History page when the text message is sent. The Reason column should display the existing reason 'Text Notification Customer Report Received' from CT2804. The Status column should be updated to 'Sent' or 'Undelivered' based on existing real-time text message listener processing.
3. Text message will be sent in Spanish if the person's written language preference is 'Spanish', otherwise the text message will be sent in 'English'.

2.1.3 Partner Integration Testing

No.

2.1.4 Execution Frequency

Real-time

2.1.5 Key Scheduling Dependencies

N/A

2.1.6 Counties Impacted

All Counties.

2.1.7 Category

N/A

2.1.8 Data Volume/Performance

~300,000 text messages per month

2.1.9 Failure Procedure/Operational Instructions

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.20	The LRS shall support multiple means of communicating appointments, appointment reminders, and critical dates and/or information that may affect a participant's eligibility, using the following means: a. E-Mail; b. Text messaging; d. Automated phone reminder; e. USPS mail	CalSAWS will have ability to send a text notification when a document is received.
2.20.1.3	The LRS shall include the ability to exchange LRS Data residing on external systems and communicate the results of any automated LRS Data matches.	CalSAWS will have ability to send a text notification.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-264873

Enable Form Number lookups in workflow

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Robyn Anderson
	Reviewed By	Christopher Vasquez, Rhiannon Chin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/14/2023	1.0	Initial draft	Robyn Anderson

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1 OVERVIEW

1.1 Current Design

Currently, users cannot search by or select form numbers while the document is in workflow. The Form Number field is grayed out and they are prevented from entering any information into the form number field on any of the Hyland screens.

1.2 Requests

Allow users to search by and select the form number while the document is in workflow.

1.3 Overview of Recommendations

1. Update the Batch Capture, QA & Indexing, Reindex All, Reindex All Confidential, Exception, Exception Confidential, pages in Hyland to allow the user to look up forms by the form number.

1.4 Assumptions

1. Form name lookups will not be impacted. They will function as they do today.
2. A new API call Get Form Number will be developed under SCR CA-248100 – Get Form Number API

2 RECOMMENDATIONS

2.1 Hyland screens

2.1.1 Overview

Users will be able to search by form numbers while the documents are in workflow.

2.1.2 Description of Change

The form number field will remain grayed out and user will not be able to edit/enter information in the field directly, but a magnifying glass icon will be placed next to the box. Clicking the icon will open a pop up that will allow the user to enter up to 3 fields:

- Form Number: Users can type a partial or full form number
- Doc Type: Users can type a partial or full Doc Type
- Time Sensitive: Users can select True or False


Once the user enters the information and clicks on the Submit button, it will be sent to the Get Form Name web service. A list of Form Names, Form

Numbers, Doc Types and Time Sensitive Flags will be returned, allowing the user to select from the list.

The following Hyland pages will need to be modified:

- QA & Indexing
- Batch Capture
- Reindex
- Reindex Confidential
- Reindex All
- Reindex All Confidential
- Person Selection
- Exception
- Exception Confidential

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
CA-248100	Workflow	Get Form Number API	 CA-248100 Create API to Enable Form I

CalSAWS | Enhancement Request (CER)

PPOCs: Please send the completed request to CER@CalSAWS.org and cc your RM.

Submission Date	3/9/2023
Title	Fresno county changing bank on the same weekend of CalSAWS Go-Live

Region #: 4	County: Fresno	
Submitter: Lao Mouanoutoua	Email: lv mouanoutoua@fresnocountyca.gov	Phone: 559 600-2219

Program(s) Impacted:			
<input checked="" type="checkbox"/> Adoptive Services	<input type="checkbox"/> ARC	<input checked="" type="checkbox"/> CalFresh	<input checked="" type="checkbox"/> Cal-Learn
<input checked="" type="checkbox"/> CalWORKS / RCA	<input type="checkbox"/> CAPI	<input checked="" type="checkbox"/> Child Care	<input type="checkbox"/> CMSP
<input checked="" type="checkbox"/> Foster Care	<input type="checkbox"/> GA/GR	<input checked="" type="checkbox"/> GAIN/REP/WTW	<input type="checkbox"/> GROW
<input checked="" type="checkbox"/> Kin-GAP	<input type="checkbox"/> Medi-Cal / RMA	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Other – specify			

Area(s) Impacted:			
<input type="checkbox"/> Call Center	<input type="checkbox"/> Case Assignment	<input type="checkbox"/> Central Print	<input type="checkbox"/> Client Correspondence
<input type="checkbox"/> Eligibility	<input type="checkbox"/> Fiscal / Collections	<input type="checkbox"/> Hearings	<input type="checkbox"/> Imaging
<input type="checkbox"/> Lobby Management	<input type="checkbox"/> Reports	<input type="checkbox"/> Resource Data Bank	<input type="checkbox"/> Schedule Appt
<input type="checkbox"/> Security	<input type="checkbox"/> Self Service Portal	<input type="checkbox"/> Special Investigation	<input type="checkbox"/> Task Mgmt
<input type="checkbox"/> Time Limits	<input type="checkbox"/> Training		
<input checked="" type="checkbox"/> Interface(s) - specify Testing of the Interface files and transactions to BMO platform (Bank of Montreal).			
<input type="checkbox"/> Other – specify			

CalSAWS | Enhancement Request (CER)

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Justification / Request Summary: Fresno county is changing bank

Issue:

Fresno county is currently banking with Bank of the West. We were informed that Bank of the West will be transitioning to BMO platform (Bank of Montreal) on the same weekend that we are going live with CalSAWS.

Will there be any issue with that?

Fresno needs assistance from project with testing files and interface transaction to new bank. Testing is needed one month prior to go-live and preferably during interface partner testing (IPT) efforts.

Proposed Recommendation:

Fresno will change banking institution from Bank of the West to Bank of Montreal.

Priority/Implementation Consideration(s):

August 1, 2023 to ensure testing file and interface transaction to new bank.

CalSAWS Response:

CER Tracking #: (automatically generate by JIRA)

SCR #

CalSAWS | Enhancement Request (CER)

Rejected By:

Date:

Rejection Reason(s) or other Comments: